

SME User Guide (Mobile)



Connecting your **business**
to payments

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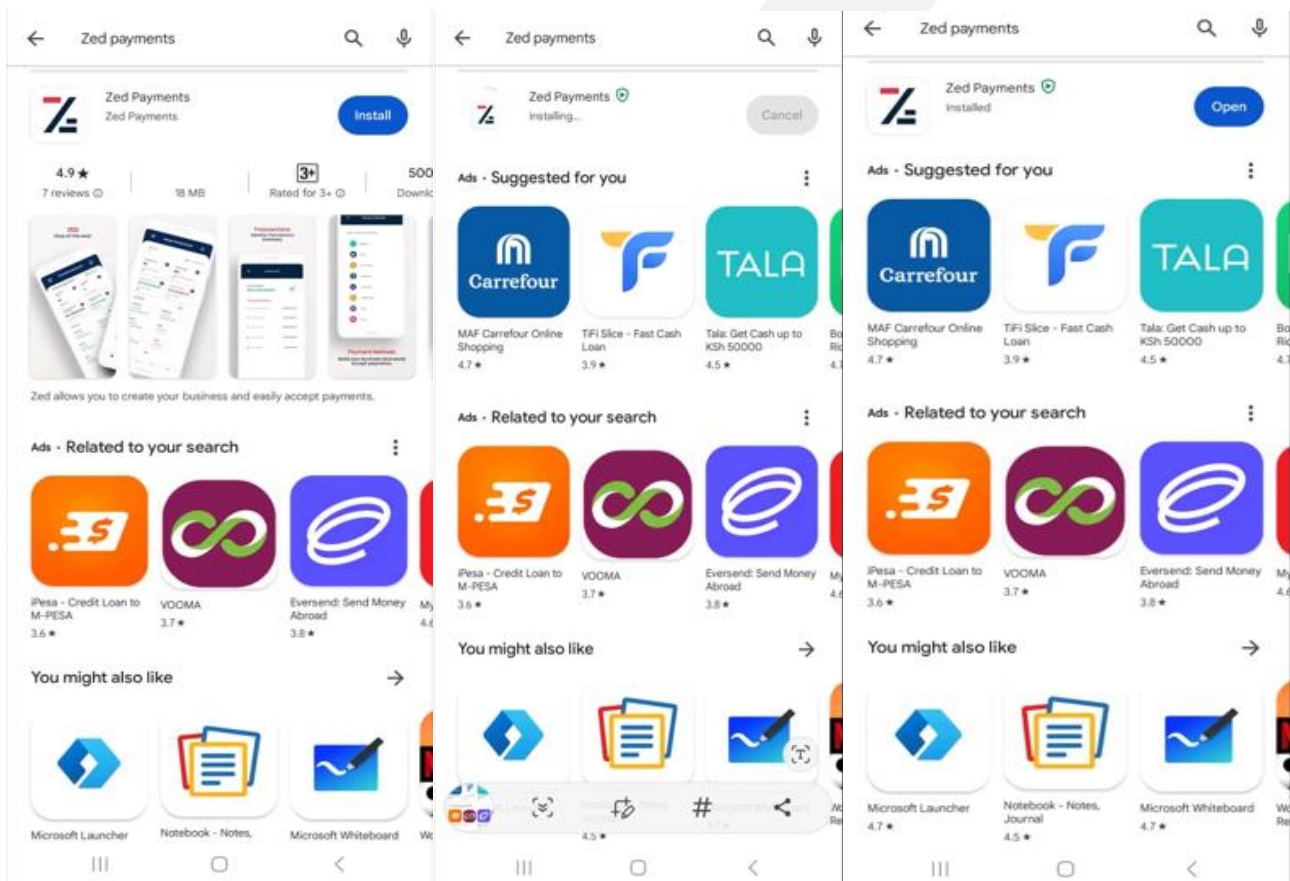
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Zed Sign Up Process Via Mobile

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

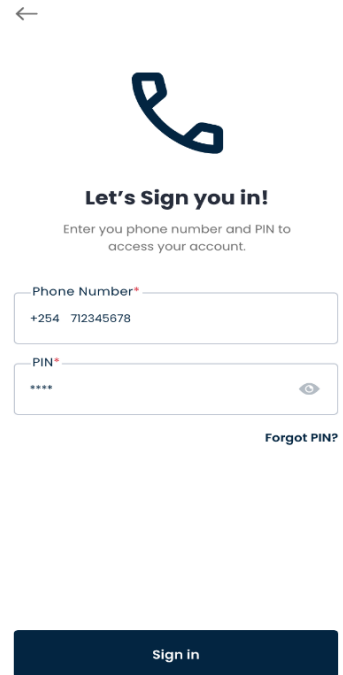
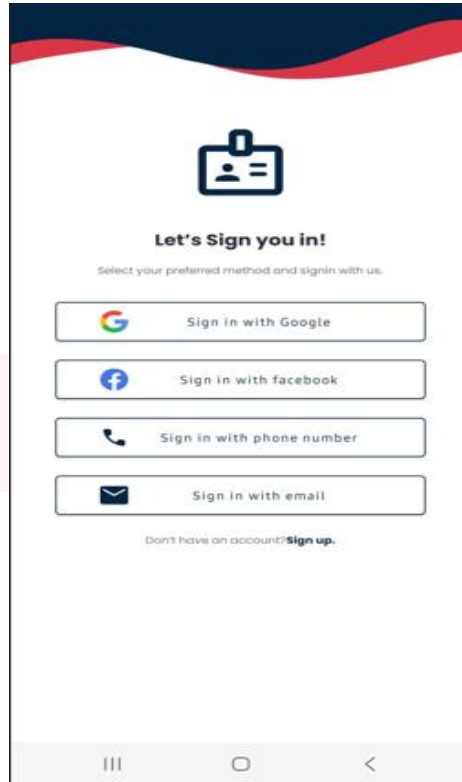
1. Installation:

- 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.

Reset your Pin

Reset your Pin

Reset your Pin

Old Pin *

New Pin *

Confirm Pin *

RESET

Reset your Pin

Old Pin *

New Pin *

Confirm Pin *

RESET

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.

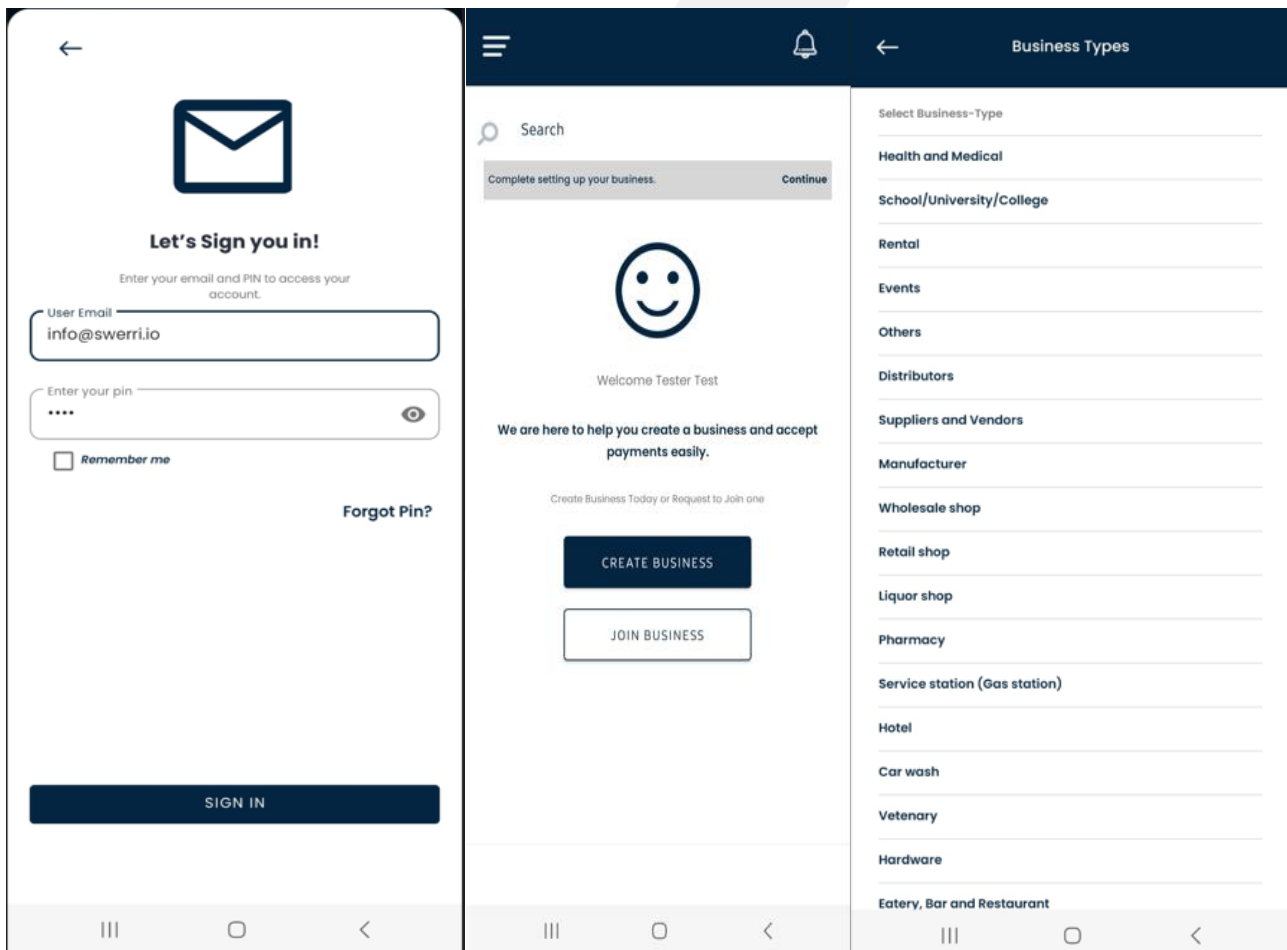
That's it! You're all set to explore and use Zed for your business needs.

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.

The image displays three sequential screenshots of a mobile application's business setup process.

Screenshot 1: Progress Indicator
 The screen shows a vertical progress bar with five steps:

1. Enter Business Details
2. Create Product / Service Categories
3. Add Products / Services
4. Create Customers
5. Payment Setup

 A dark blue 'START' button is located at the bottom center.

Screenshot 2: Business Setup Form (Initial State)
 The screen is titled 'Set up your Business'. It contains the following fields:

- Select Business Type: Hardware
- Enter business name: (empty)
- Enter business owner name: (empty)
- Country: KE +254
- Enter Phone Number: (empty)
- Enter business email: (empty)
- Physical Address*: (empty)
- Country: Kenya
- Currency: KES

 A dark blue 'PREVIEW' button is at the bottom center.

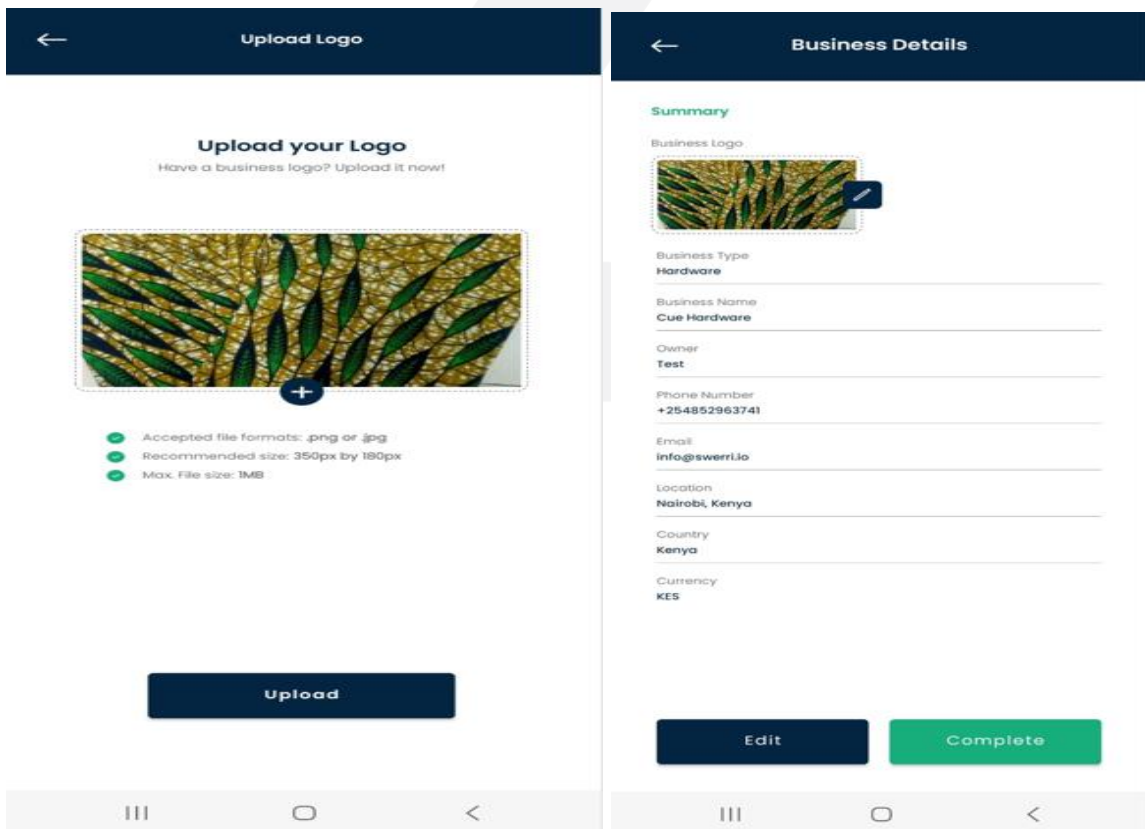
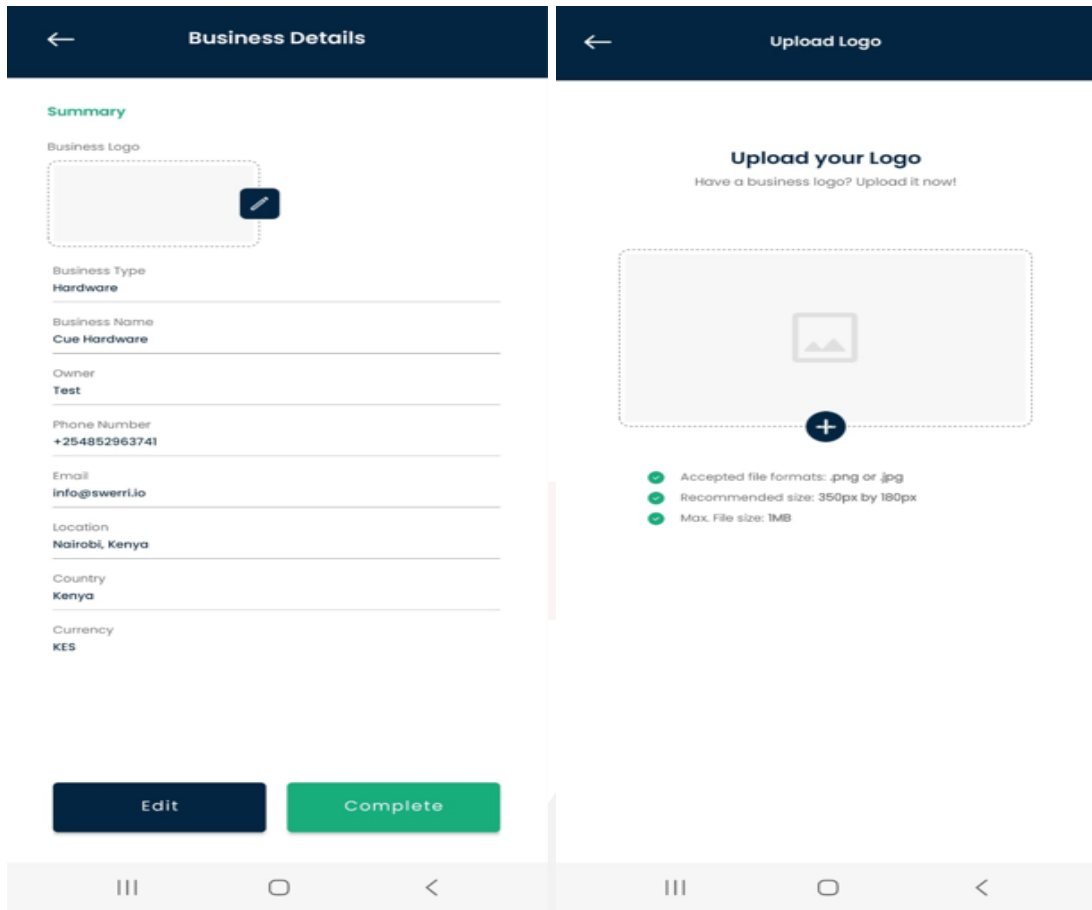
Screenshot 3: Business Setup Form (Filled State)
 The screen is titled 'Set up your Business'. It contains the following fields:

- Select Business Type: Hardware
- Enter business name: Cue Hardware
- Enter business owner name: Test
- Country: KE +254
- Enter Phone Number: 852963741
- Enter business email: abc@gmail.com
- Physical Address*: Nairobi, Kenya
- Country: Kenya
- Currency: KES

 A dark blue 'PREVIEW' button is at the bottom center.

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.



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'.

The screenshot displays the Zed app interface for creating product/service categories. It is divided into three main sections:

- Add Product/Service Category:** This section contains three input fields:
 - Category Type*:** A dropdown menu with 'Product' selected.
 - Category Name*:** A text input field containing 'Paint'.
 - Category Description*:** A text input field containing '20 Litre paint'.
- Product / Service Categories:** This section shows a list of existing categories. At the top is a search bar. Below it is a table:

Name	Type	Action
Paint	Product	
- Set up business:** This section shows a progress bar with five steps:
 1. Enter Business Details (Completed, green checkmark)
 2. Create Product / Service Categories (Completed, green checkmark)
 3. Add Products / Services (Current step, blue circle with '3')
 4. Create Customers (Not started, grey circle with '4')
 5. Payment Setup (Not started, grey circle with '5')

At the bottom of the screen, there are navigation buttons: 'Cancel', 'Add', 'Next', a plus sign (+) button, 'SKIP', and 'NEXT'. Below these buttons is a mobile navigation bar with icons for home, back, and forward navigation.

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'.

The screenshot displays three panels from the Zed app:

- Add Product Panel:** Contains form fields for Category (Paint), Product Name (Crown Paint), Price Type (Fixed), Amount (10000), Reorder Level (10), and Description (20 Litre Paint). Buttons for 'Cancel' and 'Add' are at the bottom.
- Products/Services Panel:** Shows a search bar and a table with one entry:

Name	Category	Price	Action
<input type="checkbox"/> Crown Paint	Paints	KES 10000.0	

 Buttons for 'Next' and a plus sign (+) are at the bottom.
- Set up business Panel:** A progress bar with five steps:
 - Enter Business Details (checked)
 - Create Product / Service Categories (checked)
 - Add Products / Services (checked)
 - Create Customers (4)
 - Payment Setup (5)
 Buttons for 'SKIP' and 'NEXT' are at the bottom.

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'.

Customer Account

Customer Type: Individual

First Name: Mickey | Last Name: Mouse

Phone Number: KE +254 123456789

Physical Address: Nairobi, Kenya

Customer Email: mickeymouse@gmail.com

Payment Type: Normal

ADD

Customers

Name	Type	Payment	Amount/Limit	Action
<input type="checkbox"/> Mickey Mouse	Individual	Normal	-	

Next

Set up business

Set-up your business

- Enter Business Details
- Create Product / Service Categories
- Add Products / Services
- Create Customers
- 5 Payment Setup

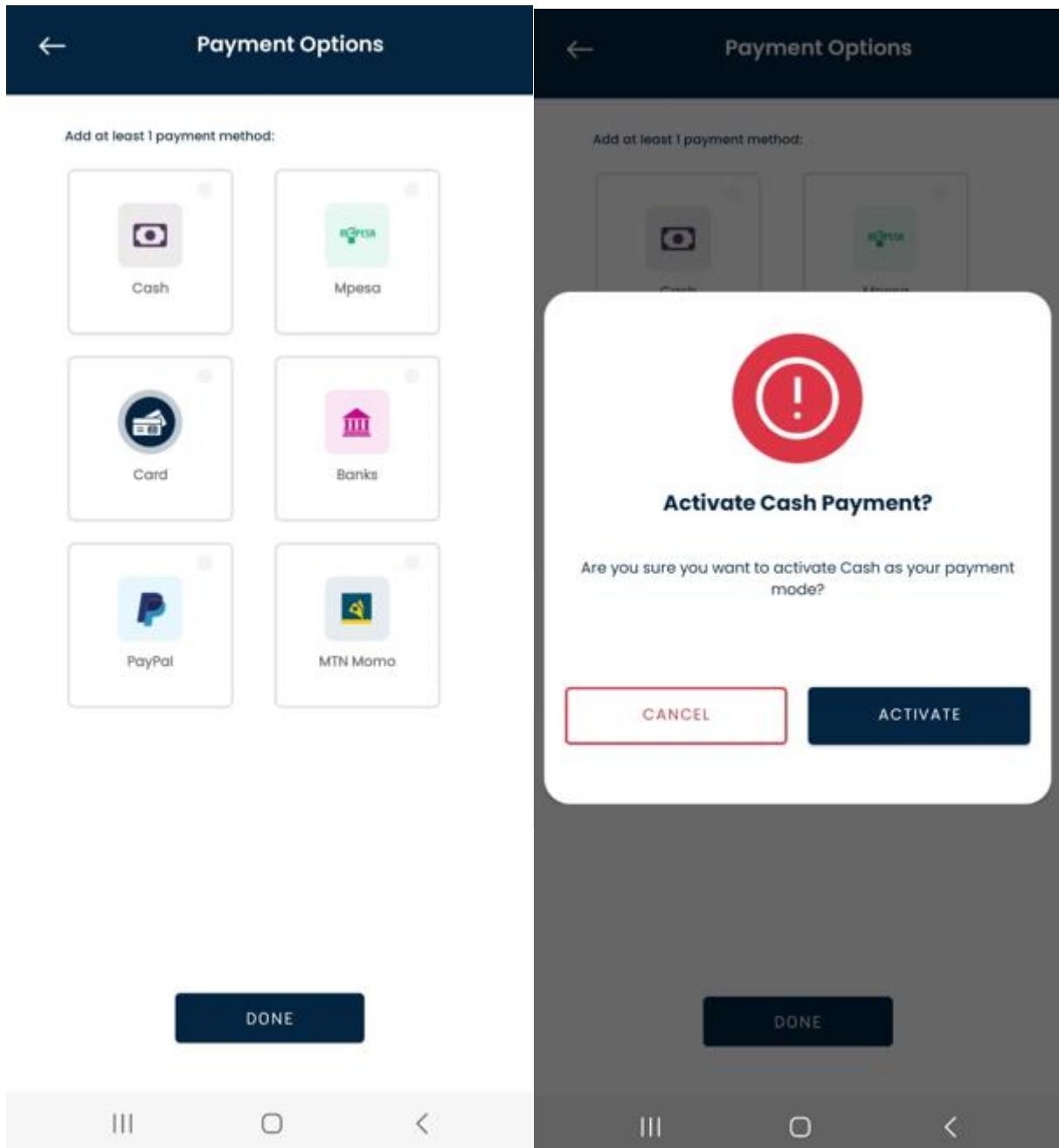
SKIP **NEXT**

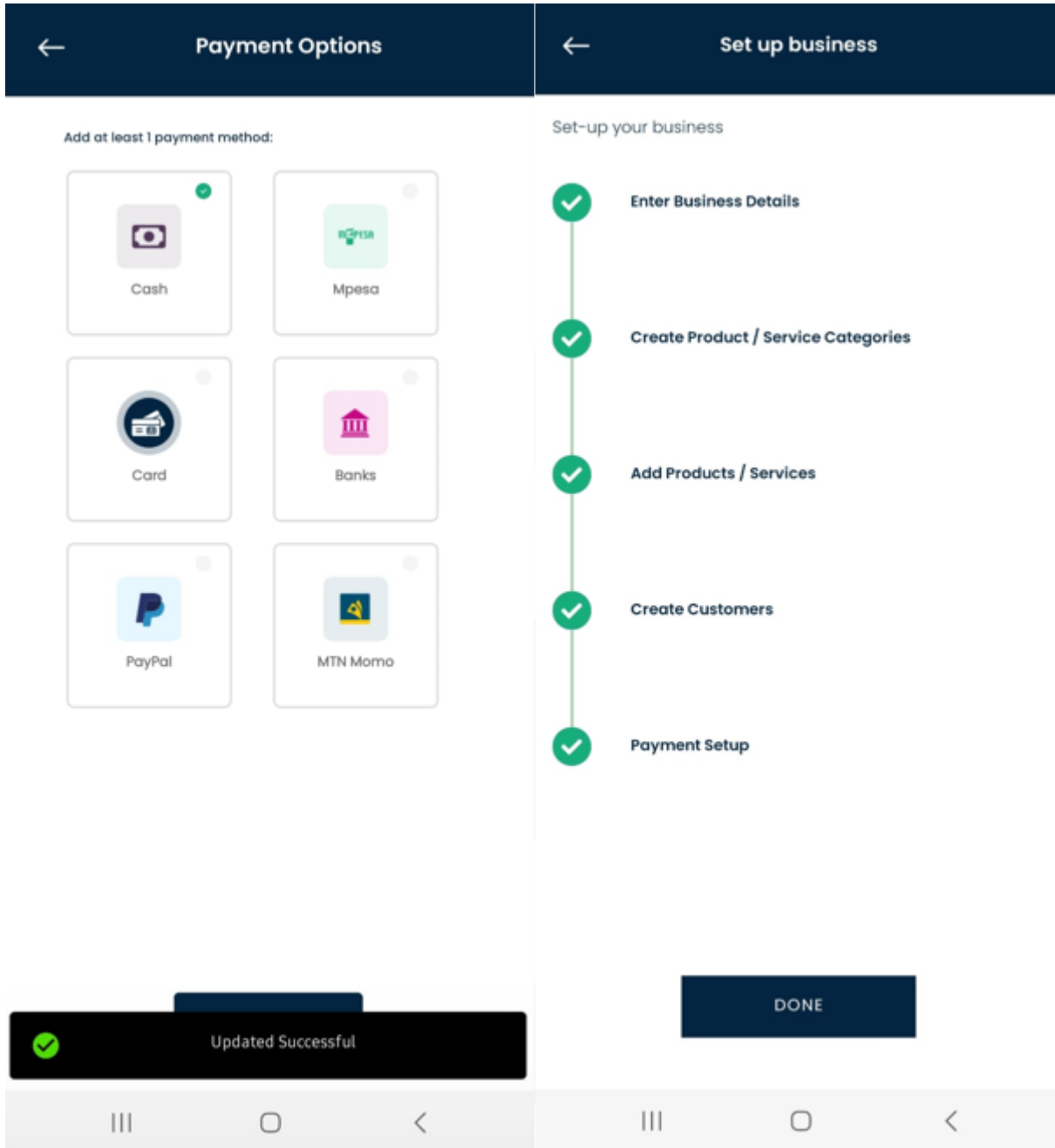
5. Payment Setup:


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'.





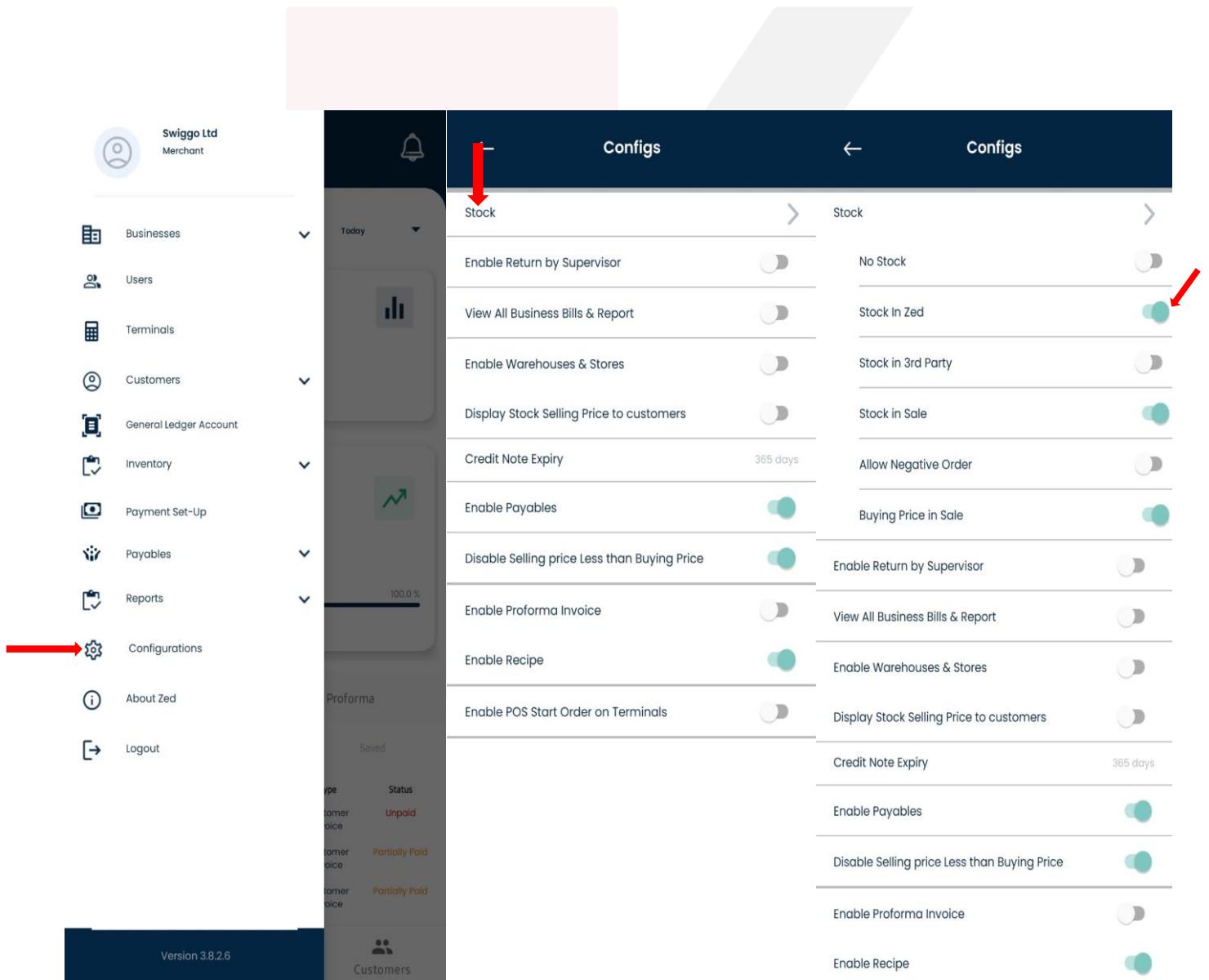
 Your business is now set to thrive with ZED. Explore additional features within the app for further optimization. Thank you for choosing ZED.

Stock in Zed

Here is a simple guide to managing inventory in Zed.

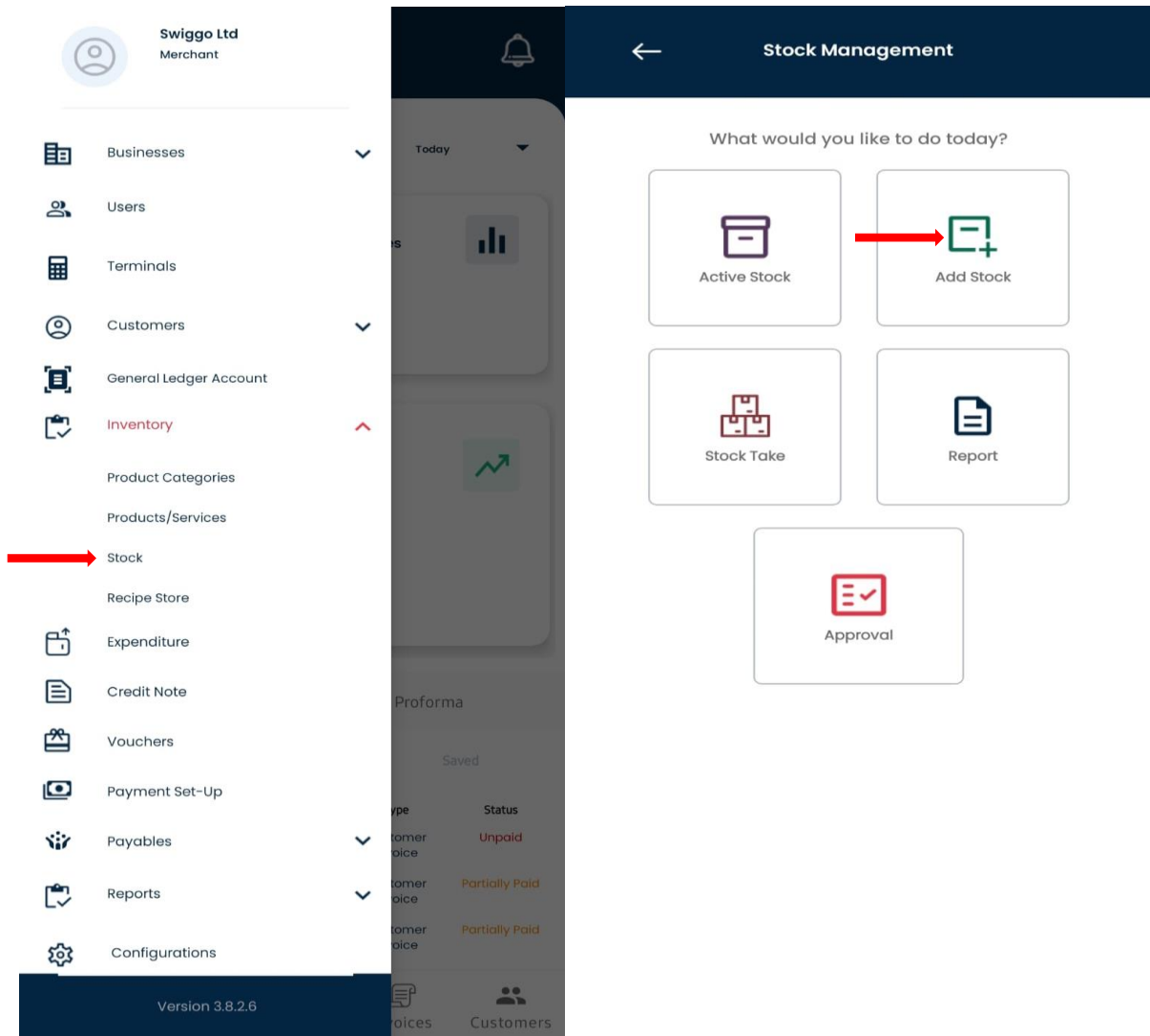
Configure Stock in Zed:

- i. Click on 'Configuration' from the menu.
- ii. Select 'Stock'.
- iii. Toggle the 'Stock in Zed' button until it turns green to activate it.

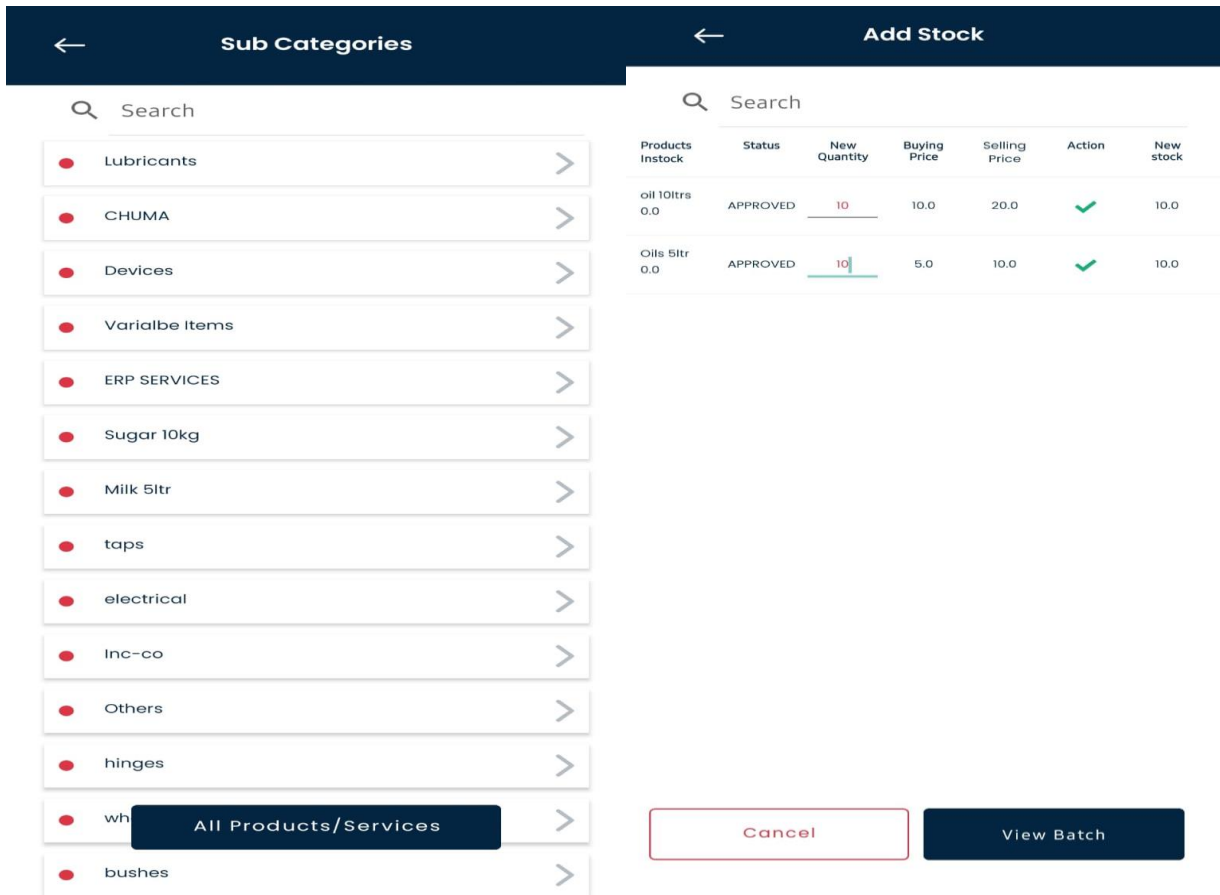


Adding Stock

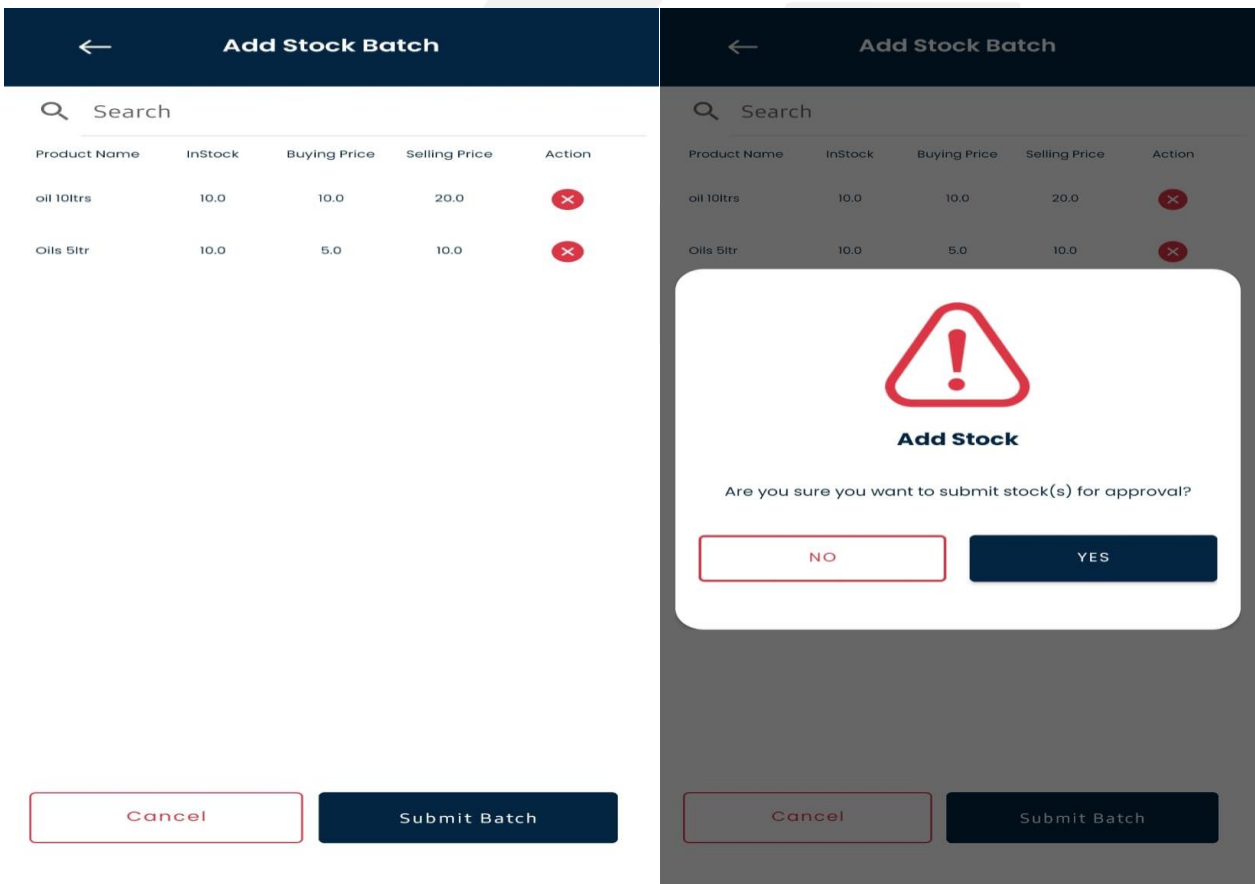
- i. Navigate to the menu and choose 'Inventory'.
- ii. Click on 'Stock'.
- iii. Select 'Add Stock' from the options.



- 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.

What would you like to do today?

Active Stock Add Stock

Stock Take Report

Approval

Approved Pending Approval¹ Cancelled

Add Stock¹ Stock-take Stock-Transfer

Batch No	Date Created	Action
Batch NO: 138	06/04/2024 12:30 pm	<input type="checkbox"/> <input checked="" type="checkbox"/>

- 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 Stock¹ Stock-take Stock-Transfer

Batch No	Date Created	Action
Batch NO: 138	06/04/2024 12:30 pm	<input checked="" type="checkbox"/> <input type="checkbox"/>

← **Batch Approval**

Approved Pending Approval Cancelled

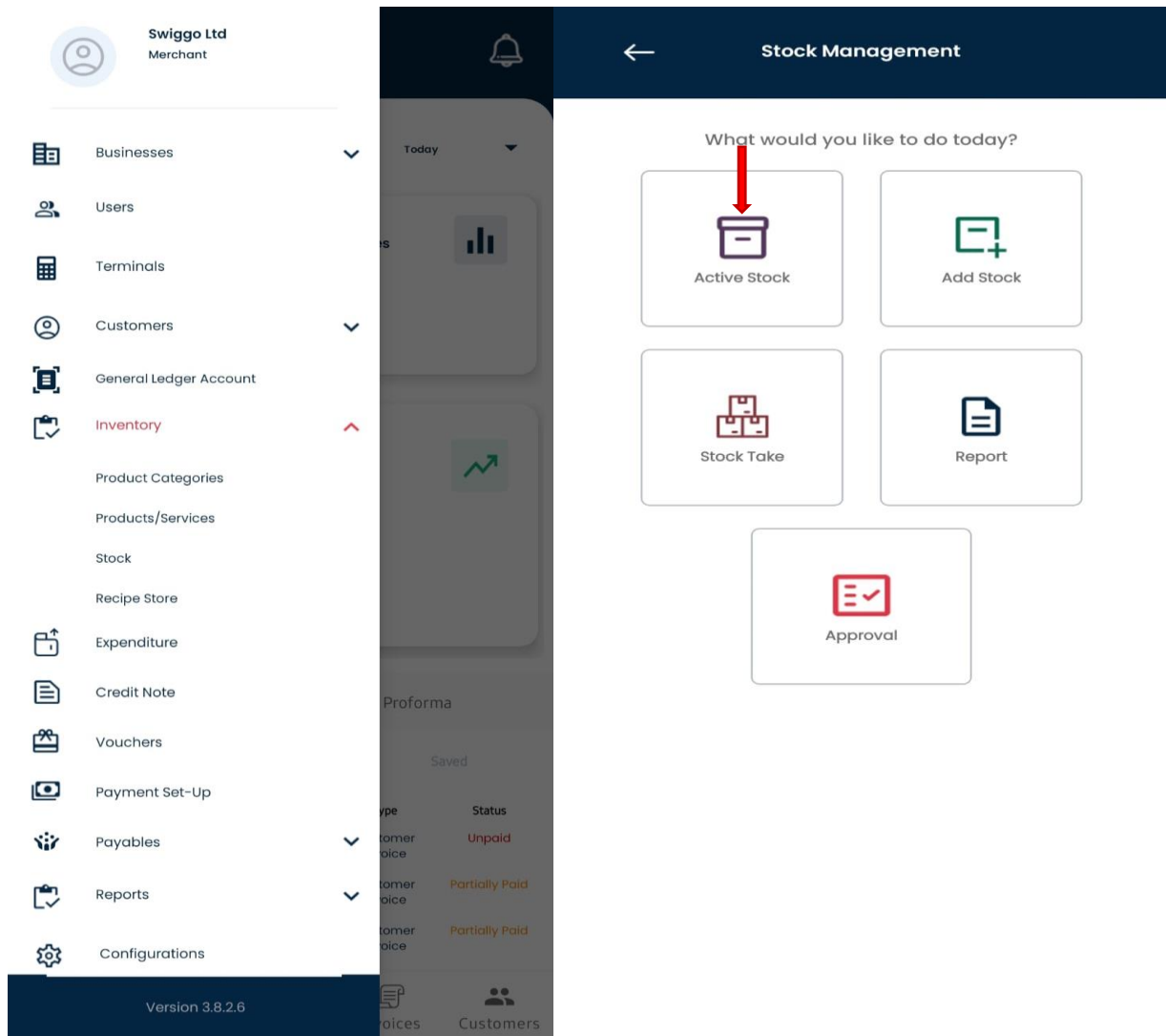
Add Stock Stock-take Stock-Transfer

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

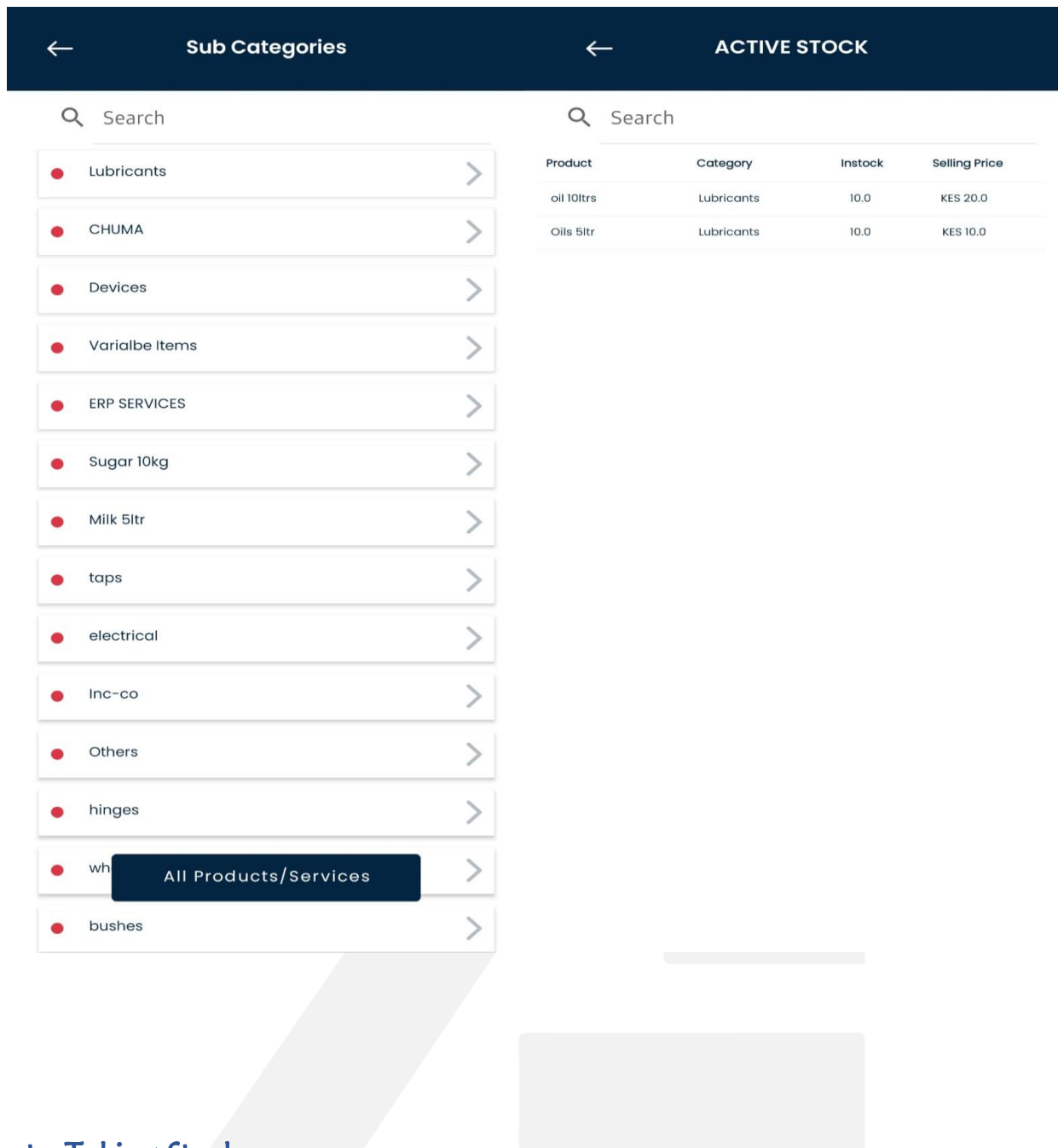
Approve(1)

How to View Active Stock

- i. Return to the menu and choose 'Inventory'.
- ii. Click on 'Stock'.



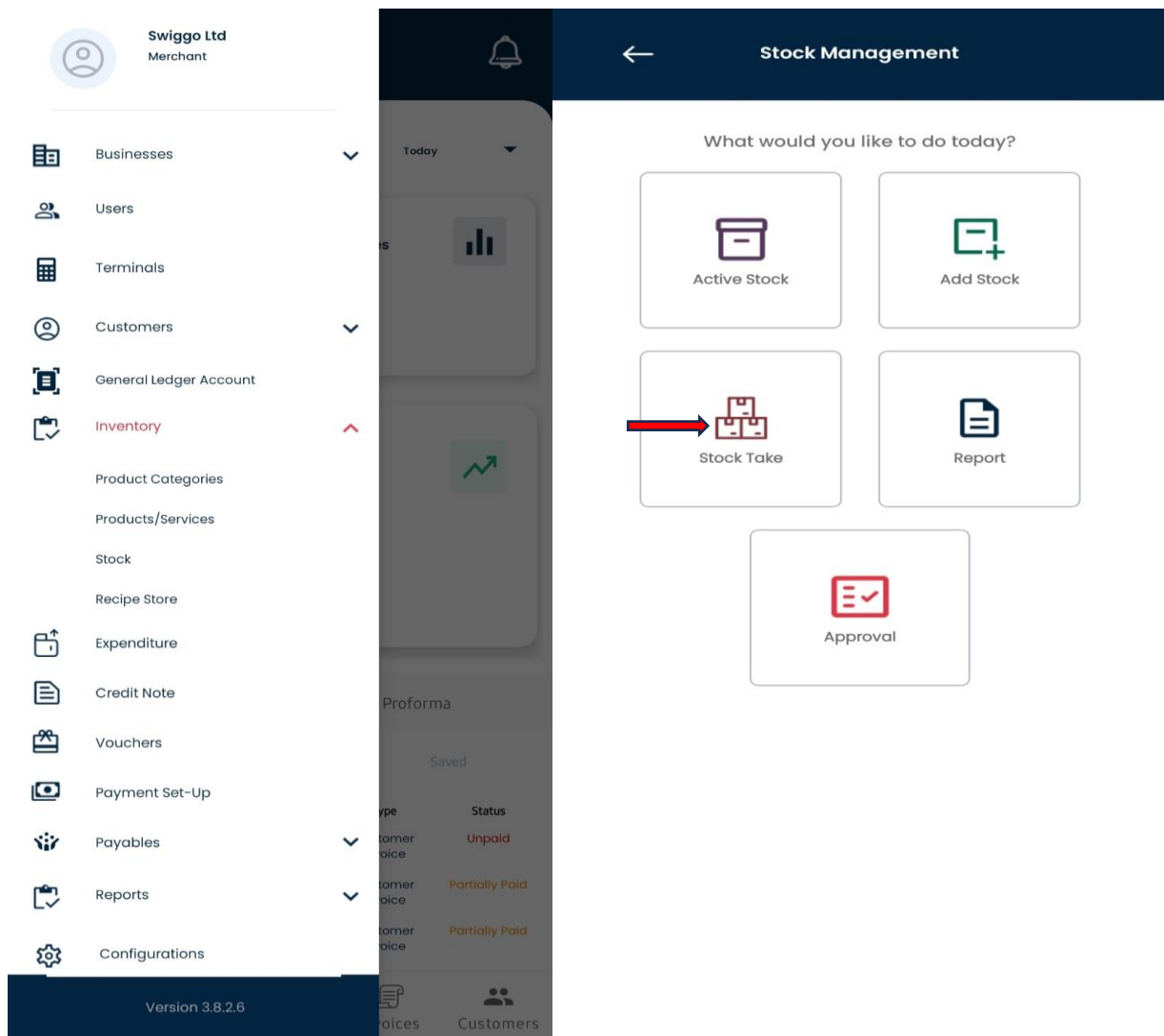
- iii. Select 'Active Stock'.
- iv. View the list of products and their quantities in stock.



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

←
ACTIVE STOCK

- 🔍 Search
- Lubricants
>
 - CHUMA
>
 - Devices
>
 - Varialbe Items
>
 - ERP SERVICES
>
 - Sugar 10kg
>
 - Milk 5ltr
>
 - taps
>
 - electrical
>
 - Inc-co
>
 - Others
>
 - hinges
>
 - wh
>
 - bushes
>

All Products/Services

🔍 Search

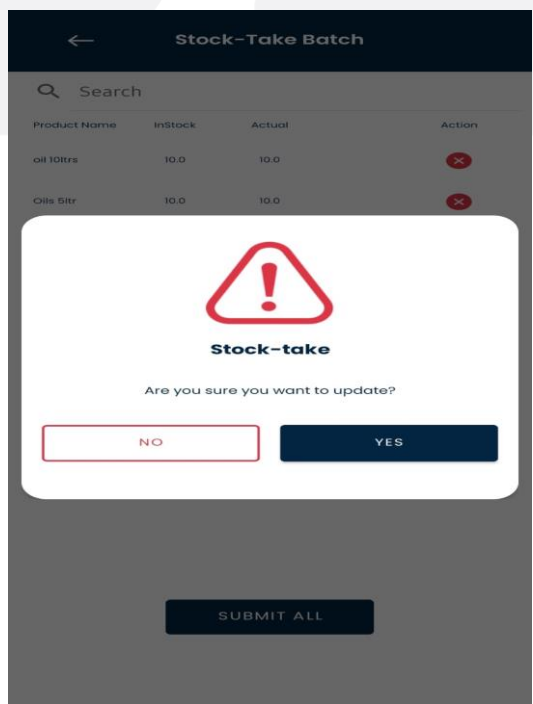
Product	Category	Instock	Selling Price
oil 10ltrs	Lubricants	10.0	KES 20.0
Oils 5ltr	Lubricants	10.0	KES 10.0

Stock Take					Stock Take				
Products	Expected	Actual	Action	Variance	Products	Expected	Actual	Action	Variance
oil 10ltrs	10.0	10	✓	0.0	oil 10ltrs	10.0	10	✓	0.0
Oils 5ltr	10.0	1	✓	-9.0	Oils 5ltr	10.0	10	✓	0.0

VIEW BATCH

VIEW BATCH

- 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'.

Batch Approval			Batch Approval		
Approved	Pending Approval ¹	Cancelled	Approved	Pending Approval ¹	Cancelled
Add Stock	Stock-take ¹	Stock-Transfer	Add Stock	Stock-take ¹	Stock-Transfer
Batch No	Date Created	Action	Batch No	Date Created	Action
Batch NO: 139	06/04/2024 04:49 pm	<input type="checkbox"/> <input checked="" type="checkbox"/>	Batch NO: 139	06/04/2024 04:49 pm	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

Approve(1)

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

←

Batch Approval

Approved	Pending Approval	Cancelled
Add Stock	Stock-take	Stock-Transfer
Batch No	Date Created	Approved On
Batch NO: 139	06/04/2024 04:49 pm	06/04/2024 04:58 pm
Batch NO: 89	03/19/2024 11:24 am	03/19/2024 11:25 am
Batch NO: 80	02/26/2024 04:04 pm	02/26/2024 04:04 pm
Batch NO: 4	07/18/2023 02:48 pm	07/18/2023 02:48 pm