



PILOT.COM

Ramp Credit Card Setup Guide & FAQ

Refer to these step-by-step instructions to enable Pilot's Ramp credit card integration!

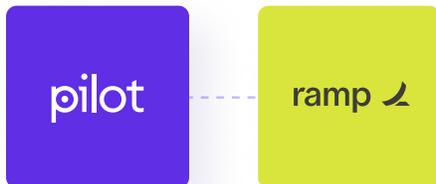




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CONNECT WITH RAMP

Step No. 1

From the Connections tab...

Navigate to your Ramp connection page via “Connections” in your Customer Portal or direct link if provided by Pilot

The screenshot displays the 'Manage your connected institutions' page in the Pilot interface. The page title is 'Manage your connected institutions' with a subtitle 'Add or update your connected financial institutions.' and an 'Add new connection' button. The left sidebar shows navigation options: Home, Tasks, Insights, Tax, and Connections (highlighted). The main content area lists four institutions:

Institution	Status
Deel	Connected (Green checkmark)
First Republic Bank	Connected (Green checkmark)
Ramp	Needs connection (Red warning triangle)
[Unlabeled]	Connected (Green checkmark)

A callout box points to the Ramp entry with the following text:

SELECT RAMP
To navigate to your Ramp connection page via “Connections”



CONNECT WITH RAMP

Step No. 2

In the Connect with Ramp section...

Click the “Connect” or “Update” button to enter Ramp’s authorization flow.

Ramp’s Update flow enables you to update Pilot’s access to Ramp when permissions need to be updated. It’s okay if this is already Connected!

2. Connect with Ramp Disconnected

Click “Connect” to link your Ramp account to Pilot and sync your financial transactions, account balances, categories, and classes to QBO in Ramp. This will create duplicate transactions in QBO for your behalf by Pilot.

- Note: Setting categories and classes for Ramp credit card transactions is optional. Any transaction not categorized will be categorized by Pilot.

After connecting your account, please do not manually sync any activity to QBO in Ramp. Doing so will create duplicate transactions in QBO. Credit Card activity to QBO via our direct integration.

For more information on how it works and how to set categories and classes in Ramp, check out our [Ramp Setup Guide](#). If you reach out to us at support@pilot.com.

[Remove institution](#) [Connect](#) [Back](#) [Done](#)

CONNECT
Select the “Connect” or “Update” button to enter Ramp’s update flow.



AUTHORIZE PILOT'S ACCESS

Step No. 3

From Ramp's authorization flow...

Input your credentials, review the information that Ramp will share with Pilot and select "Allow" to link your Ramp account to Pilot.

The image shows a composite of three elements: a Ramp login page, a referral page, and an authorization dialog box. The login page on the left has a 'Welcome back!' message and two sign-in options: 'Sign in with Google' and 'Sign in with SSO'. Below these are fields for 'Email Address' (containing 'pilotbookkeeper@pilot.com') and 'Password'. A 'Sign in to Ramp' button is at the bottom. The referral page in the background features a 'Refer & Earn \$500' headline and a 'Copy Invite Link' button. The authorization dialog box on the right is titled 'Pilot.com wants to access your Ramp account' and lists the following permissions: accounting:read, business:read, cashbacks:read, departments:read, locations:read, statements:read, transactions:read, and transfers:read. It also includes a 'Cancel request' button and a green 'Allow' button. A blue arrow points from the 'Sign in to Ramp' button to the 'Allow' button.

AUTHORIZE
Select "Allow" to link your Ramp account to Pilot.



REVIEW YOUR CONNECTION

Step No. 4

Back in the Pilot Portal...

Once back in your Institution Connection Page, you should see a “Connected” tag. Click Done or close out the page.

CONNECTED

You should now see a “Connected” tag on your linked institution.

2. Connect with Ramp

Connected

Sync your financial transactions, account balances, categorizations and classes, if applicable, to Pilot from Ramp.

- Note: Setting categories and classes for Ramp credit card transactions is optional. Any transaction not categorized or classed by you in Ramp will be managed on your behalf by Pilot.

Please do not manually sync any activity to QBO in Ramp. Doing so will create duplicate transactions since Pilot will now import your Ramp Credit Card activity to QBO via our direct integration.

For more information on how it works and how to set categories and classes in Ramp, check out our [Ramp Setup Guide & FAQ](#). If you have additional questions, please reach out to us at support@pilot.com.

Relink 

Unlink

Remove institution

Back

Done

FINALIZE

Select “Done” or close out the page.



AFTER LINKING

Avoid duplicating transactions

To help avoid duplicating transactions:

Since Pilot will now import your Ramp Credit Card activity to QuickBooks via a direct integration, please do not sync transactions to QuickBooks in the Accounting > Ramp Card page.

If you would like to mark transactions as synced to tidy up your Accounting page without syncing transactions to QuickBooks, simply mark applicable transactions as “Ready,” click “Sync all” and choose “Download CSV” instead of “Sync to QuickBooks.” For details, refer to [this article](#).

DO NOT CLICK SYNC ALL

Since we import your transactions via Ramp’s API, this would duplicate transactions.

Date	Amount	Cardholder	QuickBooks Category	Receipt	Memo	QuickBooks Vendor	Ready
Friday, December 8, 2023							
LinkedIn SaaS / Software	\$791.67	[Redacted]	Choose one (required)	-	-	LinkedIn	<input type="checkbox"/>
LinkedIn SaaS / Software	\$908.33	[Redacted]	Choose one (required)	-	-	LinkedIn	<input type="checkbox"/>
LinkedIn SaaS / Software	\$1,991.42	[Redacted]	Choose one (required)	-	-	LinkedIn	<input type="checkbox"/>
Thursday, December 7, 2023							
Mendocino Farms Restaurants	\$80.49	[Redacted]	Meals	-	-	Mendocino Farms	<input checked="" type="checkbox"/>
Bober Tea Restaurants	\$3.50	[Redacted]	Choose one (required)	-	-	New: Bober Tea	<input type="checkbox"/>
Pcbway Electronics	\$53.79	[Redacted]	Choose one (required)	-	-	New: Pcbway	<input type="checkbox"/>
Uber Taxi and Rideshare	\$63.66	[Redacted]	Choose one (required)	-	-	Uber	<input type="checkbox"/>



OPTIONAL SETTINGS

Configuring Categories and Classes in Ramp

01 Connect Ramp to QuickBooks by following the [Setup instructions](#).

02 Navigate to Manage Accounting Fields in your Settings to determine which QuickBooks accounts and classes to make available in Ramp.

Note: Be sure to create [Accounting Rules](#) to map Ramp vendors or categories to your QuickBooks accounts and departments or locations to your QuickBooks classes.

03 Finally, if you are making any manual updates to your Ramp Credit Card activity, please finalize updates related to the previous month by the 3rd business day of the current month.

Please note that final categories and classes are applied once we prepare and ship your books.



FAQ

What are the benefits of this feature?

By connecting your Ramp account with with Pilot:

- Pilot will import your Ramp Credit Card transactions throughout the month and provide more up-to-date information to you in your QuickBooks account.
- You can **optionally** take full advantage of Ramp functionality like setting recurring transaction categories and classes that map directly to your QuickBooks accounts. Previously, Pilot could only apply these categories and classes by running the Ramp <> QBO sync, which could only be run once for a given set of transactions.
 - Pilot will apply final categories and classes once we prepare and send you your books.
 - Please note that if you do not already have classes enabled with Pilot, classes added in Ramp will not be applied to your books.
- Even if you do not plan to set categories or classes in Ramp, syncing your Ramp Credit Card activity to Pilot will allow you to take full advantage of upcoming features in your Customer Portal that leverage more up-to-date information.



AUTOMATIC SYNC

How does it work?

Once your Ramp account is linked with Pilot, your Ramp credit card transactions will be synced to your QuickBooks account on a nightly basis.

Pilot will apply final categories and classes once we prepare and send you your books. Please note that if you do not already have classes enabled with Pilot, classes added in Ramp will not be applied to your books.



SECURE & PRIVATE

Am I being asked to share new data with Pilot?

- No. Ramp controls the connection and Pilot never sees the personal credentials that you use to sync your Ramp Credit Card activity to Pilot.
- When you connect your account, Ramp grants Pilot “View Only” permissions. Pilot will have access to the same transaction activity we would otherwise gather by logging into your Ramp account.

If you ever want to verify that you provided Pilot with read-only Ramp integration access, you can do so by navigating to Settings > Integrations > Third Party in Ramp.