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## Ramp Employee Training







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	71.5TH AVE New York, NY, 10003	Invoice date Invoice # Due date	05/03/23 CI-14884 05/31/23
	Invoice total	\$7	∞ CI-1488
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## Agenda

- <sup>01</sup> Employee Basics
- <sup>02</sup> Manager Basics
- <sup>03</sup> Platform Demo

## **Basics for Employees**

Accept your invite, get your cards, and submit policy requirements



## Accepting your invite

#### Check your inbox for an email from Ramp

Look for the following in your inbox: Sender: communications@ramp.com Subject Line: "Join [Company Name] on Ramp"

#### Click on the "Accept Invite" button to create your account

Follow the prompts on screen to be guided through account creation and setup

ramp 1 Join Peter Robinson on Ramp. Peter Robinson (mhavandjianbegalli+owner@ramp.com) has invited you to join Mhavandjianbegalli's Pizza Watering Hole on Ramp. This invite will expire in 14 days, on Oct 03, 2023. If you have any questions or issues, please submit a ticket to our support team. Accept Invite Best, The Ramp Team Ramp Business Corporation 71 5th Avenue, 6th Floor, New York, NY 10003 Ramp Help Center 9

## **Communication Preferences**

1

#### **Notification Formats**

SMS Email Push notifications (on mobile)

#### **Recommendations**

SMS or Push for physical card Email for virtual card(s) Email for weekly reminders and automatic receipt capture

#### How it works

Go to Settings >> Communication Preferences

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## Adding other emails

You can add other emails to Ramp that you'd like to be able to forward receipts from.

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#### How to set it up

Go to Settings >> Edit Profile >> add relevant emails under Receipt Forwarding

#### Important to Note

Your receipt will fail to match with the corresponding transaction if you forward it from an email that is not linked to your Ramp account

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## Using your new Ramp card

- 1 physical card and unlimited virtual cards/person
- If you were invited to receive physical card, it will arrive in 3-5 business days
- While you're waiting for your physical card you can go ahead and use the virtual card that was generated. Once your physical card arrives and you activate it, you can you that or the virtual card.
- Ramp cards work with Apple Wallet and Google Pay
- There may be category and/or merchant restrictions on your card(s) set by admins

	ramp 1	Signature Business		
	Automatic card matching			
2	Purchases with your physical card will be automatically matche You can aways change the virtual card after every transaction. Learn more	d. Swap Manually		

#### My Virtual Cards +

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## **Physical vs Virtual cards**

#### **Physical Card**

Use for any in-person transactions! Travel, Meals, etc.

#### Virtual Card(s)

Used for recurring business expenses like subscriptions, office equipment, etc. or individual purposes like benefits.

#### Important to Note

Different cards may be subject to different receipt and memo requirements. Ramp will remind you of what you need to submit by SMS, push or whatever you have configured.

Certain cards, such as subscription cards, can have restrictions that will make them not work on specific categories or will only work for a specific vendor. This makes them extra safe.

- 'C' If you have multiple virtual cards, anything you buy with your physical card will be auto-matched to the right virtual card. When we're not sure, we'll message you to confirm, and you can reassign transactions if necessary.

## **Requesting virtual cards**

#### When?

If you need an expense or vendor specific card

#### How?

- Log in
- Go to My Ramp
- Click the yellow button that says "Request Spend" on the top right of the screen
- Select "Virtual Card"
- Fill in desired spending details
- Submit for approval

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## **Receipt matching - SMS**

#### How it works?

Respond to Ramp's automated text, follow the instructions on how to submit info in that text message

-ŷ- Pro Tip: Save our number in your phone: HIRAMP (447-267) or 516-284-1304

Or text us directly at any time with a picture of your receipt(s)

In order to submit a memo, you'll need to respond to our automated text requesting a memo. You can't just text us at any time to submit memos to past transactions

Ramp Hello, your transaction at Num Pang for \$50.24 requires a receipt and a memo.
Please reply with a picture or email receipts@tryramp.com and we'll match it.
Receipt matched!
Lunch with candidate
J

## **Receipt matching - Email**

#### How it works?

- Wait for Ramp to email you about your online purchase
- Attach receipts/invoices to this email if prompted (we accept PDF, JPG, and PNG images)
- Type your memo directly into the memo box in the body of the email, then click "Submit"

You can also forward receipts/invoice to receipts@ramp.com

- Can be in the body of the email or attached
- You can send more than one receipt in the same email
- Include a memo by writing "Memo: enter memo here" into the body of the email but this workflow only works when sending individual receipts

Add your personal email to your Ramp account so you can submit receipts from there as well. Settings >> Edit Profile

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## Action required for your Amazon transaction

Hi Manasi,

A payment was made on your virtual card for \$75.00 at Amazon. Ramp Business Corporation's expense policy requires a receipt for transactions above \$75.00 and a memo for transactions above \$75.00.

Please reply to this email with a receipt for your transaction, or forward the receipt to <u>receipts@ramp.com</u>. Sign in to your dashboard to add a memo.

#### Transaction with Missing Items

Amazon	
12/02/2020 · General Merchandise · Missing: Receipt,	\$75.00
Memo	

Type your memo here

Submit

Email Your Receipt

Resolve on your Dashboard

Ramp Business Corporation 36 E 12th St, Floor 3, New York, NY 10003

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## **Receipt matching - Mobile App**

#### How it works?

- Download the <u>iOS</u> or <u>Android</u> app in the App store
- Click the transaction and attach an existing photo or take a photo within the app
- Type your memo into the memo field

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## Submitting reimbursements

#### How it works

- Log in
- Go to Reimbursements
- Click the yellow button that says "Create Reimbursement" on the top right of the screen
- Fill in required information
- Submit for approval
- Managers will review, edit, approve, or reject
- Once approved, you will receive your payment within 2-3 days
  - -rac{1}{2} Email your receipt to reimbursements@ramp.com and Ramp will start generating a draft reimbursement for you

Cash tips can be recorded manually on the receipt

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## **Coding your transactions**

#### What is means

Assigning information to a transaction to tell your finance team how to account for that expense

#### How it works

- Card Level Rules automate coding of some fields
- **Manual coding** All manual coding has to be done on either the Ramp dashboard or IOS mobile app:
- SMS and Email notifications will contain a hyperlink that will open the relevant transaction in Ramp on your web browser
- Ramp App will indicate your transactions missing items

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## **Flagging transactions**

#### **Reasons to flag**

- Accidental (personal charge)
- Dispute (possible fraud)
- Out of Policy (Card Managers + Admins only)

#### How it works

- Click on the transaction in your Ramp dashboard
- Scroll to the bottom of the transaction window that pops up
- Click the red Flag button and select the relevant flag type

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## **Communications from Ramp**

Card limit warnings	Out of policy	Updates	Approvals
T&E Card has reached 90.0% of its limit H Jacopo. This is freedy raminder that you've reached 90.0% of your monthly card limit for T&E Card (\$70.80 spect from \$80.00 limit). If you go over your limit, transactions will alart being automatically excited. Your monthly balance reases on Apr 01, 2022.	Nickolas's transaction was automatically flagged as out of policy.	An update to your "Wellness Benefit" card. Hi Nisrawa. An admin kas made charges to your "Wellness Benefit" card. We've curimed the anage below. Card Datalie: This over can apend on: Al caregories and all metricants. Card Name Wellness Benefit	Your card request was approved Hi Zelma, Your request for a "Gas Card" card was approved. Card Details: This card can spend on: All categories and all merchants.
You can modify the card or issue a new one from your deencoard.	flagged by a policy rule.	Spand Limit \$100.00 Monthly	Card Name Gas Card
	\$750.00 You can reply-all to this email to start a conversation with your team at Grebson's Chicken Eatery or visit Ramp for more options.	Policy General Dependent - Client Spand Auto-Look Date Mar 12, 2024	Spend Limit \$100.00 Monthly
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Spend Limit \$80.00 Auto-Lock No Date	Rung Buckness Corporation 71 Oh Averue, dh Risoc New York, NY 10003	Memo required for transactions	Receipt required for transactions above \$75.00
Indecado LI-R		Access Card	Access Card

## **Basics for Managers**

Transaction and reimbursement reviews, approvals, and policy



## Manager review

#### When?

If you need an expense or vendor specific card

#### How it Works

• Review your team's transactions to ensure they are legitimate, on budget and fulfill all required documentation

• Transactions >> Needs Review or Inbox

#### Actions to take:

• **Approve** - Transactions that have receipt, memo, coding and are legitimate business expenses

• Flag - Transactions that are not legitimate business expenses or you need additional context

• Wait - Transactions that are missing receipt, memo and coding. Ramp will automatically remind employees so you don't have to!

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## Manager review

#### **Resolving out of policy transactions**

Flagged transactions can be found via Transactions >> Out of Policy

Pending - Current Out of Policy flags that still require action

Resolved - Past Out of Policy flags that have been handled

Resolve an Out of Policy transaction when manager has the context they need and provides their approval

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# Thank you.

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