UNC SCHOOL OF GOVERNMENT

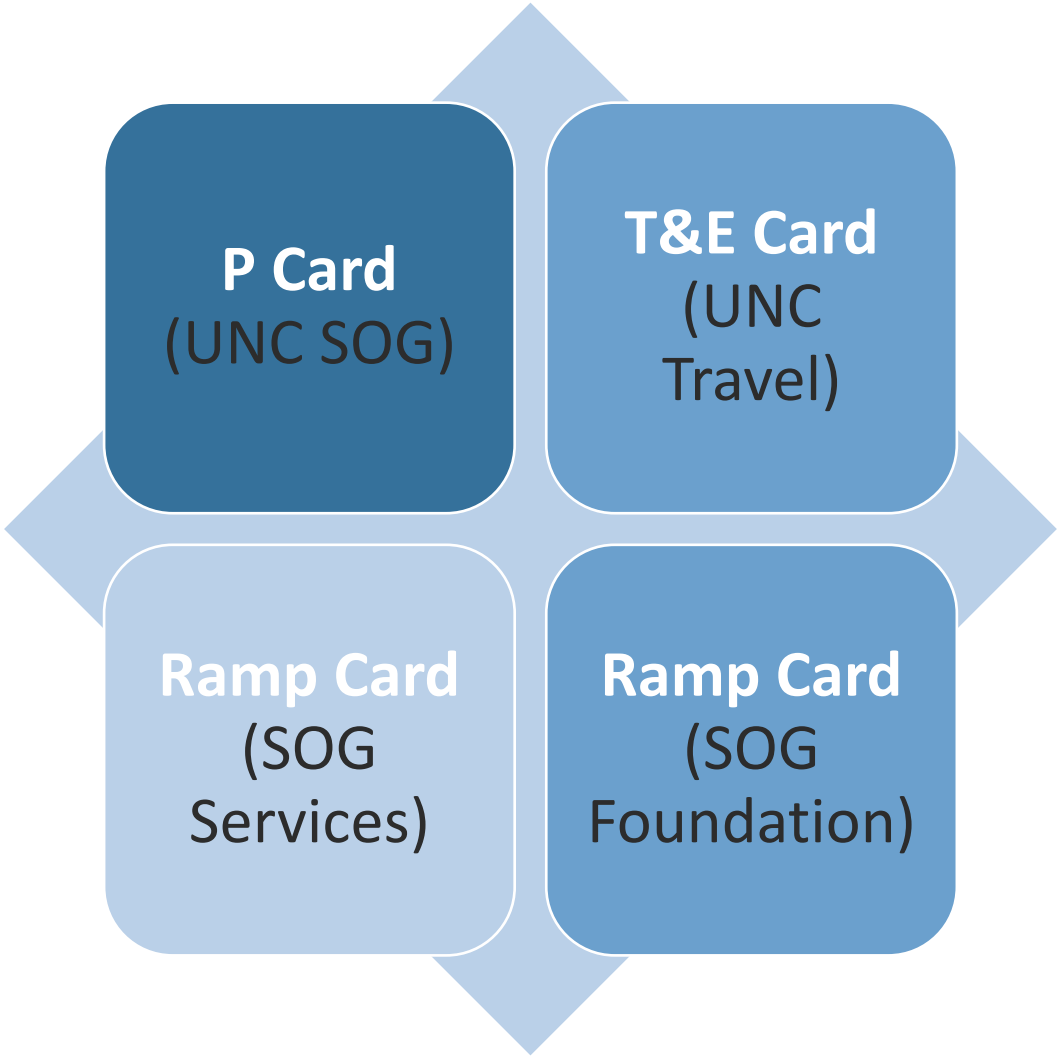
Ramp Card Training

August 7, 2024

UPDATES

CREDIT CARDS

- One School – 4 Credit Cards!



P-card
Anitra

UNIVERSITY MANAGED

- Business meals, catering, and entertainment (no alcohol)
- Conference registrations
- Professional Membership Dues
- Advertising
- Conference calls
- Copying/framing/photo
- Background checks
- Inventory purchases
- Newspaper, magazine, online subscriptions
- Postage/shipping
- Rentals (no contracts)
- Services from a vendor
- State contract purchases
- Supplies
- Utilities

BOA Works

T&E Card
Hector

UNIVERSITY MANAGED

- Business meals, catering, and entertainment (including alcohol)
- Conference registrations
- Professional Membership Dues
- Airfare
- Lodging
- Parking
- Rental vehicles and ground transportation
- Gas for rental vehicles
- Uber and Lyft
- Wifi costs (if necessary for conducting business)

SAP Concur

SOG Services Card
Amie

SCHOOL OF GOVERNMENT MANAGED

- **Business Expenses for <u>Courses</u>:**
  - Airfare
  - Registration
  - Baggage
  - Internet
  - Parking
  - Taxi/Rental Car, including gas
  - Personal meals (limit to cost consistent with per diem rates)
  - Lodging
  - Meals and entertainment for courses
  - Supplies
  - Postage/shipping
  - Services from a vendor
  - Printing

QB/Ramp

SOG Foundation Card
Amie

SCHOOL OF GOVERNMENT MANAGED

- **Business Expenses for <u>Fundraising and Advancement</u>:**
  - Airfare
  - Registration
  - Baggage
  - Internet
  - Parking
  - Taxi/Rental Car, including gas
  - lodging
  - Meals and entertainment for courses
  - Supplies
  - Postage/shipping
  - Printing

QB/ Ramp

Ramp Credit Cards

What is Ramp?

SUBTITLE

- Ramp is the Corporate Credit Card Provider for SOG Services, Inc. and the SOG Foundation, Inc.
- Ramp's online platform is used to manage cards, cardholders, and for reconciling and reporting credit card transactions

When can I use my Ramp Card?

THE CARD IS TO BE USED STRICTLY FOR SOG SERVICES OR FOUNDATION BUSINESS. NO PERSONAL EXPENSES MAY BE CHARGED TO THE CARD. SEE CREDIT CARD AGREEMENT FORM FOR MORE DETAILS

- Course Expenses
  - Check the Master Course List or Event Dashboard
  - Any purchases for courses listed under “SOG Services” can be made with a Ramp Card
  - Travel by SOG Services employees for courses
- General School Expenses
  - Purchases that carry school-wide benefits, like supplies, IT subscriptions, etc can be made with a Ramp Card
- Affiliated businesses:
  - NCCCMA
  - CUPSO
- Foundation business:
  - Meals
  - Travel
  - Supplies

Types of Cards

- Physical Card
  - Physical cards can be used like any other credit card for in-person or online purchases
- Virtual Card
  - Virtual card account information can be found in your Ramp account
  - Great for online purchases and subscriptions
  - Add to your Apple Pay or Google Wallet etc to use in person
- Limited Use Cards
  - Travel expenses
  - Single purchases in excess of your card's spending limit
  - Cards designated for specific purposes, ie, IT subscriptions. Can be limited to certain vendors or certain purchase types.

Types of Users

- Cardholder
  - Make purchases
  - Individual dashboard
- Manager
  - Manage cards for their teams
  - Oversight of team's transactions
  - Spend alerts and insights
  - Request new cards
- Assistants
  - Acts as "proxy" for designated cards
  - View transactions, submit receipts, and fill out details

Who can have a Ramp Card?

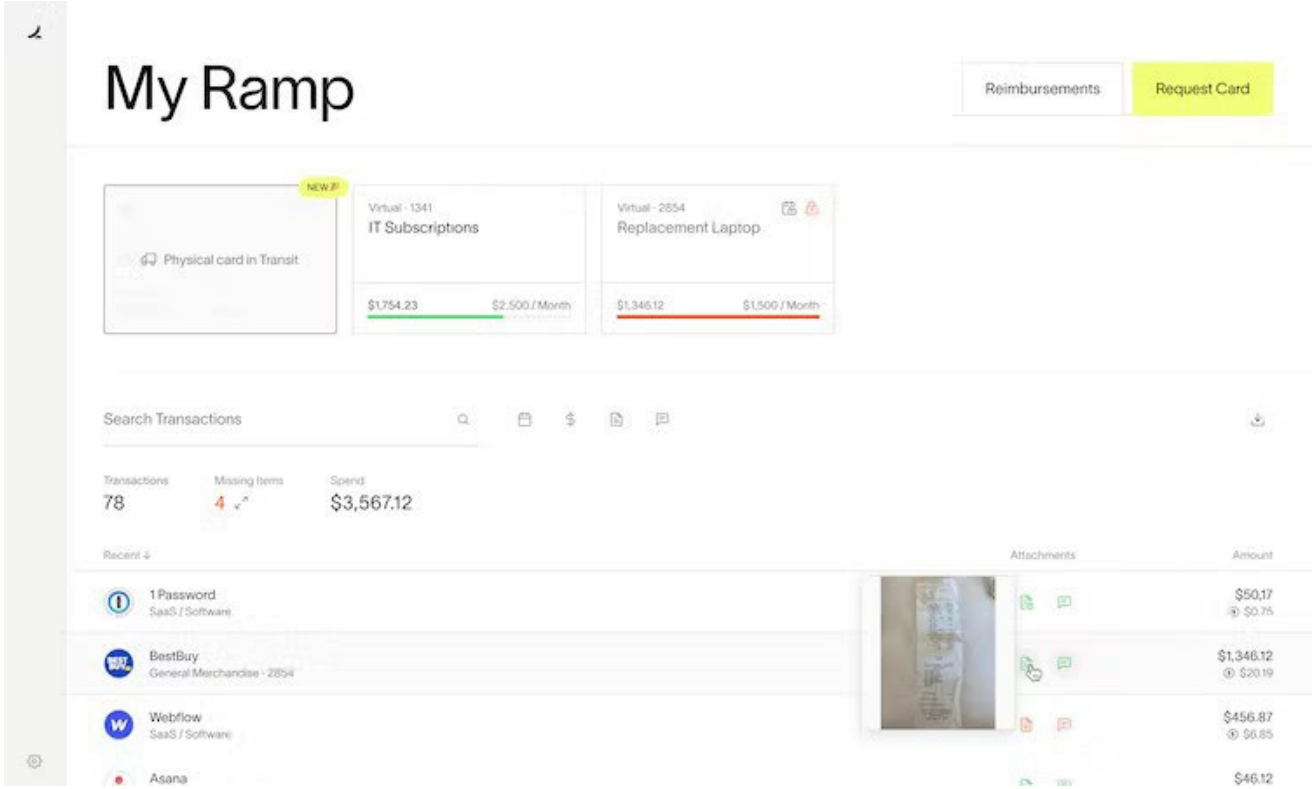
SUBTITLE

- Any employee of the School of Government, whether through UNC or SOG Services, is eligible for a Ramp Card with supervisor approval
- Cardholders should have a legitimate business need to make purchases on behalf of SOG Services, Inc. or the Foundation.

How to Access Your Account

HTTPS://APP.RAMP.COM/SIGN-IN

- Login with your SOG email address and password you created at account set up
- Once logged in, you'll see your Cards and any transactions that require your attention



How to Reconcile Expenses

- **You are required to add receipts to your transactions within 10 days of making a purchase.**

- **Your card will be auto-locked if a purchase is not reconciled after 60 days.**

- **Upload an itemized receipt, memo, and provide the cost code, if applicable. We'll take care of the rest!**

  Ramp will send you weekly emails each Friday reminding you of any missing items.

  https://support.ramp.com/hc/en-us/articles/360042588454-Submitting-receipts-and-memos-for-your-Ramp-card

After your transaction, you can send your receipts to Ramp in a few ways

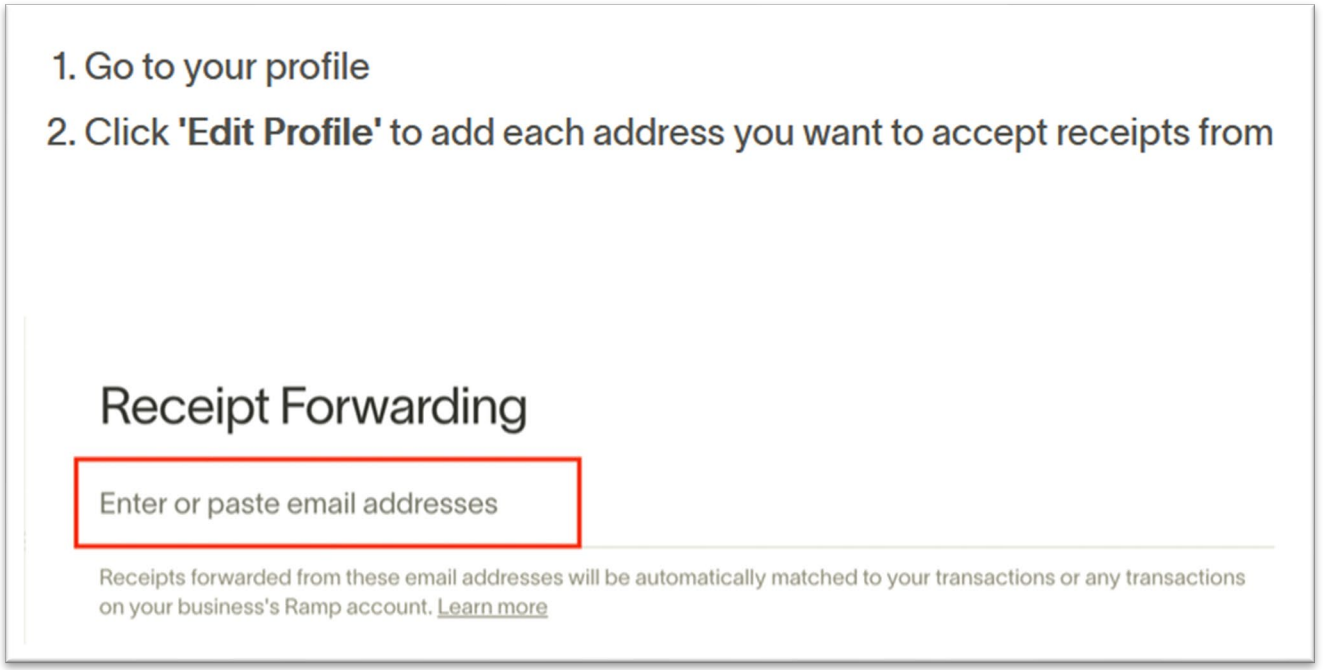
Channel	Receipts	Memos
SMS	Text us at HIRAMP (447-267) - we will match	Text us - we will add the memo to the last transaction
Email	Forward to receipts@ramp.com	Add "memo: *enter your memo*" in the body of the email
Ramp.com	Click into the transaction or missing items section and upload the receipt	Click into the transaction or missing items section and add memo
Slack	Send your receipt to the Ramp app on Slack (Simple type **/ramp**, press enter, then attach a picture of your receipt to the next message)	Add a memo when Slack app prompts you to (after receipt has been matched)

How to Reconcile Expenses

- **To provide a memo:**
  - To include a memo when forwarding your receipts for automatic matching, simply enter **Memo: insert memo here** into the body of the email
  - Text - Ramp will add the memo to the last transaction
  - Login to Ramp.com and add directly to transaction

How to Reconcile Expenses

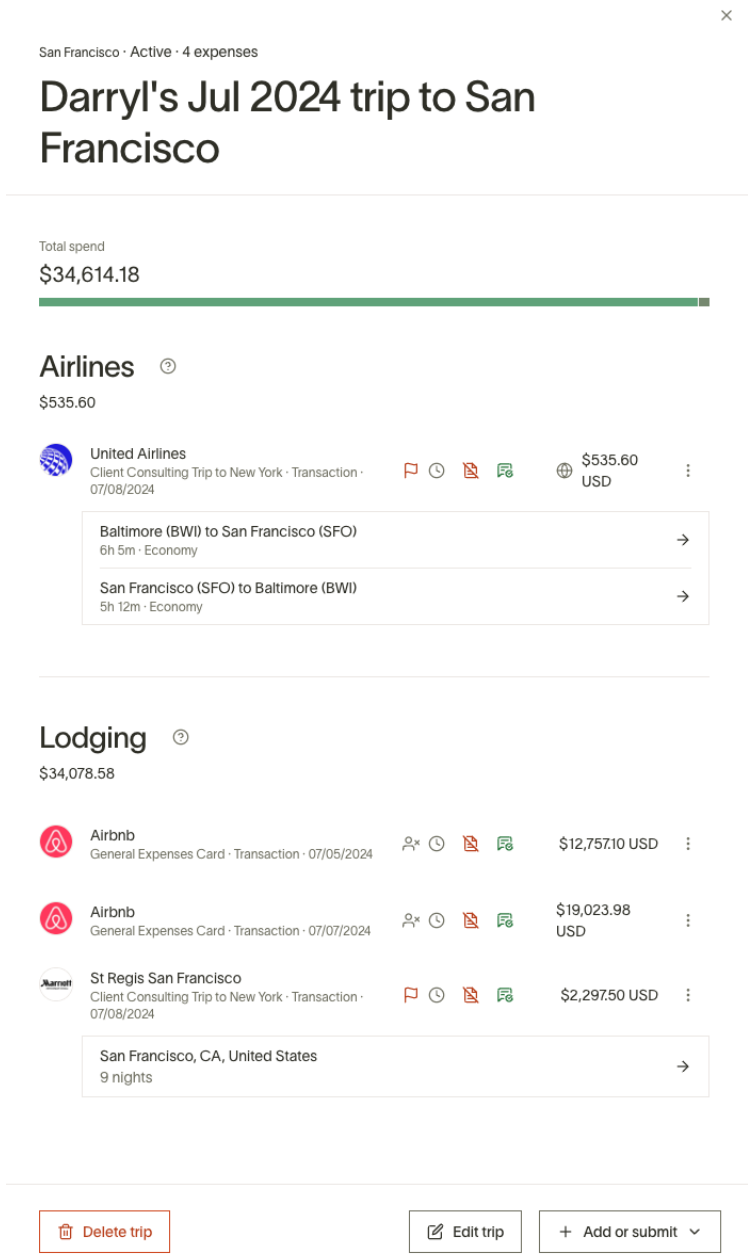
- **Forwarding receipts via additional email addresses**
  - You can also forward receipts from other email addresses you set up, such as your personal email address.



Travel with your Ramp Card

A **"Trip"** on Ramp represents a grouping of transactions and reimbursements that are associated with a single Trip. They summarize:

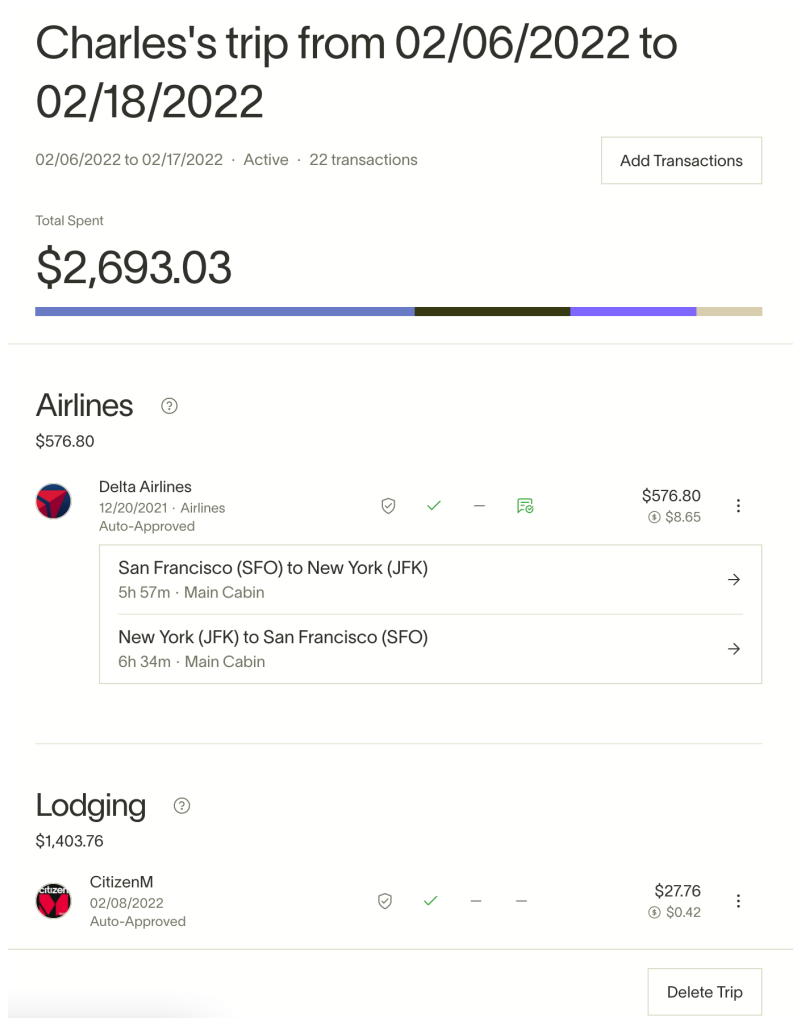
1. Total cost of the trip
2. Dates of the beginning and end of the trip
3. Source and destination of the trip
4. Airline transactions (and links to flight itinerary)
5. Lodging transactions (and links to lodging details)
6. Ground transportation (e.g. Uber / Lyft)
7. Per Diem (any spend on restaurants/grocery/alcohol/entertainment during the trip)
8. Miscellaneous (any misc. spend that falls outside of the above categories, etc.)



Travel with your Ramp Card

Trips can be created in several ways:

- Trips are automatically generated for travel expenses as receipts are submitted.
- Manually by clicking into a transaction from the trip and clicking "Add to Trip" at the bottom of the summary (you'll be prompted to create a trip if you have not already done so).
- Managers, admins, and owners may create trips for others



Questions