SME User Guide (Mobile)

Connecting your business to payments

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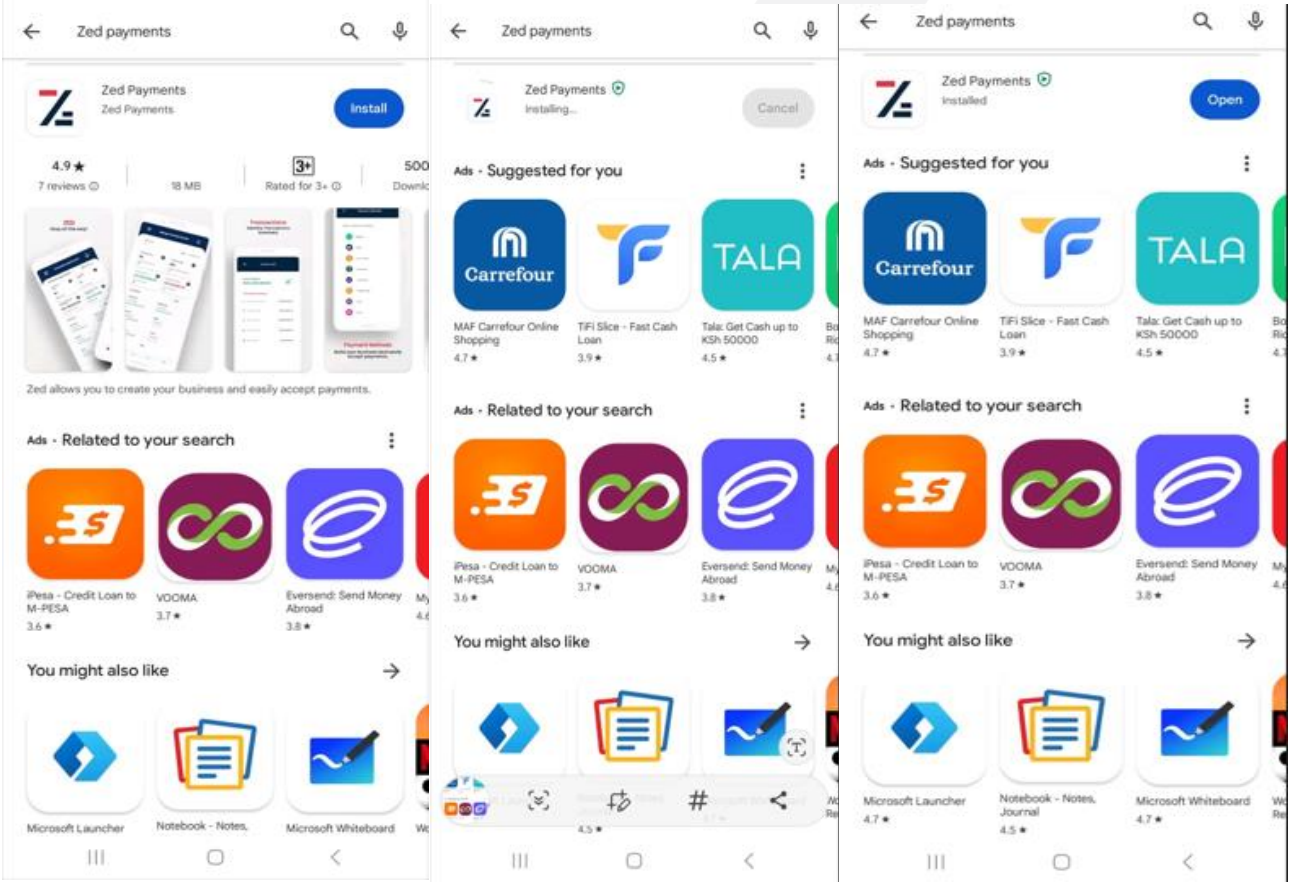
Zed Sign Up Process Via Mobile

Welcome to Zed! Here's a simple guide to help you sign up, receive your login details, and even change your pin.

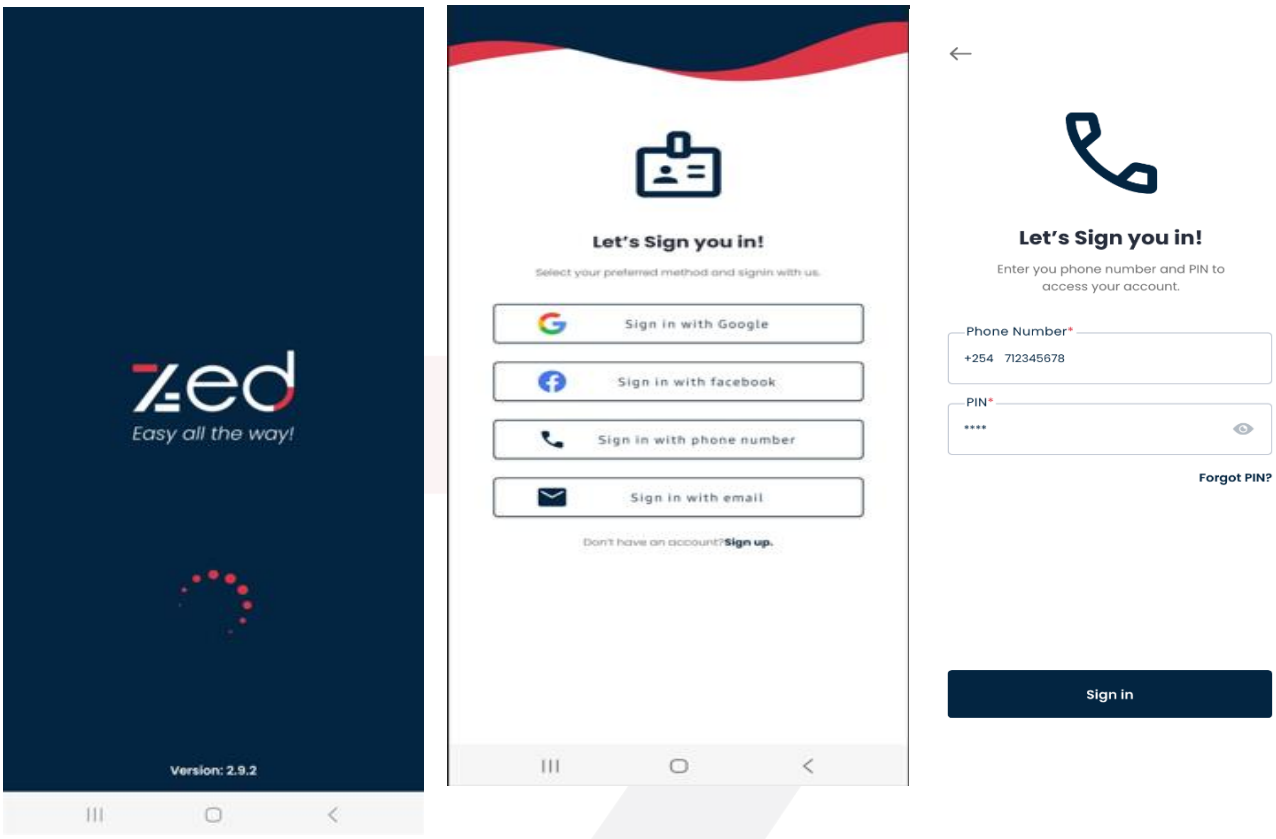
1. Installation:

i. Open the Play Store on your Android device.
ii. Search for 'Zed Payments' and click on 'Install'.
iii. Wait for the app to download.



2. Sign In:

i. Once downloaded, open the Zed app on your phone.
ii. You will be directed to the sign-in page.
iii. Choose your preferred sign-in method: Google, Facebook, Phone number, or Email.
iv. Enter the 4-digit PIN sent to your email and WhatsApp during registration.



3. PIN Change:

i. After successful login, you will be prompted to change your PIN for security purposes.

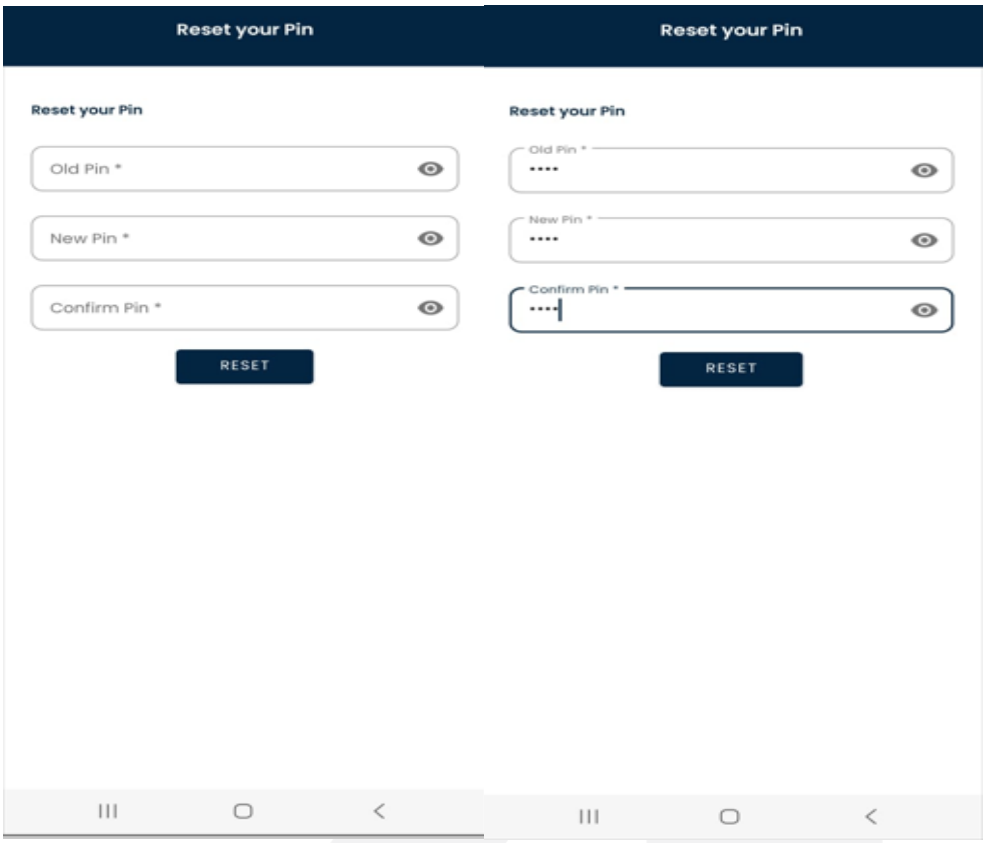
ii. To reset your PIN:

   a. Enter your current PIN as the 'Old PIN.'

   b. Set a 'New PIN' of choice.

   c. Confirm the new PIN.

iii. Click the 'Reset' button.



4. Login with New PIN:

i. Your PIN is now updated successfully.

ii. Use the new PIN for future logins to the Zed App.

iii. Now, you can either create or join a business.

That's it! You're all set to explore and use Zed for your business needs.

How To Create a Business – Mobile

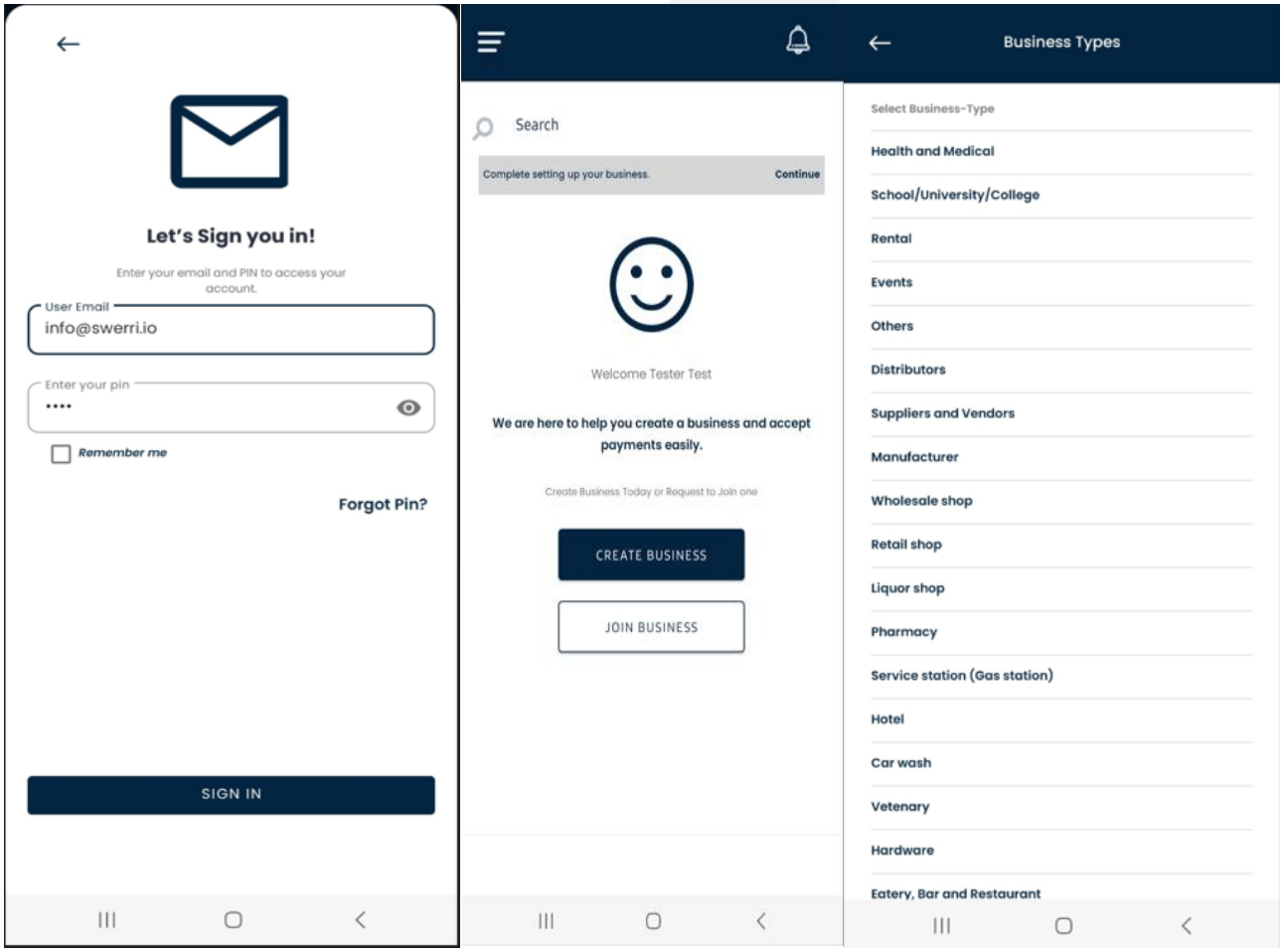
Welcome to ZED! This user guide will help you effortlessly set up your business on the go. Follow these simple steps for a smooth journey, from entering company details to establishing your customer base.

1. Setting up Your Business:

i. Open your Zed App and sign in.

ii. Click on the 'Create Business' button.

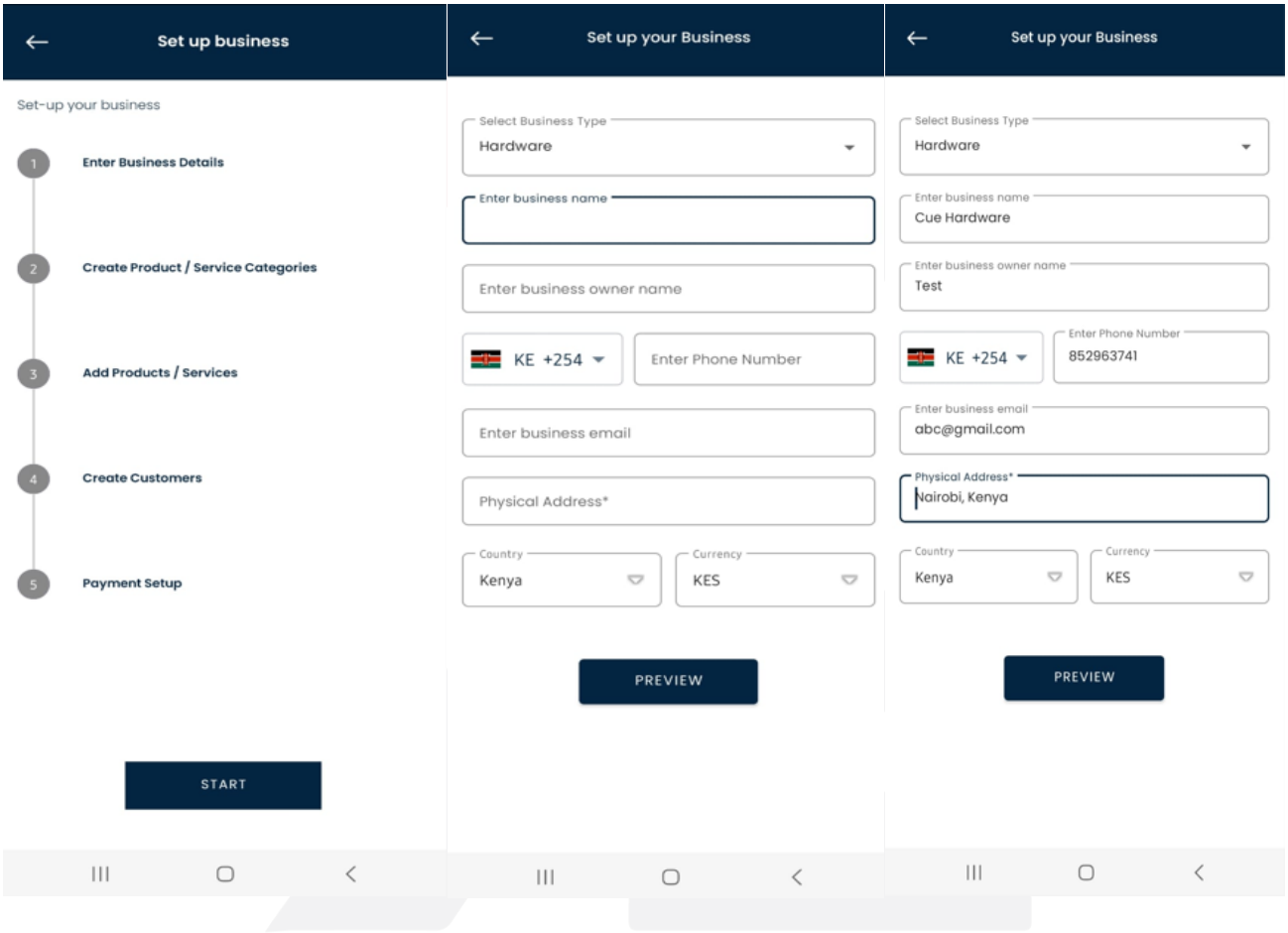
iii. Choose your business type and kickstart the setup.



iv. Click the ‘Start’ button.

v. Enter business and owner details, including name, phone number, email, address, country, and currency.

vi. Review by clicking ‘Preview’ and proceed.

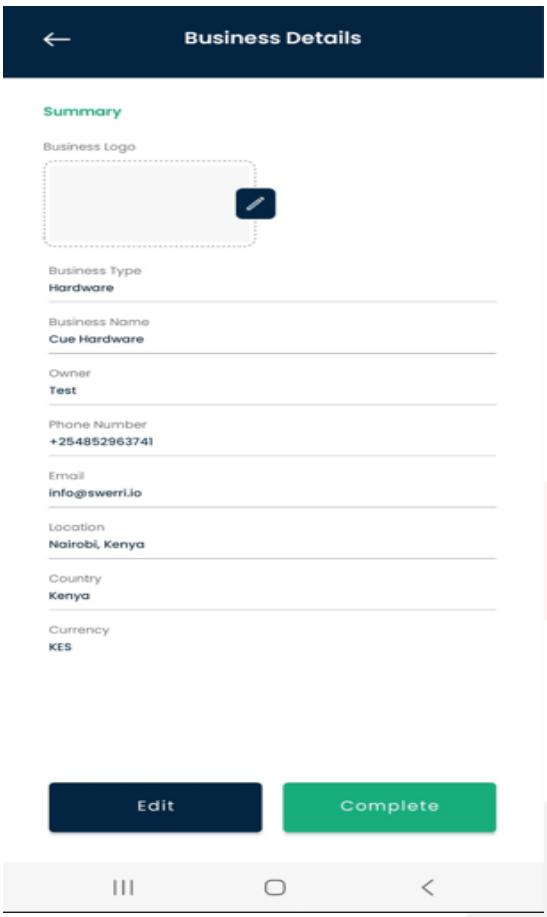


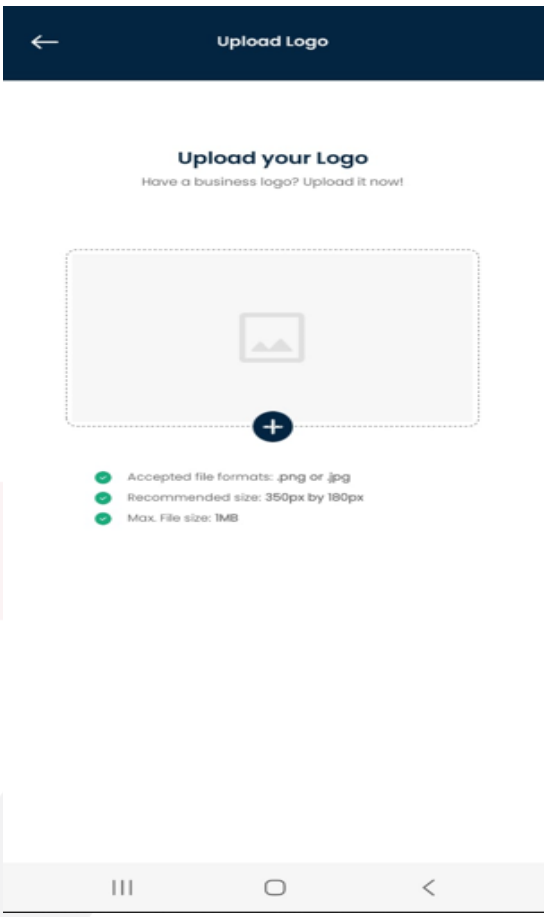
Add Business Logo

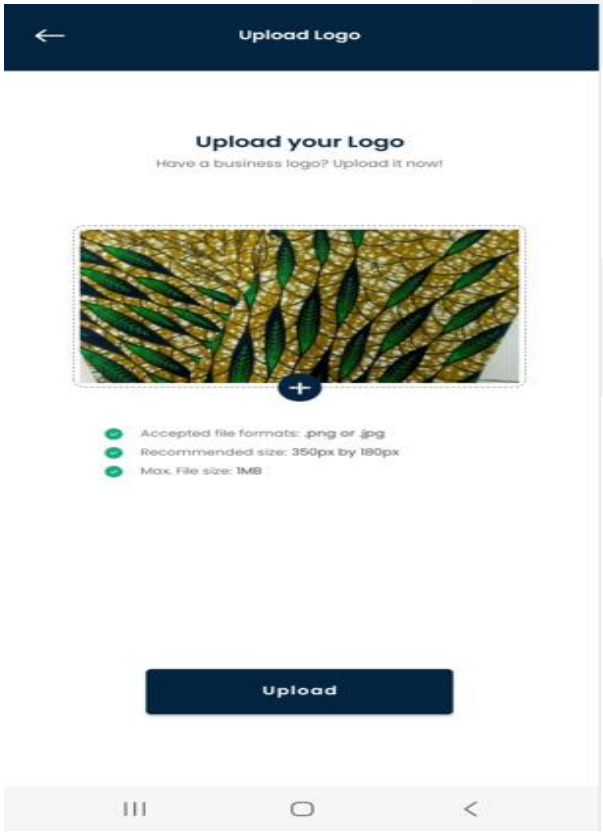
i. Click ‘Edit’ to add your logo.

ii. Use the plus (+) sign to upload from your device.

iii. Click ‘Upload’ and then ‘Complete’ upon successful upload.


Business Details
Summary
Business Logo
Business Type
Hardware
Business Name
Cue Hardware
Owner
Test
Phone Number
+254852963741
Email
info@swerri.io
Location
Nairobi, Kenya
Country
Kenya
Currency
KES
Edit
Complete


Upload Logo
Upload your Logo
Have a business logo? Upload it now!
Accepted file formats: .png or .jpg
Recommended size: 350px by 180px
Max. File size: 1MB


Upload Logo
Upload your Logo
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Recommended size: 350px by 180px
Max. File size: 1MB
Upload

Business Details
Summary
Business Logo
Business Type
Hardware
Business Name
Cue Hardware
Owner
Test
Phone Number
+254852963741
Email
info@swerri.io
Location
Nairobi, Kenya
Country
Kenya
Currency
KES
Edit
Complete

iv. Click ‘Next’ to advance to the next step.

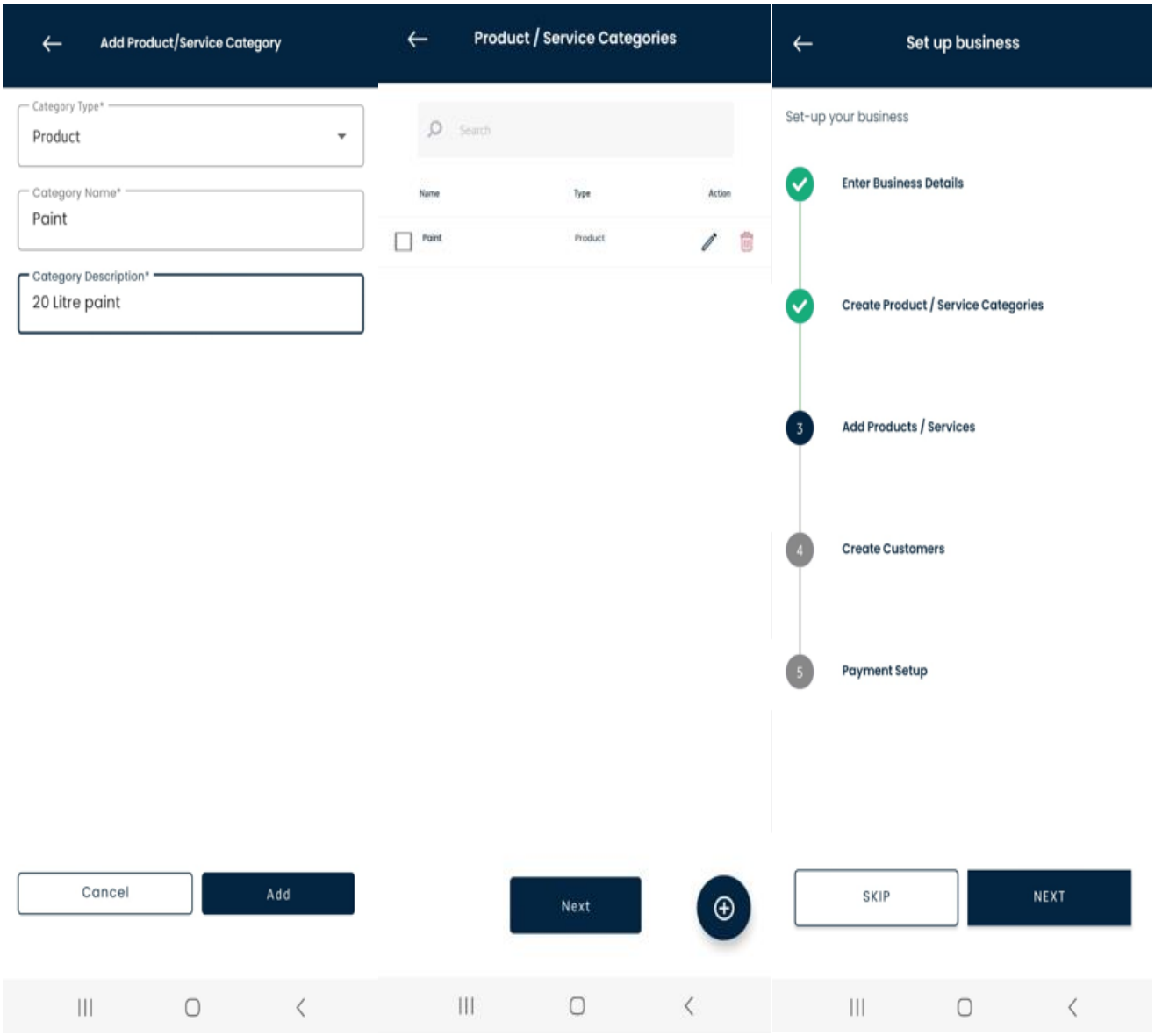
2. Creating Product/Service Categories:

i. Pick the category type for your products or services.

ii. Enter category name and description.

iii. Add more categories using the plus (+) sign.

iv. Click ‘Add’ and then ‘Next’.



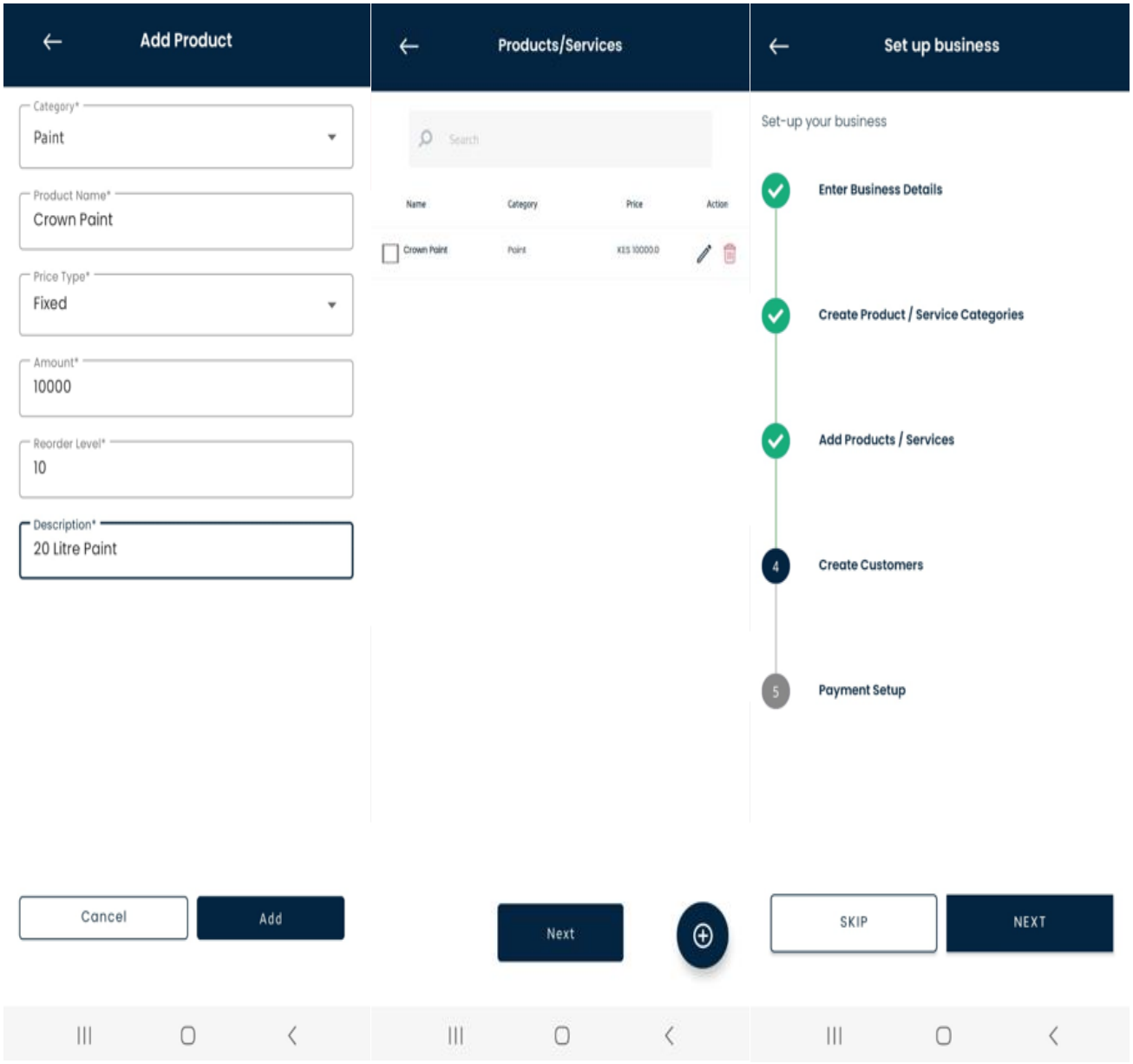
3. Add Products/Services:

i. Choose the category for your product or service.

ii. Input product name, price, amount, reorder level, and description.

iii. Add more products using the plus (+) sign.

iv. Click 'Add' and then 'Next'.



4. Create Customers:

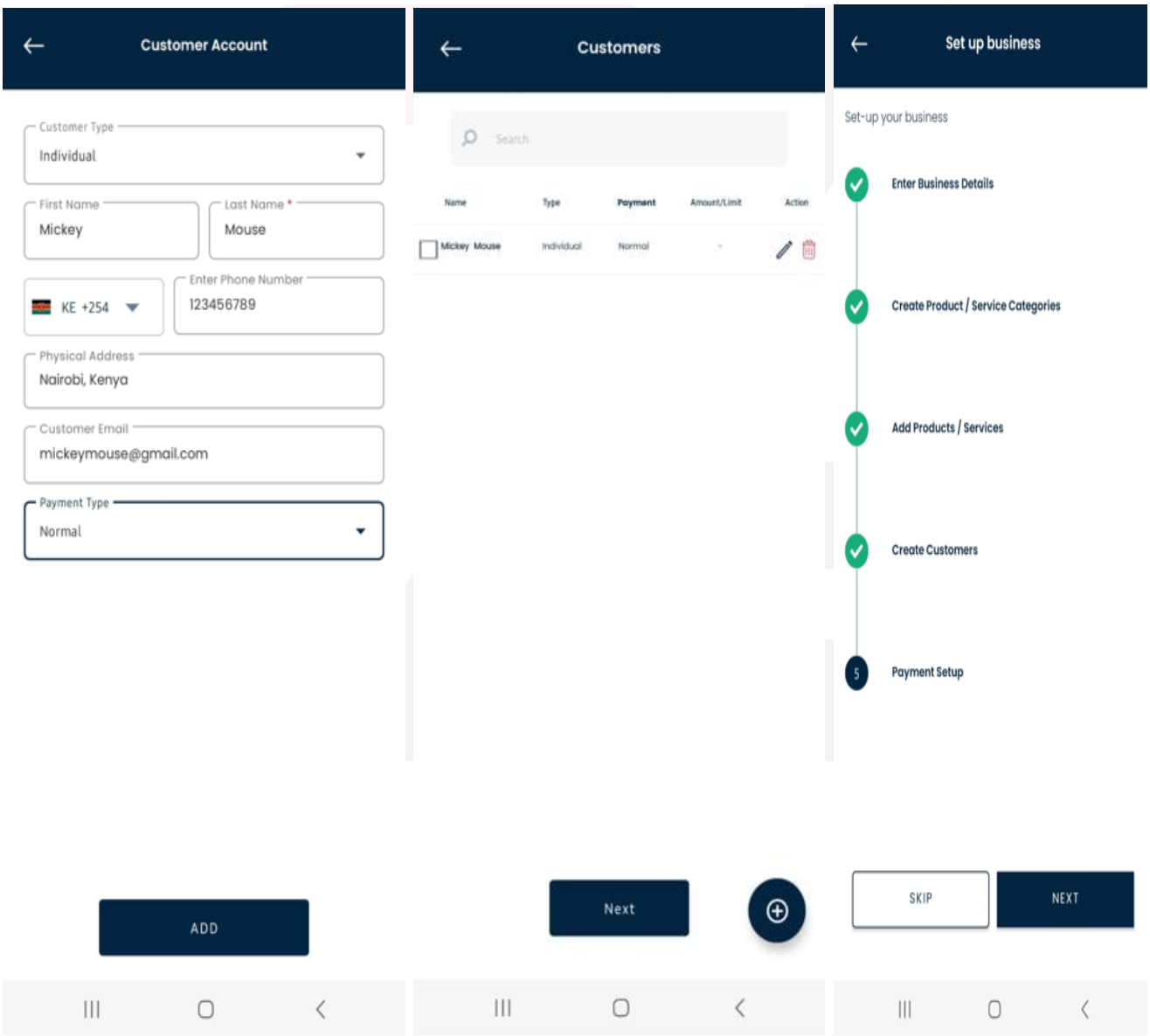
Customer Details:

i. Select customer type (Company/Individual).

ii. Input their name, phone number, address, email, and payment type.

iii. Add more customers using the plus (+) sign.

iv. Click 'Add' and then 'Next'.



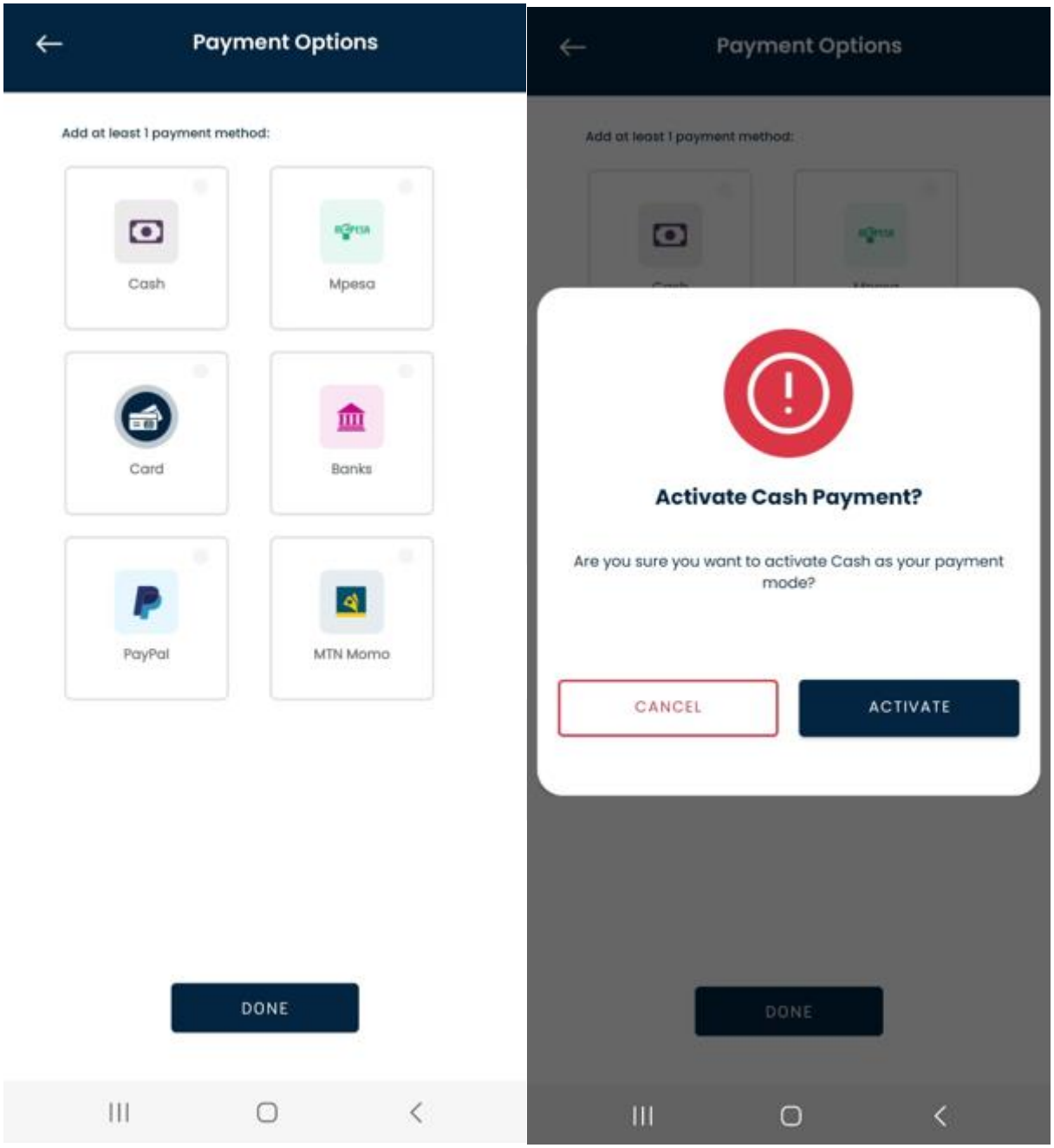
5. Payment Setup:

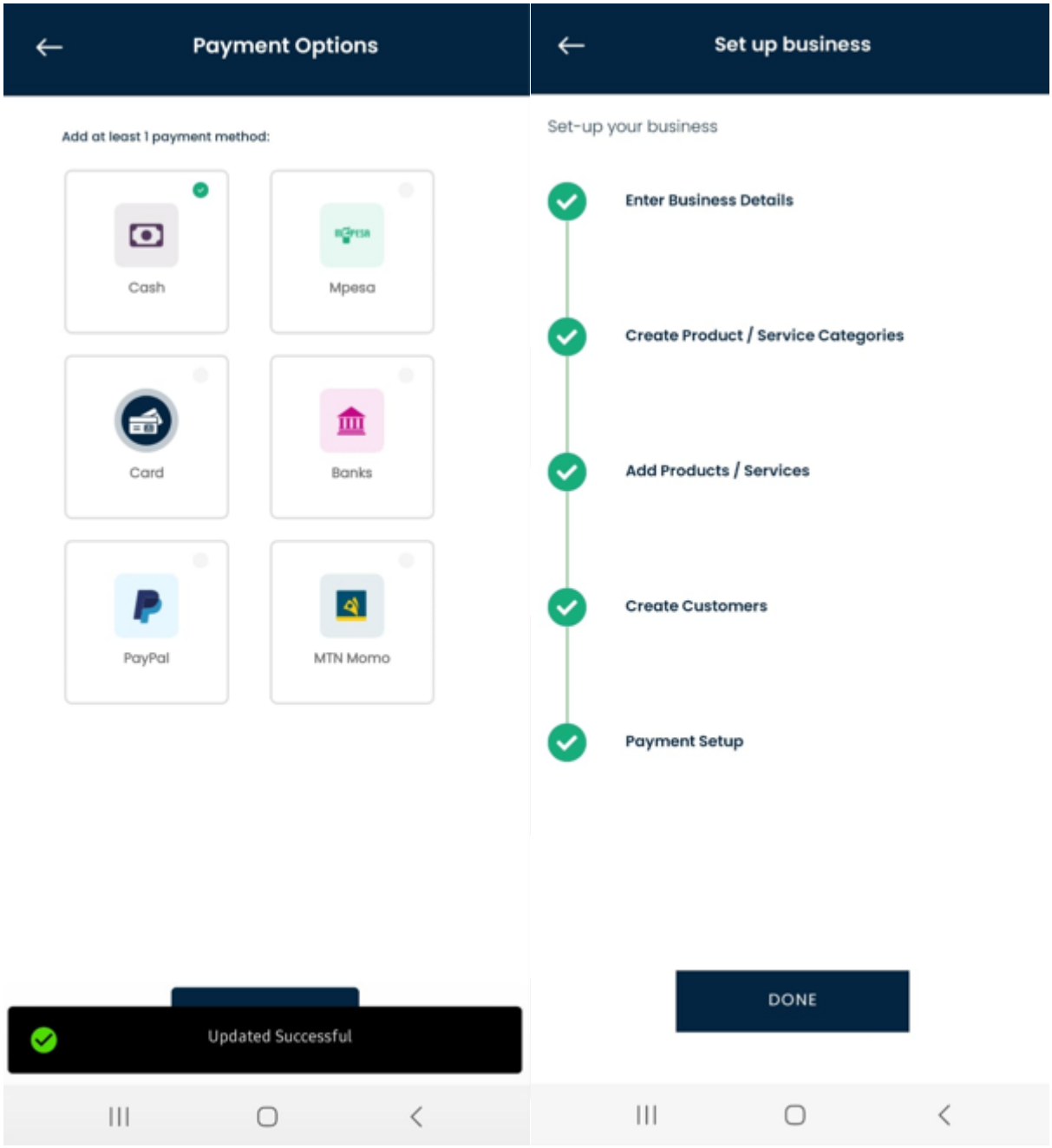
Congratulations! You're in the final stage of business setup.

Configure Payment Methods:

i. Choose from payment options: Cash, M-Pesa, Card, Banks, PayPal, and MTN MoMo.

ii. Click on your preferred option, input required details, save, and click 'Done'.





- Your business is now set to thrive with ZED. Explore additional features within the app for further optimization. Thank you for choosing ZED.

Stock in Zed

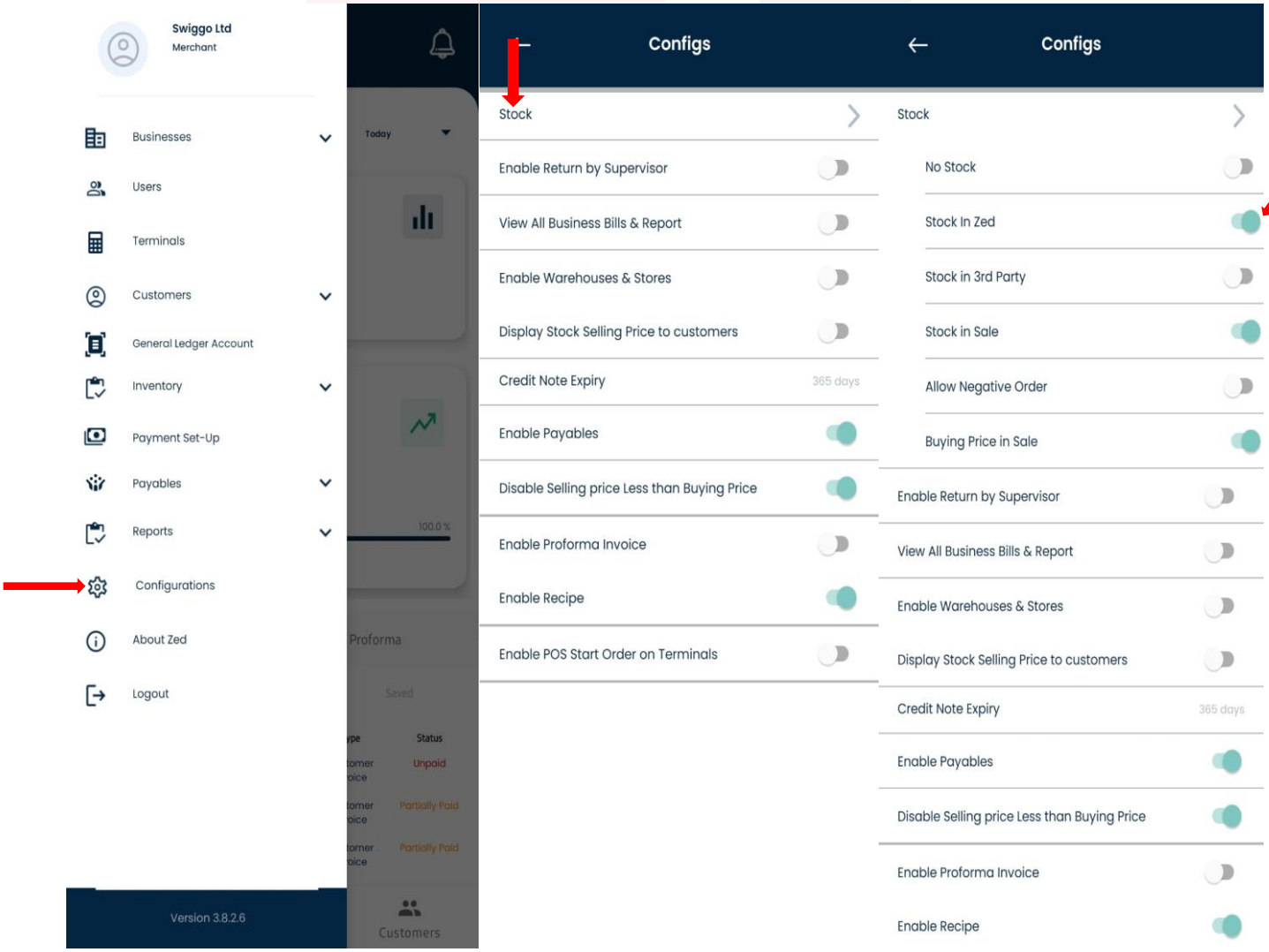
Here is a simple guide to managing inventory in Zed.

Configure Stock in Zed:

i. Click on 'Configuration' from the menu.

ii. Select 'Stock'.

iii. Toggle the 'Stock in Zed' button until it turns green to activate it.

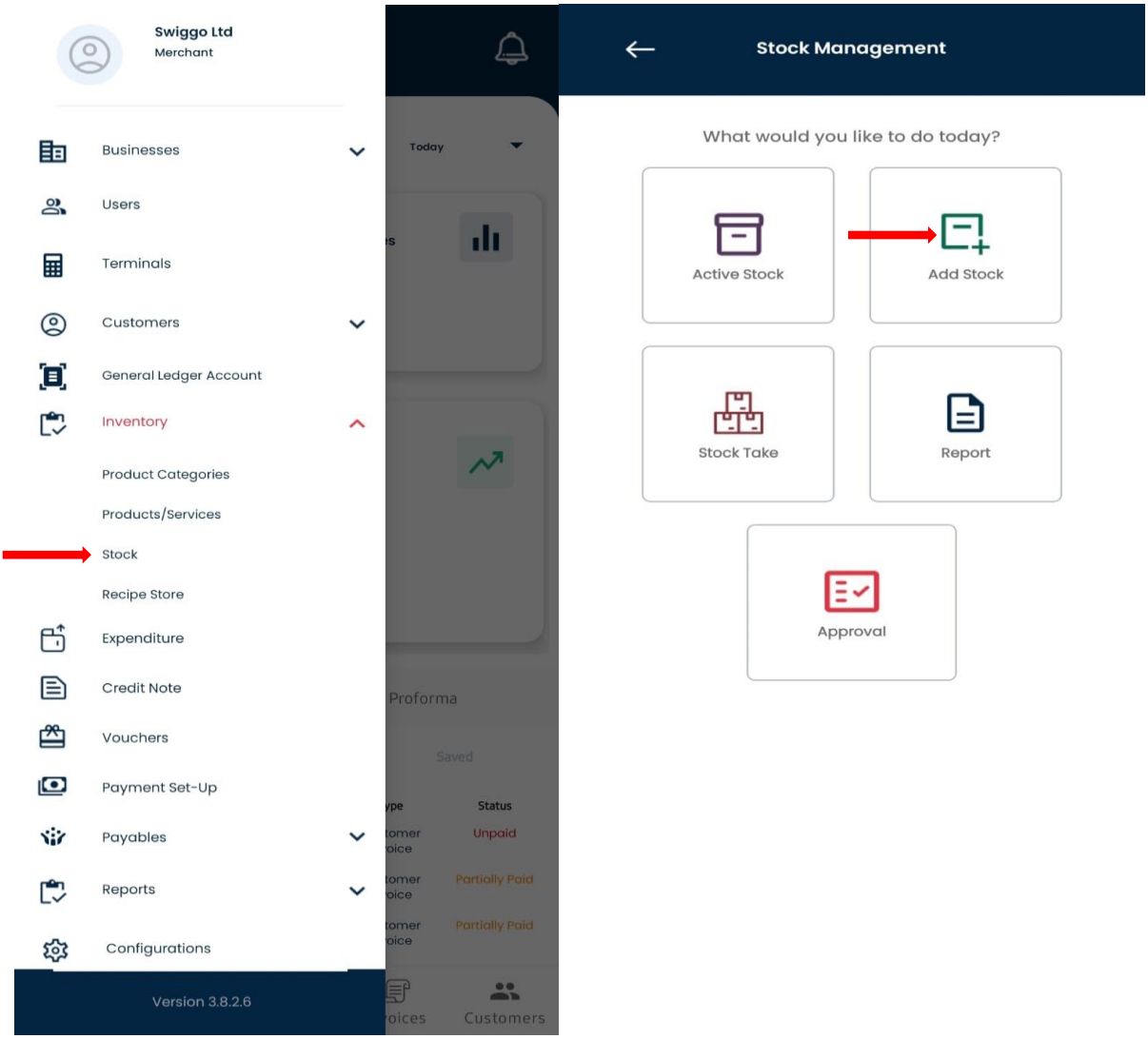


Adding Stock

i. Navigate to the menu and choose 'Inventory'.

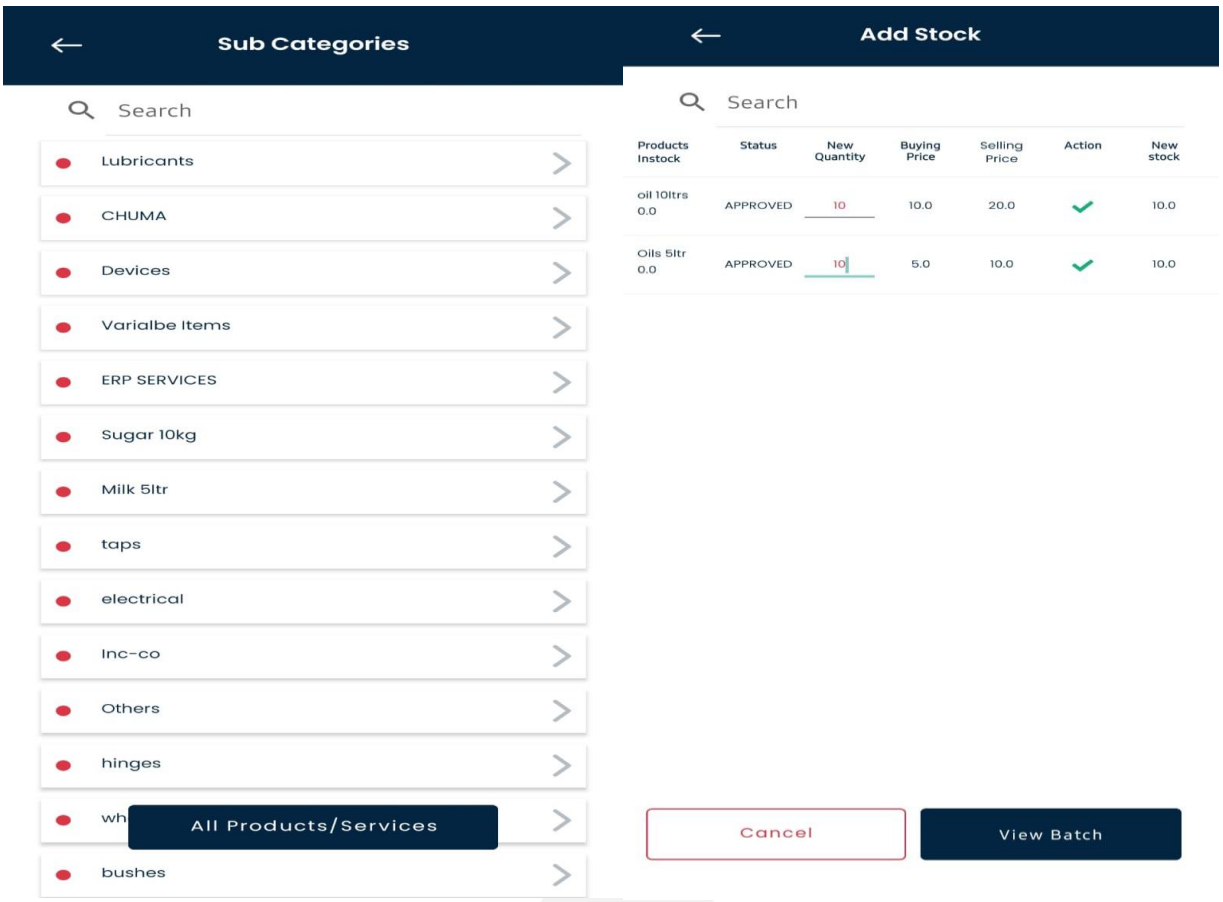
ii. Click on 'Stock'.

iii. Select 'Add Stock' from the options.

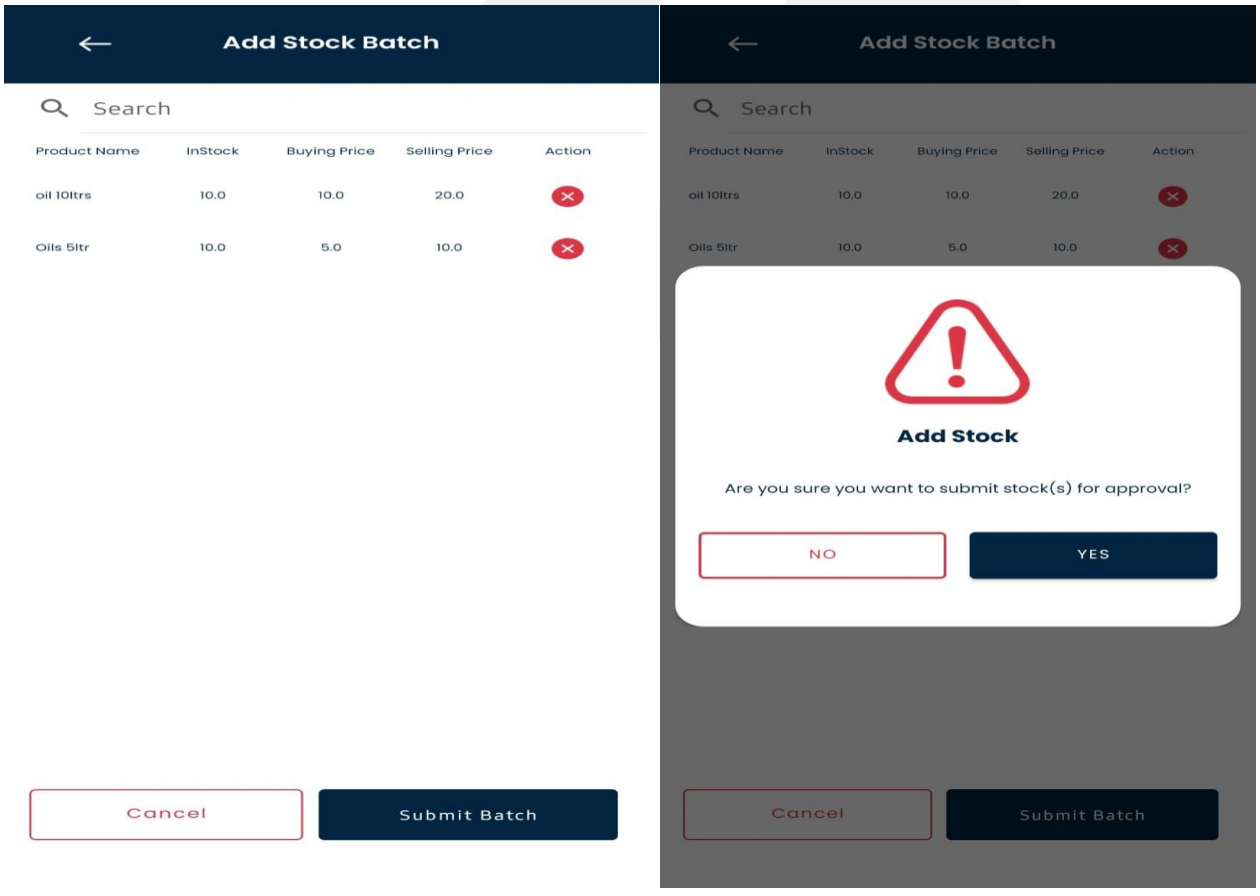


iv. Pick the product category and the specific product.

v. Enter the quantity of items in the 'New Quantity' column.



vi. Review details by clicking 'View Batch' and then 'Submit Batch'.

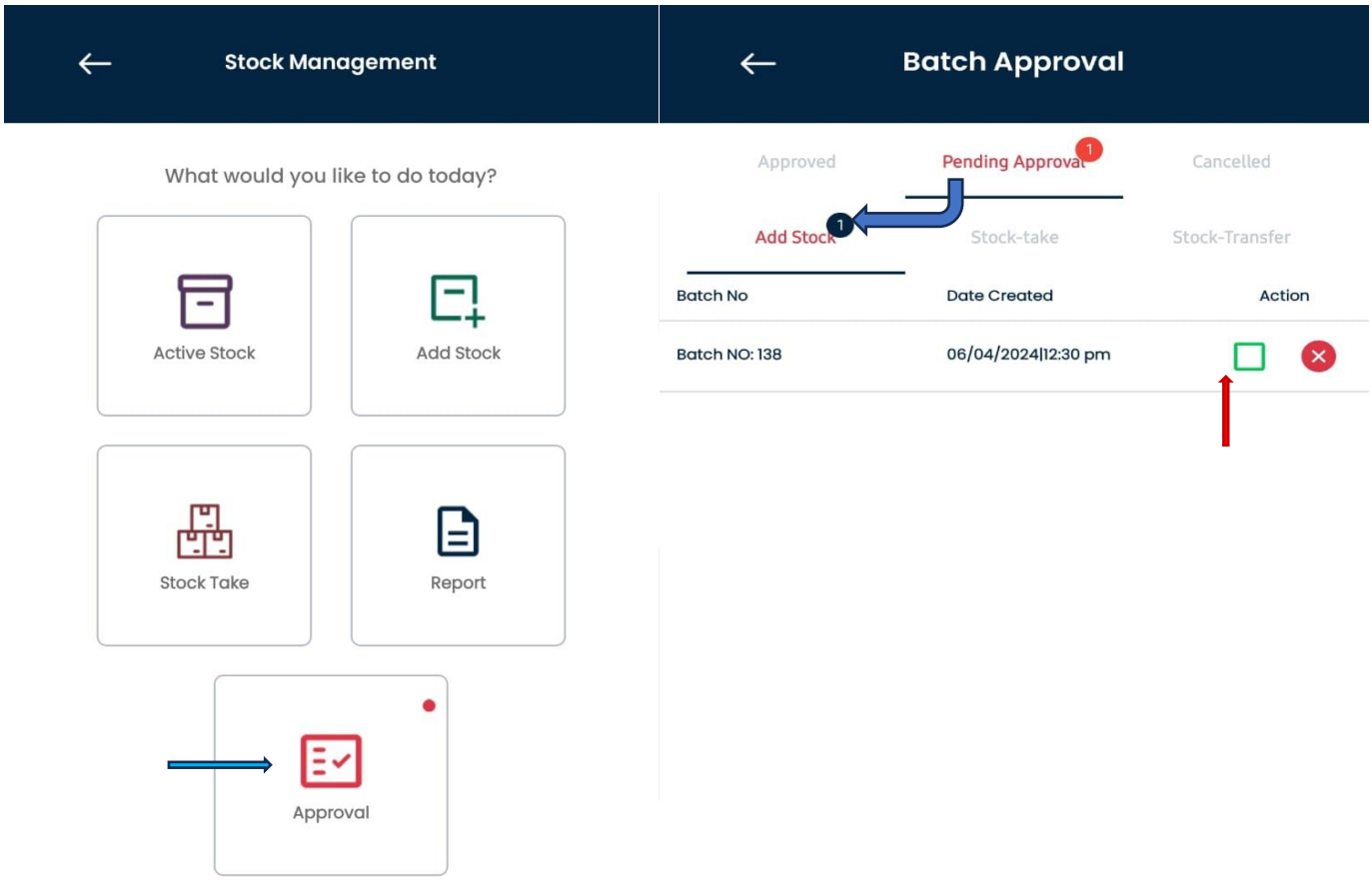


Approval

Once done with the above, the batch of stock added has to be approved.

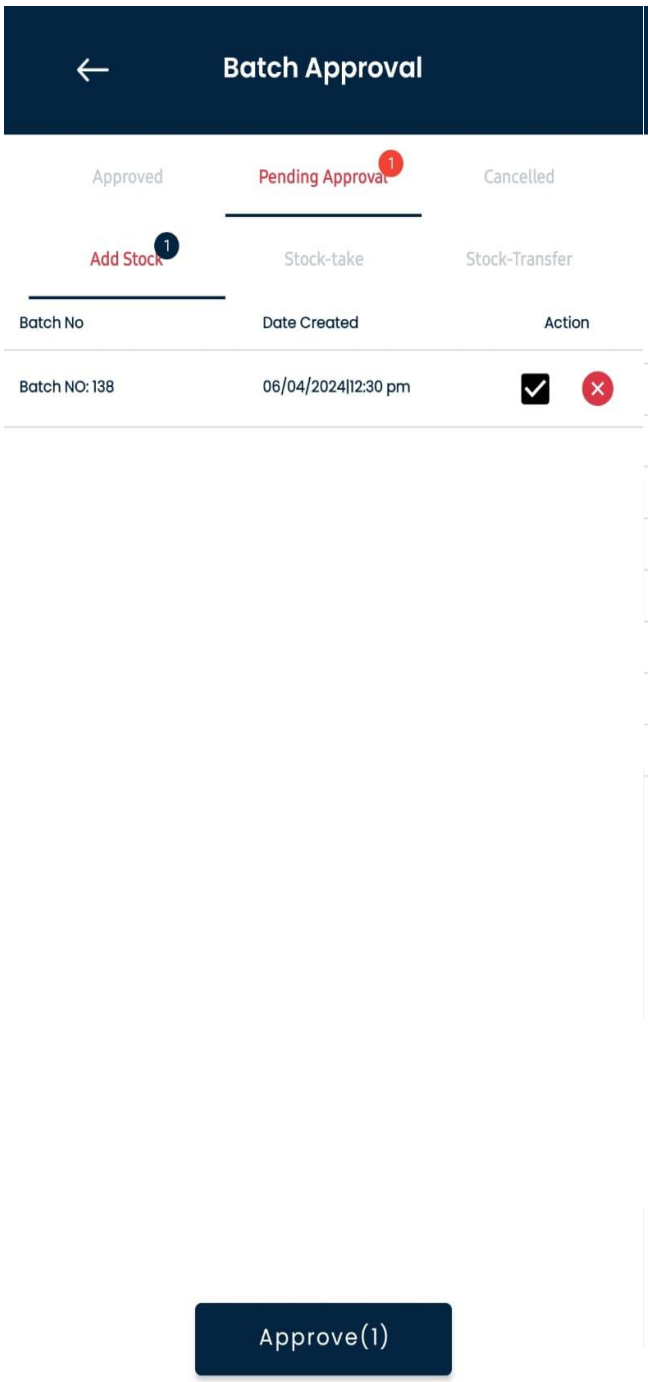
i. Click on ‘Approval’.

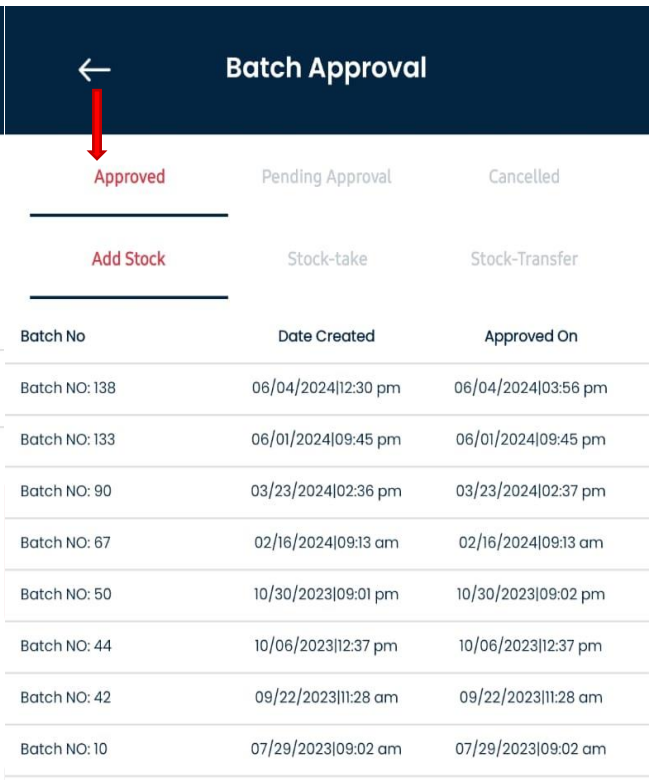
ii. Select the ‘Pending Approval’ column.



iii. Under ‘Add Stock’ tick the checkbox and click ‘Approve’.

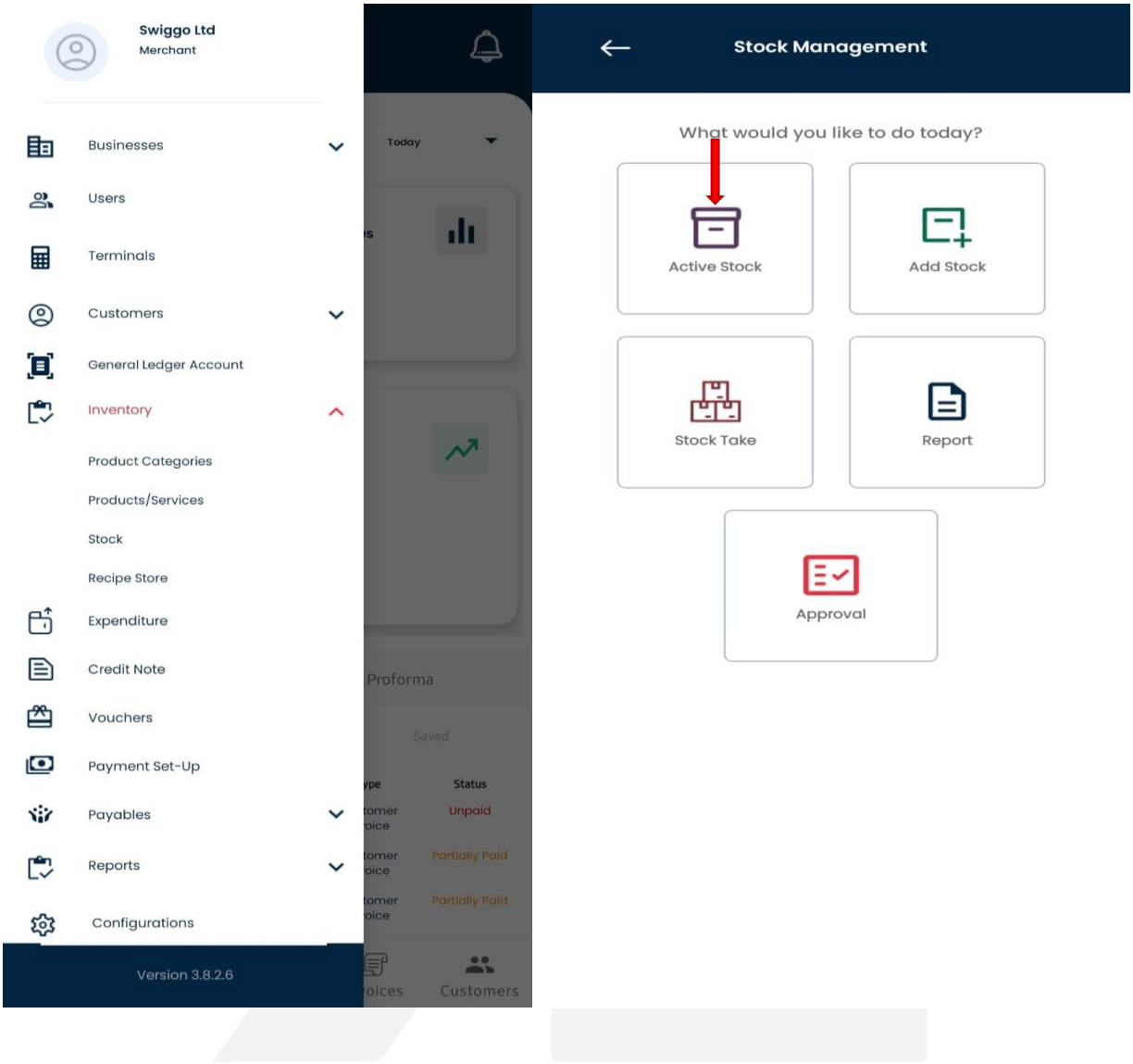
iv. Approved batches will move to the ‘Approved’ column.


Batch Approval
Approved
Pending Approval
1
Cancelled
Add Stock
1
Stock-take
Stock-Transfer
Batch No
Date Created
Action
Batch NO: 138
06/04/2024|12:30 pm
Approve(1)


Batch Approval
Approved
Pending Approval
Cancelled
Add Stock
Stock-take
Stock-Transfer
Batch No
Date Created
Approved On
Batch NO: 138
06/04/2024|12:30 pm
06/04/2024|03:56 pm
Batch NO: 133
06/01/2024|09:45 pm
06/01/2024|09:45 pm
Batch NO: 90
03/23/2024|02:36 pm
03/23/2024|02:37 pm
Batch NO: 67
02/16/2024|09:13 am
02/16/2024|09:13 am
Batch NO: 50
10/30/2023|09:01 pm
10/30/2023|09:02 pm
Batch NO: 44
10/06/2023|12:37 pm
10/06/2023|12:37 pm
Batch NO: 42
09/22/2023|11:28 am
09/22/2023|11:28 am
Batch NO: 10
07/29/2023|09:02 am
07/29/2023|09:02 am

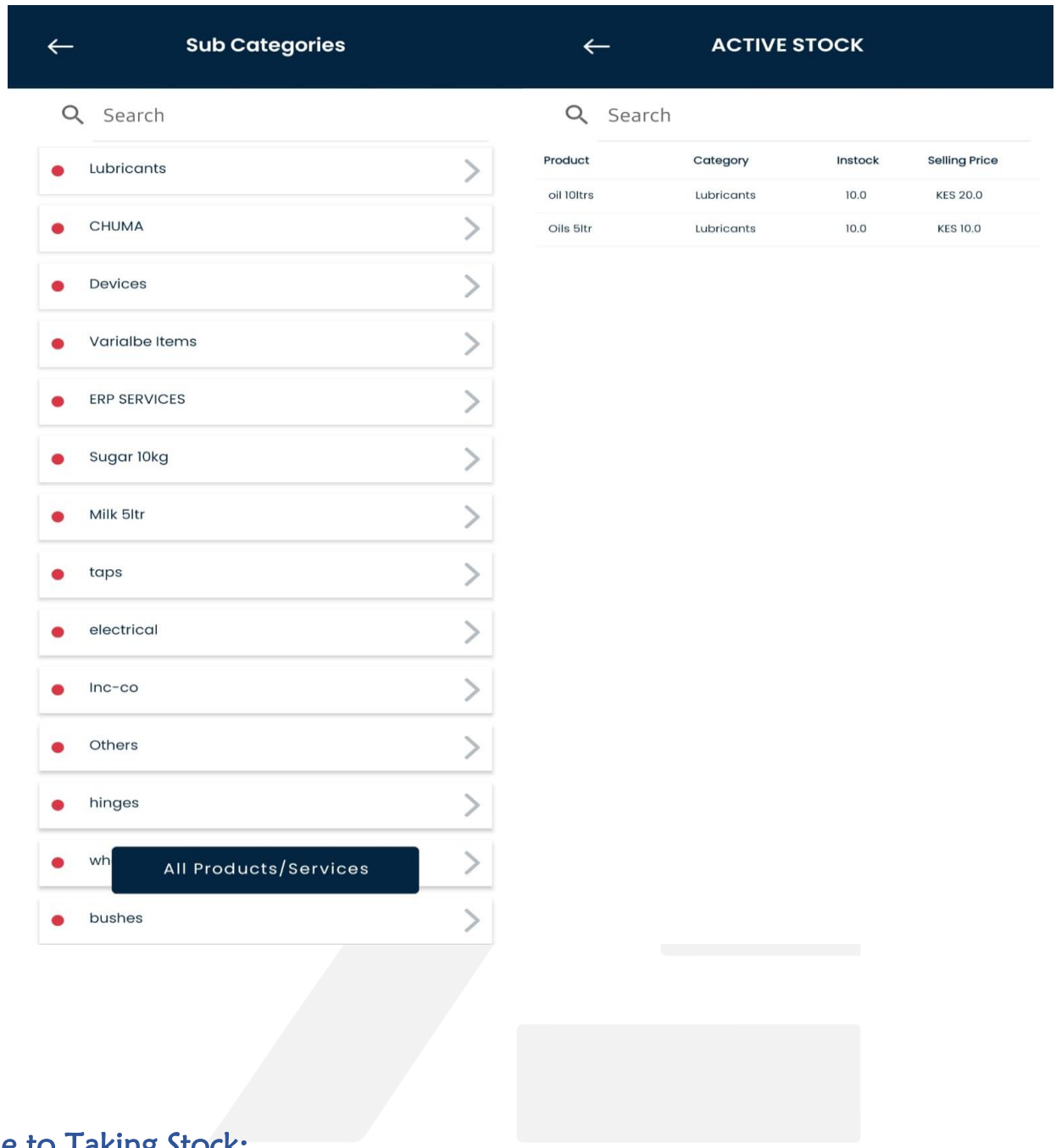
How to View Active Stock

i. Return to the menu and choose ‘Inventory’.
ii. Click on ‘Stock’.



iii. Select ‘Active Stock’.

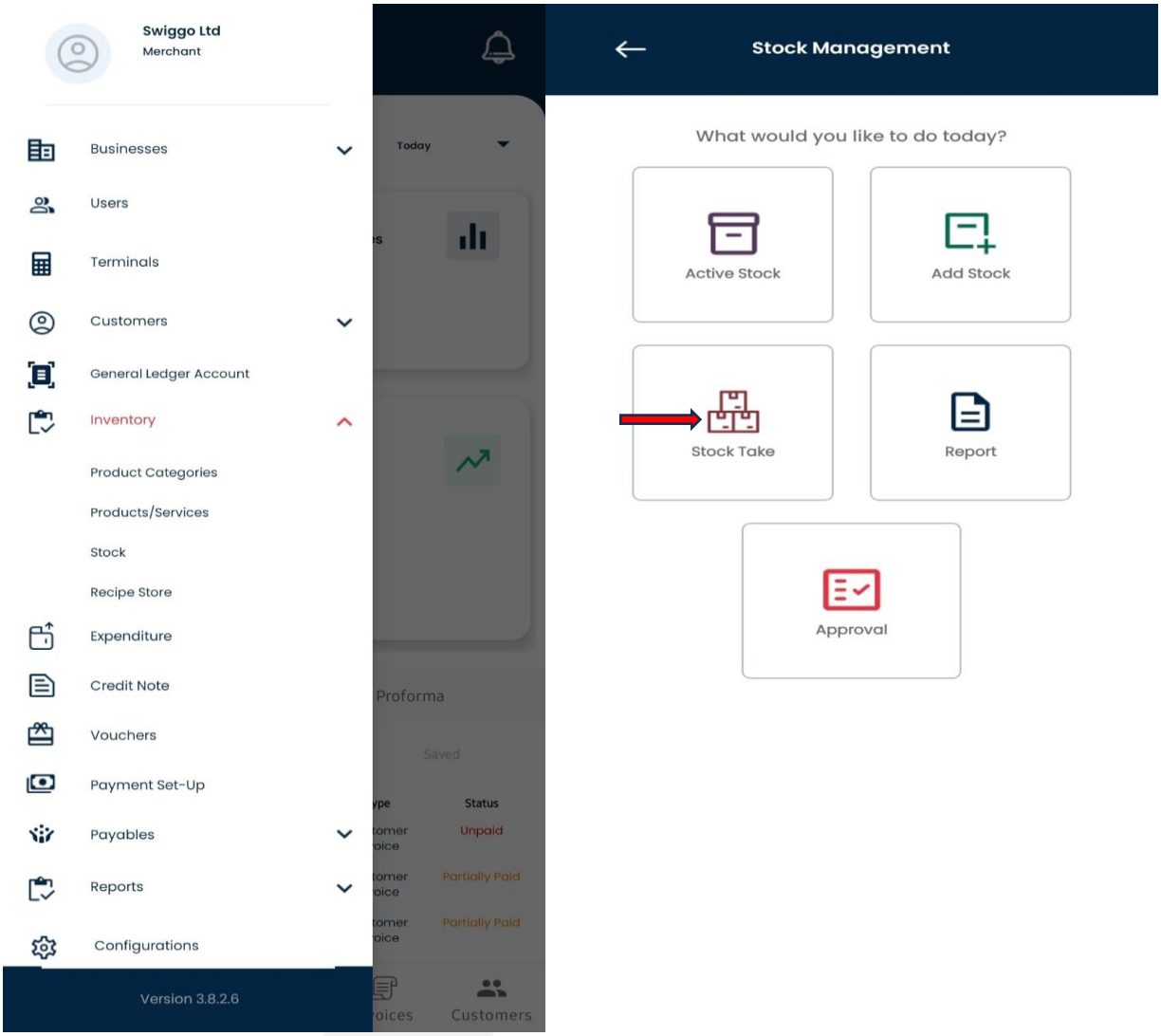
iv. View the list of products and their quantities in stock.



Guide to Taking Stock:

Stock-take is done to provide an audit of existing stock.

i. Go to the menu and select 'Inventory'.
ii. Click on 'Stock'.
iii. Choose 'Stock Take' from the options.



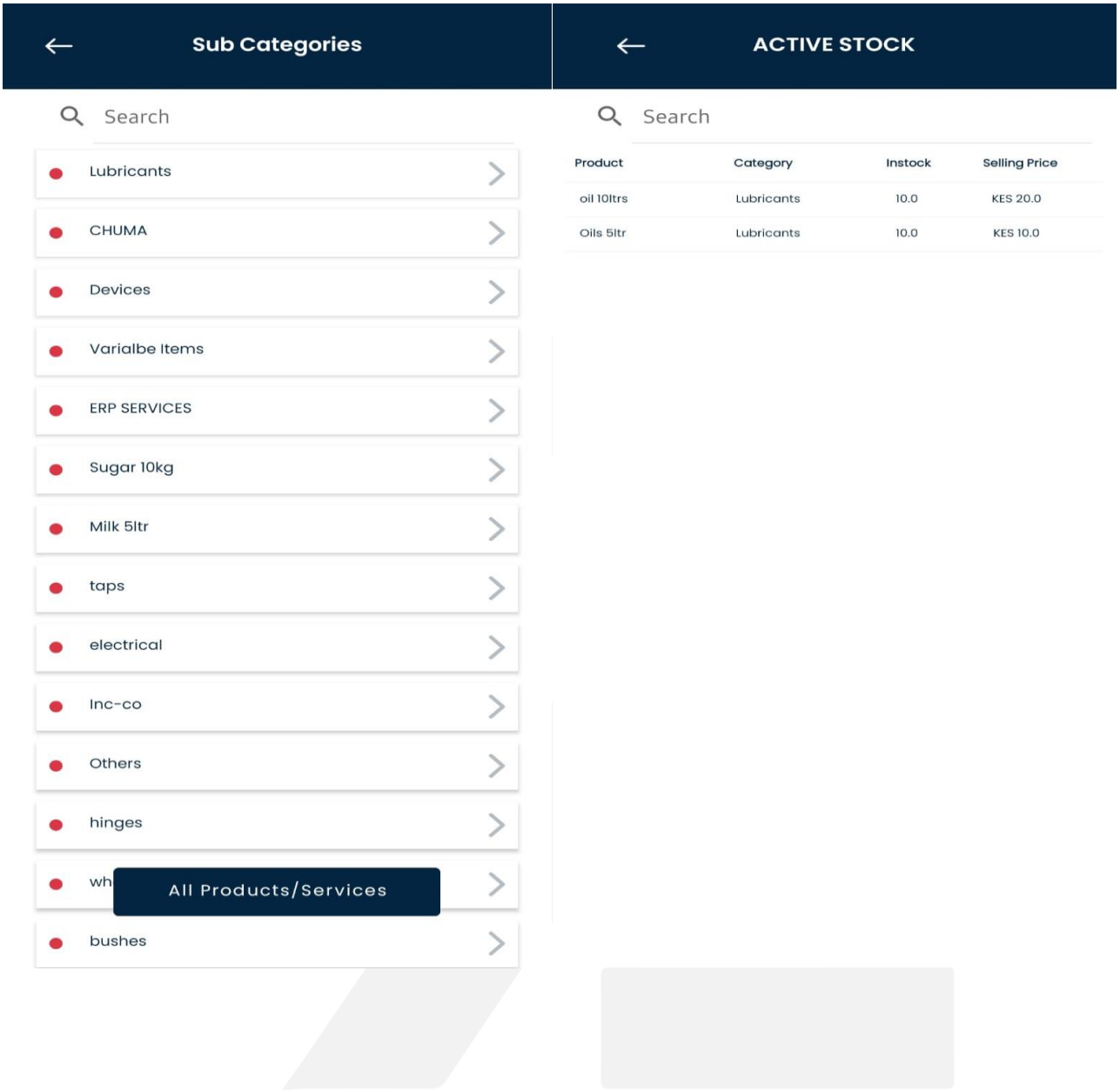
iv. Select the type of store you are auditing.

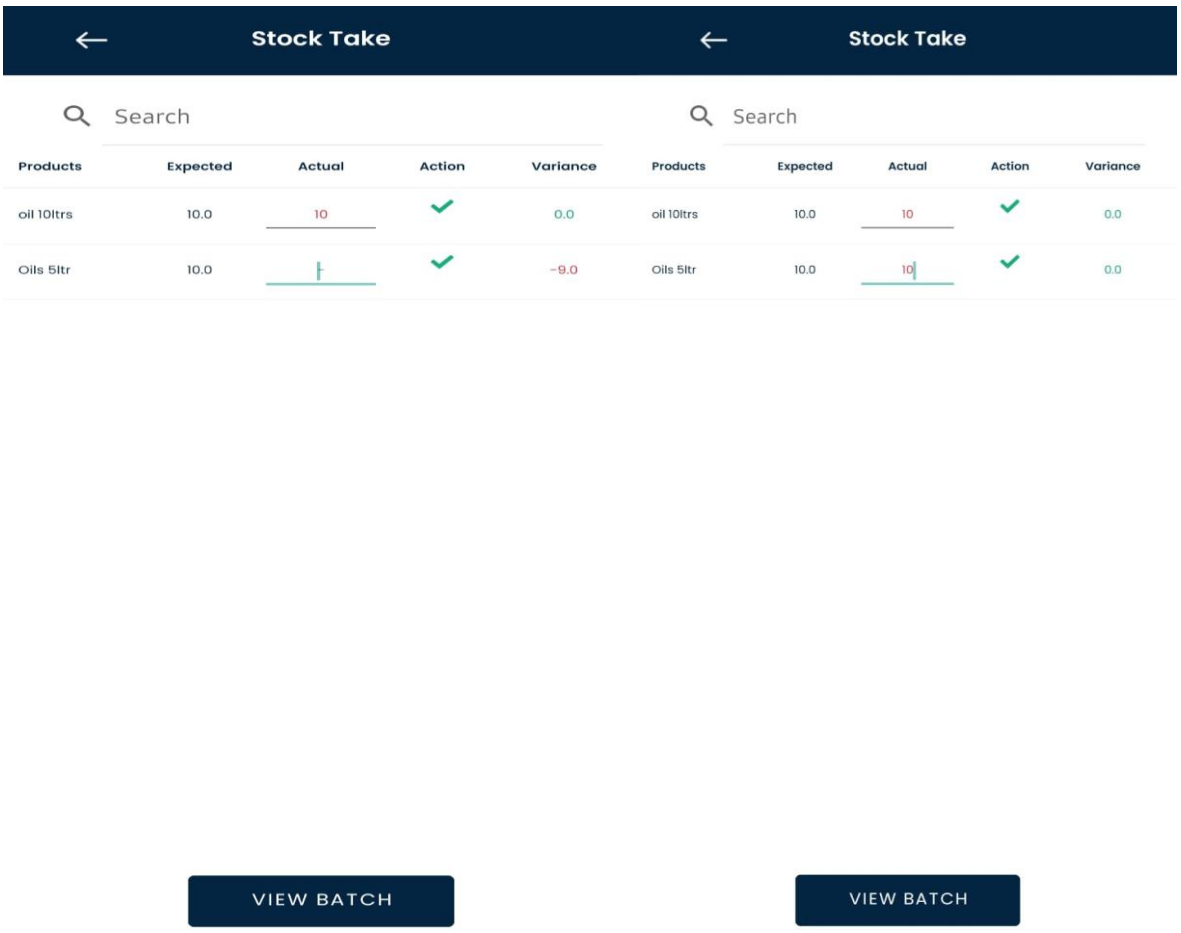
v. Click 'Next' to proceed.

PS: The above steps apply for those with multiple branches/stores.

vi. Choose the product category you are assessing.

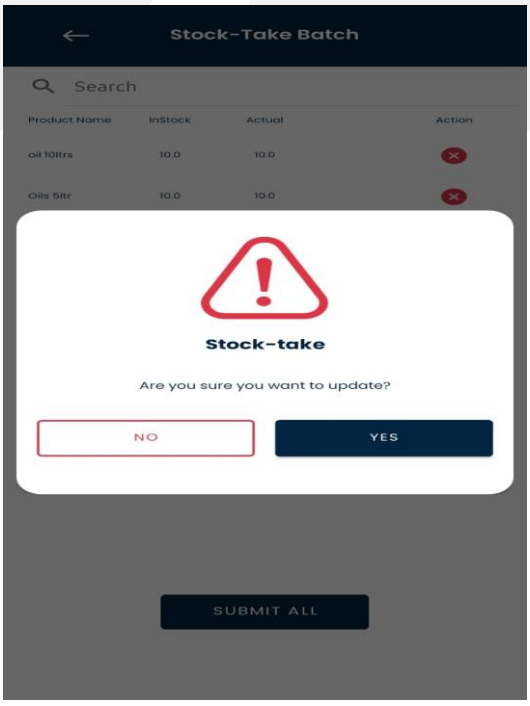
vii. Enter the actual quantity of products physically present in stock.


Sub Categories
Search
Lubricants
CHUMA
Devices
Varialbe Items
ERP SERVICES
Sugar 10kg
Milk 5ltr
taps
electrical
Inc-co
Others
hinges
wh
All Products/Services
bushes
ACTIVE STOCK
Search
Product
Category
Instock
Selling Price
oil 10ltrs
Lubricants
10.0
KES 20.0
Oils 5ltr
Lubricants
10.0
KES 10.0



viii. Review the entered details by clicking 'View Batch'.

ix. Once confirmed, click 'Submit All', then 'Yes' to finalize the stock take.

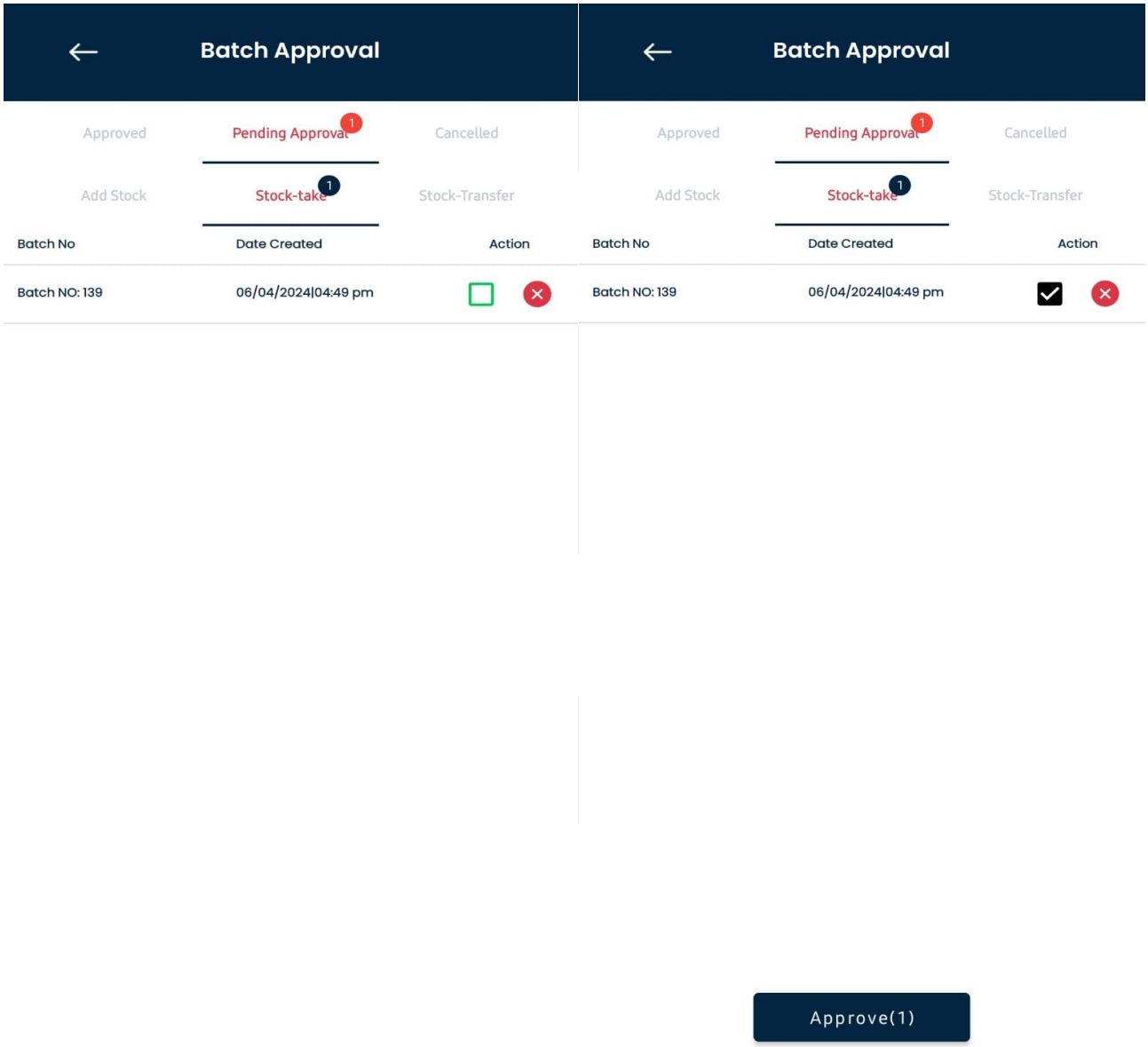
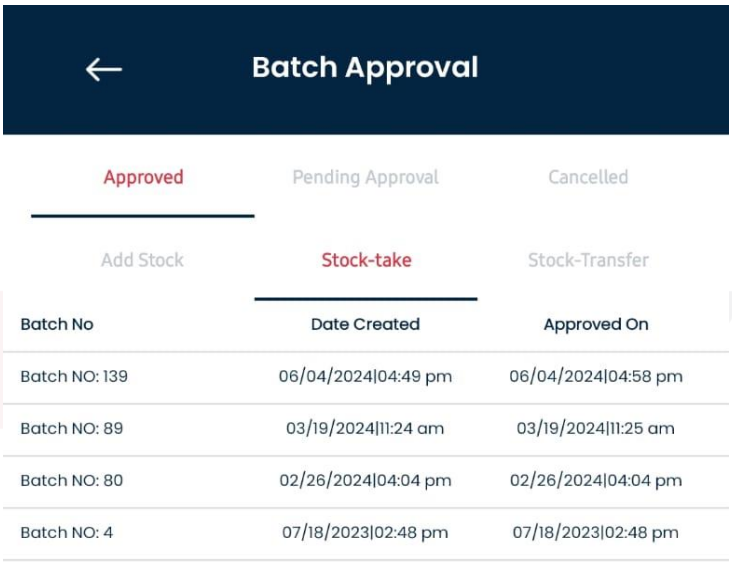


Approval

Once done with the above, the batch of stock added has to be approved.

i. Click on 'Approvals'.

ii. Select the 'Pending Approval' column under 'Stock Take'.



iii. Approved batches will move to the 'Approved' column.