Frequently Asked Questions – Ramp + Sage Integration

General Question

What does this integration do for your business?

This integration seamlessly connects Sage and Ramp, automatically syncing data between your expense management and AP systems on a scheduled basis. It eliminates manual processes, lightens the workload for your accounting team, and runs quietly in the background—so you only interact with the tools you already know. No extra systems to learn, just effortless efficiency.

Who is Ramp + Sage Integration for?

It's designed for organizations using Sage ERP systems who want to streamline their financial workflows, eliminate manual data entry, reduce errors, and gain visibility into their financial operations. This solution is particularly valuable for finance teams looking to automate expense management (including credit cards), bill payments, and vendor management processes.

How does Ramp + Sage Integration compare to CSV imports?

Ramp + Sage Integration offers significant advantages over generic CSV imports:

- Automatic syncing on your schedule vs. manual CSV export/import processes
- Built-in Sage-specific validation vs. errors detected only after import attempts
- Direct posting to Sage GL with proper validation vs. manual GL entry after import
- Seamless handling of attachments vs. no attachment support
- Transaction visibility vs. no tracking capabilities

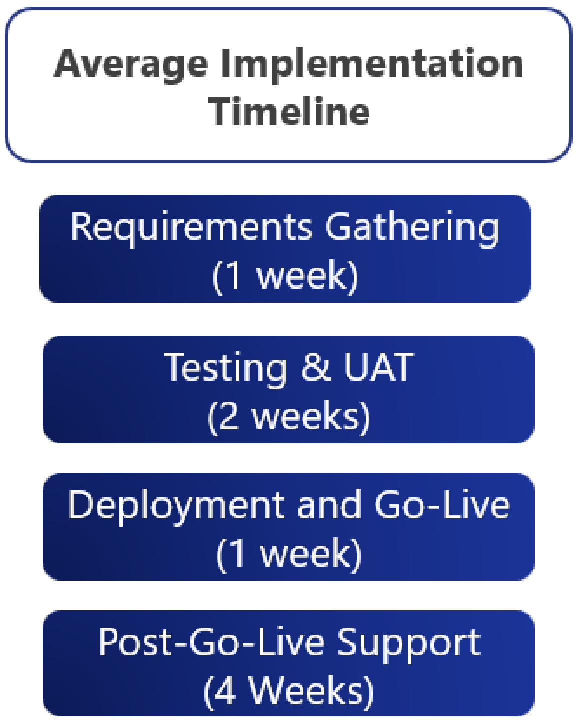
Integration & Setup

How do I get started with the Ramp + Sage Integration?

Simply book a demo to personally see the benefits of the integration and how it works in detail!

How long does the setup process take?

The exact timeline depends on your specific configuration needs and the complexity of your financial workflows. Most clients go-live within 4-6 weeks and our team works efficiently to minimize disruption to your operations.



What technical requirements are needed for the integration?

Sage 100 or Sage 300: Version 2018 or newer

- Admin access within your Sage environment.
- Ramp account with administrative privileges.

Features & Functionality

What types of transactions can be synced?

Ramp + Sage Integration supports a comprehensive range of financial transactions:

- Bills and bill payments
- Credit card transactions
- Statement payments
- Vendor information
- GL accounts and custom fields
- Employee reimbursements

Can I customize transaction mapping?

Yes! You can customize how transactions map between Ramp and your Sage system. This includes mapping GL accounts, departments, custom fields, and other critical financial data points to ensure the integration aligns perfectly with your existing workflows and reporting requirements.

Can I set up or update a vendor in either system?

Vendor setups can be done in either system. If created in Ramp, some fields may need to be completed in Sage. Conversely, Sage populates all vendor fields back to Ramp.

Will the integration support three-way matching (PO, receipt, invoice)?

The standard connector does not currently support three-way matching or purchase order (PO) matching. Custom solutions may be available outside of standard pricing. To determine whether your requirements can be met through standard functionality or require a custom approach, please contact **rampopps@anywareapps.com**.

Is the API updating in real-time or on a scheduled basis?

Updates are scheduled and can be set to run as frequently as needed, such as every hour. Manual syncs can be triggered from Sage.

How do default GL accounts get applied when paying vendors through Ramp → Sage? Are multiple GLs per vendor allowed?

Default GL accounts can be specified on the Ramp vendor record which will prepopulate the GL account when a transaction is being entered. You can override the default GL account on any transaction screen at will.

Can we break a transaction into multiple GL lines (split allocations) if one default isn't enough?

Yes, but not automatic. Requires manual entry or custom workflow.

Security & Compliance

Is my data secure?

Absolutely. All data transmitted between Ramp and your Sage system is encrypted using industry-standard protocols.

Does the integration store my financial data?

No, we adhere to a minimal data retention policy. The integration only stores the metadata necessary to facilitate the synchronization between systems.

How do the integrations handle error management?

The integrations feature proactive error management with integration errors from your Sage system that are logged for error resolution.

Billing & Support

How much does Ramp + Sage Integration cost?

We offer tiered pricing based on your organization's transaction volume. If your requirements go beyond the standard integration, custom development is available with its own pricing structure. Contact our sales team for a personalized quote tailored to your goals. Our pricing is designed to deliver exceptional value, ensuring clear ROI through time savings and improved financial accuracy.

Are there any setup or training fees?

Our standard integration includes basic setup and orientation at no additional cost. For organizations with custom integration needs, we offer premium development services at competitive rates.

Do you offer customer support?

Support related to the connector is included in your annual subscription fee and is a part of our warranty guarantee [Insert warranty link]. For support related to the connector, reach out to us at rampsupport@anywareapps.com. For Ramp related support issues please reach out to rampsupport@ramp.com.

What happens if my sync fails?

Our error-handling system will immediately notify you of any synchronization issues. The system provides detailed information about the nature of the failure, allowing you to quickly diagnose and resolve the problem. For more complex issues, our support team is available to provide assistance at rampsupport@anywareapps.com.

Sage Specific Questions

Can approved invoices post directly into Sage AP Invoice Entry as a batch with no manual re-keying?

Our integration supports both draft batch creation, as well as automatic batch posting.

Do you support multi-segment GL mapping aligned to Sage (up to 5 segments)?

Yes. Ramp syncs the full GL account to the accounting category field. Location and department sub-accounts sync separately into Ramp's location and department lists.

Do you support multi-company/entity AP posting into Sage?

Yes. Even though Sage is not a multi-entity system, companies with multiple entities typically maintain multiple Sage instances/databases. Ramp's connector supports linking transactions from one unified Ramp environment to each respective Sage instance.

What happens in Sage when a bill paid via Ramp credit card is pushed over?

A manual check entry is created in Sage, using a Ramp "bank" account tied to a liability account for the credit card. This closes the bill without impacting cash directly, only adjusting liability.

What level of detail or information will be transferred (e.g., line exclusivity, GLs, item level)?

The integration captures posted invoice data from Ramp and syncs it to Sage and includes standard header information like vendor, description, terms, and references; as well as line level detail including GL account, amount, memo, and custom fields.

Is the integration via a service running on the server, and how is it triggered (Windows Scheduler/manual)?

A service runs on the Sage server, triggered either by Windows Scheduler or manually within Sage, allowing for both scheduled and on-demand syncing.

How does bill payment information flow back to Sage to close invoices?

After payment is executed in Ramp, the payment information is sent back to Sage, where a manual payment entry is created. This entry is reviewed and posted to close the invoice.

How does Ramp batch ACH payments and reflect them in Sage?

Payments are batched and posted to Sage sub-ledger for reconciliation.