Reviewing Credit Card Transactions

With Ramp you will be able to review and approve credit card transactions for your team.

To review transactions follow the steps below:

- Click on the Transactions tab along the left hand side of the screen. We are going to start and the top and work our way down.
- The overview tab allows you to see what your team has spent and what missing items they have. If you click the missing items another window will pop up to let you know what your team still needs to do and you can remind them with one click. Ramp will also remind everyone of open items on Fridays.
- In the Needs Review tab you can see the items that are waiting for you to review and approve them. Click on a transaction to see the detail. You can then approve, reject, or flag a transaction. This will let accounting know that it is ready to be sent to the accounting system.
- Out of Policy lets you review any items that do not meet our travel policy requirements. These should be reviewed and resolved by a manager. Click into the transaction to see the details of the transactions.
- In the Declined section you can see if any card transactions were declined for your team. No action needed here this is just for your information.

View these slides from Ramp for more info:

Ramp Managing Credit Card Slides

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