



Singleton Schreiber Ramp

Employee Training
12.18.25



\$63.23

↓

¥9095.95

✓ R.Estate

71 5TH AVE
New York, NY 10003

Invoice date 05/03/23
Invoice # CI-14884
Due date 05/31/23

Invoice total \$27,000

Qty	Description	Unit price
1	Rept. 1 Month	\$25,000

✓ CI-1488

What Is Ramp?

Ramp removes friction from expense management. It automatically captures receipts, enforces spending policies in real time, and eliminates most manual reviews—saving teams hours each week. Ramp makes expense management fast, accurate, and stress-free.

How?

- Automates expense management, receipts, and reimbursements
- Reduces up to **85% of manual expense review** through smart automation
- Automatically collects receipts at the time of purchase
- Learns to write memos and submits expenses when policy-compliant
- User-friendly interface for employees and finance teams
- Powerful search and in-depth reporting for better spend visibility
- Responsive and helpful customer support

Ramp 101

Click into the transaction and scroll down to the “Accounting” section as shown below:

Memo [required field]

- This is a free form field, please type
- Example: Medical records – Customer Name FV#

Category [required field]

- Choose from the dropdown option

Vendor [required field]

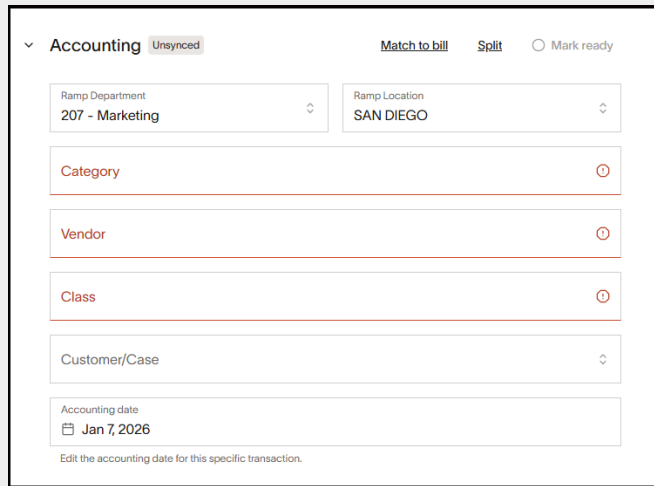
- Choose from the dropdown option

Class [required field]

- Choose from the dropdown option

Customer/Case [only use for case-related expenses]

- Choose from the dropdown option



The screenshot shows the 'Accounting' section of a transaction form. At the top, there is a dropdown menu for 'Accounting' with a 'Unsynced' status. To the right are buttons for 'Match to bill', 'Split', and a radio button for 'Mark ready'. Below these are several input fields: 'Ramp Department' (with '207 - Marketing' selected), 'Ramp Location' (with 'SAN DIEGO' selected), 'Category' (with a red error icon), 'Vendor' (with a red error icon), 'Class' (with a red error icon), and 'Customer/Case' (with a dropdown arrow). At the bottom, there is an 'Accounting date' field with a calendar icon and the date 'Jan 7, 2026'. A small note below this field says 'Edit the accounting date for this specific transaction.'

-
- There are no reports to submit. Transactions are submitted and approved individually
 - 1 physical card and 1 virtual card
 - Upload receipt first before categorizing. Ramp will analyze and categorize as best as possible, eventually learning how transactions are coded
-

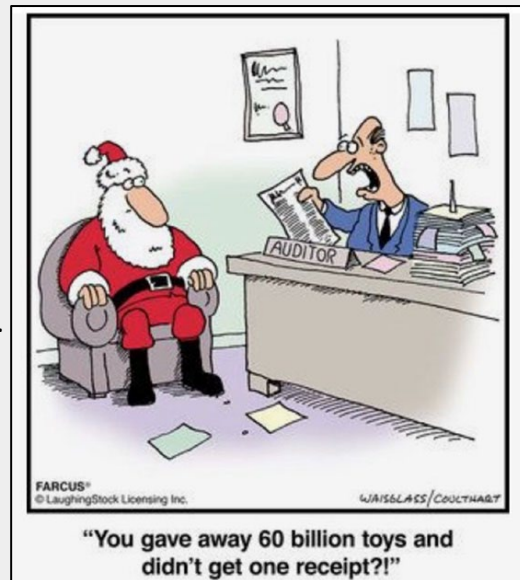
If a charge exceeds \$25, a receipt is required.
However, if the charge is case related, a receipt is **ALWAYS** required.

Let's Talk Receipts

If a charge exceeds \$25, a receipt is required.

However, if the charge is case related, a receipt is ALWAYS required.

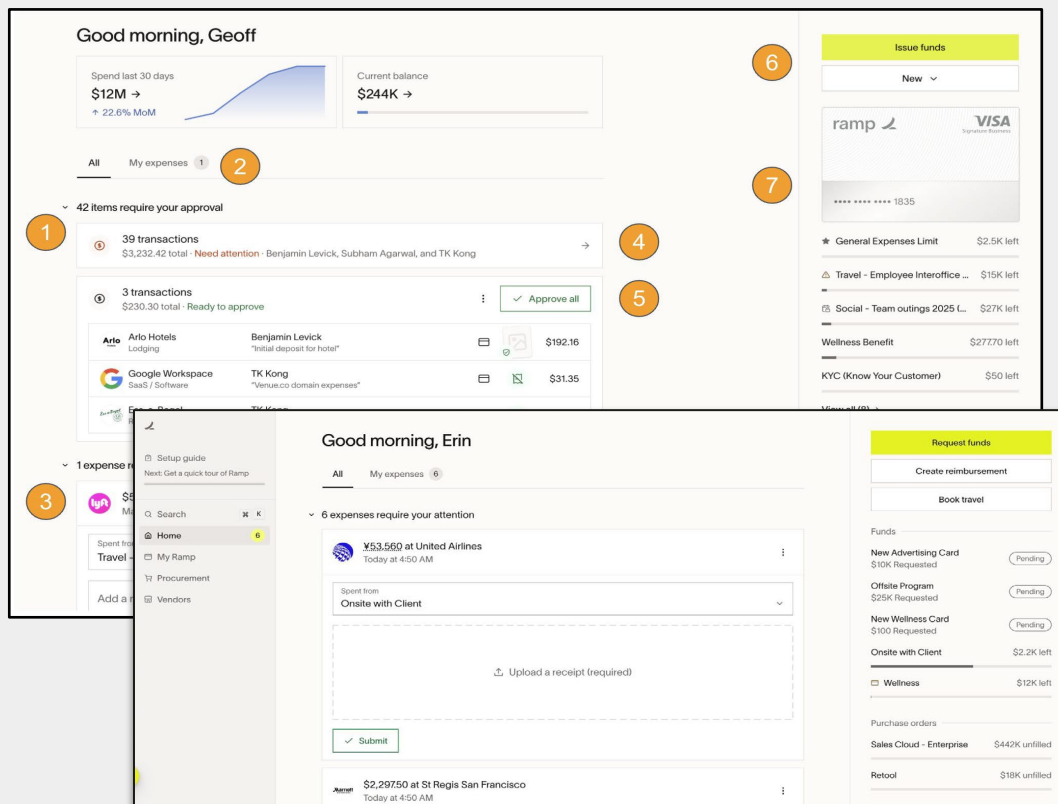
- Per diem limit is \$75 per day
- If you dine with others, please note the attendees. Failure to do so can flag expenses as being over the per diem and due from employee.
- Itemized receipts showing detail are required for meals, rental cars, and lodging. Screenshots of receipt summary or the merchant copy that does not show transaction detail is not accepted.
- Examples of transactions that are not permitted are...
 - Airline upgrades
 - Tips to housekeeping
 - Travel insurance



Please review the SSLP Travel Policy for the full list of transactions that are not permitted!

Managing Your Expenses

1. **This is your primary task list** – all items that require approval, whether they are Transactions, Reimbursements, Fund Requests, Bills, and more will appear here. **Only users with the permissions to see said tasks will see them.**
2. **Your own expenses are in the ‘All’ tab.** Users can quickly declutter their Homepage by using the carrots, which will collapse the section and keep it collapsed until it is opened again, even if you close the webpage.
3. **Users can quickly toggle between all their tasks and their own expenses by using the quick tabs at the top.** If users want to use the My expenses tables, we recommend clicking my expenses then navigating to the bottom of ‘Recent Expenses’.



Complete Your Expense Requirements

What it 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 must 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**

Required for credit card transactions*:
Receipt, Memo, Vendor, Category, Class
* +Customer/Case when applicable

Good morning, Erin

All My expenses 7

7 expenses require your attention

 \$134.56 at sweetgreen
Today at 8:00 AM

Spent from

Onsite with Client

Upload a receipt (required)

NetSuite Department*

4 - Marketing

NetSuite Category (required)

Submit

Requirements

Incomplete

[Add fields](#) [Split](#)

Spent from*	Onsite with Client (1334) ▾
Receipt*	Upload a receipt (required) ▾
Trip	Erin's Apr 2025 trip to San Francisco ▾
NetSuite Department*	4 - Marketing ▾
NetSuite Category*	Select a category (required) ▾

Set by General Expenses

Ramp provides you with flexibility on how to complete your expense requirements

Channel	Receipts	Memos	Accounting Fields
SMS	Text us at HIRAMP (447-267) - we try to match it with a transaction or you can create a reimbursement For international users, please text 844-331-1023 (toll free)	Text us - we will add the memo to the last transaction	Click the submission link sent via SMS for a mobile-friendly submission flow
Email	Forward to receipts@ramp.com . See how to set-up here . (Reimbursements must be forwarded to reimbursements@ramp.com)	Add "memo: enter your memo" in the body of the email	When receipts are captured automatically with the Gmail integration, we offer the option to code dynamic fields
Ramp.com	Click into the transaction to upload the receipt or bulk upload manually via the missing items section .	Click into the transaction or missing items section and add a memo	Click into the transaction or missing items section and enter the field
Mobile App	Capture a receipt using our mobile app or use the share extension on your phone	Tap into the transaction to record your memo	Scroll further to add your accounting fields in-app

Adding Other Emails

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

How to set it up

Go to Edit profile → Integrations

Important to Note

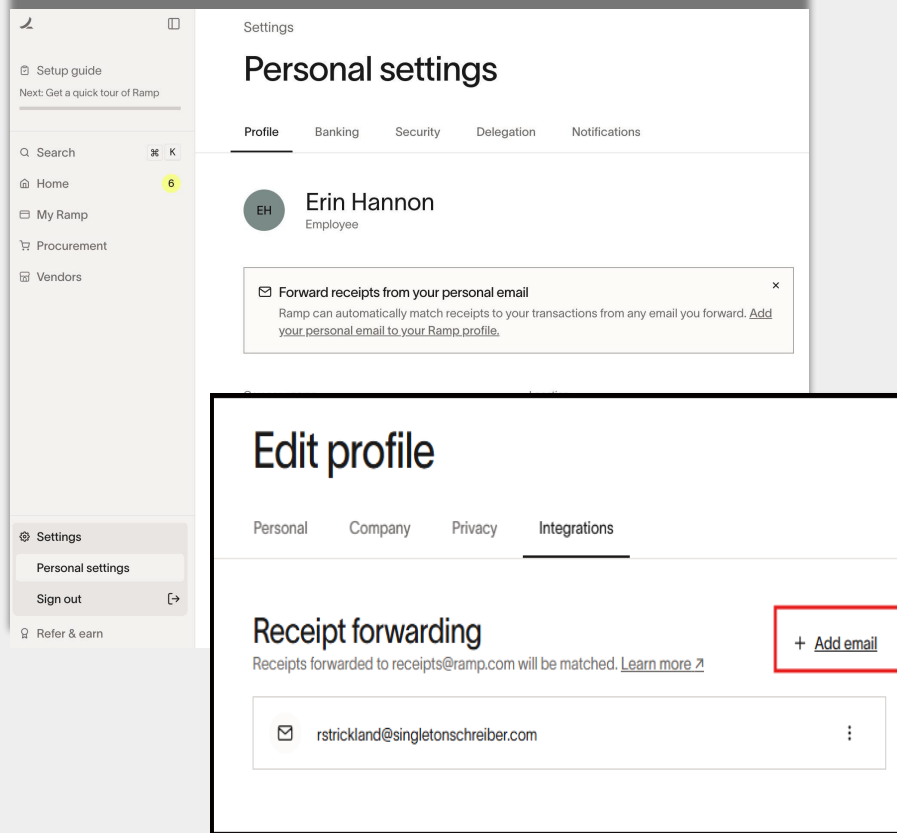
Your receipt will fail to match with the corresponding transaction if you forward it from an email that is not linked to your Ramp account

Example #1

You use your Ramp card at a restaurant, and the receipt is sent to your personal email. You can forward the email receipt to Ramp, and it would then automatically match the receipt.

Example #2

You share 1 card across the team that is under Employee A's name. Employee B can have their email be added to forward receipts to have Ramp match the receipt.



Assistant Mode

What it means

Assistant mode is a feature that allows Assistants to view their manager's transactions and perform tasks on their behalf.

What can the assistant user do?

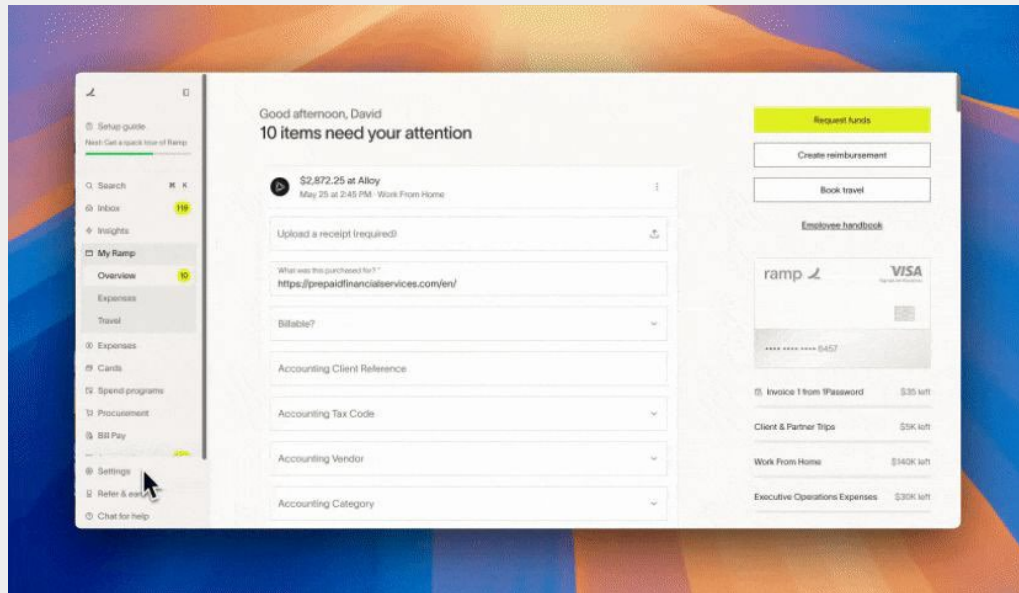
Assistants can do the following on behalf of their assigned user(s):

- View transactions
- Submit receipts
- Fill out the transaction memo + code accounting fields that are required by their Expense Policy
- Submit/edit reimbursements
- Request policy exceptions or add attendees

What notifications will the assistant receive?

Assistants will receive their assigned user's action items (such as missing business items) along with their own action items in weekly digest.

[Click here](#) for more information on the assistant role



The Above: How to assign an 'Assistant'

Actions To Take On Transactions

Actions you can take on transactions

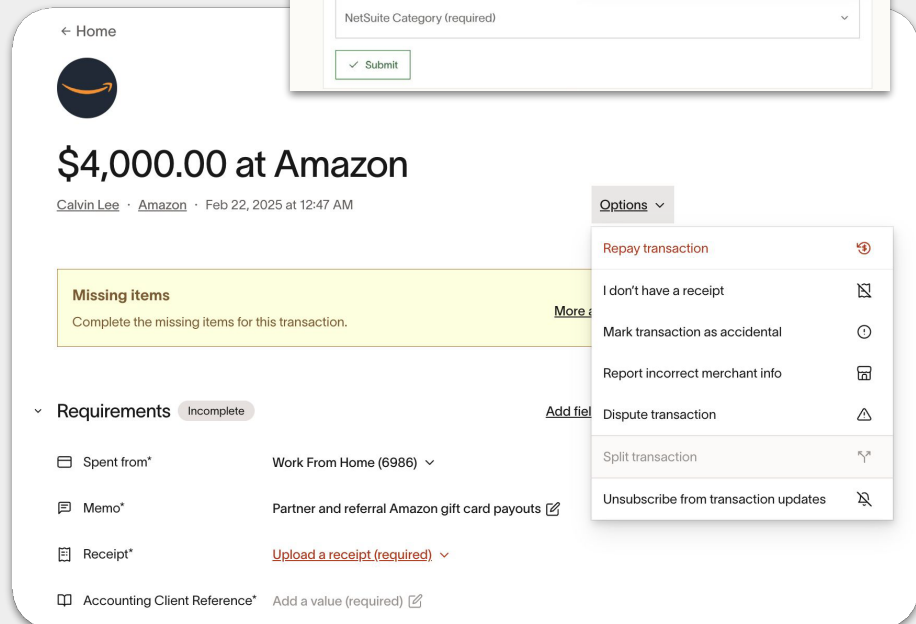
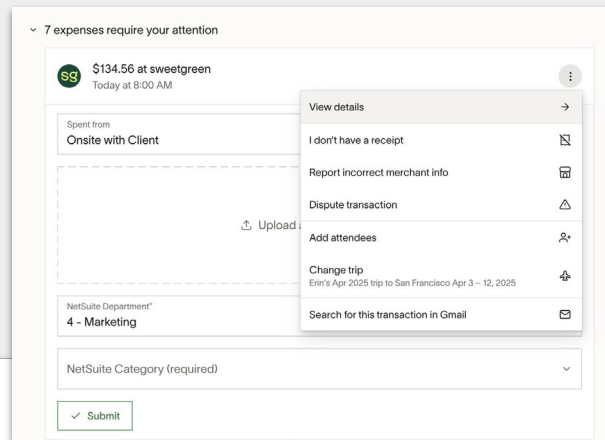
- Accidental (personal charge)
- Dispute (possible fraud)
- Missing Items (I don't have a receipt)

How it works

- Click on the transaction in your Ramp dashboard
- At the top of the transaction window, you can click into Options >> select the relevant action

What to do if you're missing a receipt?

1. Click on the transaction on your Ramp dashboard. To dismiss, please navigate to the transaction or click on the 'Missing Items' banner from your 'My Ramp' tab.
2. Once the transaction is open, please scroll and locate the vertical dots, then click on 'Request Policy Exemption'



Adding Personal Bank Account For Reimbursements

You can add a personal bank account to your Ramp account for reimbursements from due to employee prior to submitting – taking the hassle out of reimbursing SSLLP for accidental personal charges!

To receive reimbursements from Ramp, you must first connect your personal bank account

How to set it up

- Go to Personal settings → Banking
- Enter your bank information and then select “Initiate verification.”

Settings

Personal settings

Profile **Banking** Security Delegation Notifications

Personal bank account

Approved reimbursements will appear in your account within 2-3 business days.

 **Personal account (**** 3123)** : [Initiate verification](#)
Personal account - Direct connection

Last connected on Mar 12, 2024.

[Change account](#)

Submitting Reimbursements

How it works on Desktop

- Under “Request Funds” select “**Create Reimbursement**”
- Upload receipt(s) or select “mileage” or “no receipt”
- Fill in required information
- Submit for approval
- Approvers will review, edit, approve, or reject
- Once approved, you will receive your ACH payment within 2-3 days (Remember to add your bank account to receive reimbursements (see personal settings)

How it works on Mobile:

- Click the + sign in your Ramp app
- Click ‘New Reimbursement’
- Fill out for ‘Out of Pocket’ or ‘Mileage’

How it works via Text:

- Text your receipt to HIRAMP (447-267)

The image displays two overlapping screenshots of the Ramp mobile application. The background screenshot shows the 'Draft Reimbursement' screen with fields for Merchant (required), Amount (required), Currency* (set to USD), Transaction date (required), Memo (required), Reimburse from, Trip, and Who did you pay for?. The foreground screenshot shows the 'Mileage' input screen, which displays '\$0.00 USD for 0 miles' and includes fields for Start location, Destination, and a 'Round trip' checkbox. It also features a calculation table with columns for Distance, Unit*, Rate, and Reimbursement, showing '0 mi x \$0.70 = \$0.00 USD'. Below this are fields for Trip date (required), Memo (required), and Reimburse from. A note at the bottom of the foreground screen states: 'Upload your PDF, PNG, JPG, HEIC, or WEBP files. Up to 10 MB per file.'

Required for credit card transactions*:
Receipt, Memo, Vendor, Category, Class
* +Customer/Case when applicable

Requesting New Funds

When?

If you need a new budget or vendor specific card

How?

1. Log in
2. Go to Home
3. Click the yellow button that says “Request funds” on the top right of the screen
4. Select “Virtual Card” for online-only purchases, “General expenses” for funds to spend with your physical card, or choose from an existing spend program
5. Fill in desired and required spending details
6. Submit for approval

The screenshot displays the Ramp 'Request funds' interface. On the left is a sidebar with navigation options: Setup guide, Home (highlighted with a yellow badge), My Ramp, Procurement, and Vendors. The main content area shows a greeting 'Good morning, Erin' and a notification '6 expenses require your attention'. A list of expenses is visible, including a recent one for 'Onsite with Client' at United Airlines. On the right, a 'Request funds' sidebar contains buttons for 'Create reimbursement' and 'Book travel', and a list of existing funds: 'New Advertising Card' (\$10K Requested), 'Onsite Program' (\$25K Requested), 'New Wellness Card' (\$100 Requested), and 'Onsite with Client' (\$2.2K left). A modal titled 'Request general expenses' is overlaid in the foreground. It includes a 'Back' button, a text input for 'What is it for? (required)', a note to 'Make this label descriptive to uniquely identify these funds.', and three dropdown menus for 'Amount (required)', 'Currency*' (set to USD), and 'Frequency*' (set to Monthly). Below these is a 'Request details' section with a text input for 'What else should we know about this request? Be descriptive. (required)'.

How To Request A Fund Increase

What is it?

You can request an update to existing cards to increase your spending ability for a special event or indefinitely.

How?

1. Log in → Click on Card → Actions → Edit
2. Enter your updated card details → Request Changes → Enter reason for increased limit (text memo) → Request

What's Next?

Requests are sent directly to your manager/admin for review depending on how your finance team sets up the approval flow. Once approved, you'll have immediate access to your updated card.

You'll be notified via email when a request is approved.

← Back×

Edit "Onsite with Client"

What happens after I submit a request?

Similar to the process of requesting new funds, we'll notify your manager and/or finance team to review and approve any changes requested. These funds will remain the same until your changes are approved by a member of your finance team.

What is it for?*

Onsite with Client

Amount*

\$5,000

Currency

USD

ⓘ

Frequency*

Monthly

▼

Add a one-time increase

☒

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Ramp Resources

Ask Ramp – The BEST Resource!

We strongly recommend using the “Ask Ramp” feature first whenever possible on technical Ramp questions/concerns.

[Ramp Resource Support Center](#)

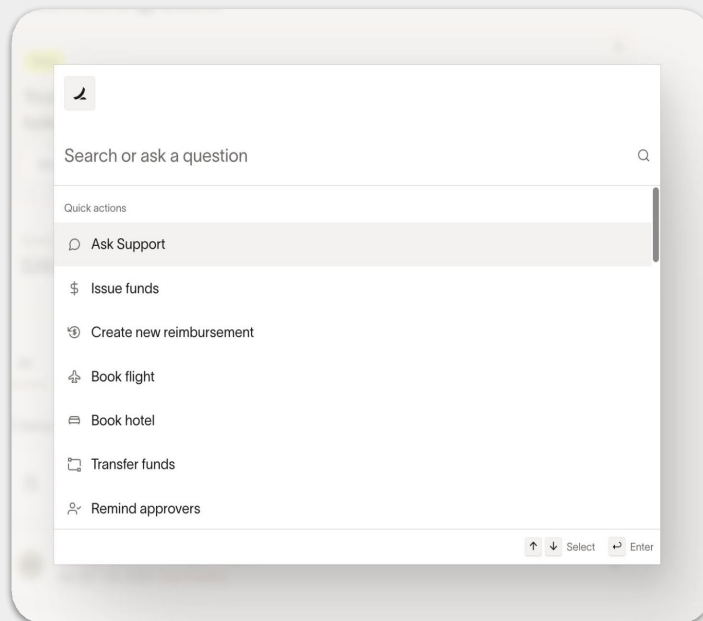
[Ramp Training Center](#)

[Ramp Training Video](#)

Ramp Support

Support Available In App

855-206-SAVE (7283): Mon - Sun 7am to 10pm EST



Conclusion – Thank You!

**Questions?
Concerns?
Need a training refresher?**

Email, call, or send a Teams Message to Rebecca Strickland anytime!

rstrickland@singletonschreiber.com

(619) 560-5494

