

School User Guide (Android)



Connecting your **business**
to payments

Table of Contents

Zed Sign Up Process via Mobile	3
1. Installation:	3
2. Sign In:	4
3. PIN Reset:.....	4
4. Login with New PIN:	5
School Set Up in Zed – Mobile.....	6
Selecting A Business.	6
School Details	7
Logo.....	8
Grades & Streams	9
Service Category	10
Adding Services	11
Payment Options	13
Add Parent/Guardian and Students	14
Invoices (Schools) - Mobile.	17
Creating Invoices.....	17
To create invoice by Grade:	18
To create invoice by students:	21
Requesting Payment for Invoices:	25
For M-pesa:	25
For Bank Paybill:.....	26
For Card Payment:.....	26
To Forfeit or cancel an invoice:	27
General Ledger.....	28
Zed Payables.....	30
Configuring Payables.....	30
Debit Account Set up.....	32
Adding Suppliers/Vendors	36
Other Payments (Petty Cash)	38
Approvers.....	39
How to Pay Suppliers/Vendors	41
A. For Inputters:	41
B. For Approvers:	43

How to Pay Other Payments..... 46

 A. For Inputters: 46

 B. For Approvers:..... 49

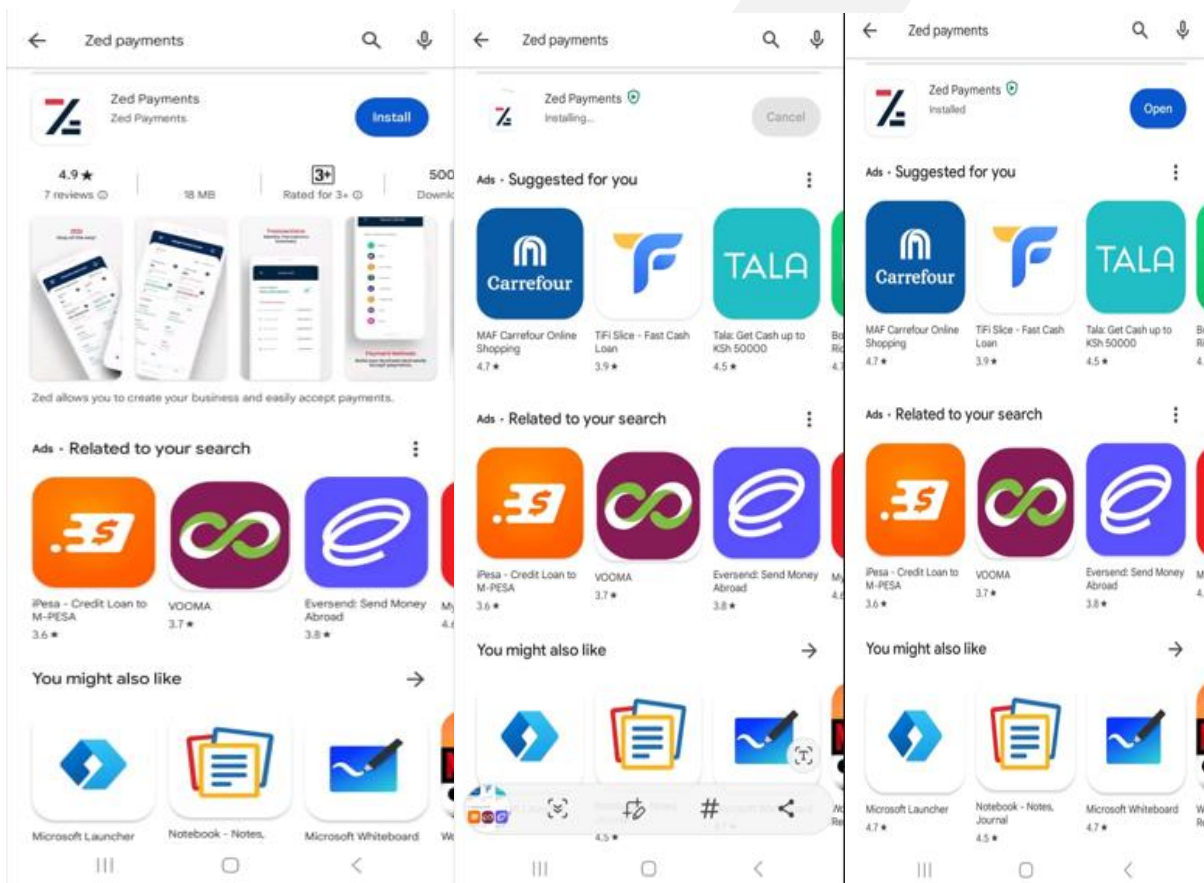


Zed Sign Up Process via Mobile

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

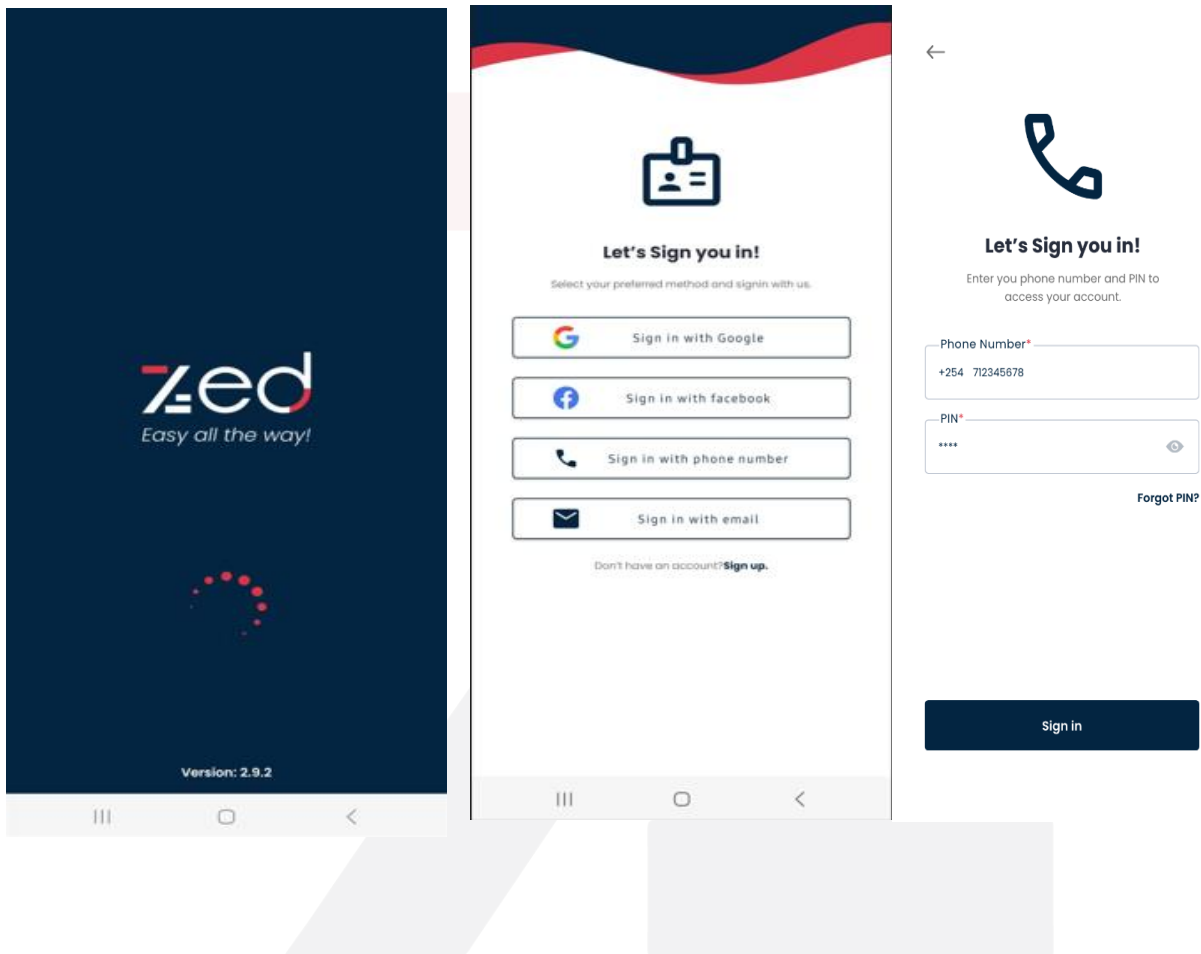
1. Installation:

- 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 Reset:

- 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.

The image displays two side-by-side screenshots of the 'Reset your Pin' screen in the Zed app. Both screens have a dark blue header with the text 'Reset your Pin'. The left screenshot shows the initial form with three input fields: 'Old Pin *', 'New Pin *', and 'Confirm Pin *', each with a toggle icon. A 'RESET' button is at the bottom. The right screenshot shows the same form after the 'Old Pin' field has been filled with four dots, and the 'Confirm Pin *' field has a cursor and four dots. The 'RESET' button is also present.

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.

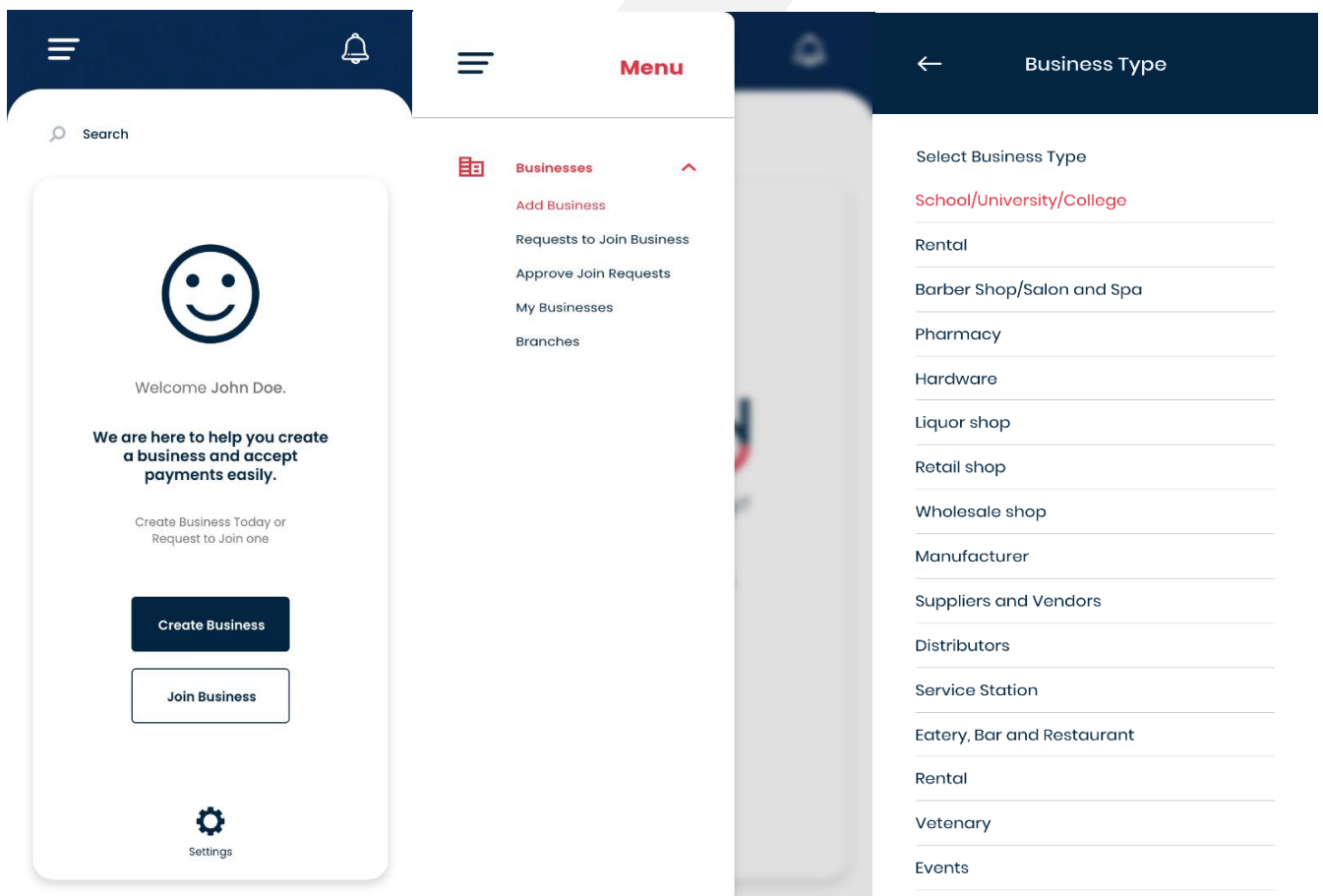
❖ That's it! You're all set to explore and use Zed for your business needs.

School Set Up in Zed – Mobile

This guide aims to help schools set up their business on ZED by creating their service categories, adding payment options, parents and students.

Selecting A Business.

- i. Open your Zed App and sign in.
- ii. Click on the 'Create Business' button.
- iii. Click on 'Add Business'.
- iv. Choose your business type as 'School/University/College', and kickstart the setup.



School Details

- i. In the list of School Types, choose the one that best describes your institution:
 - University/College
 - Secondary School
 - Kindergarten/Junior High School
 - Primary School
- ii. Click the 'Start' button.
- iii. Enter school details, including name, phone number, email, address, country, and currency.
- iv. Click 'Next' and proceed.

Business Types

Select School-Type

University/College
Add supplier name, contact details and location. >

Secondary
Junior and Senior Secondary levels (Grade 7-12) >

Kindergarten/Junior/High School
Elementary school (PP1, PP2), Lower and Upper Primary Levels (Grade 1-6) >

Kindergarten
Elementary school (PP1, PP2), Lower and Upper Primary Levels (Grade 1-6) >

Primary School
Elementary school (PP1, PP2), Lower and Upper Primary Levels (Grade 1-6) >

Set up business

Set-up your business

- 1 Add School Details
- 2 Streams & Grades
- 3 Create Service Categories
- 4 Create Services
- 5 Payment Options
- 6 Add Parent/Guardian and Students

START

Logo

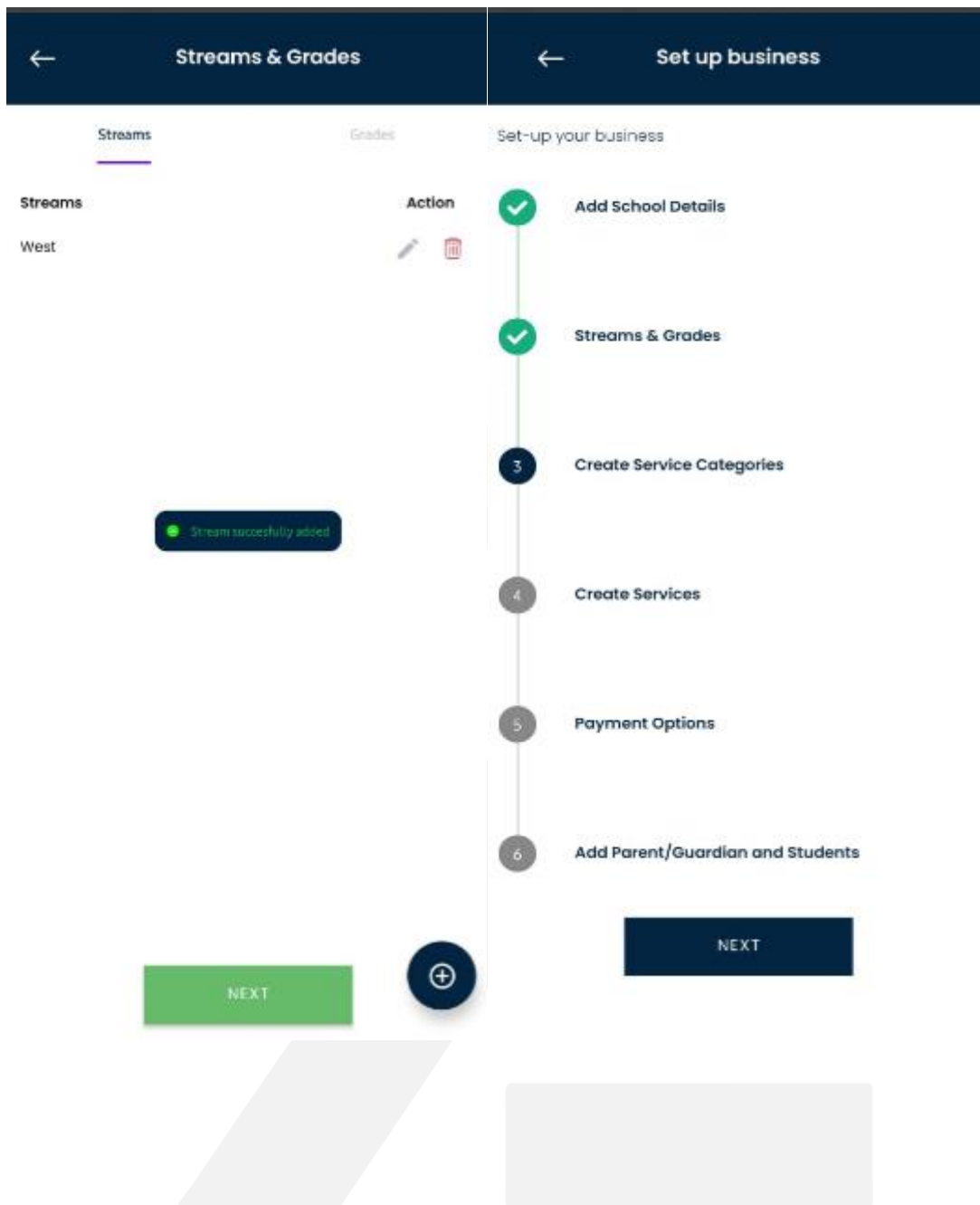
- i. Click the edit icon at the top right to add the school logo
- ii. Use the plus (+) sign to upload from your device.
- iii. Click 'Upload' and then 'Complete' upon successful upload.
- iv. Click 'Next' to advance to the next step.

The screenshot displays the 'Set up business' screen in the Zed app. At the top, there are three navigation tabs: 'School Details', 'Set up business', and 'Upload Logo'. The 'Set up business' screen features a progress indicator on the left with six steps: 1. Add School Details (completed with a green checkmark), 2. Streams & Grades, 3. Create Service Categories, 4. Create Services, 5. Payment Options, and 6. Add Parent/Guardian and Students. Below the progress indicator is a 'Business Logo' section with a red arrow pointing to an edit icon. The 'School Details' section includes fields for School Type (Primary School), School Name (Ashton Primary School), Directors (YT), Phone Number (+2545252556636), Email (ashtonpry@gmail.com), Location (Georgia), Country (Kenya), and Currency (KES). At the bottom of the 'Set up business' screen is a 'NEXT' button. The 'Upload Logo' screen shows a large dashed box for the logo with a plus sign in the center. Below the box are instructions: 'Accepted file formats: png or jpg', 'Recommended size: 350px by 180px', and 'Max. File size: 1MB'. An 'Upload' button is located at the bottom of this screen.

Grades & Streams

- i. Depending on the school type selected, the system will auto generate the grade levels associated with it.
- ii. Use the plus (+) sign to add streams. Input the name of the stream and click 'Add'.
- iii. Add as many as required.
- iv. Click 'Next' to advance to the next step.

The screenshot shows the 'Streams & Grades' interface. The top navigation bar has three tabs: 'Streams & Grades', 'Streams & Grades', and 'Add Streams'. The 'Add Streams' tab is active. Below the navigation bar, there are two tabs: 'Streams' and 'Grades'. The 'Streams' tab is active. On the left side, there is a list of 'Default Grades' with options: Class 1, Class 2, Class 3, Class 4, Class 5, Class 6, Class 7, Class 8, and COMPLETED. In the center, there is a message: 'No Streams Found, Please Add Streams'. On the right side, there is a text input field labeled 'Stream Name*'. At the bottom, there are three buttons: a green 'NEXT' button, a green 'NEXT' button, a dark blue circular button with a white plus sign, a white 'ADD ANOTHER' button, and a dark blue 'ADD' button.



Service Category

- i. Enter the name and description of the service category.
- ii. Click "View" and 'Save'.
- iii. Add as many as required.
- iv. Click 'Next' to proceed to the next step.

The screenshot displays the Zed app interface for adding service categories and setting up a business. It is divided into three main sections:

- Add Service Category (Left):** Contains two input fields: "Category Name*" and "Category Description*".
- Add Service Category (Middle):** Shows a list of added services. Two items are visible: "Tuition Fees" and "Transport", each with a "Remove" button next to it.
- Set up business (Right):** Features a vertical progress bar with six steps:
 - Add School Details (Completed, green checkmark)
 - Streams & Grades (Completed, green checkmark)
 - Create Service Categories (Active, green checkmark)
 - Create Services (Upcoming, grey circle)
 - Payment Options (Upcoming, grey circle)
 - Add Parent/Guardian and Students (Upcoming, grey circle)

At the bottom, there are several action buttons: "ADD ANOTHER" (dark blue), "VIEW" (white), "ADD ANOTHER" (dark blue), "SAVE" (white), and "NEXT" (dark blue).

Adding Services

- i. Enter the service details including the service type & category, amount type & price, grade & term, and service description.
- ii. Click "View" and 'Save'.
- iii. Add as many as required.
- iv. Click 'Next' to proceed to the next step.

Add Service

Service Name*
Service Category*
Grade Term
Amount*
Service Description*

This service can be requested.

Add Service

Service Name*
Class 1 Term 1 Fee
Service Category*
Tuition Fees
Grade Term
Class 1 Term 1
Amount*
20000
Service Description*
Class 1 Term 1 Fee

This service can be requested.

ADD ANOTHER

ADD

ADD ANOTHER

VIEW(1)

Add Service

Tuition Fees
Class 1 Term 1 Fee
Fixed KES 20,000

Tuition Fees
Class 1 Term 2 Fee
Fixed KES 20,000

Set up business

Set-up your business

- Remove ✓ Add School Details
- Remove ✓ Streams & Grades
- ✓ Create Service Categories
- ✓ Create Services
- 5 Payment Options
- 6 Add Parent/Guardian and Students

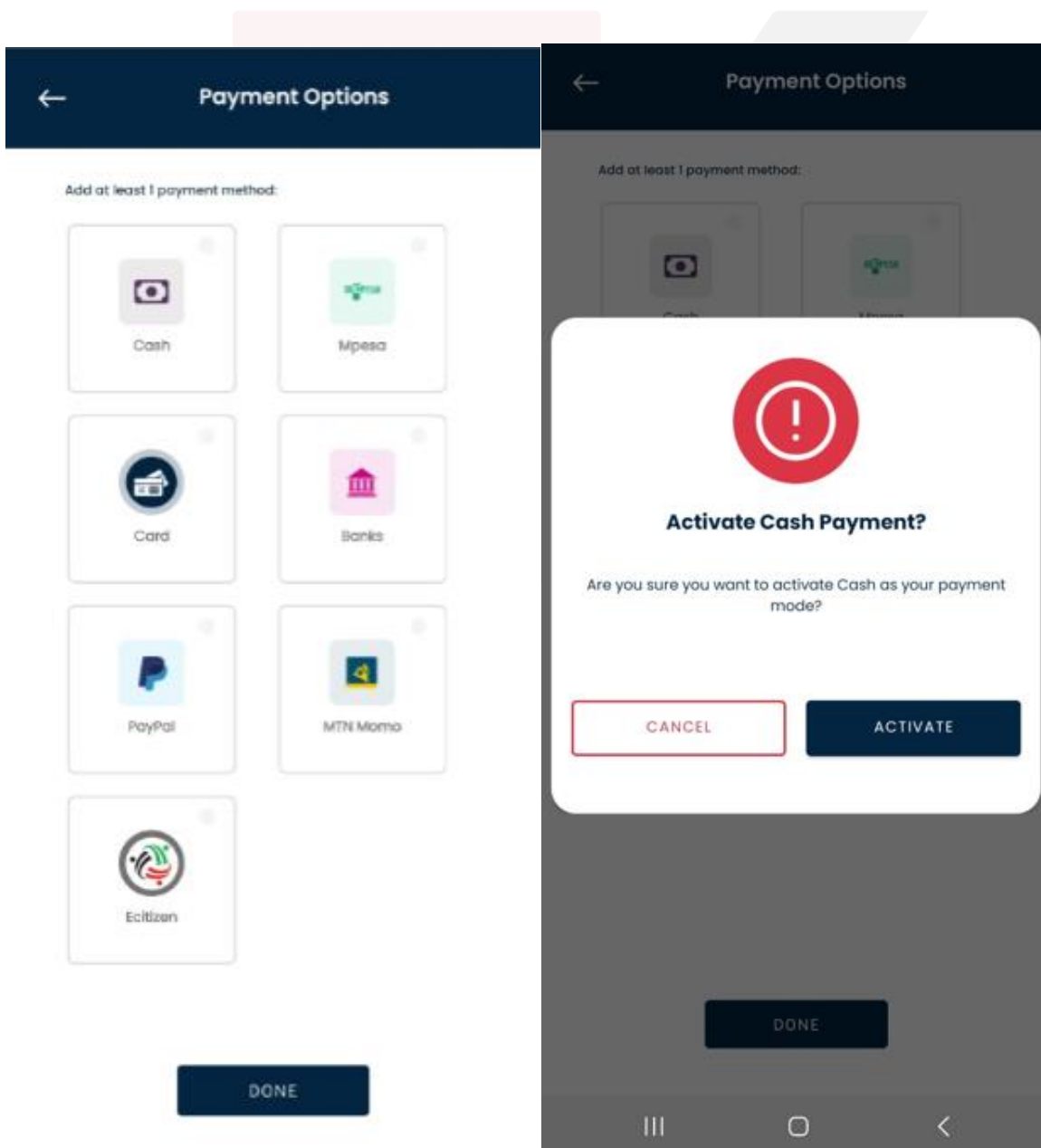
ADD ANOTHER

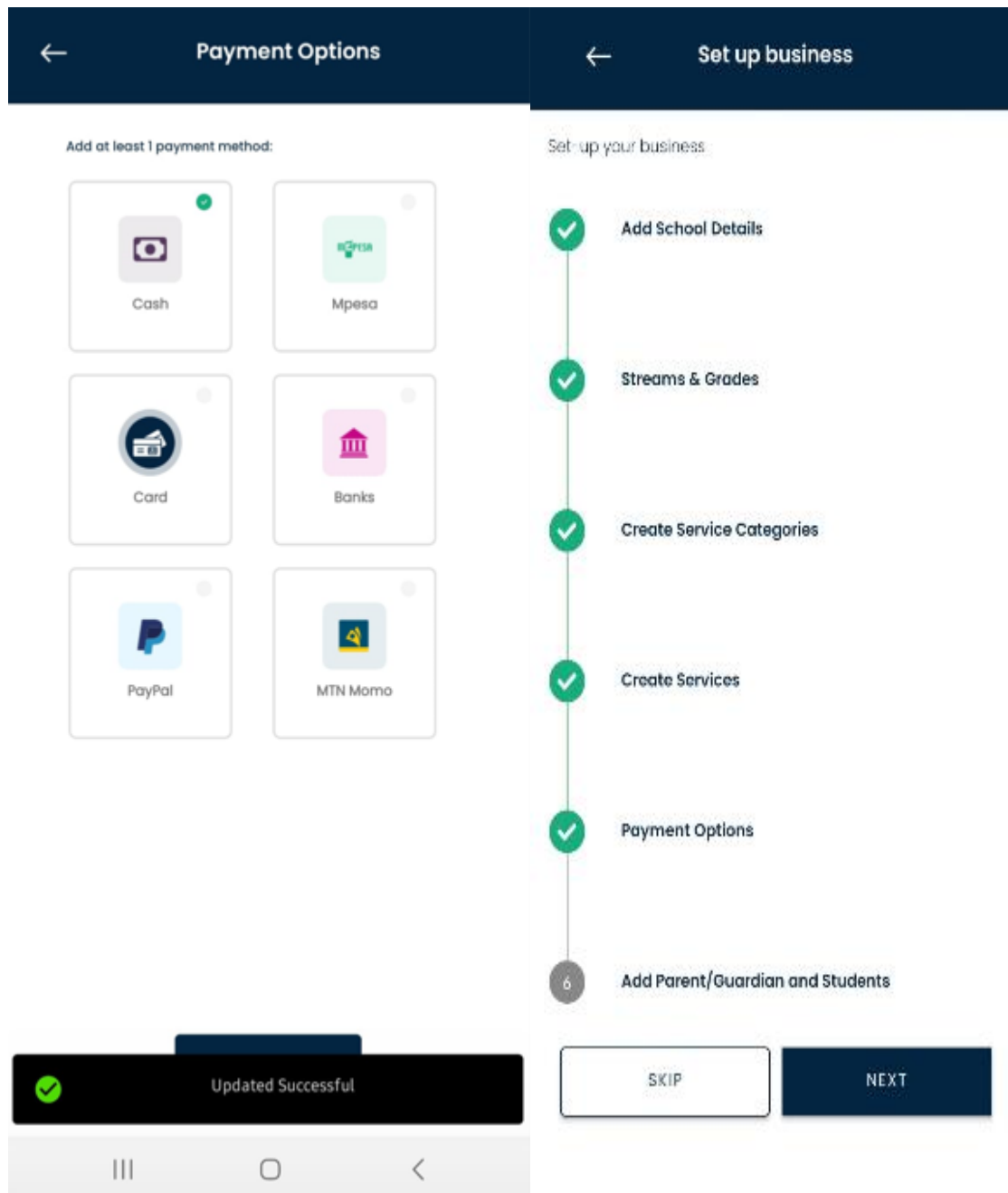
SAVE

NEXT

Payment Options

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





Add Parent/Guardian and Students

- i. Enter parent/guardian details including name, gender, phone number, email address and physical address.
- ii. Click 'Next' button.

- iii. Enter student details including:
 - Admission number
 - Admission date
 - Name
 - Date of Birth
 - Gender
 - Grade & Stream
 - Term
 - Additional information if any
- iv. Click 'Add' button
- v. Follow the same procedure to add more parents/guardians and students.
- vi. Click 'Done'.

← Add Parent / Guardian
← Add Student

Add Primary Parent/Guardian(Compulsory)

Gender ▼

KE +254 ▼

Email Address

Physical Address

Admission Number *

Admission Date*
 2024-04-18 ▼

Date of Birth*
 2024-04-18 ▼

Gender ▼

Grade ▼

Stream ▼

Term ▼

Schooling ▼

Additional Information

BACK

NEXT

ADD ANOTHER

ADD

← **Add Student** ← **Set up business**

Admission Number *
A001

Admission Date*
2024-04-18

First Name * Jane Last Name * Doe

Date of Birth*
2018-04-16

Gender
Female

Grade Class 1 Stream West

Term Term 1 Schooling Day Scholar

Additional Information

ADD ANOTHER ADD

ADD ANOTHER ADD

Set-up your business

- ✓ Add School Details
- ✓ Streams & Grades
- ✓ Create Service Categories
- ✓ Create Services
- ✓ Payment Options
- ✓ Add Parent/Guardian and Students

DONE

 Your institution is now set to thrive with ZED.

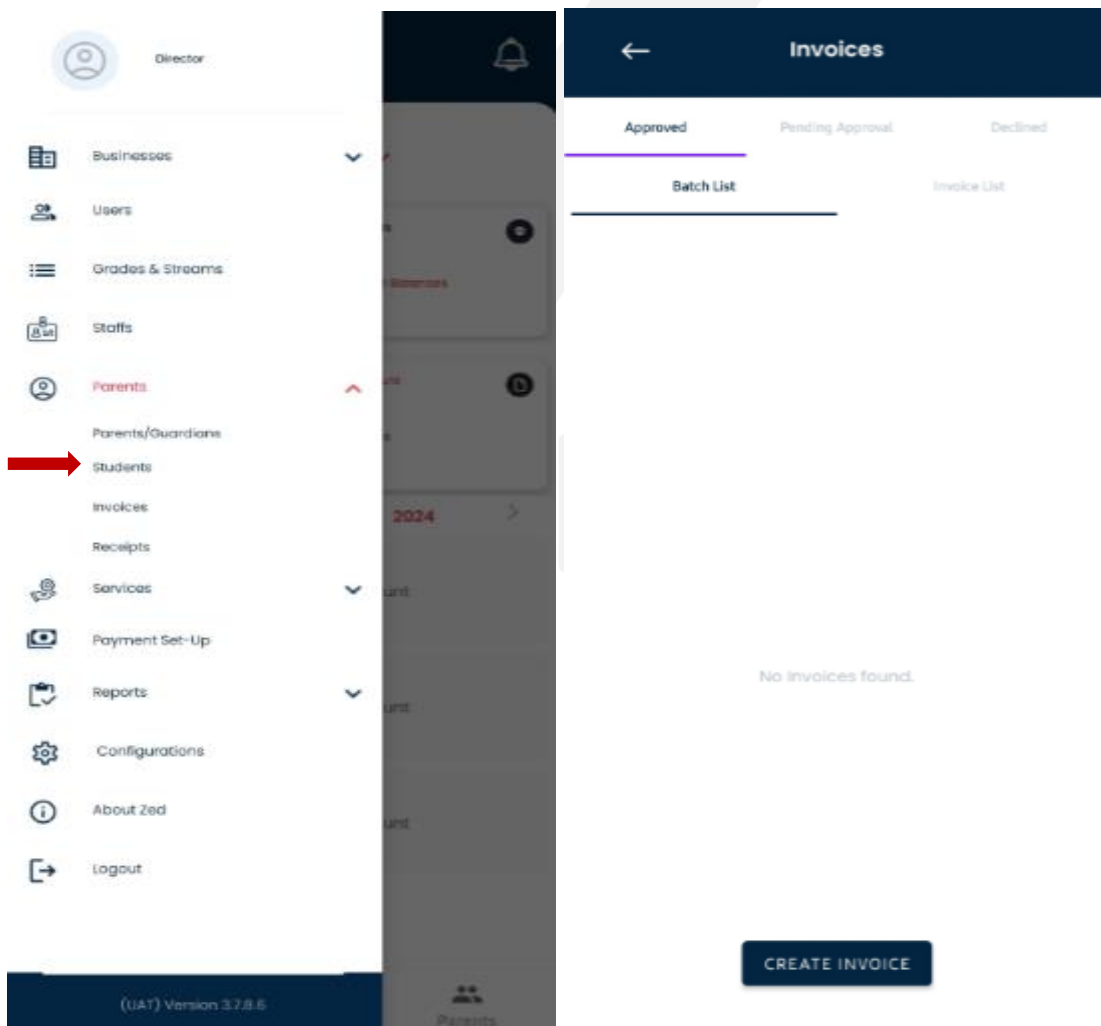
Invoices (Schools) - Mobile.

Creating Invoices

This guide provides instructions for schools on how to use Zed to generate invoices and share them directly to parents.

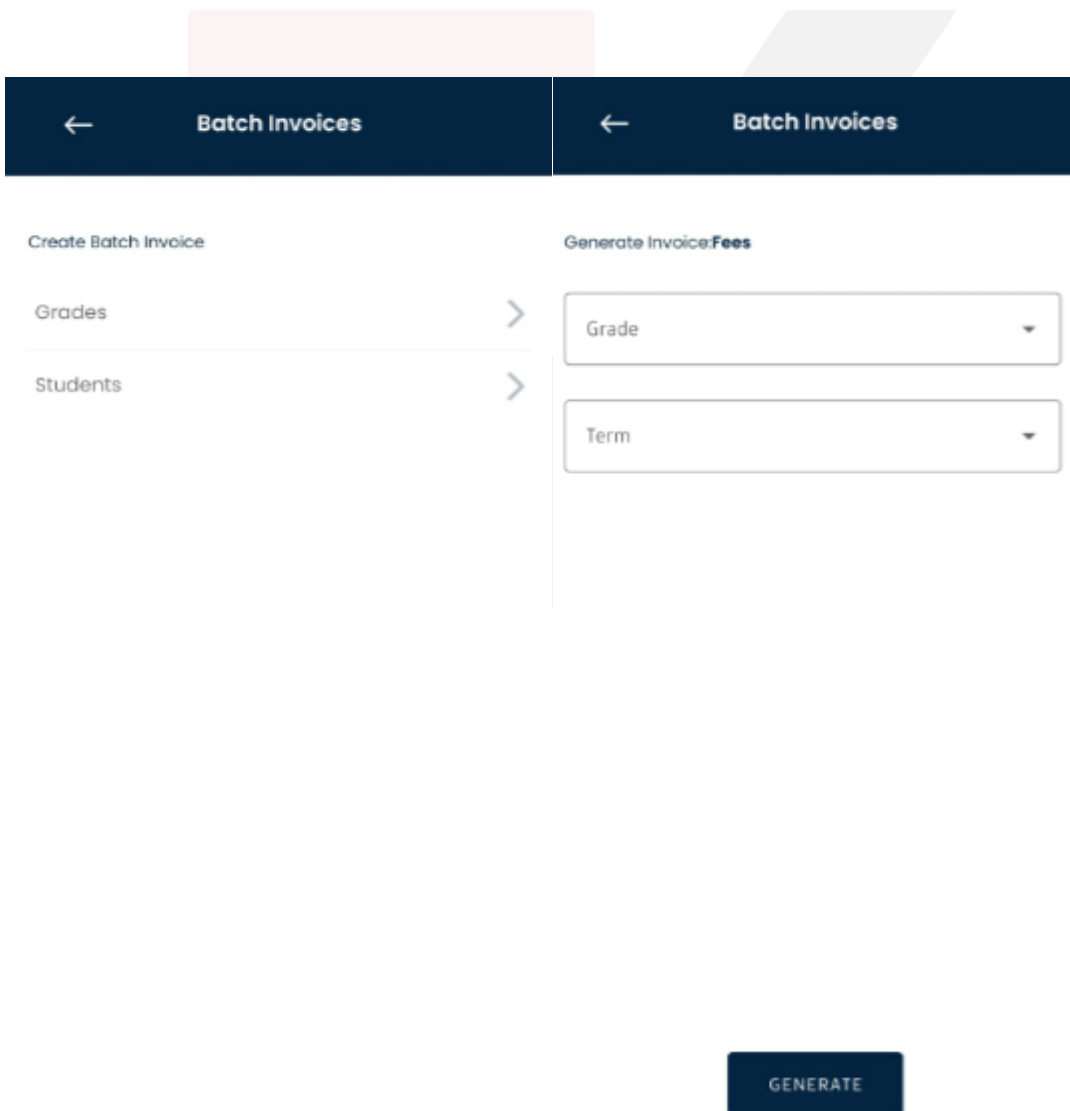
To accomplish this:

- i. Log in to your Zed account.
- ii. From the main menu, select “Parents” then click on the “Invoices” option, which will take you to the landing page.
- iii. Click the “Create Invoice” button and choose between creating batch invoices by grades or by students.



To create invoice by Grade:

- i. Click “Grades” and select the desired grade and term of the students for whom you want create invoices.
- ii. Click the ‘Generate’ button.
- iii. After generating the invoice batch, go to the “Pending Approval” section to approve the batch.



The screenshot displays the 'Batch Invoices' interface. At the top, there are two dark blue navigation bars, each with a left-pointing arrow and the text 'Batch Invoices'. Below the first bar, the section is titled 'Create Batch Invoice' and contains two items: 'Grades' and 'Students', each with a right-pointing arrow. Below the second bar, the section is titled 'Generate Invoice Fees' and contains two dropdown menus: 'Grade' and 'Term'. At the bottom center of the interface is a dark blue button with the text 'GENERATE' in white capital letters.

Batch Invoices

Generate Invoice: **Fees**

Grade
Class 1

Term
Term 1

GENERATE (1)

Invoices

Approved **Pending Approval** Declined

Batch No	Total Invoices	Total Amount	Created On	Action
AshtonPrimarySchool_1	1	KES 20,000	04/08/2024	<input type="checkbox"/>

Success created

- v. Tick the action box and click the 'Approve' button.
- vi. Select 'Proceed' option.
- vii. Batch will be successfully approved and invoices sent to parents/guardians via email and WhatsApp.

← Invoices

Approved Pending Approval Declined

Batch No	Total Invoices	Total Amount	Created On	Action
AshtonPrimary5 school_1	1	KES 20,000	04/16/2024	<input checked="" type="checkbox"/>

← Invoices

Approved Pending Approval Declined

Batch No	Total Invoices	Total Amount	Created On	Action
AshtonPrimary5 school_1	1	KES 20,000	04/16/2024	<input checked="" type="checkbox"/>

Batch(s) Approval
Total Number Of Invoices 1

By approving this batch(s), invoices will be sent to the respective parent(s).

NOTE: This action cannot be reversed.
Do you want to proceed?

CANCEL
PROCEED

Decline(1)
Approve(1)

← Invoices

Approved Pending Approval Declined

Batch List Invoice List

Batch No	Total Invoices	Total Amount	Invoice Due	Amount Due
AshtonPrimary5 school_1	1	KES 20,000	1	KES 20,000

Batch approved, Email sent

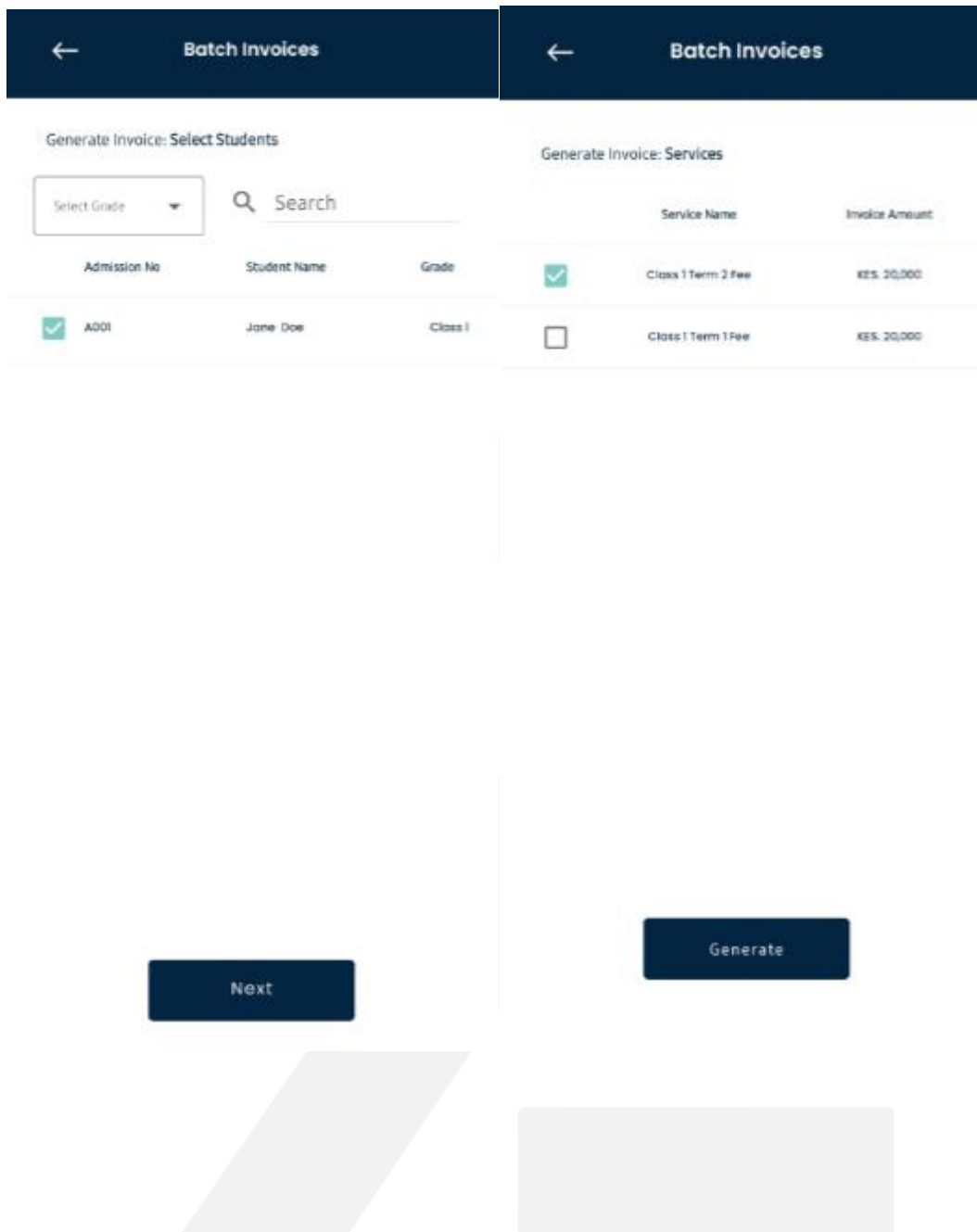
CREATE INVOICE

To create invoice by students:

- i. Click on “Students”.
- ii. Select the student’s name by checking the corresponding box.
- iii. Choose the services linked to the student and click on “Generate”.

The screenshot shows a mobile application interface for 'Batch Invoices'. On the left, a sidebar menu has 'Students' selected. The main screen is titled 'Generate Invoice: Select Students' and features a 'Select Grade' dropdown, a search bar, and a table of students. A 'Next' button is located at the bottom right.

Admission No	Student Name	Grade
<input type="checkbox"/> A001	Jane Doe	Class I



- iv. The student's invoice will be produced;
- v. Navigate to the "Pending Approval" section to authorize the invoice.
- vi. Tick the action box and click the 'Approve' button.
- vii. Select 'Proceed' option.

Invoices

Approved Pending Approval Declined

Batch No	Total Invoices	Total Amount	Created On	Action
AshlanPrimarySchool_2	1	KES 20,000	04/18/2024	<input type="checkbox"/>

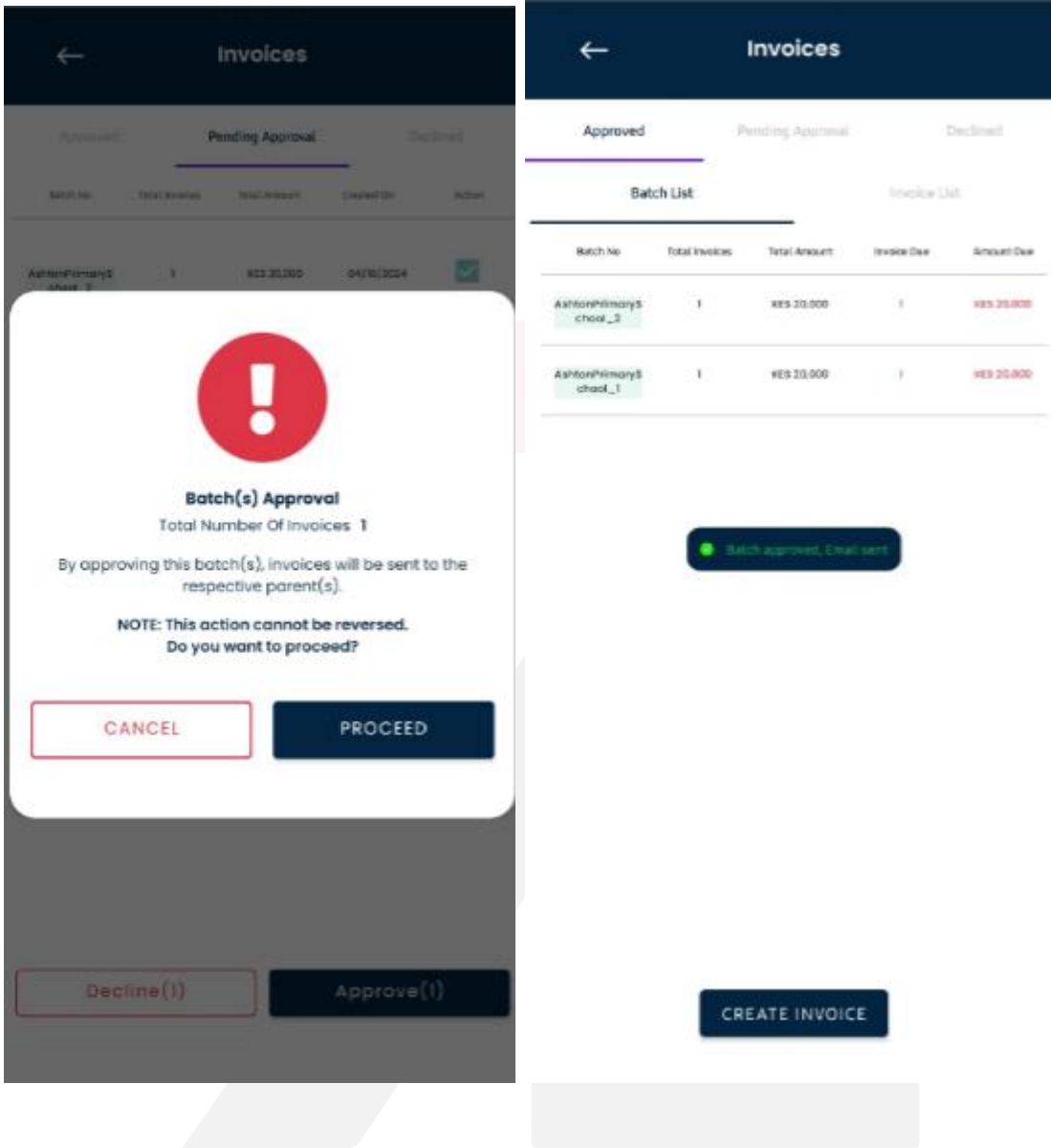
Success created

Invoices

Approved Pending Approval Declined

Batch No	Total Invoices	Total Amount	Created On	Action
AshlanPrimarySchool_2	1	KES 20,000	04/18/2024	<input checked="" type="checkbox"/>

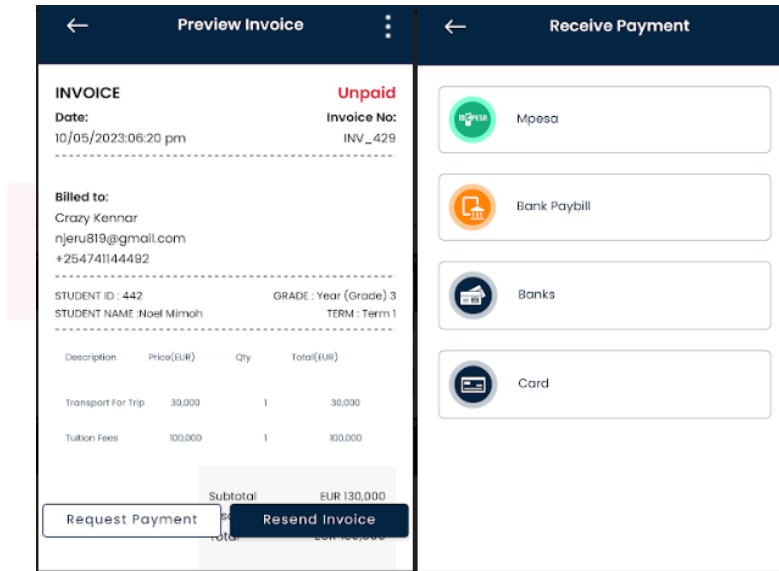
Decline(1) Approve(1)



viii. Batch will be successfully approved and invoices sent to parents/guardians via email and WhatsApp.

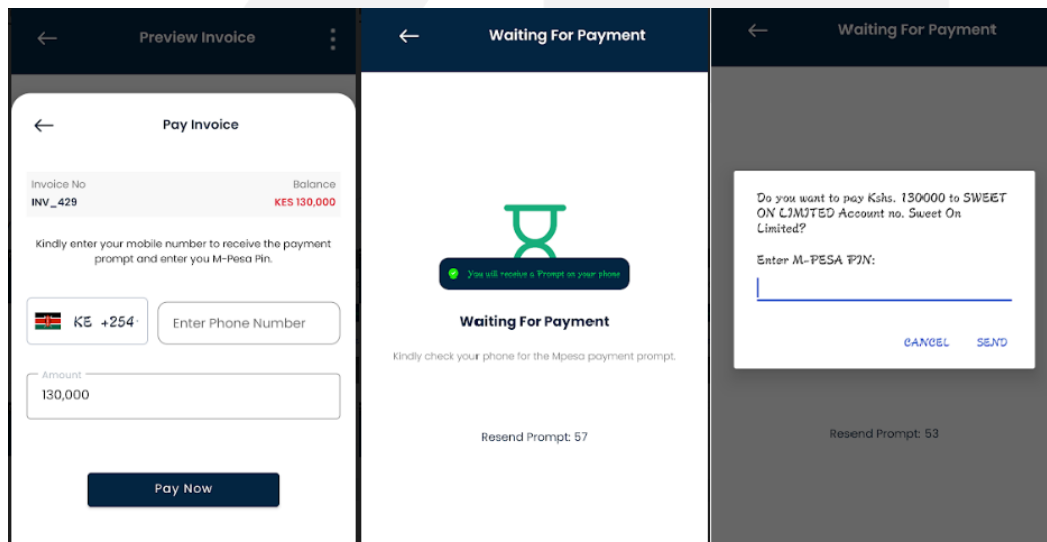
Requesting Payment for Invoices:

- i. Select and click on the invoice batch number, then click on “Sent” and choose “Request Payment.”
- ii. Choose the desired mode of payment such as M-pesa, Bank Paybill, Banks or Card.



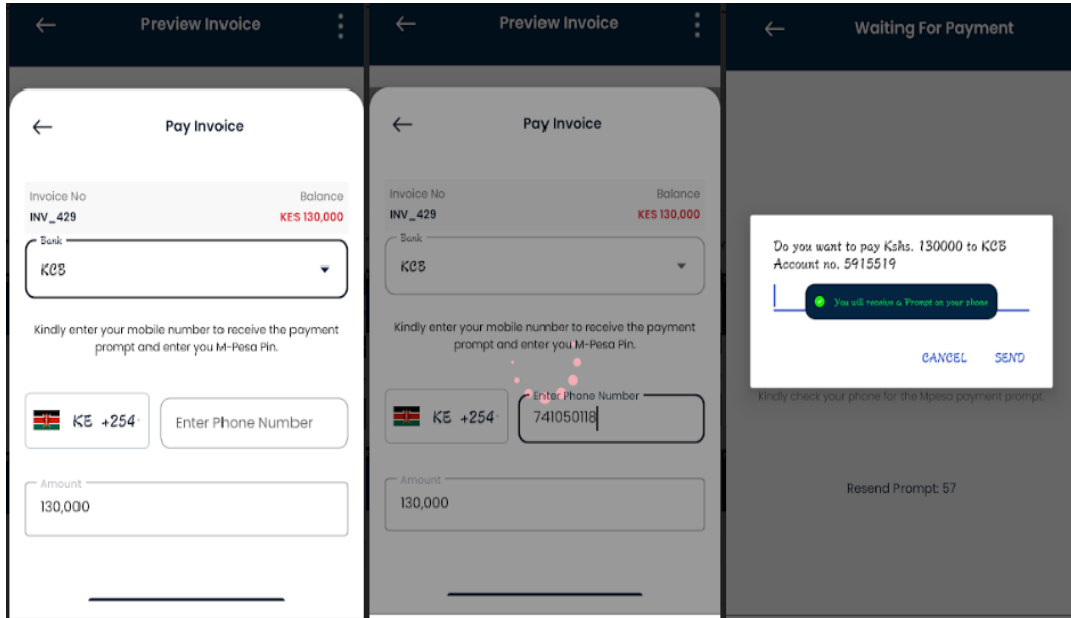
For M-pesa:

- i. Select M-pesa as the mode of payment and provide the mobile number to receive the payment prompt.
- ii. Then, enter your M-pesa PIN.



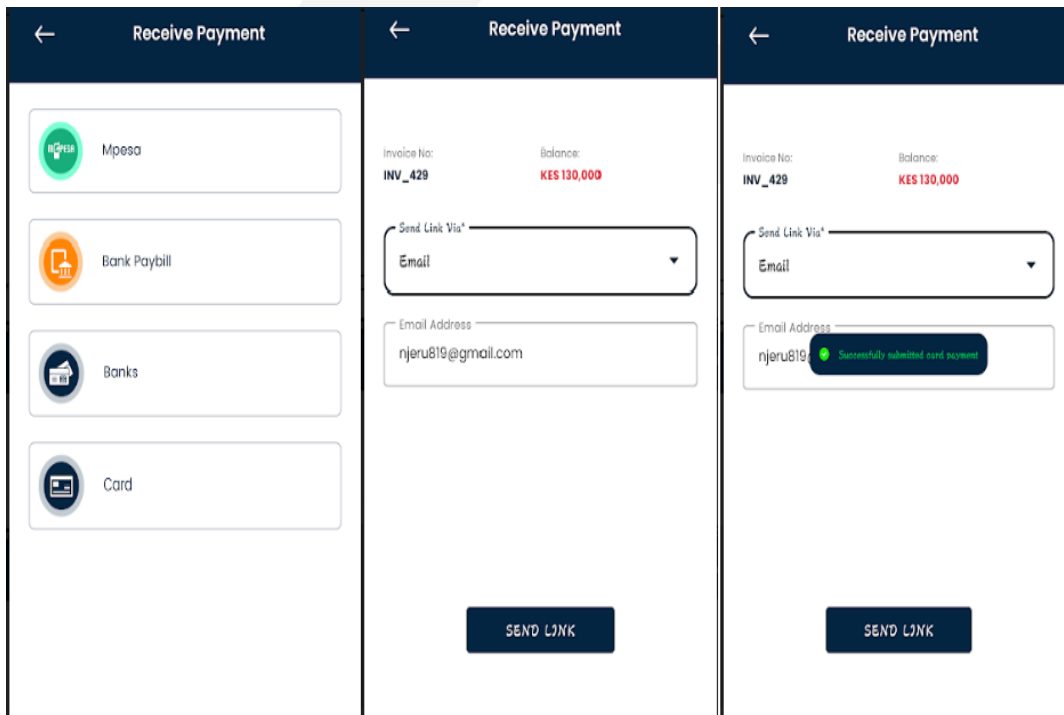
For Bank Paybill:

- i. Select the bank name from the drop-down menu
- ii. Enter the phone number to receive a prompt from KCB or the desired bank to complete the payment process.



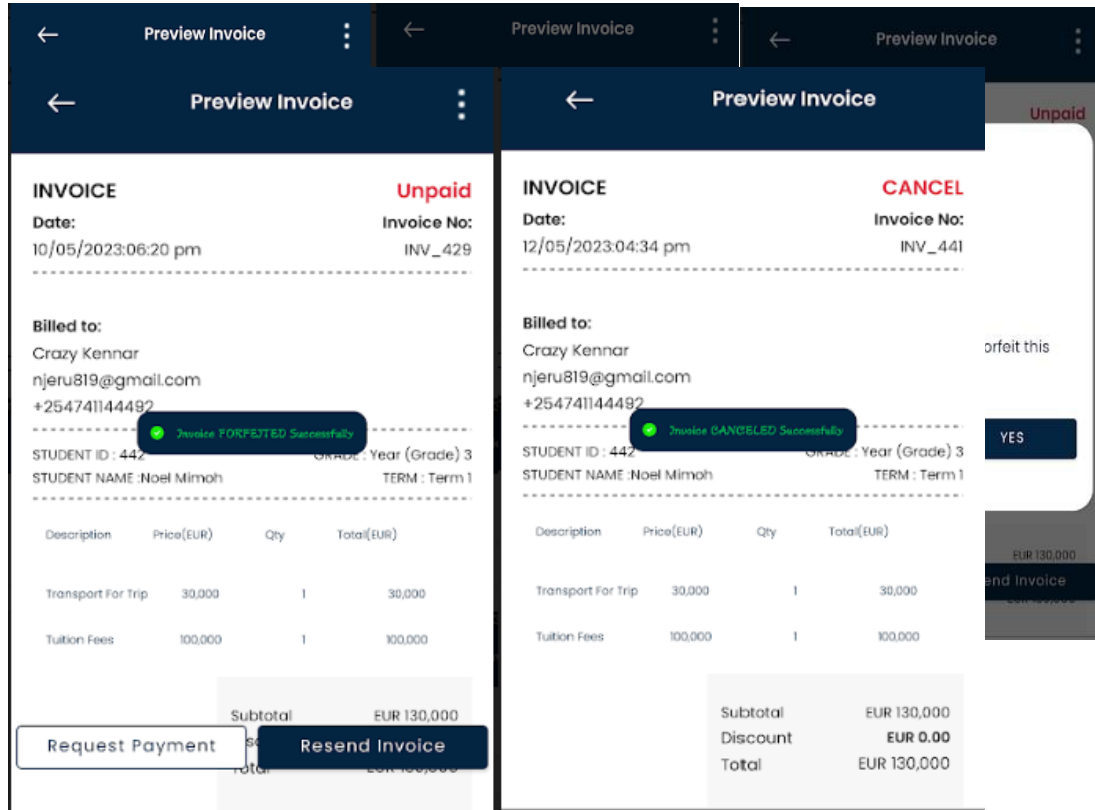
For Card Payment:

- i. Choose “card” as the mode of payment and decide whether to send the link to the parent/guardian through WhatsApp or Email.



To Forfeit or cancel an invoice:

Simply click on the three stacked dots at the top of your screen and choose to forfeit or cancel the invoice.



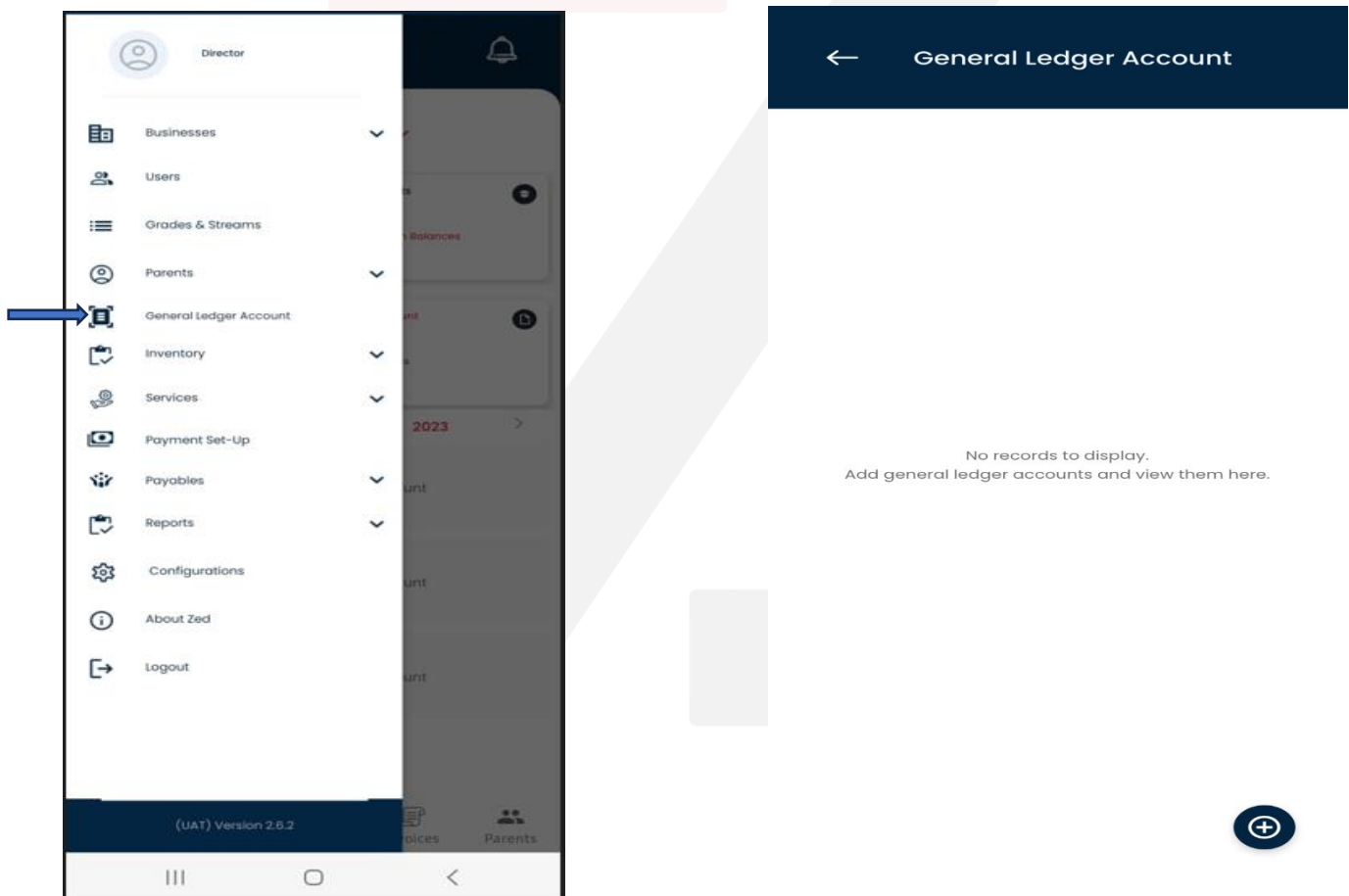
Invoice will be forfeited and cancelled successfully.

General Ledger

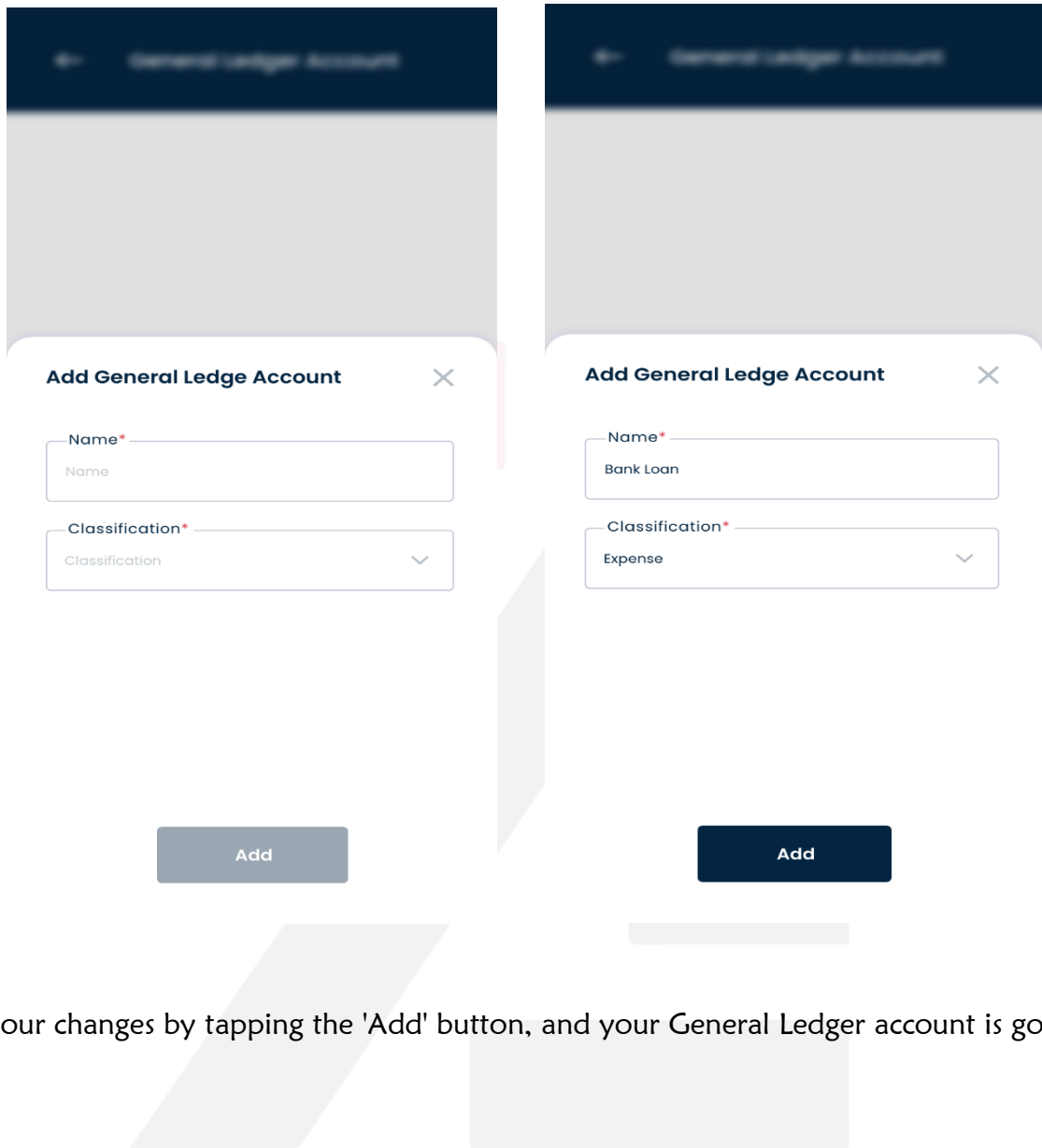
A general ledger is a financial record that keeps track of all the money coming in and going out of a business.

Creating a GL Account on Zed App is easy:

- i. Log in to Zed and select 'General Ledger Account' from the menu.
- ii. Tap the plus (+) sign to enter your account details.



- iii. Fill in the Name and Classification in the provided fields.



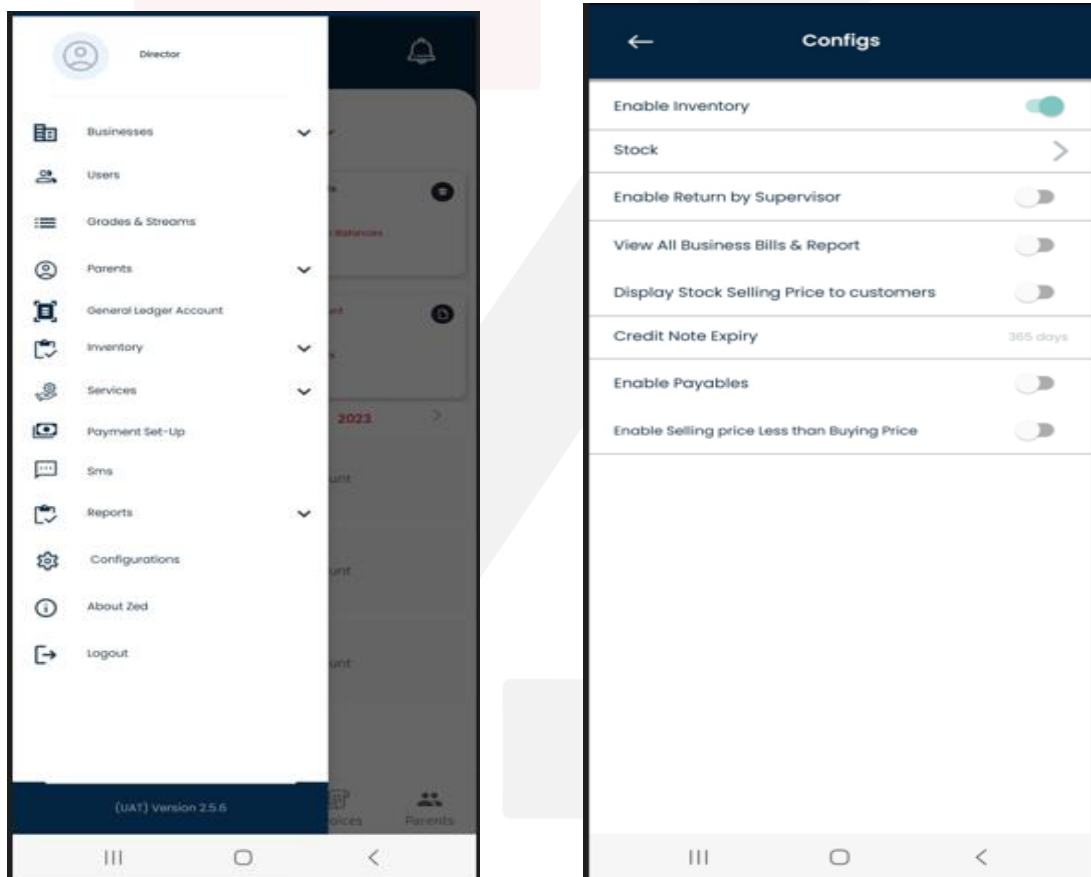
- iv. Save your changes by tapping the 'Add' button, and your General Ledger account is good to go!

Zed Payables

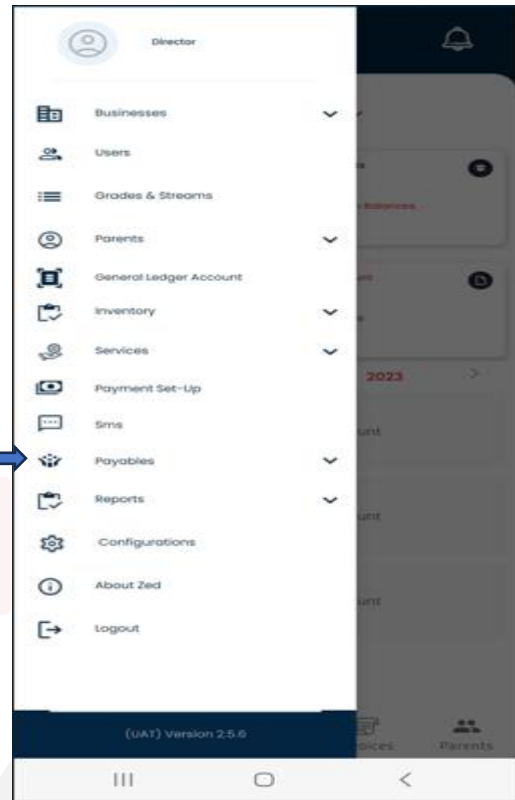
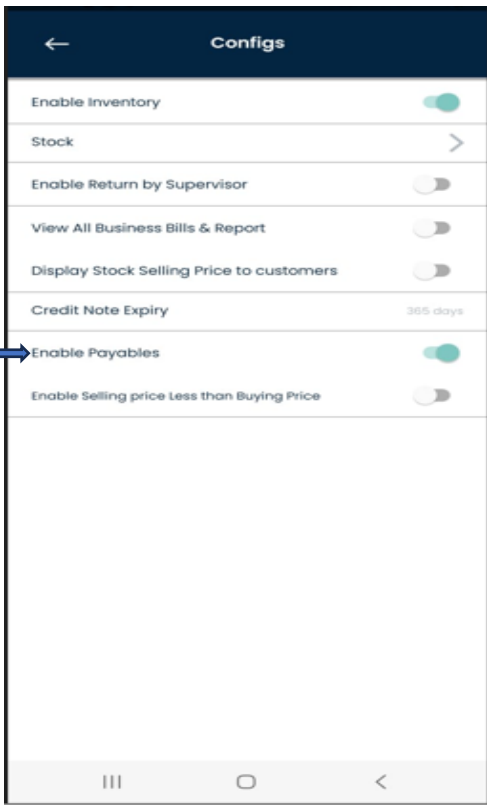
Payables encompass the school's financial obligations to suppliers, service providers, and various parties, including unpaid bills and invoices. This guide will walk you through how to use the payables feature in Zed.

Configuring Payables

- i. Access the menu and choose 'Configurations.'
- ii. In the Configurations menu, find the toggle button for 'Enable Payables.'



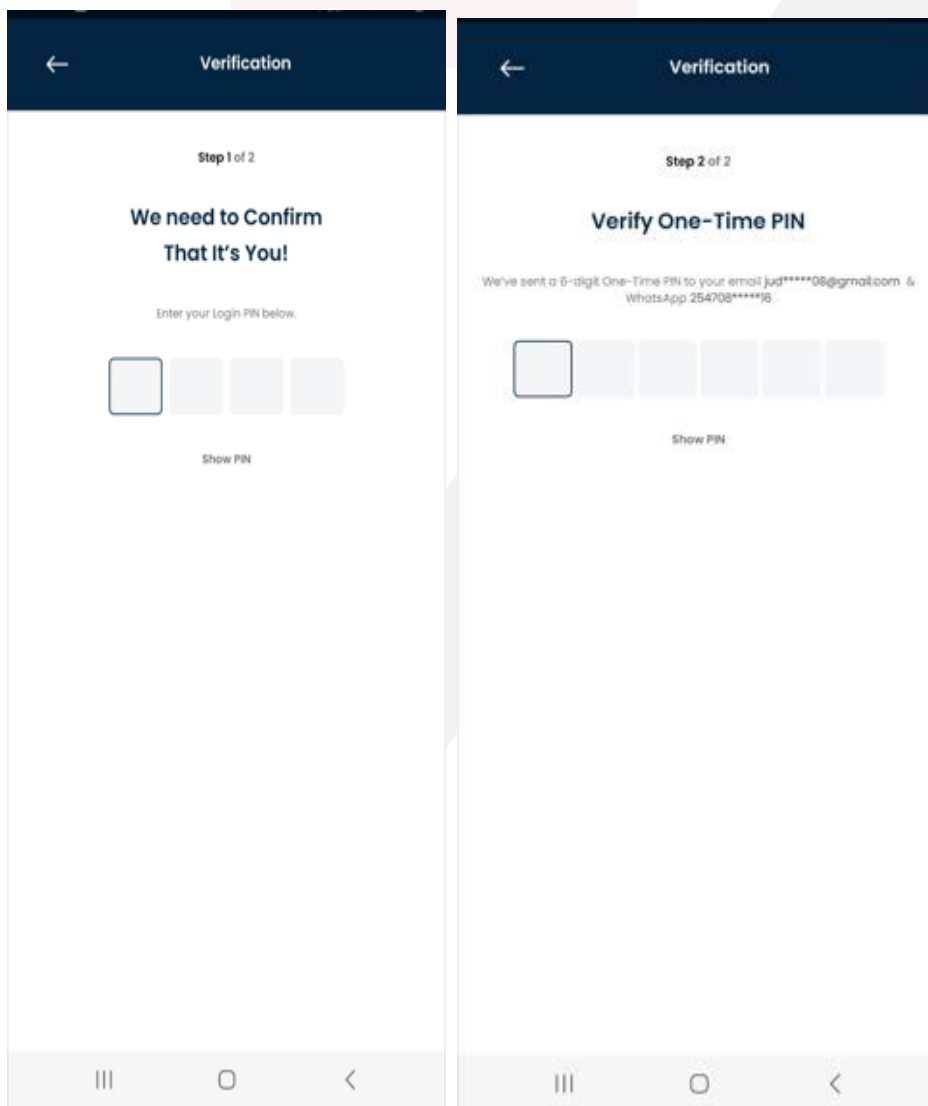
- iii. Activate the feature by simply tapping the button, it will turn into a green color.
- iv. Go back to the side menu and you will notice a “Payables” menu is availed.



Debit Account Set up

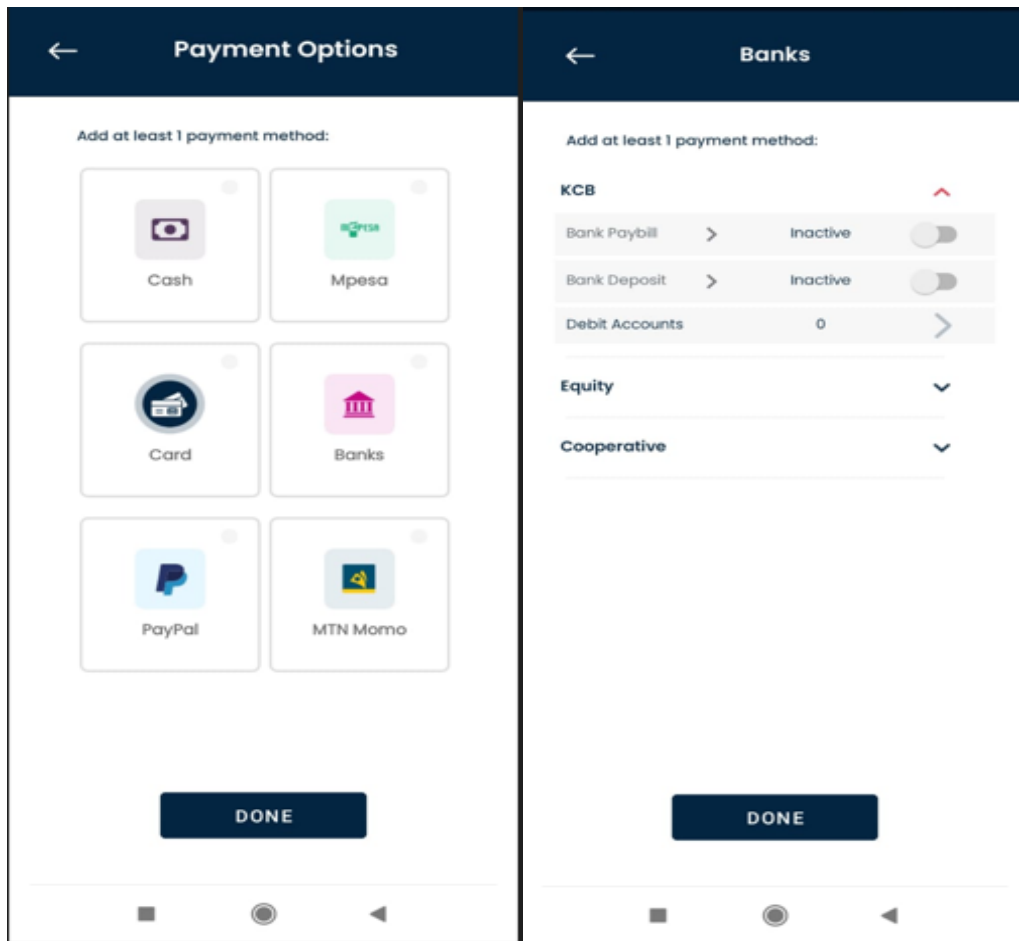
Follow these steps to establish a Debit Account for handling payments to suppliers and service providers:

- i. Navigate to 'Payment Setup' to specify the funding source, which may be your school's bank account.
- ii. Enter your Login Pin to confirm your identity.
- iii. You'll receive a one-time pin on both your WhatsApp and email for verification purposes.
- iv. Enter the 6-digit code provided for verification.

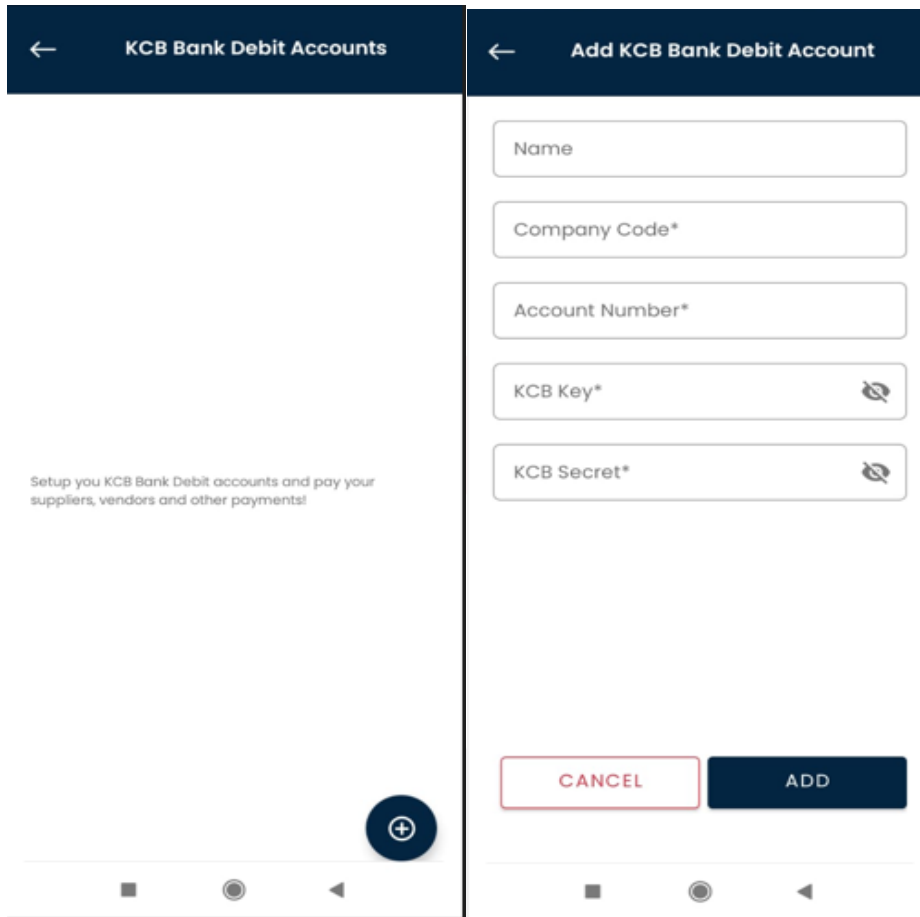




- v. Click on the 'Banks' button and select your bank from the list provided (for example, KCB).
- vi. Opt for 'Debit Accounts' to configure the account specifically designated for handling payments.



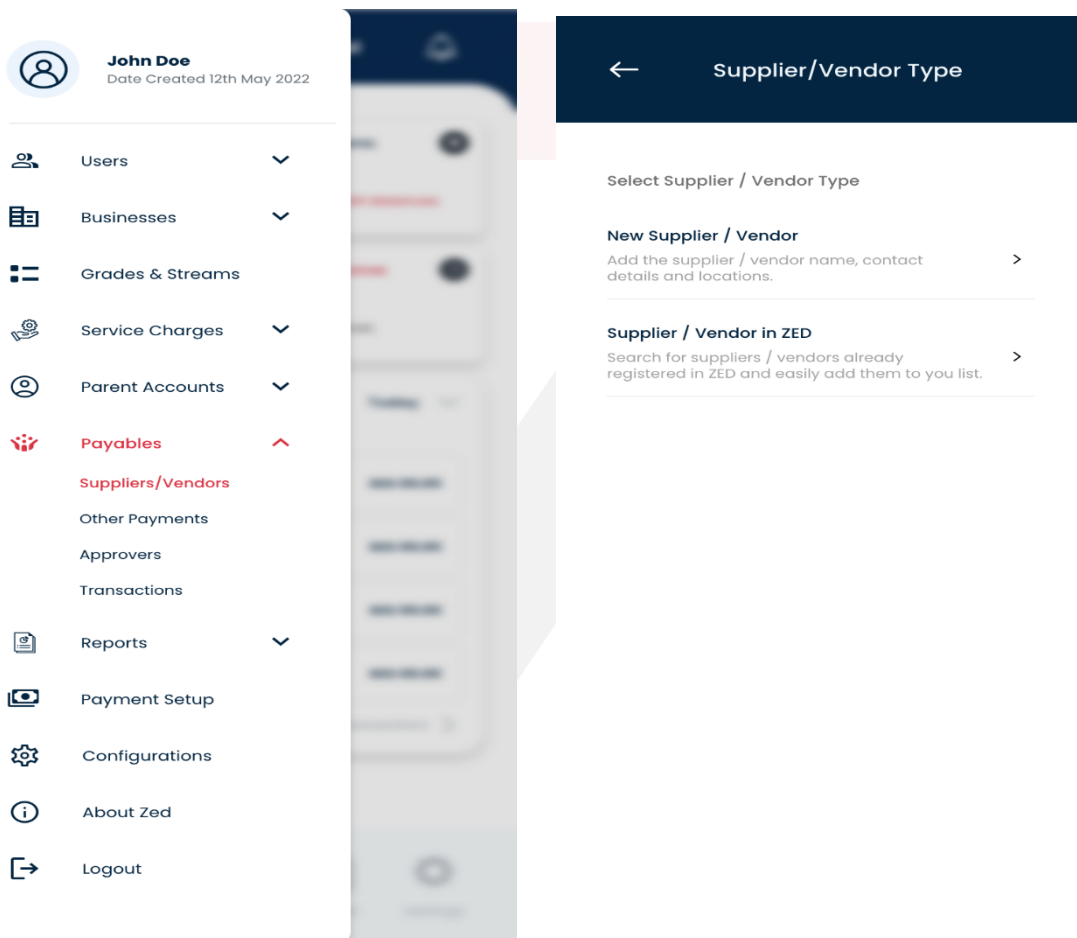
- vii. Click the plus (+) sign, and then provide the necessary information, including Name, Company Code, Account Number, Bank Key, and Secret Key.
- viii. Once you've entered the details, save your changes by clicking the 'Add' button.



Adding Suppliers/Vendors

To include your suppliers and service providers, those who provide goods or services to your business or school, simply follow these steps:

- i. Access the menu and select 'Payables,' then choose 'Suppliers/Vendors.'
- ii. Click the plus (+) sign and specify the Supplier/Vendor Type.



- iii. To add a new Supplier/Vendor, please provide the following information:
 - Input their Name, Phone Number, Email Address, Location, Bank, Account Number, and Description.
- iv. Save the details by clicking the 'Add' button.

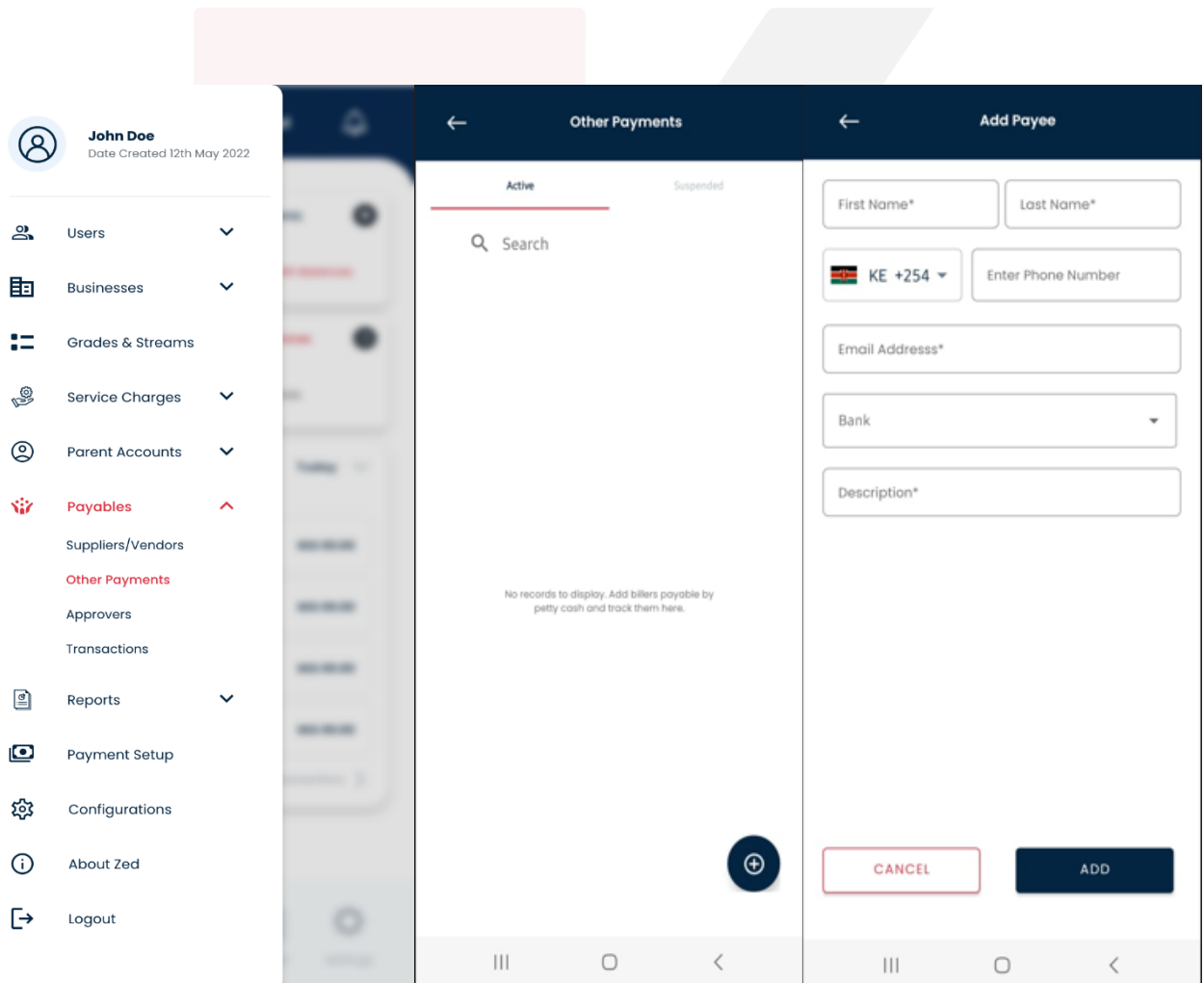
Field	Value
Supplier/Vendor Name*	Fast Suppliers Limited
Mobile Number*	+254 +25478907745
Email Address*	info@fastsuppliers.com
Location*	State Building, Kangundo Road
Bank*	KCB BANK
Account Number*	0743848U4393494
Description	Stationery Supplier

v. To add Supplier/Vendors in Zed, search for them by their name and include them in your list.

Other Payments (Petty Cash)

Here, you can input information for billers paid through petty cash and other internal transactions, helping you manage and track these payments effectively.

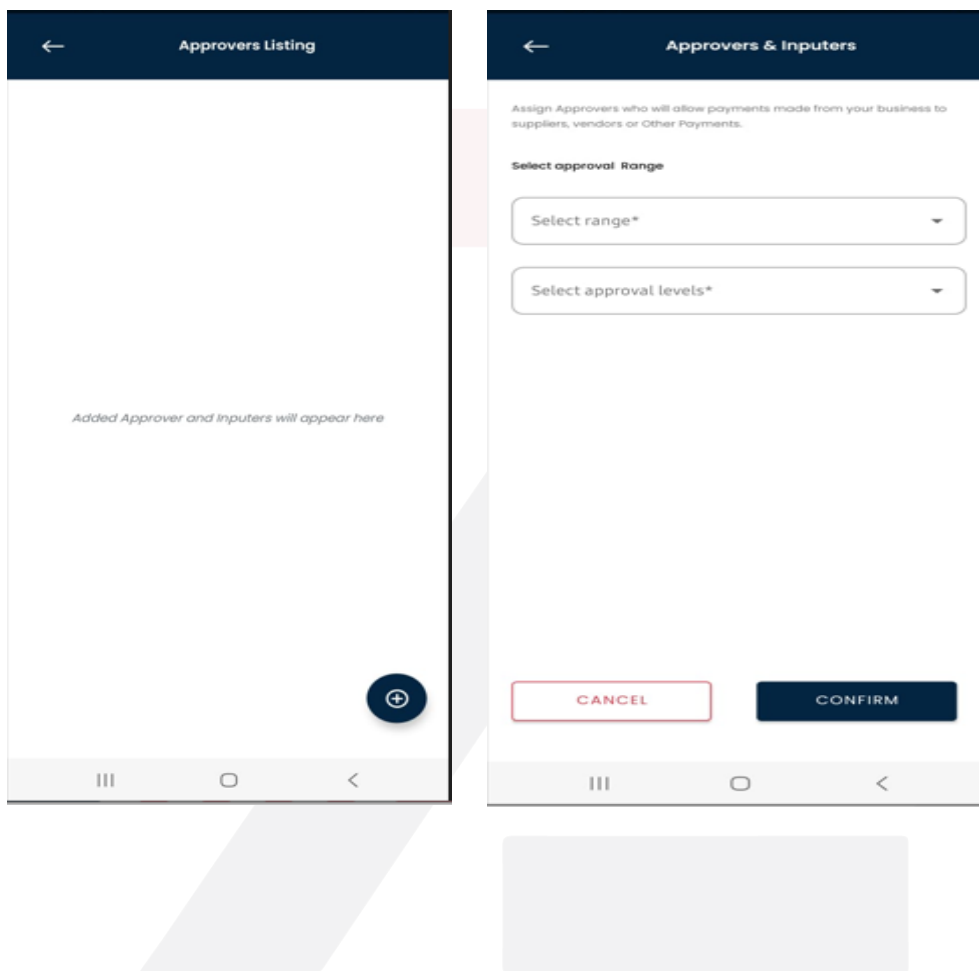
- i. Go to the Menu and select 'Payables,' then click 'Other Payments.'
- ii. Use the plus (+) sign to add payee details.
- iii. Fill in the payee's Name, Phone Number, Email Address, Bank, and Description.
- iv. To save the details, simply click the 'Add' button.



Approvers

To manage Approvers, who are responsible for requesting and approving payments, follow these steps:

- i. Access the Menu, then choose 'Payables' and select 'Approvers.' Click the plus (+) sign.
- ii. Set the Range and define the Approval Levels as needed.



- iii. When choosing a range, you're setting the exact monetary limits that an inputter or approver will handle.
- iv. In the Approval Level, you decide how many levels you want to create for the process.

← Approvers

Assign approvers who will allow payments made from your business to suppliers, vendors or petty cash.

Select approval Range

Select range*
Approval range levels

- Ksh 1 - 250,000
- Ksh 1 - 500,000
- Ksh 1 - 1,000,000
- Ksh 1 - 5,000,000
- Ksh 1 - 10,000,000

← Approvers

Assign approvers who will allow payments made from your business to suppliers, vendors or petty cash.

Select approval Range

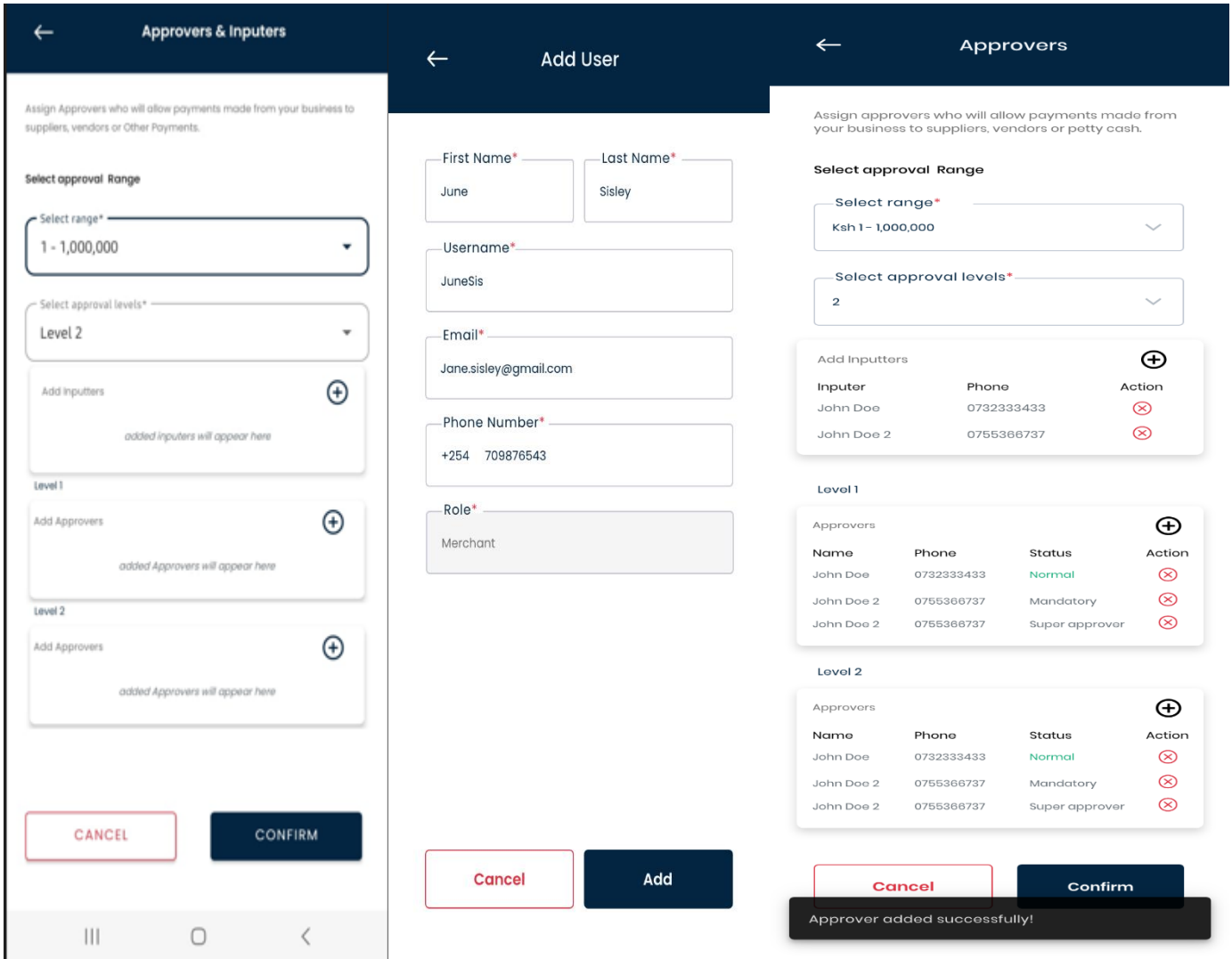
Select range*
Ksh 1 - 1,000,000

Select approval levels*
Number of approval levels

- 1
- 2
- 3
- 4
- 5

To proceed with the next steps:

- v. Click the plus (+) sign to add user details at each level.
- vi. Enter the user information and confirm by clicking the 'Add' button.
- vii. After adding users at all levels, save the information by clicking the 'Confirm' button.



[How to Pay Suppliers/Vendors](#)

NOTE: Not every user can raise a Payment, it has to be an “Inputter” or “Super Approver” user level who can be able to raise a Supplier Payment.

A. For Inputters:

- i. Log in to Zed Payments.
- ii. From the menu select 'Payables' and choose 'Suppliers/Vendors.'
- iii. If you had already created the Suppliers, Click the 'Raise Payment' button.
- iv. Select a supplier from the list and click 'Add Invoice.'

- v. Enter the Invoice Due Date and click “Add Item”.
- vi. After adding items, preview the invoice.
- vii. Finally, click 'Add Invoice' to initiate the payment.

Approvers will receive a notification to let them know about the request that needs their attention.

← Suppliers/Vendors

← Pay Supplier/Vendor

← Pay Supplier/Vendor

Name	Type	Mobile Number	Action
Joseph Suppliers	New	+254712345678	
Hannah & John Supplies	New	+254712245633	
Supplies Bora Limited	In ZED	+25474567789	
Fast Suppliers Limited	In ZED	+25478907745	

Joseph Suppliers Ksh 100,000.00
KCB Bank 3 Invoices

Hannah & John Supplies Ksh 400,000.00
Equity Bank 1 Invoice

Supplies Bora Limited Ksh 10,000.00
ABSA Bank 1 Invoice

Joseph Suppliers Ksh 100,000.00
KCB Bank 3 Invoices

INV9019000 Ksh 40,000.00 ⊗

INV901921 Ksh 50,000.00 ⊗

INV9019000 Ksh 10,000.00 ⊗

Hannah & John Supplies Ksh 400,000.00
Equity Bank 1 Invoice

Supplies Bora Limited Ksh 10,000.00
ABSA Bank 1 Invoice

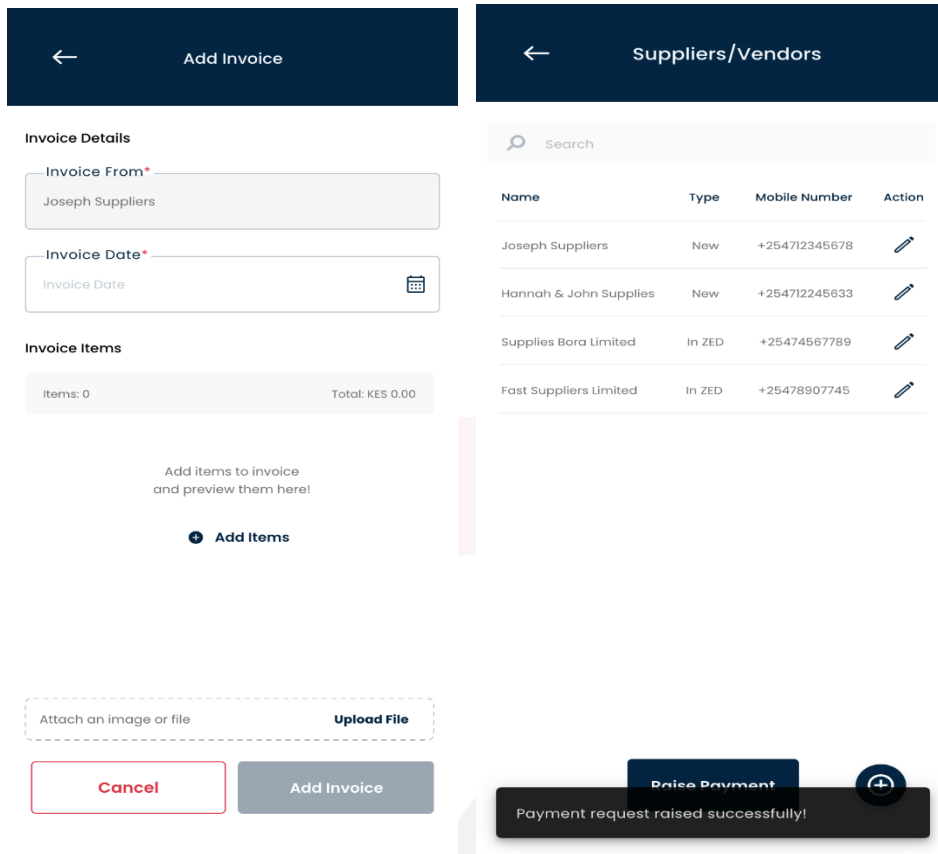
Raise Payment

Cancel

Next

Cancel

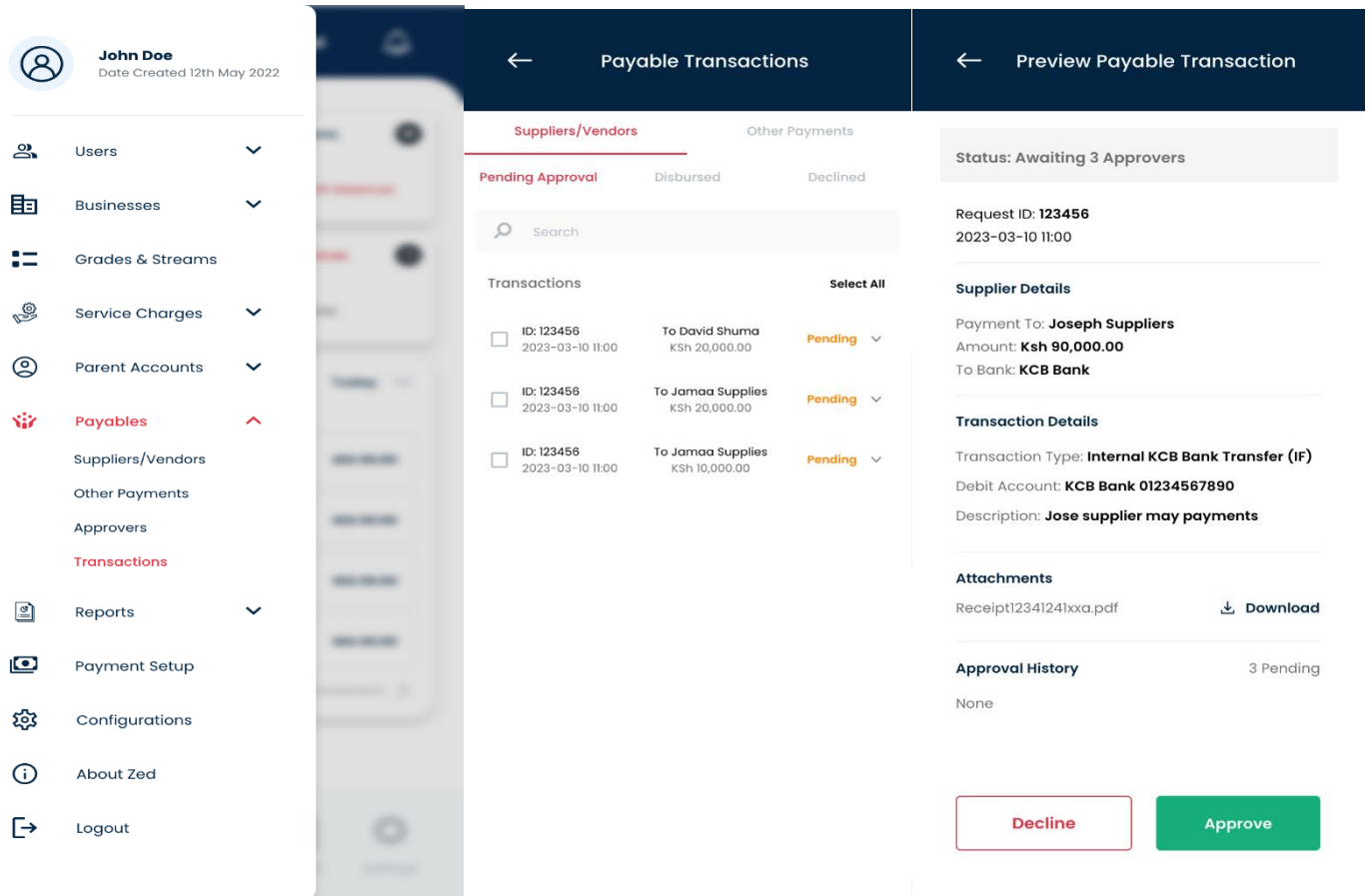
Next



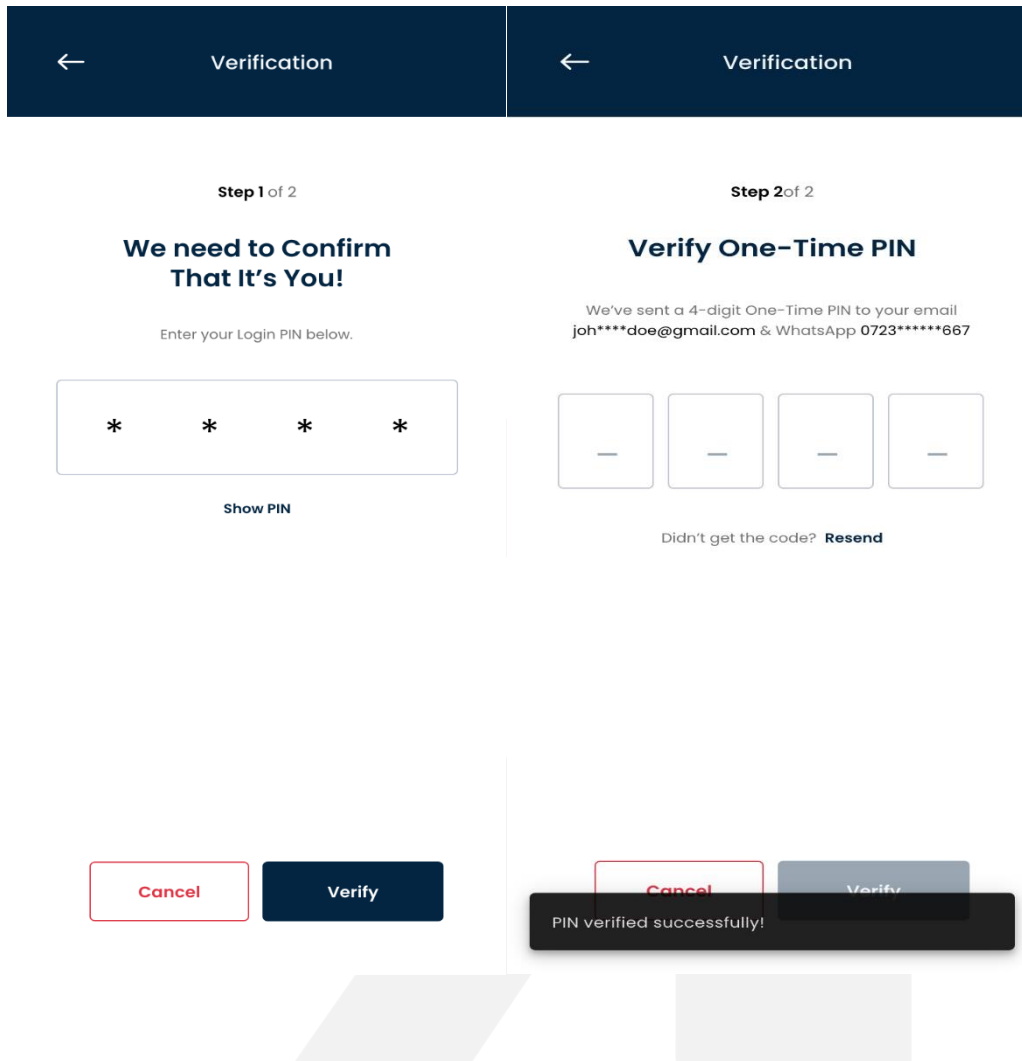
B. For Approvers:

Once a payment request has been raised, approvers complete the process by either approving or declining the payment. Here are the steps for approvers:

- i. Log in to Zed Payments.
- ii. Click 'Payables' and select 'Transactions.'
- iii. Under 'Suppliers/Vendors,' you'll find the payment request listed under the 'Pending' column.
- iv. Click on the specific transaction to preview it.
- v. After reviewing the details, click the 'Approve' button to approve the payment.



- vi. Upon clicking 'Approve', enter your Login Pin for confirmation.
- vii. A 6-digit verification code will be sent to the approver's email.
- viii. Input the received code into the designated field for verification.
- ix. Click the 'Verify' button to confirm.



- x. After clicking 'Approve,' a pop-up confirmation message will indicate that the approval has been successful. A notification of the same will be sent to other approvers.
- xi. From the Approval History an activity log will show you have approved the transaction and it will wait for others to approve.
- xii. When all approvals are done and the payment process is complete, the status changes to 'Approved' and Awaits Disbursement.
- xiii. The transaction will be received in the bank for Funds disbursement.
- xiv. If successfully disbursed, transaction moves to “Disbursed” Tab.

← Payable Transactions

Suppliers/Vendors Other Payments

Pending Approval **Disbursed** Declined

Search

Transactions

ID: 123456 David Shuma **Disbursed** ^

2023-03-10 11:00 1234678900...

Inputter

Ann 006 12.08.2023 10:00

Level 1 Approval **Complete**

Joan 006 **Approved**

Simon 002 **Approved**

Level 2 Approval **Complete**

Japheth 021 **Approved**

Level 3 Approval **Complete**

Joseph 022 **Approved**

ID: 123456 David Shuma **Disbursed** v

2023-03-10 11:00 1234678900...

ID: 123456 David Shuma **Disbursed** v

2023-03-10 11:00 Ksh 10,000.00

← Supplier/Vendor Invoices

Unpaid Invoices **Paid Invoices**

Search

20 invoices **Total: KES 160,000.00**

Supplier/Vendor Invoice No	Amount Due Date Paid	Status Type
James Supplies INV0006	50,000.00 03-06-2023	Paid One-off
John & John Company INV0005	20,000.00 03-06-2023	Paid One-off
Joseph Suppliers INV0004	20,000.00 03-06-2023	Paid One-off
Retro Boom Enterprises INV0003	15,000.00 03-06-2023	Paid One-off
Jambo Jama Compa... INV0002	15,000.00 03-06-2023	Paid One-off
Hannah & John Supplies INV0001	15,000.00 03-06-2023	Paid One-off

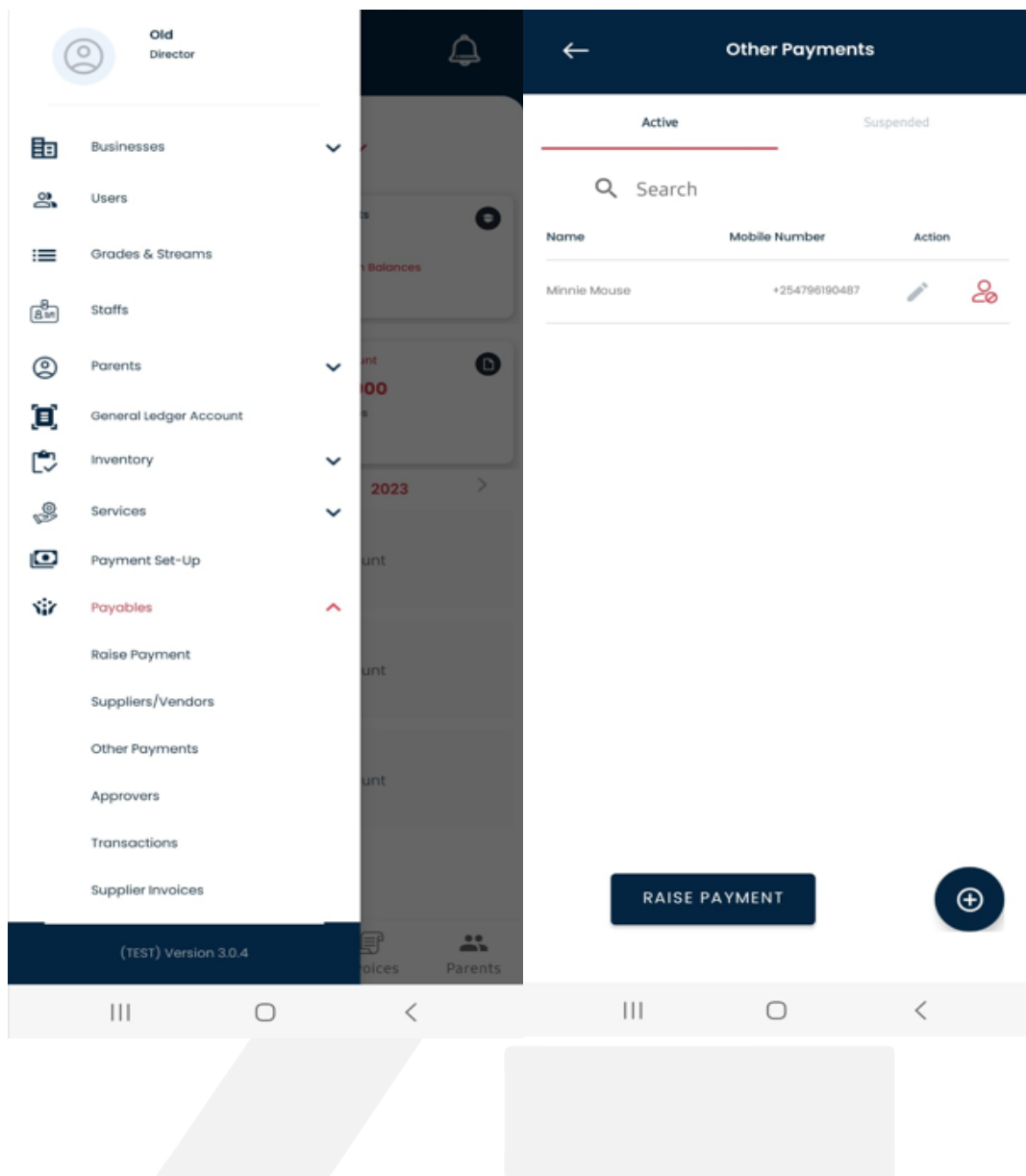
- Transaction completed and Funds disbursed to Supplier’s account.

How to Pay Other Payments

NOTE: Not every user can raise a Payment, it has to be an “Inputter” or “Super Approver” user level who can be able to raise a Supplier Payment.

A. For Inputters:

- i. Log in to your Zed App.
- ii. From the menu select 'Payables' and choose 'Other Payments'.
- iii. Click the 'Raise Payment' button.



- iv. Select payee and fill in payee details.
- v. Click 'Preview Request' button and click 'Raise Payment'.
- vi. Approvers will receive a notification to let them know about the request that needs their attention.

← Other Payment Request

Payee Details

Select Payee* >

Send To* ▾

Amount*

Transaction Details

Transaction Type* ▾

Account to Debit* ▾

Description*

Cancel

Preview Request

← Other Payment Request

Payee Details

Select Payee* >
Minnie Mouse

Send To* ▾
Send to Phone-MPESA(+254123456789)

Amount*
1000

Transaction Details

Transaction Type* ▾
MOBILE MONEY (MO)

Account to Debit* ▾
KCB:1291666699

Description*
Transport

Cancel

Preview Request



← Preview Other Payment Request

Payee Details

Payee:
Marge Simpson

Send To:
MPESA(254708753016)

Amount:
KES 1,000

Transaction Details

Transaction Type:
MOBILE MONEY(MO)

Debit Account:
**KCB(Power Academy)
1291666699**

Description:
Transport

CANCEL

RAISE PAYMENT

← Preview Payable Transaction

Awaiting 2 Approvers

Request ID: **FT350**
12/08/2023 11:52 am

Supplier Details

Payment To: **Marge Simpson**
Amount: **KES 1,000**
To Bank: **null**
To A/C: **254708753016**

Transaction Details

Transaction Type:
Mobile Money

Debit Account:
Bank Name: **KCB**
A/C: **1291666699**

Description:
Transport

Approval History

2 pending

- 12/08/2023 11:52 am
Judy has created a Payee Payment transaction {FT350} for amount {Ksh 1000}

DECLINE

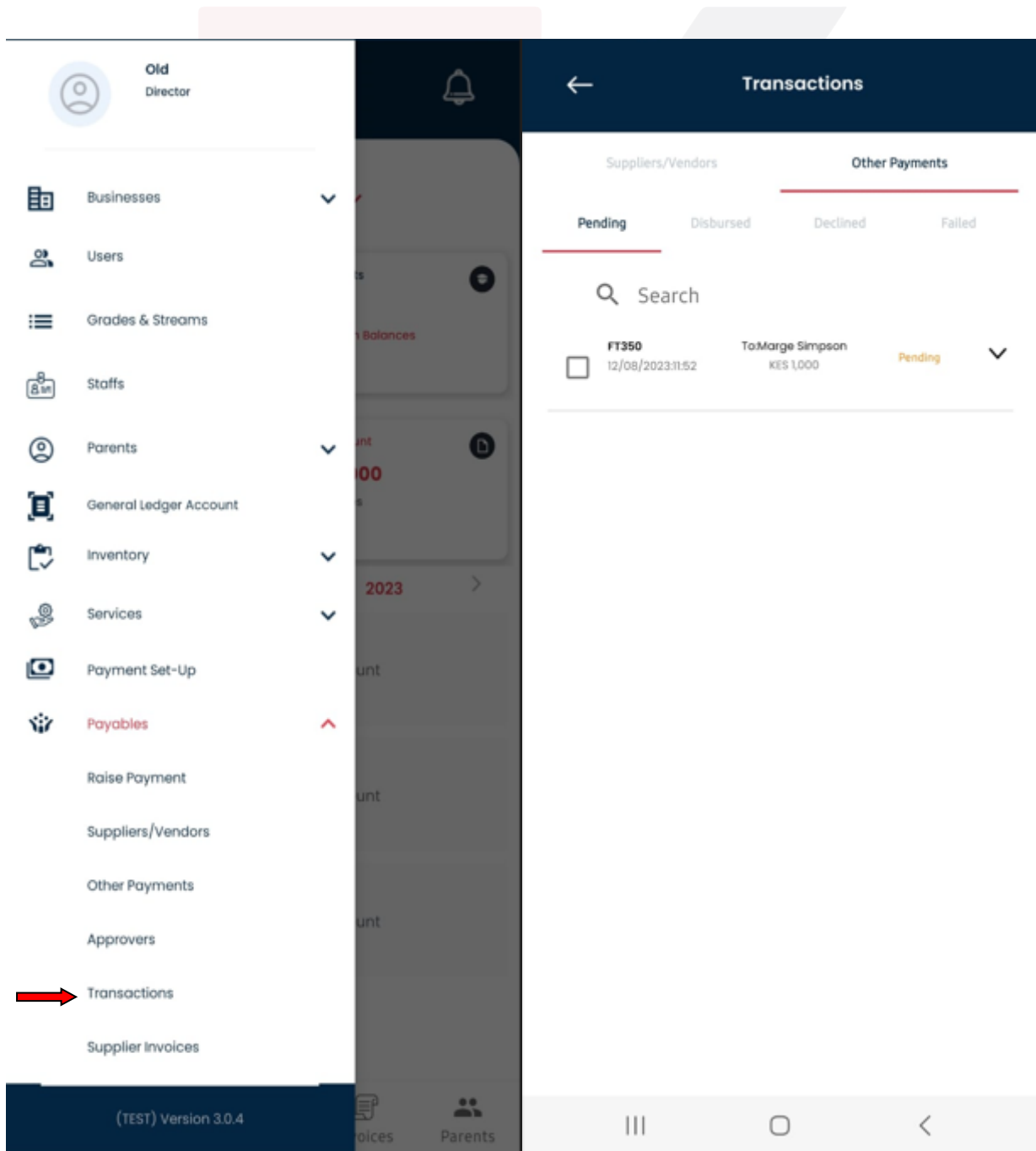
APPROVE



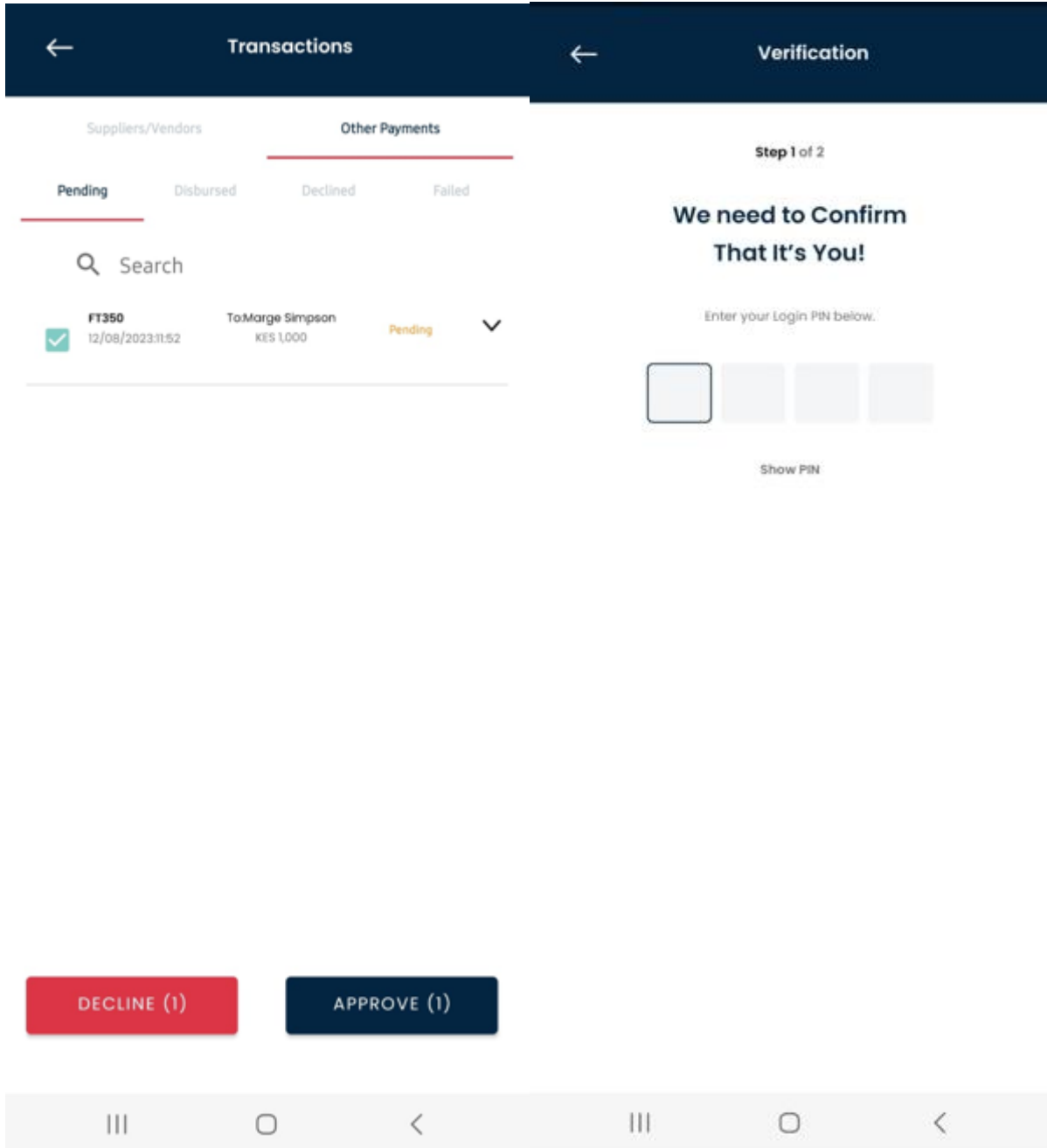
B. For Approvers:

Once a payment request has been raised, approvers complete the process by either approving or declining the payment. Here are the steps for approvers:

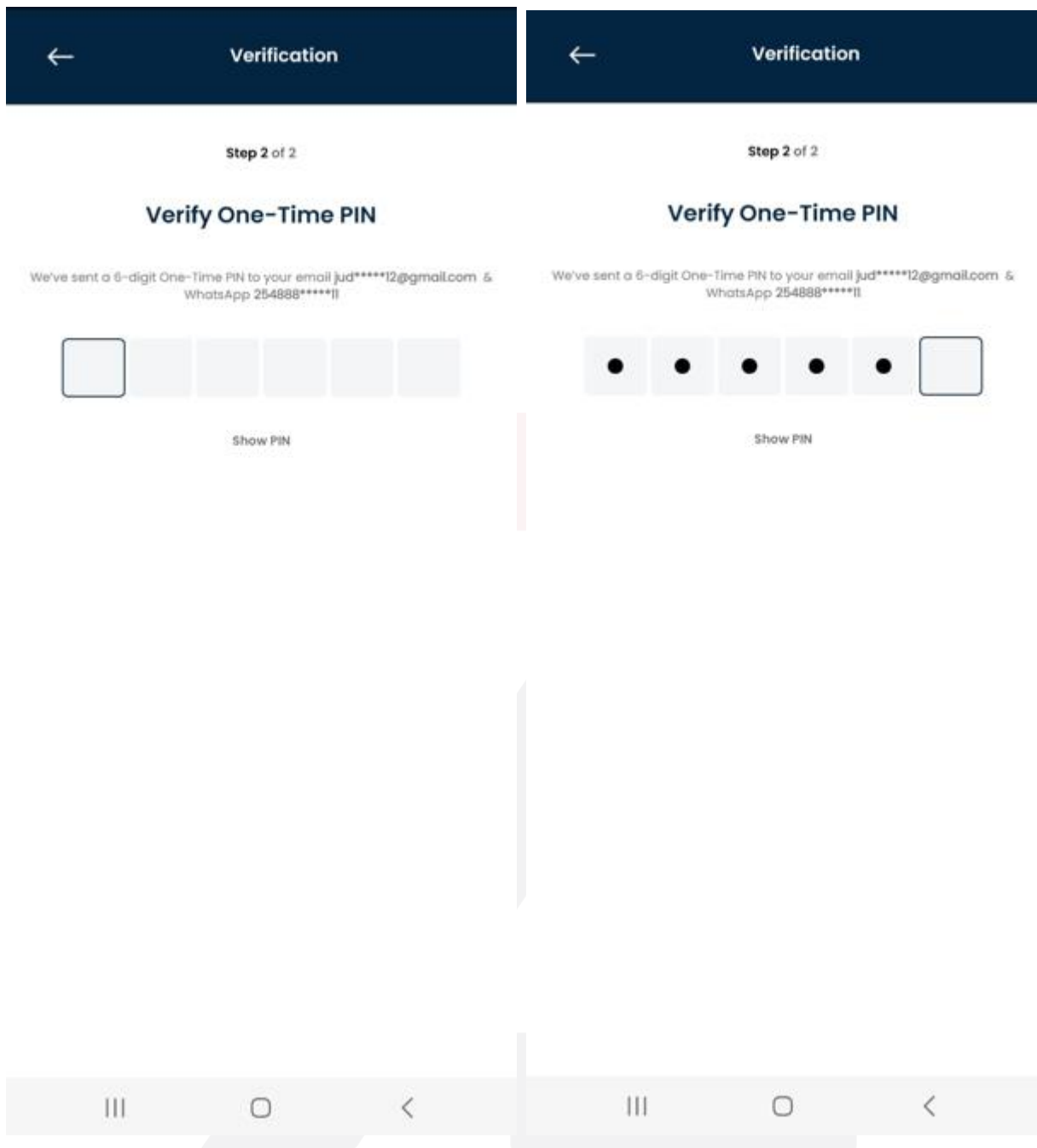
- i. Log in to Zed Payments.
- ii. Click 'Payables' and select 'Transactions'.
- iii. Under 'Other Payments' you'll find the payment request listed under the 'Pending' column.



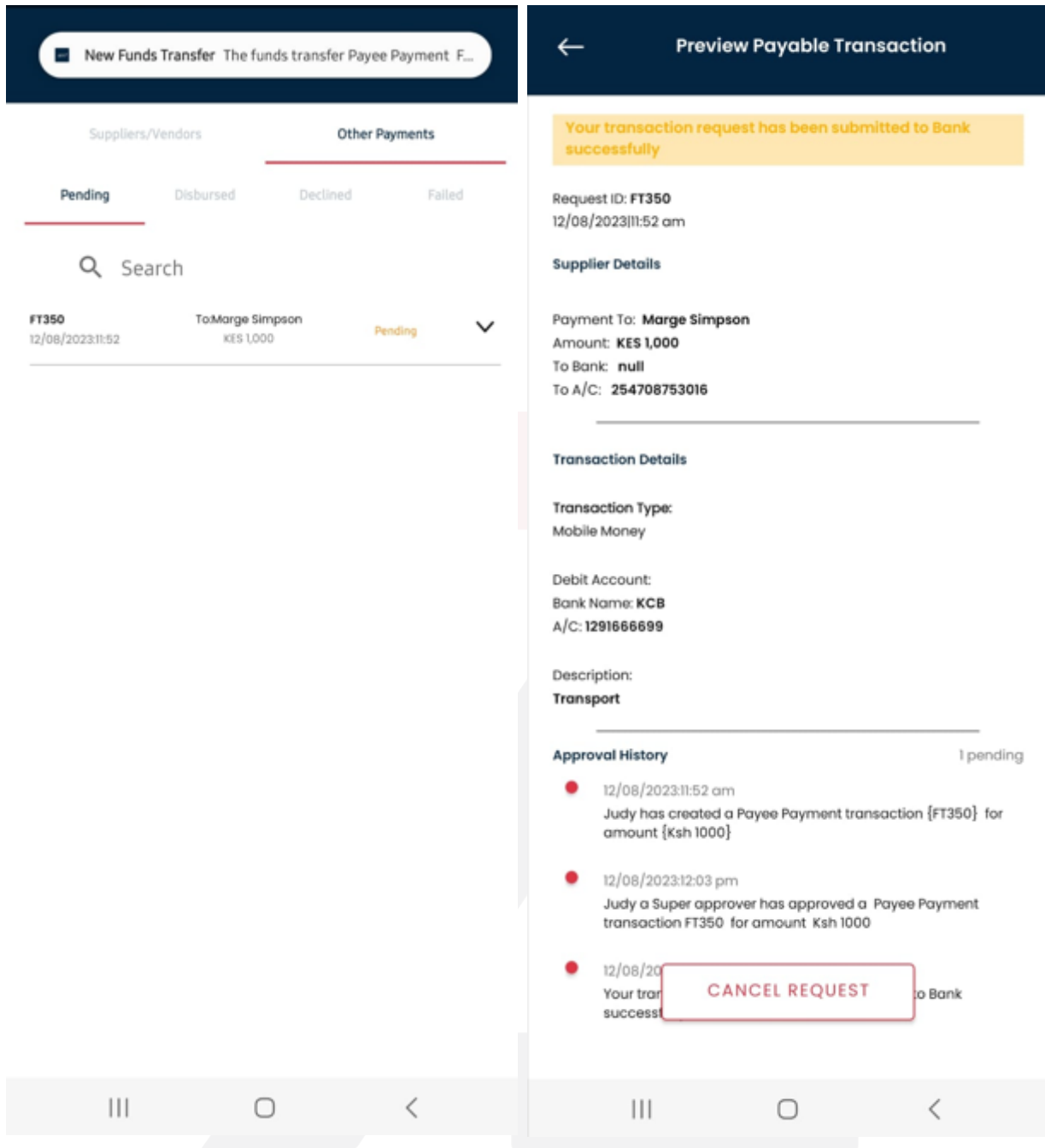
- iv. Click on the specific transaction to preview it.
- v. After reviewing the details, click the 'Approve' button to approve the payment.
- vi. Upon clicking 'Approve', enter your Login Pin for confirmation.



- vii. A 6-digit verification code will be sent to the approver's email.
- viii. Input the received code into the designated field for verification.



- ix. A pop-up confirmation message will indicate that the approval has been successful. A notification of the same will be sent to other approvers.
- x. From the Approval History an activity log will show you have approved the transaction and it will wait for others to approve.



xi. When all approvals are done and the payment process is complete, the status changes to 'Approved' and Awaits Disbursement.

xii. The transaction will be received in the bank for Funds disbursement.

Once successfully disbursed, transaction moves to “Disbursed” Tab.

← Payable Transactions

← Payable Transactions

Suppliers/Vendors

Other Payments

Suppliers/Vendors

Other Payments

Pending Approval **Disbursed** Declined Failed

Pending Approval **Disbursed** Declined Failed

Transactions

ID: 123456 2023-03-10 11:00	To Shamra Steve KSh 20,000.00	Disbursed ▾
ID: 123456 2023-03-10 11:00	To Layman Loe KSh 20,000.00	Disbursed ▾
ID: 123456 2023-03-10 11:00	To Layman Loe KSh 10,000.00	Disbursed ▾

Transactions

ID: 123456 2023-03-10 11:00	To Shamra Steve KSh 20,000.00	Pending ▲
Inputter		
Ann	006	12.08.2023 10:00
Level 1 Approval		
Joan	006	Approved
Simon	002	Approved
Level 2 Approval		
Japheth	021	Approved
Level 3 Approval		
Joseph	022	Approved
ID: 123456 2023-03-10 11:00	To Layman Loe KSh 20,000.00	Disbursed ▾
ID: 123456 2023-03-10 11:00	To Layman Loe KSh 10,000.00	Disbursed ▾