Frequently Asked Questions - Ramp + Sage Integration

General Questions

What is Ramp + Sage Integration?

Ramp + Sage Integration is a purpose-built solution that seamlessly connects Ramp with Sage 100 and Sage 300 ERP systems. Unlike generic CSV imports, this integration understands the unique data structures and requirements of Sage platforms, ensuring proper data mapping, validation, and direct posting to your general ledger.

Who is Ramp + Sage Integration for?

It's designed for organizations using Sage 100 or Sage 300 ERP systems who want to streamline their financial workflows, eliminate manual data entry, reduce errors, and gain real-time visibility into their financial operations. This solution is particularly valuable for finance teams looking to automate expense management, bill payments, and vendor management processes.

What are the main differences between Sage 100 and Sage 300 integrations?

While both integrations deliver powerful financial automation, there are some key differences:

Sage 100 Integration: - Bi-directional bill creation - One-way payment synchronization (Ramp → Sage 100) - Purchase Order integration coming soon

Sage 300 Integration: - Full bi-directional bill and payment synchronization - Purchase Order management available now (pending Ramp API) - Enhanced international currency support

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 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 - Real-time transaction visibility vs. no tracking capabilities

Integration & Setup

How do I get started with Ramp + Sage Integration?

You'll need a Sage 100 or Sage 300 ERP system and a Ramp account. Our team will guide you through the setup process, which includes connecting your systems, configuring your preferences, and testing the integration to ensure everything works perfectly for your specific needs.

How long does the setup process take?

Most users can be up and running with Ramp + Sage Integration in just a few days. The exact timeline depends on your specific configuration needs and the complexity of your financial workflows. Our team works efficiently to minimize disruption to your operations.

Do I need to schedule a training or setup session?

While not mandatory, we recommend a brief orientation session to ensure you get the most out of your integration. Our team can walk you through the key features, help you configure your preferences, and answer any questions you might have about optimizing your financial workflows.

What technical requirements are needed for the integration?

For Sage 100, you'll need: - Sage 100 version 2018 or newer - Admin access to your Sage system - A Ramp account with administrative privileges

For Sage 300, you'll need: - Sage 300 version 2018 or newer - Admin access to your Sage system - A 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 - Purchase orders (available now for Sage 300, coming soon for Sage 100)

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.

How do you handle bill management?

Both integrations offer bi-directional bill synchronization, allowing you to create and manage bills in either Ramp or your Sage system. For Sage 100, bills created in either system will automatically appear in both. For Sage 300, you get full bi-directional management with changes syncing seamlessly between systems.

How are credit card transactions handled?

Expenses made with Ramp cards flow directly into your Sage system, complete with all transaction details. Statement payments and the valuable 1.5% cash back you earn are automatically recorded, simplifying reconciliation and maximizing your returns. This eliminates the need for manual entry and ensures accurate expense tracking.

How do you handle vendor management?

Both integrations offer bi-directional vendor synchronization, allowing you to maintain a single source of truth for all vendor information. Create or update vendor details in either system, and changes propagate automatically, ensuring consistent data across your entire financial ecosystem.

How do you handle international transactions?

For Sage 100, basic international support is available. For Sage 300, the integration offers enhanced bi-directional international currency support with built-in currency conversion for international bills and cards. This ensures accurate financial reporting regardless of which currencies your business operates in.

How are employee reimbursements handled?

Both integrations streamline employee reimbursements with automated synchronization from Ramp to your Sage system. For Sage 100, the system treats employees as vendors for reimbursement purposes, using the efficient Vendor Bill process. This ensures your team members get paid promptly and accurately while maintaining proper financial controls.

Can I track the status of synced transactions?

Yes, both integrations provide real-time visibility into transaction status through a comprehensive activity log. This allows you to monitor the synchronization process and quickly identify and resolve any issues that might arise.

Security & Compliance

Is my data secure?

Absolutely. All data transmitted between Ramp and your Sage system is encrypted using industry-standard protocols. We implement robust security measures to protect your financial information at every step of the integration process.

Does Ramp store my Sage financial data?

No, we adhere to a minimal data retention policy. The integration only stores the information necessary to facilitate the synchronization between systems. Your sensitive financial data remains primarily within your Sage environment.

How does the integration handle error management?

Both integrations feature proactive error management with integration errors from your Sage system displayed directly in the Ramp interface. For Sage 100 non-SQL clients, comprehensive logging options ensure you always have visibility into system operations. This helps you quickly identify and resolve any synchronization issues.

Billing & Support

How much does Ramp + Sage Integration cost?

We offer tiered pricing based on your organization's size and transaction volume. Please contact our sales team for a customized quote that meets your specific needs. Our pricing is designed to deliver exceptional value with a clear ROI through time savings and improved financial accuracy.

Are there any setup or training fees?

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

Do you offer customer support?

Yes! We provide comprehensive support through multiple channels, including email, phone, and an online help center. Our dedicated support team is highly knowledgeable about both Ramp and Sage systems, ensuring you get expert assistance whenever you need it.

What happens if my sync fails?

Our error-handling system will immediately notify you of any synchronization issues through the Ramp interface. 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.

Future Enhancements

What new features are coming to the integration?

We're continuously improving the Ramp + Sage Integration with exciting new features on the horizon:

For Sage 100: - Purchase Order Integration: POs created in Sage 100 will import into Ramp, with the complete process flowing through to paid AP bills syncing back to Sage 100 - Receipt Synchronization: Receipts created in Sage 100 will synchronize to Ramp - Tax Module Support: Enhanced tax handling capabilities

For Sage 300: - Receipt Synchronization: Receipts created in Sage 300 will synchronize to Ramp - Purchase Request Management: Support for purchase requests in both systems - Advanced Allocation Tools: Bi-directional synchronization of allocations and amortization templates - Tax Module Integration: Enhanced tax handling capabilities

How often do you update the integration?

We regularly release updates to enhance functionality, improve performance, and address any issues. Major feature updates typically occur quarterly, while minor improvements and bug fixes are released more frequently. All updates are designed to be minimally disruptive to your operations.

How will I learn about new features?

We communicate all updates through multiple channels, including email notifications, in-app announcements, and our product blog. For significant feature releases, we may also offer webinars or training sessions to help you make the most of new capabilities.