



## Ramp Credit Card Quick Reference

*For Employees Who Frequently Travel or Make Business Purchases*

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### 1. Receipts & Memos: Required for Every Purchase

- Attach a receipt and memo for every transaction.
- Memo must include details of the customer/vendor and the purpose of the expense.
- **For Field Service Representatives only – Memo's must include JOB#**

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### Expense Categories & Examples

- **General Travel (GT):** Airfare, lodging, car rental, taxi/Uber, food, tolls, parking  
*Example: "GT – Hotel for Sales Meeting with [Client Name]"*
- **Client Meals (CM):** Meals with clients  
*Example: "CM – Lunch with [Client Name]"*
- **Trade Show Travel (TS):** Travel costs for trade shows  
*Example: "TS – Airfare to NRF Big Show"*
- **CSD Travel & Meals (FSR/CSD Team):**
  - **TRAVEL EXP:** Travel to non-customer sites (e.g., main office for training)
  - **CSD CUSTOMER TRAVEL:** Travel to/from customer sites (gas, food, hotel, airfare, etc.)
  - **CSD CONSUMABLES:** Tools/work gear for everyday work
  - **CSD AUTO:** Vehicle repair/maintenance
  - **CSD OFF/ONBOARDING –** Office visit, training, etc.
  - **PURCHASES – RETAIL EQUIP:** Parts for installs/service calls

### Responsibility:

Employees must ensure compliance with these requirements for every transaction.

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### 2. Available Credit: Your Responsibility

Always check your available credit before making purchases, especially during off hours.

If you need more funds:

- Request a temporary credit increase in the Ramp portal.
- Submit your request during work hours and in advance.
- Approval is required from your manager, then finance, through the Ramp portal.

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### 3. Fraudulent or Accidental Charges: Dispute and Report Promptly

If you suspect a fraudulent charge:

- Dispute the charge directly through the Ramp portal.

If you accidentally use the Ramp card for a personal purchase:

- Contact your manager immediately.

- Navigate to the purchase in Ramp and click on **“re-pay.”**

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#### **4. If Your Card Is Declined**

If you urgently need to make a purchase and your Ramp card is declined:

- You may use your personal credit card to complete the transaction.
- Submit an expense reimbursement request for the purchase.

#### **Next Steps:**

- Contact Ramp support (via phone or mobile app) to determine why your card was declined.

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#### **Ramp Support Information**

**Phone:** 855-206-SAVE (7283)

#### **Ask Ramp:**

Ramp offers an AI-generated solution center called **“Ask Ramp.”**

Click on **“Ask Ramp”** in the portal and simply type in what you are trying to do.

The system will generate step-by-step instructions or information regarding your question.

