

# SME User Guide (Web)



Connecting your **business**  
to payments

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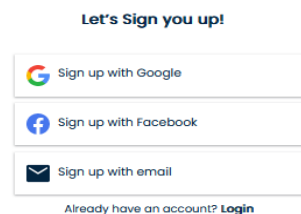
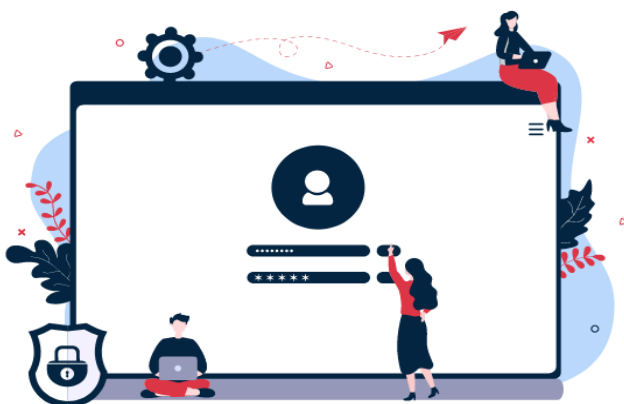
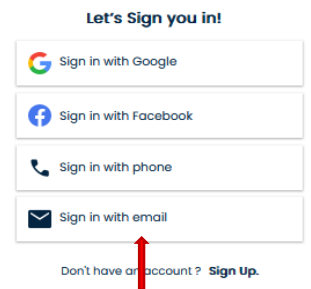
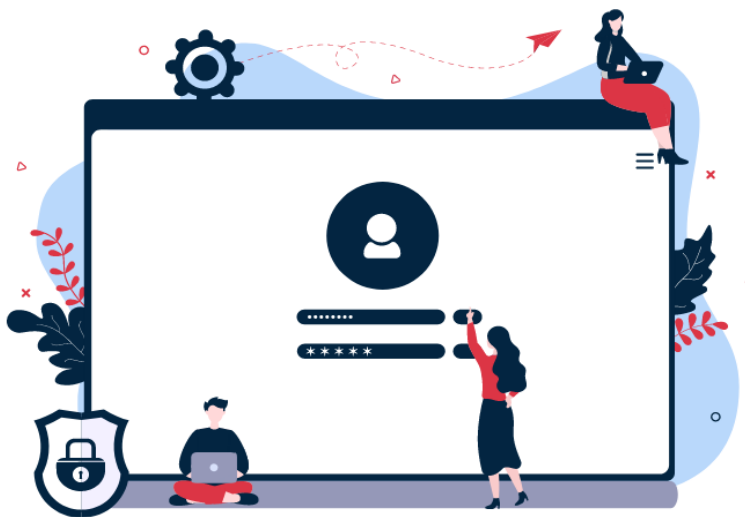
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## ZED SIGN UP PROCESS VIA WEB

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

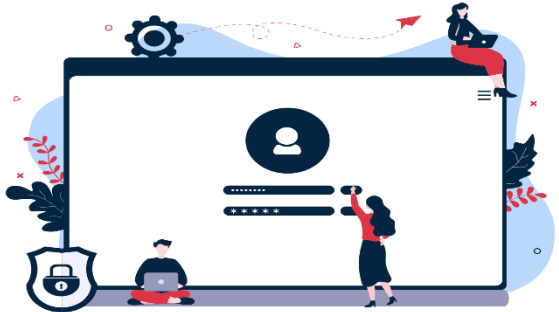
### How to Sign Up:

- i. Access the Zed web portal via <http://web.zed.business>.
- ii. Once on the website, click on the 'Sign Up' button to be directed to the sign-up page.
- iii. Select your preferred sign-up option (Google, Facebook, or Email).



- iv. Enter your name, username, email, and phone number.

v. Click 'Create Account' when you're done.



### Create Account

<input type="text" value="First Name*"/> <small>First name</small>	<input type="text" value="Last Name*"/> <small>Last name</small>
<input type="text" value="Username*"/> <small>Username</small>	
<input type="text" value="Email*"/> <small>User Email</small>	
<input type="text" value="Phone Number*"/> <small>KE +254</small> <small>Enter your phone number</small>	

By Proceeding, you agree to Zed Payment's Terms of Service and Privacy Policy.

Create Account

Already have an account? [Login](#)



### Create Account

<input type="text" value="First Name*"/> <small>John</small>	<input type="text" value="Last Name*"/> <small>Doe</small>
<input type="text" value="Username*"/> <small>Doe doe</small>	
<input type="text" value="Email*"/> <small>Doe@gmail.com</small>	
<input type="text" value="Phone Number*"/> <small>KE +254</small> <small>709876542</small>	

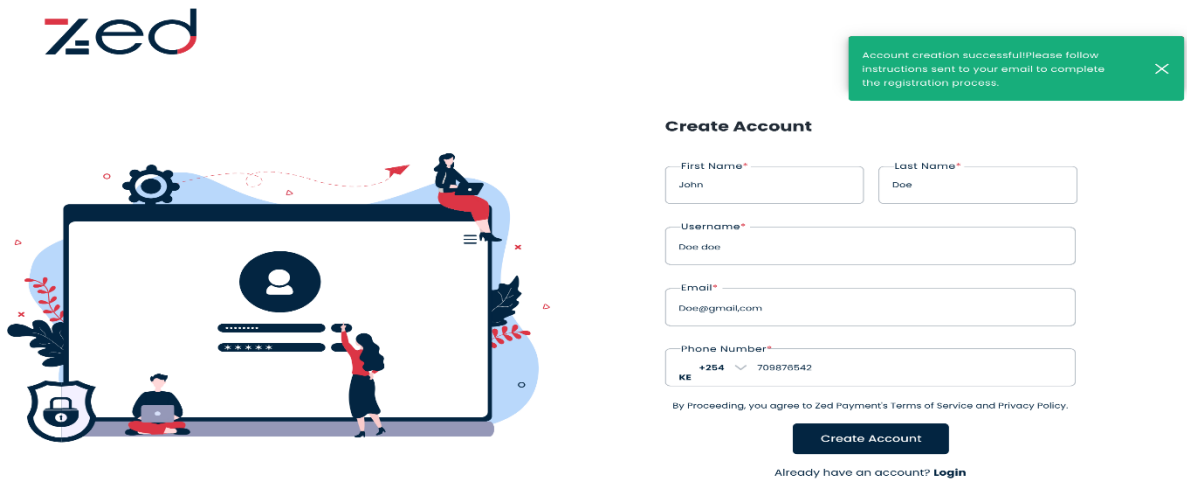
By Proceeding, you agree to Zed Payment's Terms of Service and Privacy Policy.



Create Account

Already have an account? [Login](#)

- vi. Upon successful registration, a confirmation message will pop up with instructions on what to do next.

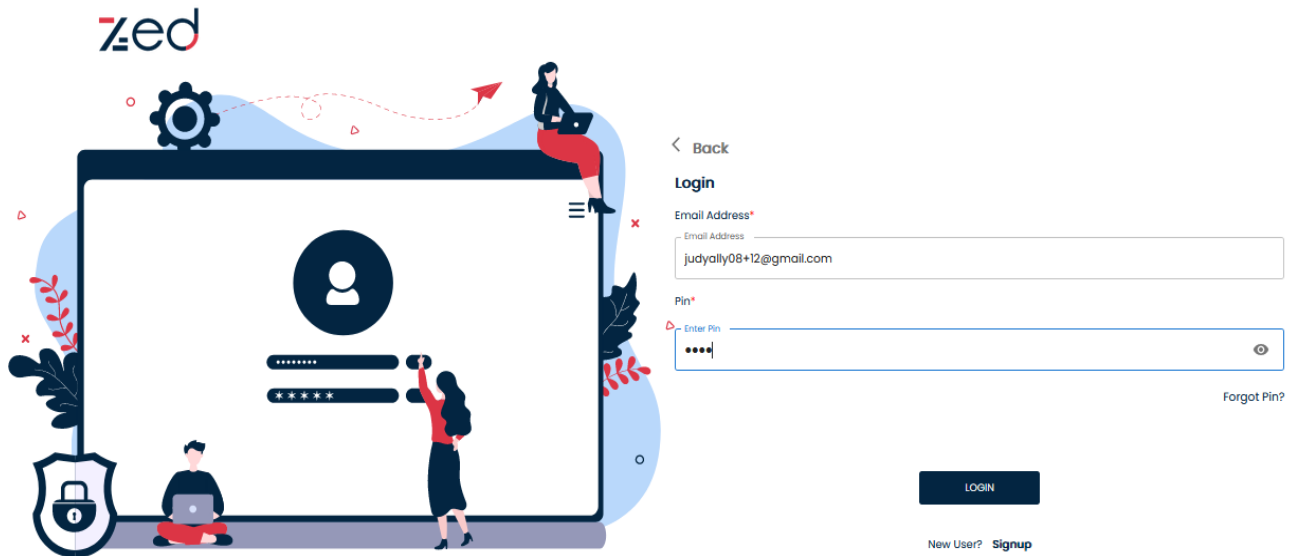


### How to Change Pin:

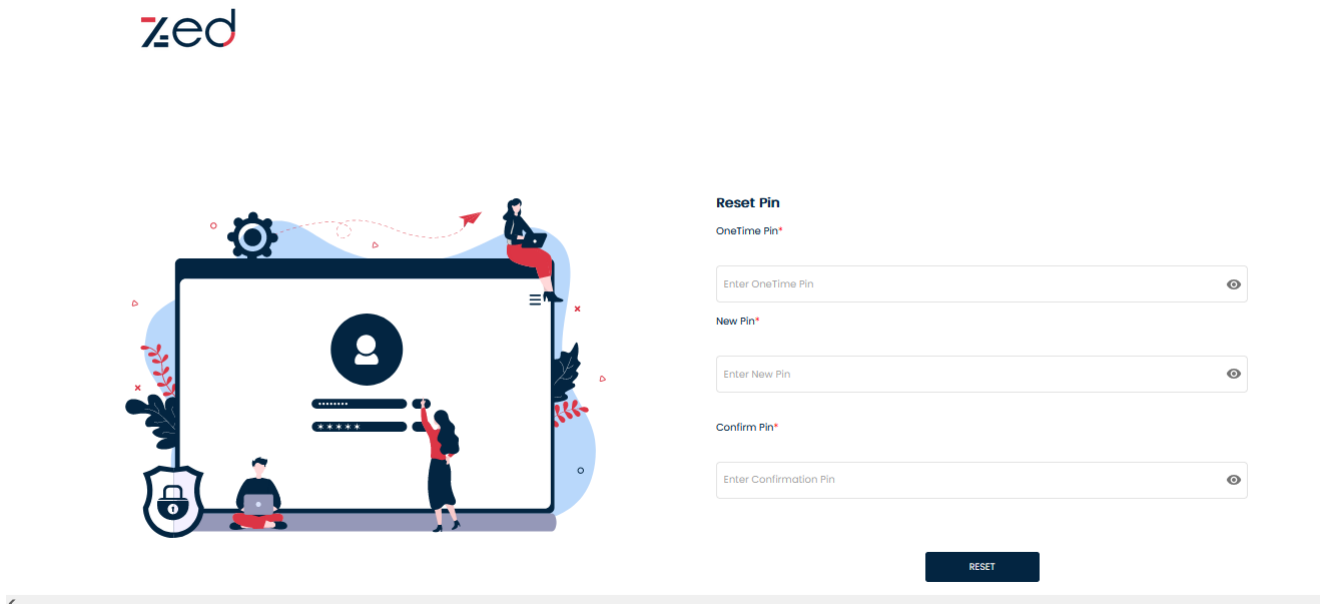
- i. Your login credentials will be sent to your email and WhatsApp after successful registration.
- ii. Return to the homepage and choose your preferred sign-in option (Google, Facebook, Phone, or Email).



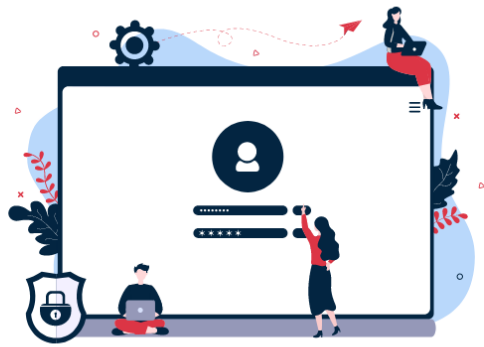
- iii. Provide your login credentials and click 'Login.'



iv. Upon logging in, you'll be prompted to change your pin.



- v. Enter the 'Onetime Pin' sent during registration.
- vi. Set your 'New Pin' of choice, confirm, and click 'Reset.'



### Reset Pin

OneTime Pin\*

New Pin\*

Confirm Pin\*

RESET

- vii. After successfully changing your pin, log in again.
- viii. Now, you can either create or join a business in Zed.

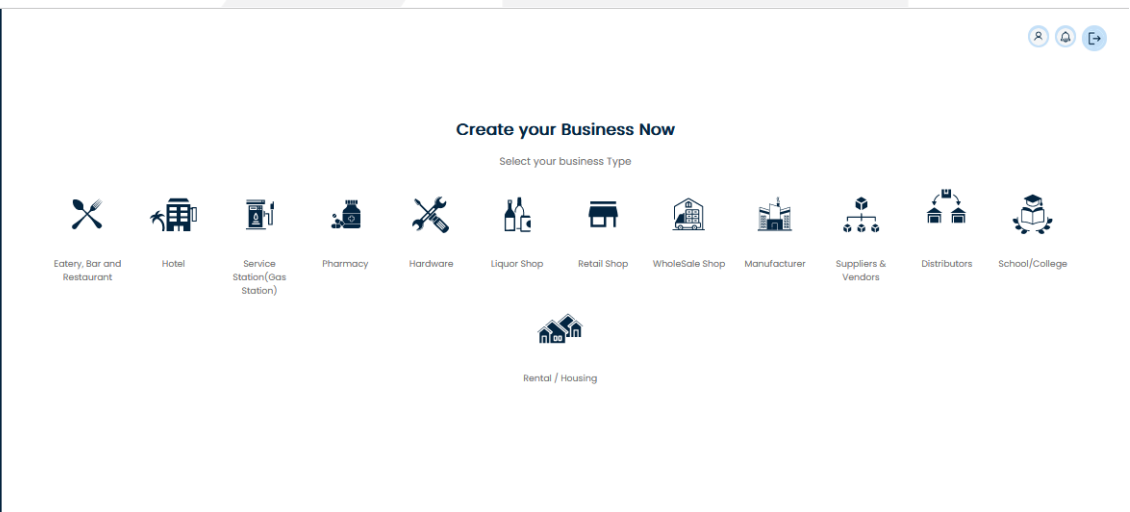
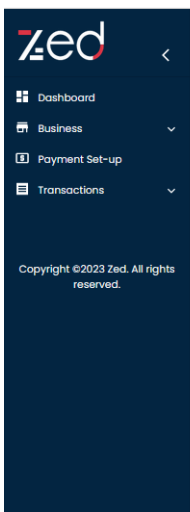
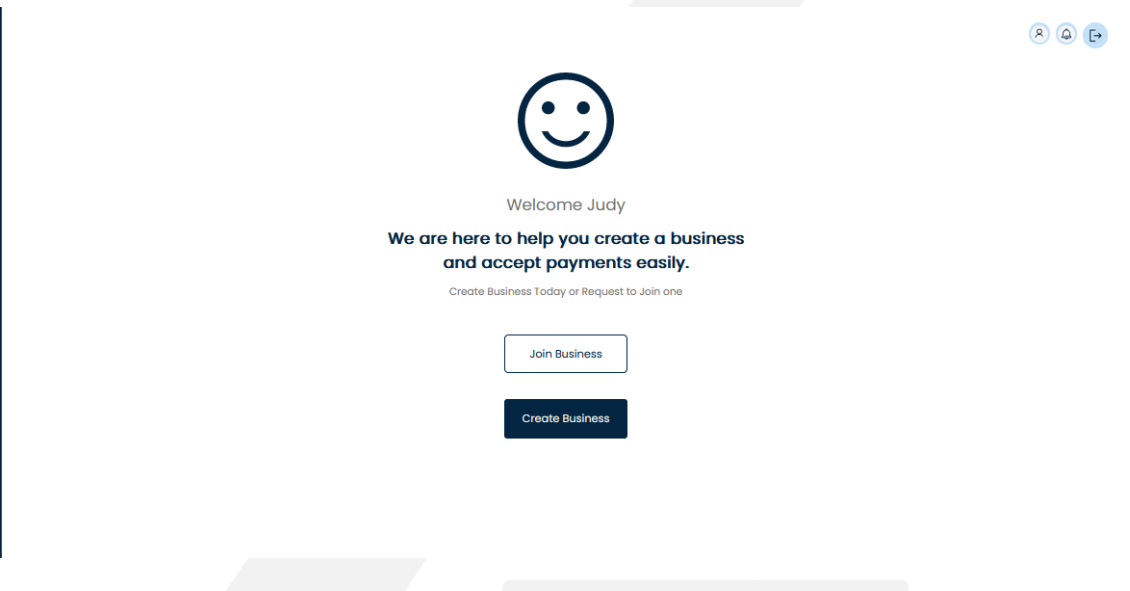
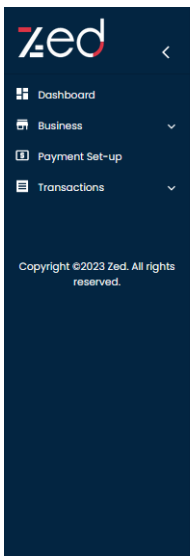
That's it! You're all set to explore and use Zed for your business needs.

# HOW TO CREATE A BUSINESS – WEB

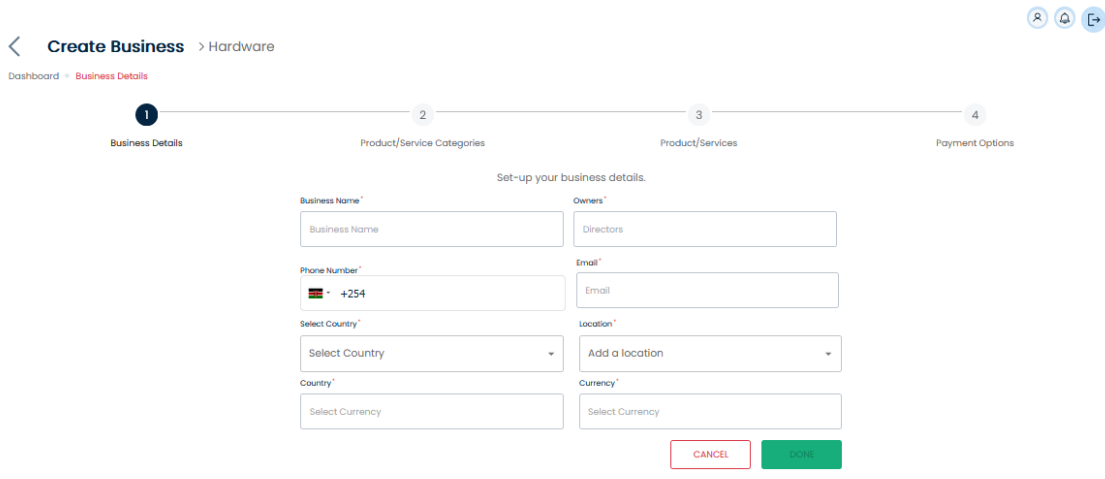
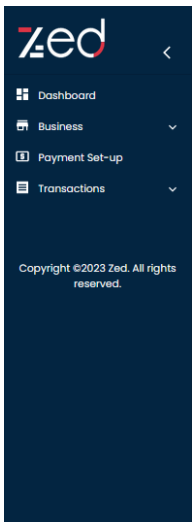
Welcome to ZED! This user guide will help you effortlessly set up your business on the go. Follow these simple steps for a smooth journey, from entering company details to establishing your customer base.

## 1. Setting up Your Business:

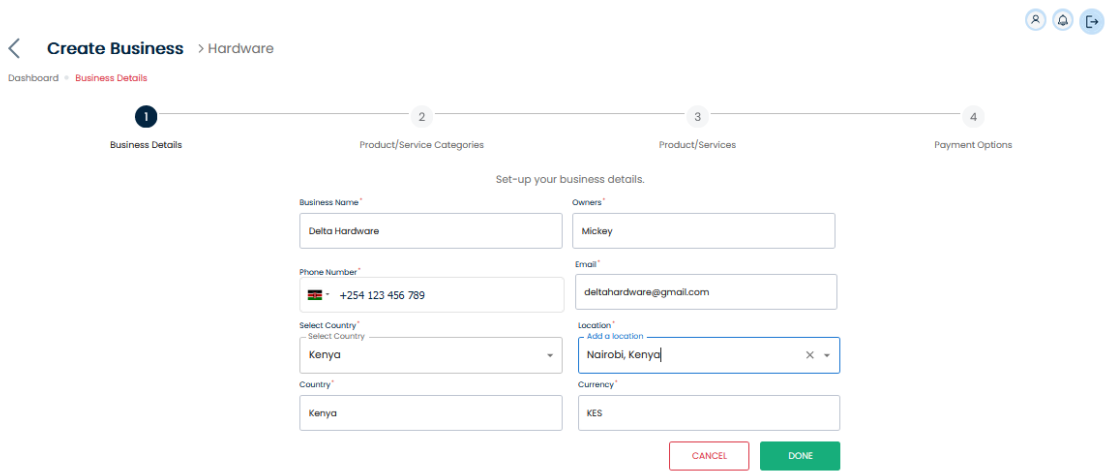
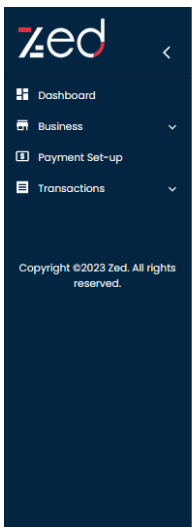
- i. Visit <http://web.zed.business> and log in to your Zed account.
- ii. Click on the ‘Create Business’ button.
- iii. Select your business type to begin the setup.







- iv. Provide business and owner details: name, phone number, email, country, location, and currency.
- v. Click 'Done' to save changes, then click 'Next' to proceed.



## 2. Creating Product/Service Categories:

- i. Enter the category name.
- ii. Pick the category type for your products or services.
- iii. Enter a brief category description.
- iv. Click 'Preview' to review.

- v. Click 'Add Category' to add more.
- vi. Click 'Next' to advance to the next step.

Dashboard

Business

Payment Set-up

Transactions

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Delta Hardware

Create Business > Hardware

Dashboard > Product/Service Categories

Business Details (1) Product/Service Categories (2) Product/Services (3) Payment Options (4)

Create a Service Category

Category Name\*  Category Type\*

Category Description\*

SKIP CANCEL PREVIEW

Dashboard

Business

Payment Set-up

Transactions

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Delta Hardware

Create Business > Hardware

Dashboard > Product/Service Categories

Business Details (1) Product/Service Categories (2) Product/Services (3) Payment Options (4)

Product/Service Categories

UPLOAD FILE ADD CATEGORY

<input type="checkbox"/>	Category Name	Category Type	Category Description	Action
<input type="checkbox"/>	Paint	Product	20 Liter Can	

Rows per page: 5 1-1 of 1

NEXT

### 3. Add Products/Services:

- i. Select the category for your product or service.
- ii. Input product name, pricing status, amount, buying price, description and reorder level.

Delta Hardware

< Create Business > Hardware

Dashboard > Product/Services

Business Details (✓) Product/Service Categories (✓) Product/Services (3) Payment Options (4)

Create a Product/Service

UPLOAD FILE

Category\*  
Select Category

Product Name\*  
Product Name

Pricing Status\*  
Amount\*

Buying Price\*  
Service Description

Reorder Level\*  
Reorder Level

SKIP CANCEL PREVIEW

Delta Hardware

< Create Business > Hardware

Dashboard > Product/Services

Business Details (✓) Product/Service Categories (✓) Product/Services (3) Payment Options (4)

Create a Product/Service

UPLOAD FILE

Category\*  
Paint

Product Name\*  
Crown Paint

Pricing Status\*  
Amount\*

Buying Price\*  
Service Description

Reorder Level\*  
5

SKIP CANCEL PREVIEW

- iii. Click 'Preview' to review.
- iv. Click 'Add Service' to add more.
- v. Click 'Next' to proceed.

**Delta Hardware** Dashboard > Product/Services

**Create Business** > Hardware

Business Details  Product/Service Categories  **Product/Services**  Payment Options

List Of Services UPLOAD FILE ADD SERVICE

<input type="checkbox"/>	Name	Category	Price Type	Amount	Description	Action
<input type="checkbox"/>	Crown Paint	Paint	Fixed	10000	20 Liters	<span>✎</span> <span>✖</span>

Rows per page: 5 1-1 of 1 ◀ ▶

NEXT

## 4. Payment Setup:

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

Configure Payment Methods:

- i. Choose from payment options: M-Pesa, Bank, Card, Cash, MTN MoMo and PayPal.
- ii. Click on your preferred option, input required details, save, and click 'Activate'.

**Delta Hardware** Dashboard > Payment Options

**Create Business** > Hardware

Business Details  Product/Service Categories  Product/Services  **Payment Options**

Add at least 1 payment method. COMPLETE

- Mpesa Not Set
- Bank Not Set
- Card Not Set
- Cash Not Set
- MTN MoMo Not Set
- Paypal Not Set

- Dashboard
- Business
- Payment Set-up
- Transactions

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Delta Hardware

< Create Business > Hardware

Dashboard > Payment Options

Business Details ✓ Product/Service Categories ✓ Product/Services ✓ Payment Options 4

Add at least 1 payment method. COMPLETE

Mpesa	Not Set	<input type="checkbox"/>
Bank	Not Set	<input type="checkbox"/>
Card	Not Set	<input type="checkbox"/>
Cash	Not Set	<input type="checkbox"/>
MTN MoMo	Not Set	<input type="checkbox"/>
Paypal	Not Set	<input type="checkbox"/>

**Mpesa Setup**

Do you have Mpesa Daraja set up for your business?

- Dashboard
- Business
- Payment Set-up
- Transactions

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Delta Hardware

< Create Business > Hardware

Dashboard > Payment Options

Business Details ✓ Product/Service Categories ✓ Product/Services ✓ Payment Options 4

Add at least 1 payment method. COMPLETE

Mpesa	Not Set	<input type="checkbox"/>
Bank	Not Set	<input type="checkbox"/>
Card	Not Set	<input type="checkbox"/>
Cash	Not Set	<input type="checkbox"/>
MTN MoMo	Not Set	<input type="checkbox"/>
Paypal	Not Set	<input type="checkbox"/>

**Mpesa Daraja Setup**

Business Name\*  Business Shortcode\*

Consumer Key\*

Consumer Secret\*  Account Reference\*

Pass Key\*

By ticking, you are agreeing to the terms and conditions.

Branches

- POS
- Payment Setup
- Sms
- Terminals/Printers
- General Ledger Account
- Inventory
- Expenditure
- Credit Note
- Vouchers
- Customer Accounts
- Transactions
- Reports

Delta Hardware

< Create Business > Hardware

Dashboard > Payment Options

Business Details ✓ Product/Service Categories ✓ Product/Services ✓ Payment Options 4

Add at least 1 payment method. COMPLETE

Mpesa	Active	<input checked="" type="checkbox"/>
Bank	Not Set	<input type="checkbox"/>
Card	Not Set	<input type="checkbox"/>
Cash	Active	<input checked="" type="checkbox"/>
MTN MoMo	Not Set	<input type="checkbox"/>
Paypal	Not Set	<input type="checkbox"/>

Your business is now set up on ZED! If you have any questions, refer to our help resources. 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 Config'.
- iii. Toggle the 'Stock in Zed' button until it turns blue to activate it.

The screenshot shows the Zed Configuration page. On the left is a dark blue sidebar menu with the following items: Expenditure, Credit Note, Vouchers, Customer Accounts (with a dropdown arrow), Transactions (with a dropdown arrow), Reports (with a dropdown arrow), Configurations (with a dropdown arrow and highlighted in light blue), Business Config, Stock Config (highlighted in light blue), Accounting Config, Payables Config, QuickBooks, and QuickBooks. The main content area is titled 'Configuration' in red. Below the title is a breadcrumb 'Dashboard \ Stock Configs' and a search bar with the placeholder 'search'. A table lists configuration options with their corresponding toggle switches:

Configuration	Action
No Stock	<input type="checkbox"/>
Stock In Zed	<input checked="" type="checkbox"/>
Stock in 3rd Party	<input type="checkbox"/>
Stock in Sale	<input type="checkbox"/>
Allow Negative Order	<input type="checkbox"/>

### Adding Stock

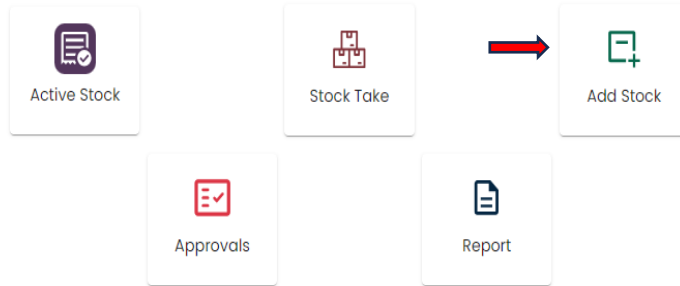
- i. Navigate to the menu and choose 'Inventory'.
- ii. Click on 'Stock'.
- iii. Select 'Add Stock' from the options.

- Payment Setup
- Sms
- Terminals/Printers
- General Ledger Account
- Inventory
  - Product Categories
  - Product /Services
- Stock**
- Expenditure
- Credit Note
- Vouchers

## Stock Management

Dashboard > Stock

What would you like to do today?



- iv. Choose the location to add the stock from the drop-down menu (main store or warehouse).
- v. Click 'Next'.

- Payment Setup
- Sms
- Terminals/Printers
- General Ledger Account
- Inventory
  - Product Categories
  - Product /Services
- Stock**
- Expenditure
- Credit Note
- Vouchers
- Customer Accounts

## < Stock Management

Dashboard > Stock > Add Stock

Add Stock



- POS
- Payment Setup
- Sms
- Terminals/Printers
- General Ledger Account
- Inventory
  - Product Categories
  - Product /Services
  - Stock
- Expenditure
- Credit Note



## < Stock Management

Dashboard > Stock > Add Stock

Add Stock

Add To  
Mainstore

MainStore  
Main Store

NEXT

- vi. Pick the product category and the specific product.
- vii. Enter the quantity of items in the 'New Quantity' column.



## < Stock Management

Dashboard > Stock > Add Stock

Q Search Category

- Cement >
- Paints >

Q Search products

CANCEL

VIEW BATCH

Product Name	In Stock	New Quantity	Buying Price	New Buying Pri...	Action
No rows					



## < Stock Management

Dashboard > Stock > Add Stock







Product Name	In Stock	New Quantity	Buying Price	New Buying Pri...	Action
Crown Paints	0	<input type="text" value="100"/>	720	<input type="text"/>	✓
Duracoat	0	<input type="text" value="100"/>	720	<input type="text"/>	✓
Solai	0	<input type="text" value="100"/>	718	<input type="text"/>	✓

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



## < Stock Management

Dashboard > Stock > Add Stock

Batch No:xxxx      Supplier: **Yetu Gen Suppliers**      Warehouse: **Main Store**

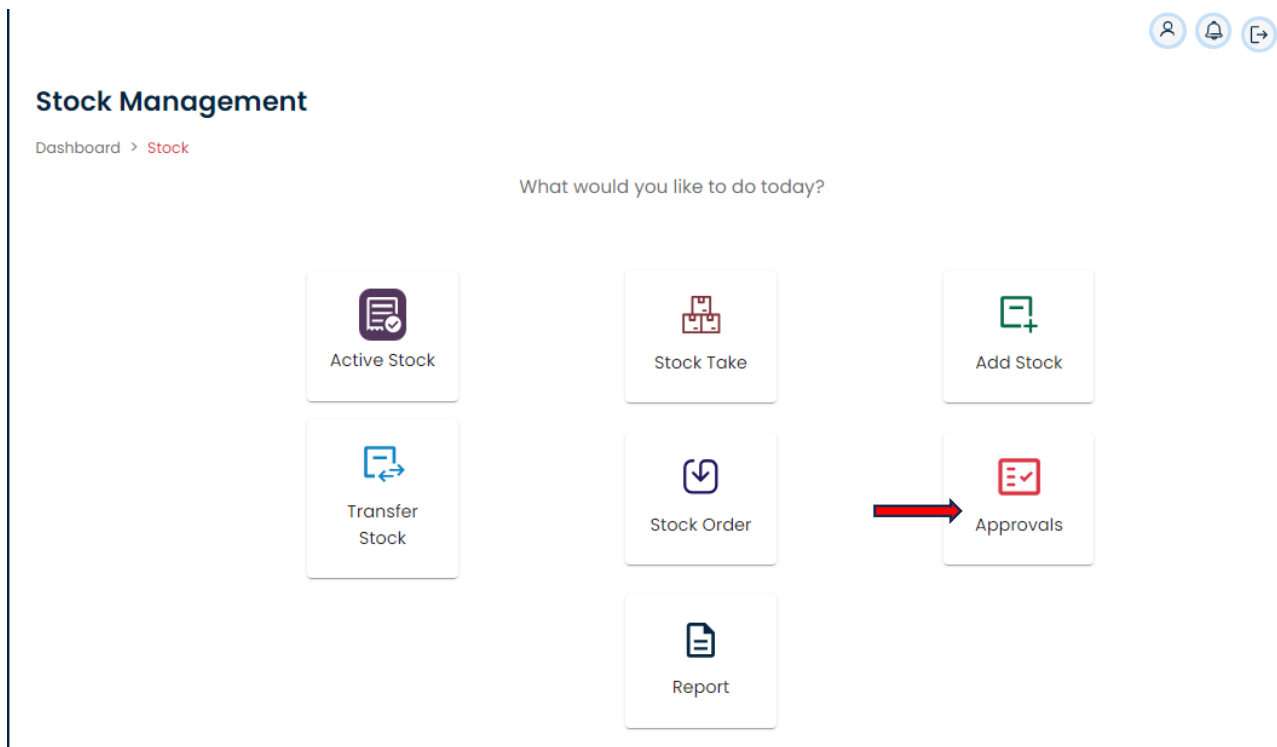



Product Name	In Stock	New Quantity	Buying Price	Action
Crown Paints	0	100	800	
Duracoat	0	100	800	
Solai	0	100	800	

## Approval

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

- i. Click on 'Approvals'.
- ii. Select the 'Pending' column.



The screenshot shows the 'Stock Management' dashboard. At the top right, there are three circular icons: a user profile, a bell for notifications, and a search icon. Below the title 'Stock Management', there is a breadcrumb trail 'Dashboard > Stock'. A central heading asks 'What would you like to do today?'. Below this, there are seven action buttons arranged in a grid: 'Active Stock', 'Stock Take', 'Add Stock', 'Transfer Stock', 'Stock Order', 'Approvals', and 'Report'. A red arrow points to the 'Approvals' button, which features a red checkmark icon. In the top right corner of the dashboard area, there are three small circular icons: a user profile, a bell, and a search icon.

- iii. Tick the action button and click 'Approve'.

## < Stock Management

Dashboard > Stock > Approvals

Approved **Pending** Cancelled

**Add Stock** Stock Take Stock Transfer

Batch NO	Date Created	Batch NO
<input type="checkbox"/> 3	3/22/2024 4:52:02 PM	<input checked="" type="checkbox"/> <input type="checkbox"/>

The screenshot shows the 'Stock Management' interface with a confirmation dialog box. The dialog box contains the following text:

**Approve Batch?**  
Selected batch number(s) will be approved and stock updated automatically.

At the bottom of the dialog are two buttons: **CANCEL** and **APPROVE**.

The background interface shows the 'Approvals' section with a table containing one row with Batch NO '1', a date, and two checkboxes (one checked, one unchecked).

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



## < Stock Management

Dashboard > Stock > Approvals

**Approved** Pending Cancelled

**Add Stock** Stock Take Stock Transfer

Batch No	Date Created	Approved On
3	3/22/2024 4:52:02 PM	3/22/2024 5:02:21 PM
1	2/8/2024 4:18:00 PM	2/8/2024 4:18:14 PM

Rows per page: 5 ▾ 1-2 of 2 < >

## How to View Active Stock


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


- Payment Setup
- Sms
- Terminals/Printers
- General Ledger Account
- Inventory
  - Product Categories
  - Product /Services
  - Stock
- Expenditure
- Credit Note
- Vouchers


## Stock Management


Dashboard > Stock


What would you like to do today?

  
 Active Stock




  
 Stock Take

  
 Add Stock

  
 Approvals

  
 Report

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

### < Stock Management

Dashboard > Active Stock

**Branches**

Main Store

Search product

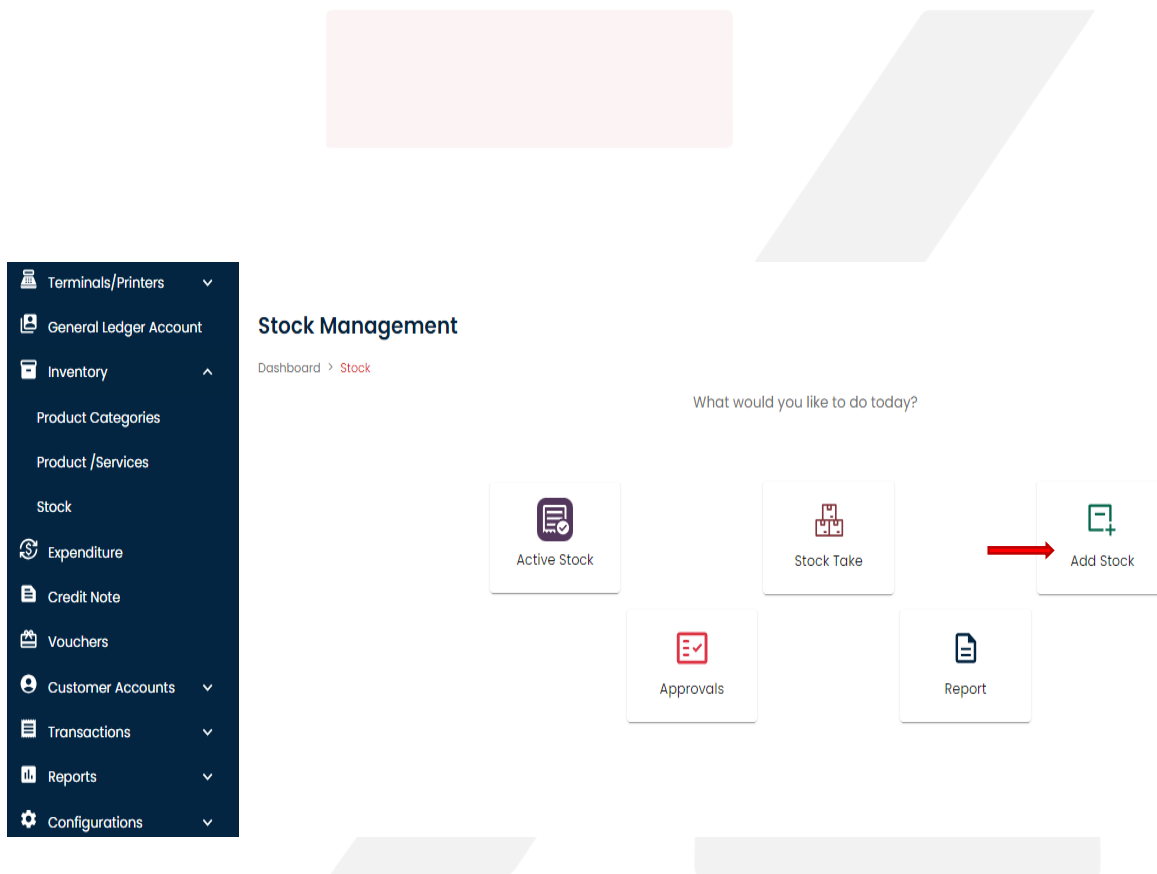
Product Name	Category	Instock	Selling Price (KES)
Bamburi Cement	Cement	150	800
Blue Triangle Cement	Cement	80	800
Crown Paint	Paints	100	13000
Duracoat Paint	Paints	100	12500
Savannah Cement	Cement	100	800

Rows per page: 5 1-5 of 6 < >

## 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.

**< Stock Management**

Dashboard > Stock > **Stock Take**

Select Store Type ▾

- General Ledger Account
- Inventory ^
- Product Categories
- Product /Services
- Stock
- Expenditure
- Credit Note
- Vouchers
- Customer Accounts ▾
- Transactions ▾
- Reports ▾
- Configurations ▾
- About ZED



**< Stock Management**

Dashboard > Stock > **Stock Take**

Select Store Type ▾  
Main store

MainStore ▾  
Main Store

**NEXT**

vi. Choose the product category you are assessing.





## < Stock Management

Dashboard > Stock > **Stock Take**

Search Categories:

Cement >

Paints >

Search products:  CANCEL VIEW BATCH

Product Name	Expected	Actual	Action	Variance
No rows				

Rows per page: 5 ▾ 0-0 of 0 < >

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



## < Stock Management

Dashboard > Stock > **Stock Take**

Search Categories:

Cement >

Paints <

Search products:  CANCEL VIEW BATCH

Product Name	Expected	Actual	Action	Variance
Crown Paint	100	<input type="text"/>	✓	<input type="text" value="100"/>
Duracoot Paint	100	<input type="text"/>	✓	<input type="text" value="100"/>
Salai Paint	100	<input type="text"/>	✓	<input type="text" value="100"/>

1 row selected

Rows per page: 5 ▾ 1-3 of 3 < >



## < Stock Management

Dashboard > Stock > **Stock Take**

Cement >

Paints <

CANCEL
VIEW BATCH

Product Name	Expected	Actual	Action	Variance
Crown Paint	100	<input type="text" value="100"/>	✓	<input type="text" value="0"/>
Duracoat Paint	100	<input type="text" value="100"/>	✓	<input type="text" value="0"/>
Solai Paint	100	<input type="text" value="99"/>	✓	<input type="text" value="1"/>

1 row selected
Rows per page: 5 ▾ 1-3 of 3 < >

- viii. Review the entered details by clicking 'View Batch'.
- ix. Once confirmed, click 'Submit Batch' to finalize the stock take.

## < Stock Management

Dashboard > Stock > **Stock Take**

Batch No:xxxx

Supplier: **supplierName**

Warehouse: **warehouseName**

CLEAR
SUBMIT BATCH

Product Name	expectedQuantity	Actual	Action
Crown Paint	100	100	✖
Duracoat Paint	100	100	✖
Solai Paint	100	99	✖

Rows per page: 5 ▾ 0-0 of 0 < >

## Approval

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

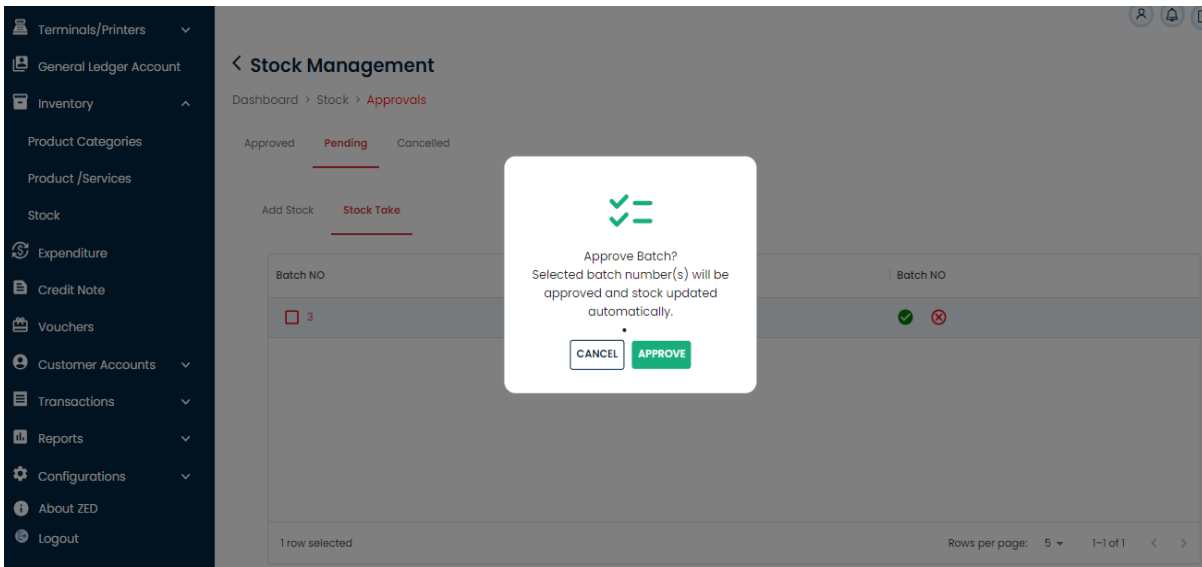
- i. Click on 'Approvals'.
- ii. Select the 'Pending' column under 'Stock Take'.

The screenshot shows the 'Stock Management' interface. At the top, there is a breadcrumb trail: 'Dashboard > Stock > Approvals'. Below this, there are three tabs: 'Approved', 'Pending' (which is selected and underlined), and 'Cancelled'. Under the 'Pending' tab, there are two sub-tabs: 'Add Stock' and 'Stock Take' (which is selected and underlined). The main content area is a table with the following structure:

Batch NO	Date Created	Batch NO
<input type="checkbox"/> 3	3/22/2024 5:58:11 PM	<input checked="" type="checkbox"/> <input type="checkbox"/>

At the bottom right of the table, there is a pagination control: 'Rows per page: 5' followed by '1-1 of 1' and navigation arrows.

- iii. Tick the action button and click 'Approve'.



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

### < Stock Management

Dashboard > Stock > Approvals

Approved Pending Cancelled

Add Stock Stock Take

Batch No	Date Created	Approved On
3	3/22/2024 5:58:11 PM	3/22/2024 5:59:48 PM

Rows per page: 5 1-1 of 1