# School User Guide (Web)



Connecting your business to payments

# Table of Contents

Zed Sign Up process via web	3
How to Sign Up:	
How to Change Pin:	5
Creating A School in Zed	
Log In	
School details:	10
Logo:	
Grades and Streams:	14
Service Categories:	
Adding Services:	
Payment options:	
For M-Pesa option:	
For Bank Option:	
Card Payment Set Up:	22
eCitizen Setup:	22
PayPal Option:	23
MTN MoMo:	24
To Add Parent/ Guardian & Student:	25
Generating Invoices on Zed Portal	26
Creating Invoices:	26
Student Promotion	
How to Promote Students on Zed	
Zed Payables	
(Web)	
Configuring Payables	
Debit Account Set up	
Adding Suppliers/Vendors	43
Other Payments	46
Approvers	48
How to Pay Suppliers/Vendors	52
For Inputters:	52
For Approvers:	55
How to Pay Other Payments	61
For Inputters:	61
	Page   1

	zed
For Approvers:	65
General Ledger	69

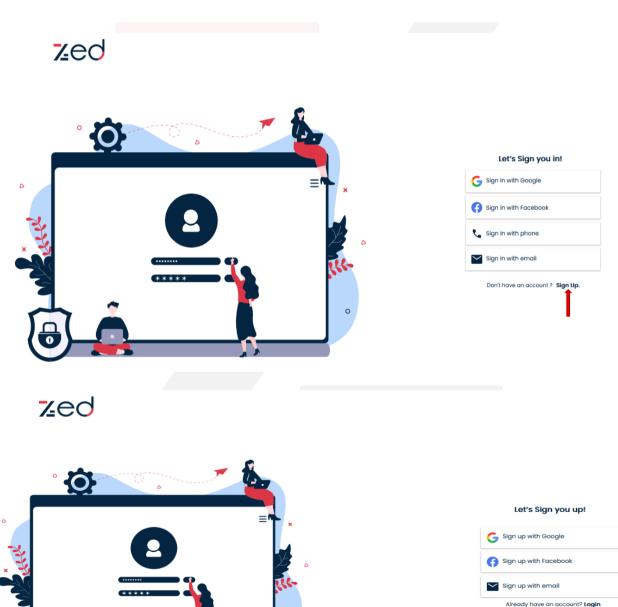


# Zed Sign Up process via web

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 <u>http://web.zed.business.</u>
- 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).



Ze

- iv. Enter your name, username, email, and phone number.
- v. Click 'Create Account' when you are done.



### Create Account

First Name*	Last Name*
First name	Last name
Username	
-Email*	
User Email	
Phone Number*	
KE +254 V Enter your phone num	ber
By Proceeding, you agree to Zed Payme	ent's Terms of Service and Privacy Policy.
Create	Account
Already have an	account? Login

zed



### **Create Account**

—First Name* ———— John	Last Name*
Username*	
Doe doe	
Email*	
Doe@gmail,com	
Phone Number*	
<b>KE +254</b> ∨ 709876542	

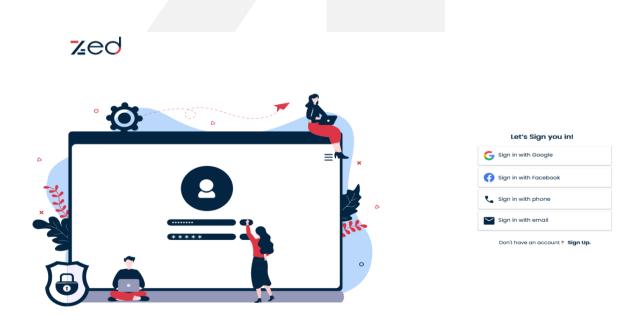


vi. Upon successful registration, a confirmation message will pop up with instructions on what to do next.

Zed	Account creation successfullPlace follow instructions sent to your email to complete X the registration process.
	Create Account
	First Name*       Last Name*         John       Doe         Username*       Doe         Doe doe       Doe         Email*       Doeggemail.com         Phone Number*       +264 × 708970642         Ke       Zeroszoszt         By Proceeding, you agree to Zed Payment's Terms of Service and Privacy Policy.         Create Account

# 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).



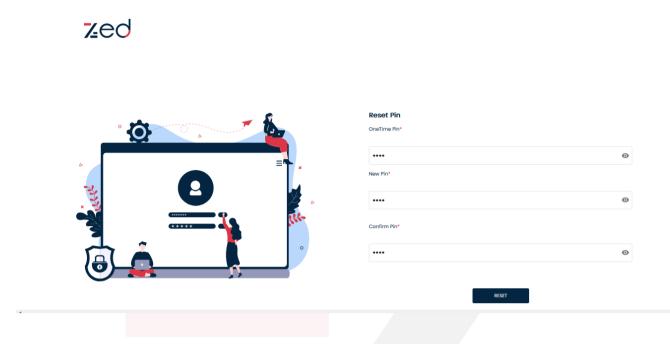
iii. Provide your login credentials and click 'Login'.

zed	
•	
	< Back
	Login
▶ =™ ×	Email Address*
	- Email Address judyally08+12@gmail.com
	Pin*
× 3	Conter Pin
	Forgot Pin?
	LOGIN
	New User? Signup
	Forgot Pin

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

zed		
	Reset Pin OneTime Pin*	
	Enter One filme ent	
	Confirm Pin*	
	Enter Confirmation Pin	

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



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

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

# Creating A School in Zed.

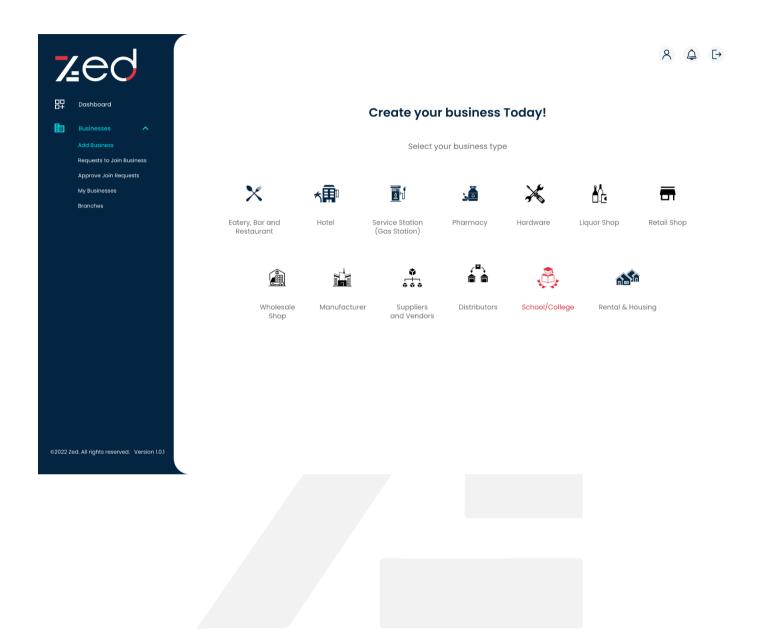
This user guide will walk you through the five-step process of setting up their school on ZED.

# Log In.

- i. Open your web browser.
- ii. Use <u>https://web.zed.business</u> to login into the zed portal.
- iii. Enter your log in credentials.
- iv. Select and click on 'dashboard'

zed	-	8	4	[→
Cashboard         Examples         Add Business         Add Business         Approve Join Requests         Approve Join Requests         Businesses         Branches	<image/> <image/> <image/> <section-header><section-header><section-header><section-header><text><text></text></text></section-header></section-header></section-header></section-header>			
©2022 Zed. All rights reserved. Version 1.0.1				

- v. Click on 'Create business'
- vi. Select 'School/College' and then select the 'School Type'.



Dashboard / School Type

# Select School Type

Please select the type of school you want to setup

School Types					
University/College >					
Secondary >					
Kindergarten/Junior/High School 🔉					
Kindergarten >					
Primary School 🖒					
	Rows per page:	100 -	1-5 of 5	<	>

# School details:

i. After selecting the school type, Enter school details.

zed <	< Create Business					8 4 🕒
🚮 Businesses 🔷 🔨	Dashboard - School Details					
My Business	0	2	3	4	5	6
POS	School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Students
<ul> <li>About ZED</li> <li>Logout</li> <li>Copyright ©2023 Zed. All rights reserved.</li> </ul>		Set-up your busin school type" Secondary Director" School Owner Email	ess details.	School Name " School Name Phone Number" T + 254 Locaton"		
		Email Select Country Country *	<i>I</i> .	Curreng* Curreng* Currency CANCEL	DONE	

Zed

**₽ 8 ₽ ₽** 

- ii. Select the school type, i.e., primary, secondary, college and university.
- iii. Enter school name, director, phone number, email, location, country, and currency

< Create Busines	s				
Dashboard • School Details					
1	2	3	4	5	6
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Students
	Set-up your busines	s details.			
	School Type*		School Name*		
	Kindergarten/Junior/	High School	Trinity Educational Centre		
	Director*		Phone Number*		
	Prof Mineh		+254 123 456 789		
	Email*		Location"		
	trinityec@gmail.com		Nairobi		
	- Select Country			~	
	Country"		Currency*		
	Kenya		KES		
			CAN	ICEL DONE	
iv. Select and	click 'done.'				

# Logo:

i. Click inside the outline of the logo at the top right to add the school logo.

0	2	3	4	5	6
chool Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Stud
		Scho	ol Summary		
	Your Logo		Email zpaymentsltd@gmail.com		
			Location Nairobi		
	School Type Kindergarten/Junior/High School		Country		
	School Name Trinity Educational Centre		- Kenya Currency		
	Director Prof Mineh		— KES — Phone Number — +254769607456		
	Grades Year (Grade) I, Year (Grade) 2, Year (G (Grade) 5, Year (Grade) 6, Year (Grade Year (Grade) 10, Year (Grade) 11, Year (	) 7, Year (Grade) 8, Year (Grade)			
			_	EDIT	NEXT

iii. Select the image and upload it.

Open		×		
$\rightarrow$ $\checkmark$ $\uparrow$ $\blacktriangleright$ > Pictures	∽ C Search Pictures	م		
rganise 🔻 New folder		• 🔲 😗 🕴	5	6
ConeDrive - Perse Common Comm	eved Pictures Screenshots	ices I@gmail.com	Payment Options	Parent/Guardians & Stud
Videor				
File name:	V Image Files	Cancel 56		
	) 2, Year (Grade) 3, Year (Grade) 4, Year 'ear (Grade) 7, Year (Grade) 8, Year (Grade) 9			

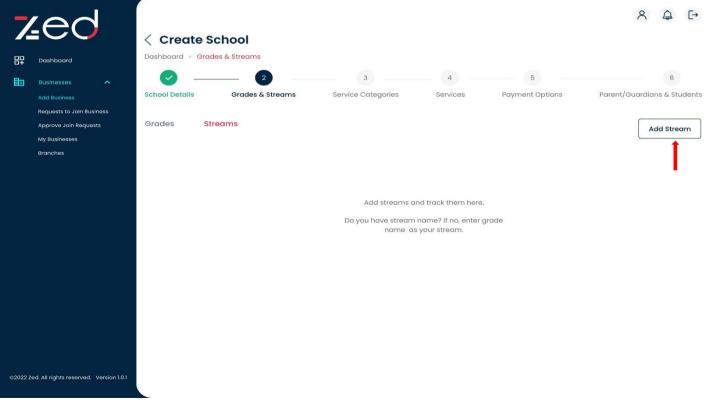
iv. Upon successful upload, click 'Next' to advance to the next step.

reate Busines	ss				
rd 🔹 School Details					
1	2	3	4	5	6
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Stude
		School S	Summary		
Y	our Logo		Email		
			zpaymentsltd@gmail.com		
			Location		
e	chool Type		Nairobi		
	indergarten/Junior/High School		Country		
-	chool Name		Kenya		
	rinity Educational Centre		Currency		
-	irector		KES		
	rof Mineh		Phone Number		
_	rades		+254769607456		
Y. (t	ear (Grade) 1, Year (Grade) 2, Year (G Grade) 5, Year (Grade) 6, Year (Grade ear (Grade) 10, Year (Grade) 11, Year (	) 7, Year (Grade) 8, Year (Grade) 9,			
-				EDIT	NEXT

# Grades and Streams:

• Depending on the school type selected, the system will auto generate the grade levels associated with it.

	Create School		8 ⊈ E→
Businesses Add Business	School Details Grades & Streams	3 4	Payment Options Parent/Guardians & Students
Add business Requests to Join Business Approve Join Requests My Businesses Branches	Crades Streams		Add Stream
	Default Grades		
	PP 1	Grade 4	Grade 9
	PP 2	Grade 5	Grade 10
	Grade 1	Grade 6	Grade 11
	Grade 2	Grade 7	Grade 12
	Grade 3	Grade 8	
€2022 Zed. All rights reserved. Version 1.0.1			Next
i. To add strear	ns, click the 'Add Stream' but	ton.	



7.6

- ii. Input the name of the stream and click 'Save'.
- iii. You can add as many as you require.

	2	3	4	5	6
School Details G	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Stu
Red					
CANCEL	SAVE				
y Educational Centre				e	ý Stream Added Successfully
ty Educational Centre Create Business ard • Grades & Streams				e	ý Stream Added Successfully
reate Business	2	3	4	5	Stream Added Successfully
Create Business ard • Grades & Streams	2 Grades & Streams	3 Service Categories	4 Services		
Create Business ard • Grades & Streams	•			5	6
Create Business ard • Grades & Streams Control Details G	•			5	6 Parent/Guardians & Stud
Create Business ard • Grades & Streams Control Details G Streams Grades	•			5	6 Parent/Guardians & Stud
Create Business ard • Grades & Streams School Details G Streams Grades Q Search Streams	•		Services	5	6 Parent/Guardians & Stud
Create Business ard • Grades & Streams School Details G Streams Grades Q Search Streams Streams	•		Services	5	6 Parent/Guardians & Stud

iv. Once done, click 'Next' to proceed.

Zed

# Service Categories:

i. To create a service category, enter the name and description of the service category and click "Preview".

Trinity Educational Centre				🔗 Scho	ol details added successfully. X
< Create Business					
Dashboard   Service Categories					
	<b>⊘</b>	3		5	6
			4		
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Students
		Create a Ser	vice Category		
		Category Name*	Category Type"		
		Category Name	Service		
		Category Description*			
		Category Description			
		SKIP	CANCEL PREVIEW		
Trinity Educational Centre					8 4 [-
< Create Business					
Dashboard   Service Categories					
$\checkmark$		3	4	5	6
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Students
		Create a Serv	vice Category		
		Category Name*	Category Type"		
		Transport Charge	Service		
		Category Description*			
		School Transport Charge			
			CANCEL PREVIEW (2)		
		SKIP	CANCEL PREVIEW (2)		

ii. To add more Service Categories, click 'Create category' on the far right and follow the same procedure.

						<u> </u>
	lucational Centre					
	ate Business					
Dashboard (	Service Categories	<b>⊘</b>	3		5	6
50	hool Details	Grades & Streams	Service Categories	4 Services	Payment Options	Parent/Guardians & Students
30	HOOI Detuis	Grades & Streams	service cutegories	Services	Payment options	Patent/Guardians & students
	Service Categories					CREATE CATEGORY
	Category Name			Category Description		Action
	Fees			School Fees		REMOVE
	Transport Charge			School Transport Charge		REMOVE
					Rows per page:	5 • 1-2 of 2 < >

NEXT

iii. Click the 'Next' button to proceed

# Adding Services:

i. Enter the service details including the service name & category, amount type & price, grade & term, and service description.

< Create Business					
Dashboard   Services					
<b>Ø</b>		<b>~</b>	4	5	6
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Students
		Creat	e a Service		
	Service Name*		Service Category*		
	Grade 1 Term 1 Fee		Fees	•	
	Amount Type"		Amount		
	Fixed		20000		
	Select Grade*		Term*		
	Year (Grade) 1	*	Term 1	*	
	Service Description				
	Grade 1 Term 1 Tuiti	on Fee			
			SAVE		

zed

- ii. Click the 'Save' button.
- iii. To add more Services, click 'Create Service' button at the top right and follow the same procedure.

< Create Business							
Dashboard • Services							
$\bigcirc$				4		5	6
School Details	Grades & Streams		Service Categories	Services		Payment Options	Parent/Guardians & Students
List Of Services							CREATE SERVICE
Service Name	Service Category	Price Type	Amount	Grade	Term	Service De	scription Action
Grade 1 Term 1 Fee	Fees	Fixed	20000	Year (Grade) 1	Term 1	Grade 1 Ter	m 1 Tuitio REMOVE

Rows per page: 5 💌 1–1 of 1 < >



iv. Click 'Next' to continue.

# Payment options:

Once all services have been added, choose the preferred payment method(s) for your school. The available options are: M-Pesa, Cash, Banks, Card, PayPal, eCitizen and MTN MoMo

## For M-Pesa option:

- i. Choose payment method as M-Pesa.
- ii. A pop-up window will appear to the right asking if you have Mpesa Daraja set up. Click 'YES'.

### **Create Business** < Dashboard • Payment Options 5 $\checkmark$ 6 $\checkmark$ School Details Grades & Streams Service Categories Services Payment Options Parent/Guardians & Students Add at least 1 payment method. < Mpesa Setup Not Set Mpesa 💼 Bank Not Set Do you have Mpesa Daraja set up for your business? Card Not Set NO YES 😰 Cash Not Set Not Set Ecitizen Not Set Paypal Not Set SKIP

- iii. Type in the M-Pesa Daraja information as provided by Safaricom.
- iv. Check the box below to accept the terms and conditions.

Create Busines	s				
Dashboard • Payment Options					
$\checkmark$				5	6
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Student
Add at least 1 payment meth	od.				
Mpesa		Not Set	< Mpesa Daraja Setup		
Bank		Not Set	Business Name*	e 12345	*
Card		Not Set	Consumer Key*		
😕 Cash		Not Set	Consumer Secret	Account Reference	
		Not Set	************************		
Ecitizen		Not Set	Pass Key "		
Paypal		Not Set			
<b>~</b>		SKIP NEXT	By ticking, you are	agreeing to the terms an el Activate	na conditions.

v. Click 'Activate' button to finish updating the M-Pesa Daraja details.

# For Bank Option:

- Choose and click on "Bank" and then select the specific bank.
  - a) Mobile Money:

< Create Business	5				
Dashboard • Payment Options					
<b>O</b>	<ul> <li>Image: A start of the start of</li></ul>	$\checkmark$	<b>O</b>	5	6
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Students
Add at least 1 payment metho	od.				
Mpesa		Active	Banks		
Bank		Not Set 🔵	KCB Bank		^
Card		Not Set	Mobile Money Bank Deposit		Not Set
Cash		Not Set	Debit Accounts		Not Set >
		Not Set	Equity Bank COMING SOON		~
Ecitizen		Not Set	Co-operative Bank COMING SO	DON	v
Paypal		Not Set			
		SKIP			

i. Choose Mobile Money and input your till number.

Add at least 1 payment method.			
mpesa Mpesa	Active 💽	← Banks	
Bank	Not Set	KCB Bank	^
Card	Not Set	Mobile Money	Not Set
Cash	Not Set	Bank Deposit Debit Accounts	Not Set Not Set >
	Not Set	Equity Bank COMING SOON	~
Ecitizen	Not Set	Co-operative Bank COMING SOON	~
Paypal	Not Set		
		Setup Mode *	
	SKIP NEXT	KCB MOBILE MONEY	
		Vooma Till 👻	
		Vooma Till No.	
		e.g 123456	
		Verify Vooma Till No.	
		e.g 123456	
			SAVE

- ii. Verify the till number and save details.
- iii. Details will be updated successfully.

### < Create Business

Dashboard • Payme	ant Options				
<b>e</b>	<b>S</b>	<ul> <li>Image: A start of the start of</li></ul>	<ul> <li>Image: A start of the start of</li></ul>	5	6
School Det	ails Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Students
Add at least <b>1</b> pay	ment method.				
Mpesa		Active 🚺	← Banks		
Bank		Not Set	KCB Bank		^
		Not Set	Mobile Money		Active 💽
			Bank Deposit		Not Set
😰 Cash		Not Set	Debit Accounts		Not Set >
	)	Not Set	Equity Bank COMING SC	NOC	~
Ecitizen		Not Set	Co-operative Bank CO	MING SOON	~
Paypal P		Not Set			
		SKIP NEXT			

- b) Bank Deposit:
- i. Click on "Bank", select the specific bank and choose 'Bank Deposit'.

Add at least 1 payment method.			
mpesa Mpesa	Active 💽	← Banks	
Bank	Not Set	KCB Bank	^
Card	Not Set	Mobile Money Bank Deposit	Active Not Set
S Cash	Not Set	Debit Accounts	Not Set >
( МТК МОМО	Not Set	Equity Bank COMING SOON	~
Citizen	Not Set	Co-operative Bank COMING SOON	~
Paypal	Not Set		
	NEWT	Account Name	
SKIP	NEXT	e.g John Doe	
		Account Number	
		e.g 1234567890	
			SAVE

ii. Enter the Account Name as well as Account Number and click 'Save' to update the details.

# Card Payment Set Up:

- i. Click on the card option and enter the merchant's details, I.e., ID, Key and Secret Key.
- ii. Click 'Save'.
- iii. Card details will be added successfully.

Trinity Educational Centr					
Dashboard • Payment Options					
$\checkmark$	<ul> <li>Image: A start of the start of</li></ul>	<b>Ø</b>	<ul> <li>Image: A start of the start of</li></ul>	5	6
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Students
Add at least 1 payment method	э.				
Mpesa		Active	← Card Setup		
Bank		Not Set	Merchant ID		
Card		Not Set	Merchat ID		
Cash		Not Set	Merchant Key		
		Not Set	Merchant Secrete Key		٥
Ecitizen		Not Set			٢
Paypal		Not Set			SAVE
		SKIP NEXT			

# eCitizen Setup:

- i. Click on the eCitizen option.
- ii. Fill in the eCitizen Account ID, eCitizen Key and the Secret Key.
- iii. Click 'Activate' and the details will be added successfully.

Trinity Educational Cen					8 4 [+
ashboard • Payment Options	~				
<b>Ø</b>	<b>Ø</b>	<b>O</b>	<b>O</b>	5	6
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Students
Add at least <b>1</b> payment meth	od.				
Mpesa		Active 💽	Ecitizen Setup		
Bank		Not Set	Ecitizen Account ID		
Card		Not Set	Ecitizen Account ID		
Cash		Not Set	Ecitizen Key		
		Not Set	Ecitizen Key		
Ecitizen		Not Set			
Paypal		Not Set	Ecitizen Secret		0
		SKIP		CANCEL	ACTIVATE

# PayPal Option:

- i. Select 'PayPal' and enter the Client Id and Access Token.
- ii. Click on the check box to accept the terms and conditions.
- iii. Select the 'Activate' button to update the details.

< Create Business	s				
Dashboard   Payment Options					
<b>Ø</b>	<b></b>	<b></b>		5	6
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Students
Add at least <b>1</b> payment metho	od.				
Mpesa		Active	← Paypal Setup		
Bank		Not Set	Client ID		
Card		Not Set	********** Access Token		
😰 Cash		Not Set			Ø
		Pending	By ticking, you are agree	eing to the terms and conditions.	
Ecitizen		Active 🚺		Cancel Activate	8
		Not Set			
		SKIP NEXT			

# MTN MoMo:

- i. Select MTN MoMo as payment method.
- ii. Enter the Merchant Name, Subscription Name, Consumer Key and Pass Key.
- iii. Click on the checkbox to accept the terms and conditions.
- iv. Select the 'Activate' button to update the details.

Create Busines	s				
Dashboard • Payment Options					
$\checkmark$	<b></b>	Solution		5	6
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Studen
Add at least 1 payment metho	od.				
Mpesa		Active 💽	< MTN MoMo Setup		
Bank		Not Set	Merchant Name*		
Card		Not Set	Subscription Name*		
Cash		Not Set	Collections		
		Pending	V By ticking, you a	re agreeing to the terms an Cancel Ac	d conditions. tivate
Ecitizen		Active 💽	l		_
Paypal		Not Set			
		SKIP			

# v. Click 'Complete' then 'Next' to proceed to the final stage of business setup.

Trinity Educational Cent					(8) (4) (5)
Dashboard • Payment Options	<b>⊘</b>	<b>⊘</b>	<b>⊘</b>		
School Details	Grades & Streams	Service Categories	Services	5 Payment Options	6 Parent/Guardians & Students
Add at least <b>1</b> payment metho	od.				
Mpesa		Active			
		Not Set			
Card		Not Set			
Cash		Not Set			
		Not Set			
Ecitizen		Active			
		Not Set			
		SKIP NEXT			

# To Add Parent/ Guardian & Student:i. One can choose to either drag and drop CSV File or;

ii. Select and click on "Browse Files"

Trinity Educational Cent Create Business	5				(A) (□)
Dashboard • Parent/Guardians &	Students	<b>⊘</b>	<b>⊘</b>	<b>⊘</b>	6
School Details	Grades & Streams	Service Categories	Services	Payment Options	Parent/Guardians & Students
		Add at least 1 F	Parent/Guardian		
		🕹 DOWNLOAD	D CSV TEMPLATE		
		2	Ъ		
		Drag and drop here	your CSV file		
			or ISE FILES		
		SKIP STEP	ADD PARENT/GUARDIAN		

- iii. Select the excel file from your computer's saved files.
- iv. Click on Add Parent/ Guardian and save your information.

Open			×			
$\leftrightarrow$ $\rightarrow$ $\checkmark$ $\uparrow$	≪ Onboardin > Schools ∨ C	Search Schools	م			
Organise 🔻 New folde		≣	- 🛯 😗			
OneDrive - Pers	Name	Date modified	Туре			6
I	🐻 Campus_Student_Template_data.6ae9f56	26/04/2024 10:08	Microsoft	igories Services	Payment Options	Parent/Guardians & Stude
🚽 Downloads 🖈	🕖 ILKERIN GARDENS NAROK-Zed Payments	27/10/2023 11:18	Microsoft	Add at least 1 Parent/Guardian		
ocuments 🌧	🗐 Introduction Letter (Schools)	20/03/2024 11:04	Microsoft	▲ DOWNLOAD CSV TEMPLATE		
🛜 Documents E 🖈	Parent-Student-Template	26/04/2024 10:00	Microsoft			
💿 Camera uplo 🖈	🗃 Project Completion Form for Schools Draft	24/07/2023 11:46	Microsoft	$\sim$		
🔀 Pictures 🔹 🖈	🗃 Project Completion Form for Schools	11/08/2023 11:57	Microsoft	CT3		
🕑 Music 🔹 🖈	🔊 Taita Taveta University System agreement	27/10/2023 12:17	Microsoft	Dress and dress your COV file		
Videor				Drag and drop your CSV file here		
File n	ame: Parent-Student-Template	All Files	~	or		
		Open	Cancel	BROWSE FILES		
ging Service						
uration						

The information will be uploaded successfully to your school's Zed account.

# Generating Invoices on Zed Portal

ZED assists both the parents and the school in tracking payments. They can view the payment history and be confident in the amount paid to the school. This has the potential to reduce fraud and dishonesty.

# Creating Invoices:

- i. Go to the main menu and select 'Parents Accounts', then choose 'Invoices'.
- ii. Once you're redirected to your dashboard, click on 'Create Invoice' located in the upper right corner.

_			_								
	:	Grades & Streams	Trinity Education	al Centre							8 🔒 🕞
	٢	Bank Statements									
	ର୍ଡ	Student Promotion	Invoices							UPLOAD BALANC	ES CREATE INVOICE
	÷	Staff	Dashboard Invoices	G APPROVAL DECLI							
		Parents Accounts		G APPROVAL DECLI	NED						
		Parents/Guardians	Batch List		Ŧ	Q Search:			School Type 👻		EXPORT
		Students									
		Invoices	Batch No	Approved On	Total I	Invoices	Total Amount	Paid Invoices	Paid Amount	Invoices Due	Amount Due
		Receipts									
	-	Services						· · ·			
		Transactions									
	9	Reports						$\equiv \times$			
		Messaging Service						No Data to Display!			
	鐐	Configuration									
										Rows per page: 10 👻	0-0 of 0 < >

a)

i. When generating batch invoices by grade, choose the grade, term and click the 'Generate' button.

💶 Grades & Streams 🗸 🗸	Trinity Educational Centre
Bank Statements	Generate Invoices
Student Promotion	Dashboard  Invoices Generate Invoice
L= Staff	Generate Invoices:
Parents Accounts	Grade     Student
Parents/Guardians	Grade*
Students	Select Grade 👻
Invoices	Term®
Receipts	Select Term 👻
Services ~	
Transactions ~	GENERATE (0)
🖻 Reports 🗸 🗸	
Messaging Service	
钧 Configuration	
Copyright ©2024 Zed. All rights reserved.	

:	Grades & Streams	~	Trinity Educational Centre								
	Bank Statements										
ତ	Student Promotion		Generate Invoices								
÷	Staff		Dashboard • Invoices • Generate Invoice Generate Invoices:								
9	Parents Accounts	^	Grade O Student								
	Parents/Guardians		Grade								
	Students		Year (Grade) 1 👻								
	Invoices		Term®								
	Receipts		Term 1 👻								
-	Services	~									
	Transactions	~	G	ENERATE (2)							
9	Reports	~									

ii. Batch invoices for the grade and term selected will be created successfully.

iii. Navigate to the 'Pending approval' column to approve the generated invoices.

Trinity Educational Centre				× 4 [-
Invoices Dashboard = Inv ces			UPLOAD BALAN	ICES CREATE INVOICE
APPROVED PENDING APPROVAL DEC		School Type	•	51/2017 <b>1</b>
Batch No	Created On	Total Invoices	Total Amount	EXPORT
TrinityEducationalCentre_1	May 23, 2024 11:00:19 AM	2	40004	$\oslash \otimes$
			Rows per page: 10 -	✓ 1–1 of 1 < >

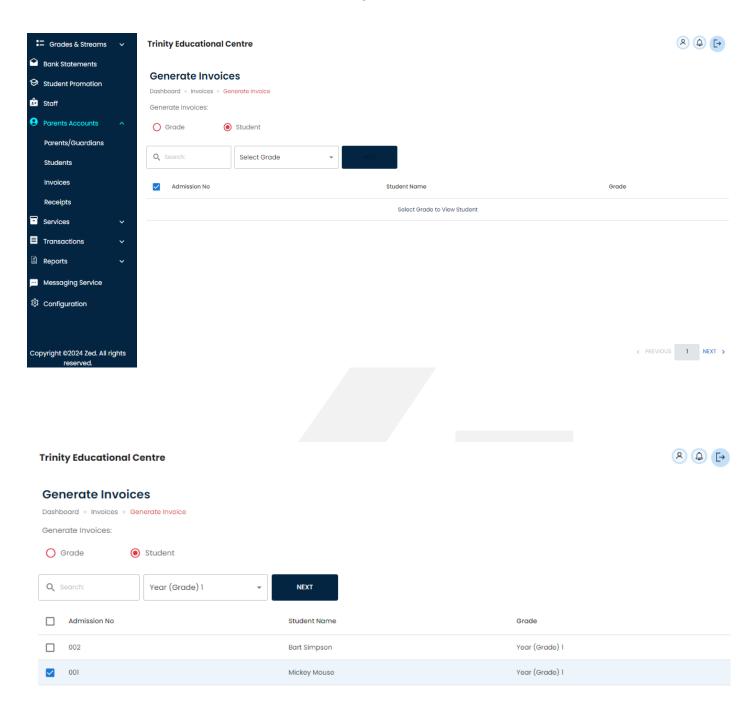
iv. Select the approval tick. The batch will then be automatically sent to parents/guardians via email and WhatsApp.

Trinity Educational Centre			Satch Approved Succes	ssfully, Invoice(s) Sent X
Invoices			UPLOAD BALANO	
Dashboard Invoices				
APPROVED PENDING APPROVAL DECLINED				
Batch List 👻	Q Search:	School Type 👻		EXPORT
Batch No Approved On Total I	voices Total Amount	Paid Invoices Paid Amount	Invoices Due	Amount Due
<u>TrinityEducationalCentre_1</u> May 23, 2024 II:02:50 AM	2 40004	0 KES 0.00	2	KES 40,004.00

Rows per page: 10  $\checkmark$  1–1 of 1 < >

# b)

- i. To create an invoice by student(s), select their grade level.
- ii. Then, choose the student(s) by clicking the checkbox next to their name.





- iii. Click 'Next' button.
- iv. Choose the service by clicking its corresponding checkbox.

### × ↓ [→ **Trinity Educational Centre Generate Invoices** Dashboard . Invoices . Generate Invoice Generate Invoices: O Grade Student Q Search: All GENERATE Ŧ Service Name Description Grade Term Amount Piano Lessons Piano Lessons 1 Swimming Lessons 1 Swimming Lessons Skating Class Skating Class 1 Zone 1 Transport Zone I Transport 1 ) row selected Rows per page: 5 💌 1-4 of 4 < >

- v. Press the 'Generate' button and student's invoice will be created.
- vi. Navigate to the 'Pending approval' column to approve the generated invoices.

Trinity Educational Centre						× 4 [-
Invoices					UPLOAD BALANCES	CREATE INVOICE
Dashboard Invoices	LINED					
		ſ				
Q Search:			School Type	•		EXPORT
Batch No	Created On	Total Invoice	5	Total Amount		Action
TrinityEducationalCentre_2	May 23, 2024 11:38:58 AM	1		2		$\oslash \otimes$

Rows per page: 10 👻 1-1 of 1 < >

vii. Select the approval tick. The batch will then be automatically sent to parents/guardians via email and WhatsApp.

rinity Educational Centre				1	Satch Approved S	Successfully, Invoice(s) Sent X
nvoices					UPLOAD E	CREATE INVOICE
Dashboard  Invoices						
APPROVED PENDING APPROVAL DECLINED						
Batch List	← Q Search:			School Type 👻		EXPORT :
Batch No Approved On	Total Invoices	Total Amount	Paid Invoices	Paid Amount	Invoices Due	Amount Due
TrinityEducationalCentre_2 May 23, 2024 11:54:31 AM	1	2	0	KES 0.00	1	KES 2.00
TrinityEducationalCentre_1 May 23, 2024 11:02:50 AM	2	40004	D	KES 0.00	2	KES 40,004.00

- To view the invoices created, click on Approved invoices.
- Select the batch you want and click on the Invoice number to view the specific invoice details.

Trinity Educational Centre					× ↓ ►
Invoices				UPLOAD BALANCES	CREATE INVOICE
Dashboard • Invoices					
APPROVED PENDING APPROVAL DECLINED					
Batch List 👻	Q Search:		School Type	•	EXPORT :
Batch No Approved On Total Invoi	ces Total Amount	Paid Invoices	Paid Amount	nvoices Due	Amount Due
TrinityEducationalCentre_ May 23, 2024 11:54:31 AM	1 2	0	KES 0.00 1		KES 2.00
TrinityEducationalCentre_ May 23, 2024 11:02:50 AM	2 40004	D	KES 0.00 2	2	KES 40,004.00

8 ♀ ►

### **Trinity Educational Centre**

### **Invoice Batch**

Dashboard 
Invoices 
Invoice Batch

Batch No TrinityEc	: lucationalCentre_		Status: APPROVED	Invoices: 2	Total Ama <b>KES 40,00</b>		Amount Paid: KES 0.00	Amount KES 40,	
Q Search:									EXPORT :
Invoice No	Admission No	Student Name	Grade	Term	Invoice Amount	Discount Amount	Amount Paid	Amount Due	Delivery Statu
INV_1686	002	Bart Simpson	Vear (Grade) 1	Term I	KES 20,002.00	KES 0.00	KES 0.00	KES 20,002.00	Sent
INV_1687	001	Mickey Mouse	Year (Grade) 1	Term 1	KES 20,002.00	KES 0.00	KES 0.00	KES 20,002.00	Sent

### **Trinity Educational Centre**

× ♀ ►

	REQUEST PAYMENT	
		Unpaid Invoice No: INV_1689
		Billed to: Homer Simpson hamer@yahao.com +254445567888
STUDENT NAME: Bart Simpson	GRADE:Year (Grade) 1	TERM: <b>Term 1</b>
Price (KES)	Qty	Total (KES)
KES 20,000.00	1	KES 20,000.00
	Subtotal Discount <b>Total</b>	KES 20,000.00 KES 0.00 <b>KES 20,000.00</b>
	Price (KES)	STUDENT NAME: Bart Simpson       GRADE:Year (Grade) 1         Price (KES)       Qty         KES 20,000.00       1         Subtotal Discount

# **Student Promotion**

This guide explains how to move students from one school year or term to the next.

# How to Promote Students on Zed

- i. Access the Zed web portal via <u>http://web.zed.business</u>
- ii. Log in to your account.

zed	
	< Back Login Phone Number*
	Pin*
	Enter Pin O
	LOGIN New User? Signup

- iii. On the menu, click 'Student Promotion.'
- iv. Click the 'Promote Students' button.

7	ed		Bango Primary School 😽	8	4	[→
			Student Promotions			
87	Dashboard		Dashboard   Student Promotions			
De	Users	~				
			Previous Activity Student History			
	Businesses	~				
9	Service Charges	~				
æ			No Activity			
<u> </u>	Bank Statements		Promote students and track			
0	Parent Accounts	~	the activities here!			
ଚ	Student Promotion					
			Promote Students			
	Reports	~				
	Sms					
-						
0	Payment Setup					
<b>\$</b>	Configurations					
@2022.7e	ed. All rights reserved. V	ersion 101				
	. v	01010111.011				

	^	Elite Educational Centre				<b>a</b> 8	F 8 A			E 8 Q C
zed	<					E 📾 🤍	E 🖩 🔍 🤍			Em 🕓 🔍 🤟
		Promote Students								
Dashboard		DashBoard								
📇 Users	~	Change Type Grade								
Business	~	Gidde								
Zed Pocket Money	~	Grade • To •								
Payment Set-up										
💶 Grades & Streams		Search Students								
Bank Statements		Q search								
Student Promotion		Admission Na Student Name								
Parents Accounts	J.									
General Ledger Acc	_									
	_									
Services	ř									
Inventory	^	No Data to Display/								
Product Categories										
Product /Services										
Stock		Rows per page: 10 👻 0-0 of 0 < >								
🗏 pos										
		Promote to Next Grade Promote to Next Term								
Stock	~ ~	Rows per page: 10 + 0-0 of 0 < > Promote to Next Grade Promote to Next Term	-	_	_	_	_	_	_	_

zed

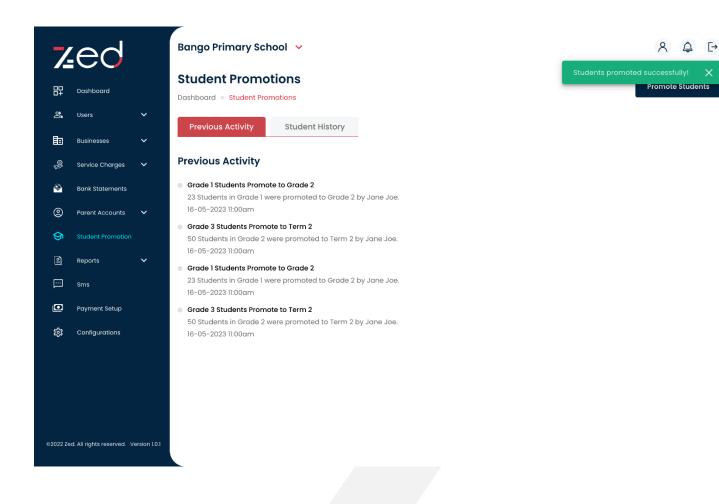
- v. Decide if you're promoting by grade or term.
- vi. Specify the grade or term where you will be promoting students.
- vii. Pick the students to promote by checking the boxes next to their names.

zed	<	Elite Educational Centre		
Dashboard		Promote Students		
Lisers	~	DashBoard   Student Promotion   Promot	e Student	
- Business	~	Grade		Ť
Zed Pocket Money	~	- Grade	Γ <sup>το</sup>	
Payment Set-up		Year (Grade) 2	+ Year (Grade) 3	Ť
📰 Grades & Streams		Search Students		
Bank Statements	- 1	Q search		
Student Promotion		Admission No	Student Name	
Parents Accounts	~			
😫 General Ledger Acc	ount	1004	Florence Kirk	
Services	~	1003	Emma Harris	
Inventory	^	1002	Mickey Mouse	
Product Categories		1001	Dalay Duck	
Product /Services				
Stock				
🗏 POS			Rows per page: 10 + 1-4 o	of 4 < >
Transactions	~		Promote to Next Grade Promote	e to Next Term

zed (	Promote Students DashBoard = Student Promotion = Promote Student Change Type	
Dashboard	Term	*
🚢 Users 🗸 🗸	- Grade Year (Grade) 2	Term
🖬 Business 🗸 🗸	- From Term	
Zed Pocket Money ~	Term 1	
Payment Set-up	Search Students	
₽ Grades & Streams	Q search	
Bank Statements		
Student Promotion	Admission No	Student Nome
😢 Parents Accounts 🗸 🗸	2004	Florence Kirk
General Ledger Account	2 1003	Emma Harris
Services ~	2002	Mickey Mouse
Inventory ^	1001	Dalay Duck
Product Categories		
Product /Services		
Stock		Rows per page: 10 $\star$ 1-4 of 4 $\langle \rangle$
Pos		Promote to Next Grade Promote to Next Term
🗏 Transactions 🛛 🗸 🤍		

viii. Click either 'Promote to Next Grade' or 'Promote to Next Term,' depending on your promotion destination.





ix. A confirmation pop-up will appear upon successful promotion.

The students will be successfully promoted to the next level.

## Zed Payables

## <u>(Web)</u>

Welcome to Zed! This guide is here to make handling your school's financial obligations a breeze. Payables cover everything from unpaid bills to invoices and payments to suppliers and service providers. Let's dive into how to use the Payables feature in Zed.

## **Configuring Payables**

- Visit <u>http://web.zed.business</u> and log in to your Zed account.
- From the menu, select 'Configurations.'
- Look for the 'Enable Payables' toggle button in the Configurations menu.

zed	Bango Primary School 🗸	8 ₽ E•
ConfigurationsConfigurationsConfigurationsConfigurations	Bango Primary School   Configurations   Dashboard Configurations     Search:   Enable Zed Accou   Enable Zed Accou     Enable Payables   Enable Payables   Enable Payables   Cancel   Imable Payables   Assign one or more approvers to transactions made from the business. Pay directly to suppliers and vendors from the app. Imable Imable Imable Cancel Enable	

• Click 'Enable' in the pop-up that appears.

• Once done, a confirmation will appear, and the Payables button turns green.

7	≤ed		Bango Primary School 🛛 🗸	
			Configurations	
87	Dashboard		Dashboard   Configurations	
ŋe	Users	~	Q Search:	
₽	Businesses	~		
ġ	Service Charges	~	Enable Zed Accounting	
0	Parent Accounts	~	Enable Inventory	
Ŵ	Payables	~	Enable Payables	
9	Reports	~		
	Sms			
٥	Payment Setup			
ŝ	Configurations			
@2022.7	ed. All rights reserved.	Version 101		
920222	eu. Aimgnis reserveu.	Version 1.0.1		

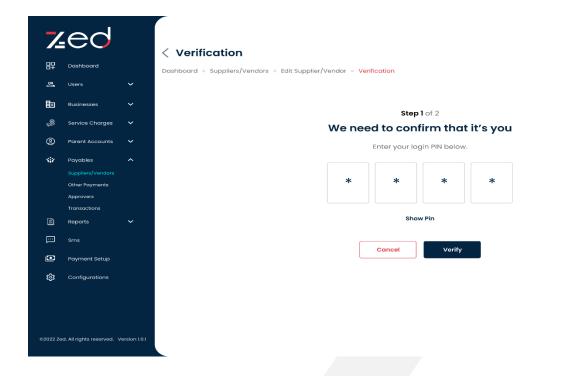
7	ed		Bango Primary School 🗸 🗸	
			Configurations	
₽₽	Dashboard		Dashboard  Configurations	
Ŋc	Users	~	Q Search:	
	Businesses	~	C search.	
, gg	Service Charges	~	Enable Zed Accounting	
٢	Parent Accounts	~		
**		~	Enable Inventory	
Nir	Payables Suppliers/Vendors	^	Enable Payables	
	Other Payments			
	Approvers			
9	Transactions Reports	~		
	Sms			
0	Payment Setup			
<u>تې</u>				
©2022 Ze	ed. All rights reserved. N	Version 1.0.1		

• Return to the side menu, and voila! You'll see the newly added "Payables" menu.

## Debit Account Set up

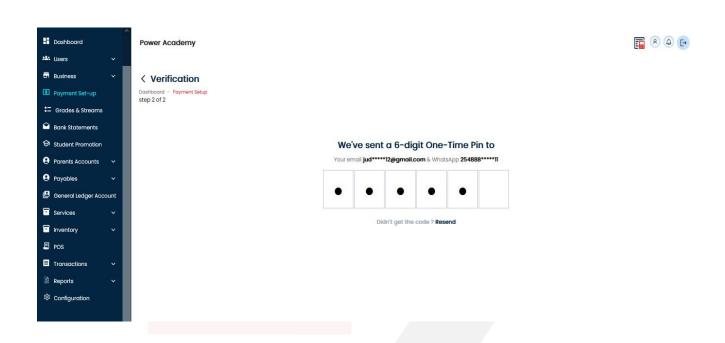
Follow these steps to establish a Debit Account for handling payments to suppliers and service providers:

- Head to 'Payment Set-up' to specify your funding source, like your school's bank account.
- Enter your Login Pin for confirmation.



- Get a one-time pin on both WhatsApp and email for verification.
- Enter the 6-digit code for verification.

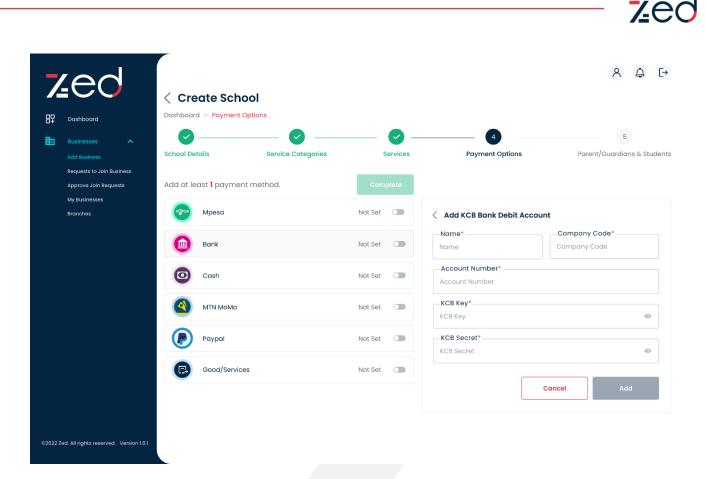
	-		
- Dashboard	Power Academy		
📇 Users 🗸 🗸			
🖬 Business 🗸 🗸	< Verification		
Payment Set-up	Dashboard  Payment Setup step 2 of 2		
Grades & Streams			
Bank Statements			
Student Promotion		We've sent a 6-digit Or	ne-Time Pin to
😫 Parents Accounts 🗸 🗸		Your email jud*****12@gmail.com & W	/hatsApp 254888*****11
😫 Payables 🗸 🗸			
🚨 General Ledger Account			
Gervices v			
🖬 Inventory 🗸 🗸		Didn't get the code ?	Resend
E pos			
■ Transactions ~			
🗈 Reports 🗸 🗸			
钧 Configuration			



- Click 'Bank' and select your bank from the provided list (e.g., KCB).
- Opt for 'Debit Accounts' to set up the account for handling payments.

Dashboard	^	Power Academy			F 8 0 F
🗥 Users	~				
Business	~	Add at least ] payment method.			
Payment Set-up		🚱 Mpesa	Active O	← Banks	
😄 Grades & Streams		<b>A</b>			
ᅌ Bank Statements		Bank Bank	Not Set	KCB Bank	^
Student Promotion		Card	Not Set	Mobile Money	Not Set
Parents Accounts	~	S Cash	Active O	Bank Deposit Debit Accounts	Not Set >
e Payables	~			Equity Bank COMING SOON	~
🕒 General Ledger Acc	ount		Not Set	Co-operative Bank COMING SOON	*
Services	~	Paypal	Not Set		
Inventory	~	Pocket Money Setup	Not Set		
🗏 POS			Not Set		
Transactions	~				
Reports	~				
尊 Configuration					

<u>7</u>eo



• Enter details like Account Name, Company Code, Account Number, Bank Key, and Secret Key.

Dashboard Dashboard Businesses Add Business Requests to Join Business	Create School Dashboard = Payment Options	Services	Payment Options	A A E→ 5 Parent/Guardians & Students
Approve Join Requests My Businesses	Add at least 1 payment method.	Complete		
Branches	Mpesa	Not Set	< Add KCB Bank Debit Accour	
	Bank	Not Set	Name* Suppliers Debit Account	Company Code* 001
	Cash	Not Set	Account Number* 012345678910	
		Not Set	-KCB Key*	••••••
	Paypal	Not Set	KCB Secret*	•••••
	Good/Services	Not Set		
				Cancel Add
©2022 Zed. All rights reserved. Version 1.0	21			

• Click 'Add Account' to save your configuration.

	Create School		R ♀ E→ Debit Account added successfully. X
Businesses     Add Business     Requests to Join Business     Approve Join Requests	School Details Service Categories	Services	Payment Options Parent/Guardians & Student
My Businesses Branches	Mpesa	Not Set	KCB Bank Debit Accounts Setup you KCB Bank Debit accounts and pay your suppliers, vendors and other payments!
	Cash	Not Set	Suppliers Debit Account 012345678910 Edit Remove
	🔇 МТИ МОМО	Not Set	
	Paypal	Not Set	Done Add Account
	Good/Services	Not Set	
62022 Zert All rights reserved. Version 1.0.1			

• A confirmation pop-up will assure you of the successful setup.

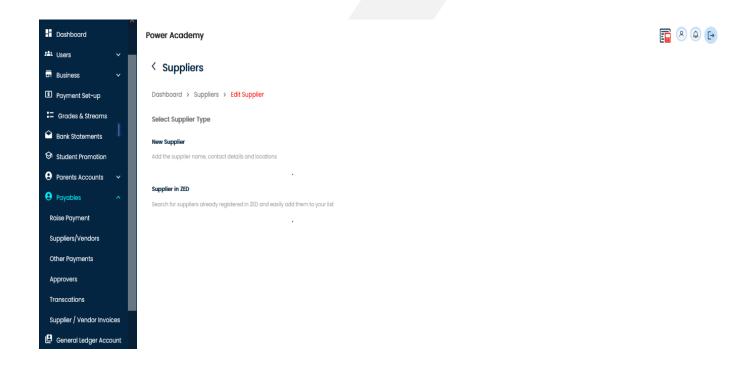
## Adding Suppliers/Vendors

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

- From the main menu, click on 'Payables,' then select 'Suppliers/Vendors.'
- Hit 'Add Supplier' and choose 'New Supplier.'

# zed

Dashboard	Power Academy				<b>.</b>	8 @ [→
Mat Users 🗸 🗸	Quere l'ann					
🖬 Business 🗸 🗸	Suppliers				ADD SUPPLIER R/	AISE PAYMENT
Payment Set-up	Dashboard > Suppliers					
💶 Grades & Streams	Active Suspended					
Bank Statements	Q Search supplier					
Student Promotion						
Parents Accounts ~						
e Payables ^	Name	Mobile Phone	Email	Location	Actions	
Raise Payment						
Suppliers/Vendors						
Other Payments			No rows			
Approvers						
Transcations						
Supplier / Vendor Invoices						
General Ledger Account					Rows per page: 5 ≠ 0−0 of 0	$\langle \rangle$



• Fill in the necessary information: Input the supplier/vendor Name, Phone Number, Email Address, Location, Bank, Account Number, and Description.

R & D

A		
Dashboard	Power Academy	
🛎 Users 🗸 🗸		
🖬 Business 🗸 🗸	< Suppliers	
Payment Set-up	Dashboard > Suppliers > Add Supplier	
😂 Grades & Streams	Supplier Name	
Bank Statements	зарыя капте	
Student Promotion	- +254	
Parents Accounts ~		
e Payables ^	Email Adress	
Raise Payment		
Suppliers/Vendors	Add a location	*
Other Payments	Select Bank Name	
Approvers		
Transcations	Bank Account Number	
Supplier / Vendor Invoices		
General Ledger Account	Bank Account Number	
🗧 Services 🗸 🗸		
Inventory ~		ADD

7	ed		< Add Supplier/Vend	or
₽₽	Dashboard		Dashboard Suppliers/Vendors A	
je	Users	~	Select Supplier/Vendor Type	
₽	Businesses	~	● New Supplier / Vendor ○ S	upplier/Vendor in ZED
19	Service Charges	~	Supplier Name*	
٢	Parent Accounts	~	Fast Suppliers Limited	
ŵ	Payables	^	Phone Number* +254 712345678	Email Address* info@fastsuppliers.com
			_Location*	
	Other Payments		State Building, Kangundo Road	
	Transactions		-Bank*	Account Number*
9	Reports	~	KCB Bank $\lor$	074384804393494
Ē	Sms		Description*	
O	Payment Setup		Stationery Supplier	
	Configurations			Cancel Add
~~	comgarationa			
©2022 Ze	ad. All rights reserved.	Version 1.0.1		

• Once all details are entered, click 'Add' to save.

## **Other Payments**

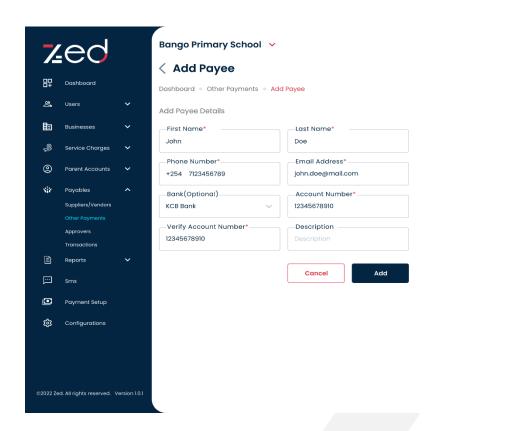
Here, you can input information for billers paid through petty cash and other internal transactions, helping you manage and track these payments effectively.

• Navigate to the Menu and choose 'Payables,' then click on 'Other Payments.'

			_							
7_	ed		Bango Primary School 🗸					8	¢	[→
87	Dashboard		Other Payments Dashboard • Other Payments				Add Payee	Raise	Payme	ent
Ĵc	Users	~	Active Suspended							
劻	Businesses	~								
<u>_</u>	Service Charges	~	Q Search:							
0	Parent Accounts	~	Name	Mobile No.		Email		Actio	on	
ŵ	Payables Suppliers/Vendors Other Payments	^			No records to display. Add payees and view them her	re.				
	Approvers Transactions									
9	Reports	~								
Ē	Sms									
O	Payment Setup									
ŝ	Configurations									
©2022 Ze	d. All rights reserved. 1	Version 1.0.1								

- Click 'Add Payee' to input information for billers paid through petty cash and other internal transactions.
- Fill in the payee's Name, Phone Number, Email Address, Bank Account, and Description.

_/	ad		Bango Primary School 🖌		8	<u></u>	[→
/_	ed		< Add Payee				
87	Dashboard		Dashboard   Other Payments   Add	Pavee			
ð	Users	~	Add Payee Details				
≣∎	Businesses	~	First Name*	-Last Name*			
	Service Charges	~	First Name	Last Name			
			Phone Number*	-Email Address*			
٢	Parent Accounts	~	+254 Phone Number	Email Address			
Ŵ	Payables	^	_Bank(Optional)	Account Number*			
	Suppliers/Vendors Other Payments		Bank 🗸	Account Number			
	Approvers		Verify Account Number*	Description			
	Transactions		Verify Account Number	Description			
Ø	Reports	~					
Ē	Sms			Cancel Add			
0	Payment Setup						
錢	Configurations						
©2022 Ze	d. All rights reserved. V	ersion 1.0.1					



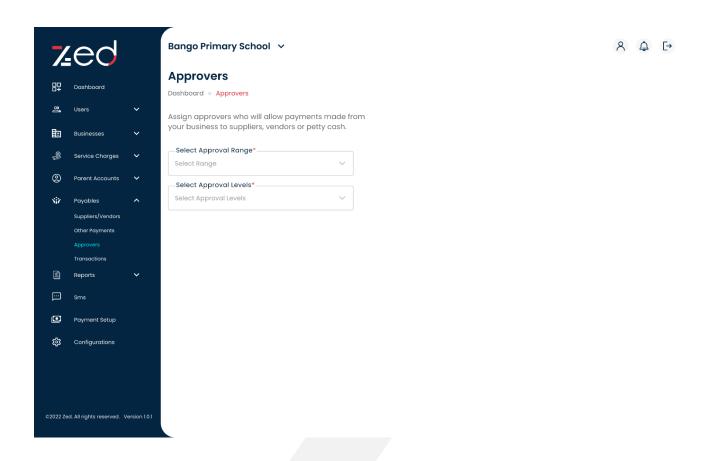
• Once you've filled in the details, click 'Add' to save.

#### **Approvers**

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

- Go to the Menu, select 'Payables,' and click on 'Approvers.' Look for the plus (+) sign.
- Define the Range and set Approval Levels according to your needs.

8 4 1-



- Range: Specify the monetary limits for inputters or approvers.
- Approval Levels: Decide how many levels you want for the approval process.

8 ₽ F

/_	ed		Bango Primary School	•
₽₽			Approvers	
37	Dashboard		Dashboard • Approvers	
ŝ	Users	~	Assign approvers who will al your business to suppliers, v	
b	Businesses	~	your business to suppliers, v	endors of petty cash.
Ş	Service Charges	~	Select Approval Range*	
			Ksh 1 - 1,000,000	~
ම	Parent Accounts	~	Select Approval Levels*	
÷۲	Payables	^	2	~
	Suppliers/Vendors			
	Other Payments		Inputers	Assign Inputer
			No inputters added yet.	
	Transactions			
9	Reports	~	Level 1 Approvers	<ul> <li>Assign Approver</li> </ul>
	Sms		No inputters added yet.	
0	Payment Setup		Level 2 Approvers	Assign Approver
ŝ	Configurations		No inputters added yet.	Assign Approver
			Cancel	Confirm
			Cancer	Confirm
22 Ze	d. All rights reserved.	/ersion 1.0.1		

To proceed with the next steps:

- For each level, click the plus (+) sign to add user details.
- Enter user information and click 'Assign' to save the details.

	ed		Bango Primary Schoo	ol 🗸
			Approvers	
87	Dashboard		Dashboard • Approvers	
ð	Users		Assign approvers who will	
Ēa	Businesses		your business to suppliers,	vendors or petty cash.
<i>_</i> @	Service Charges		Select Approval Range* Ksh 1 - 1,000,000	~
0	Parent Accounts		Select Approval Levels*	
1.1	Payables		2	$\sim$
	Suppliers/Vendors			
	Other Payments		Inputers	Assign Inpute
			John Doe +254 712	345 678
	Transactions		June Sisley +254 712	345 678
s)	Reports	~		
	Sms		Level 1 Approvers	Assign Approve
O	Payment Setup		No inputters added yet.	
ŝ	Configurations		Level 2 Approvers	Assign Approve
			No inputters added yet.	
			Cance	Confirm
©2022 Ze	d. All rights reserved.	Version 1.0.1		

• After adding users at all levels, save the information by clicking the 'Confirm' button.



zed	Bai	ngo Primo	ary School	~						8		[→
	Ар	provers	5									
Dashboard		board • Ap										
🖧 Users	~	an approve	rs who will allo	w payments	made fror	n						
Businesses			o suppliers, ve									
Service Charges	· · ·	lect Approvo 1 - 1,000,000										
Parent Account:	· ·				~							
- Payables	^ Se	lect Approvo	al Levels*		~							
Suppliers/Vendor	s											
Other Payments		iters		🕀 Assig								
Approvers Transactions		Doe	+254 712 345									
Reports	V June	Sisley	+254 712 345	678								
💬 Sms	Leve	el 1 Approve	rs	🕀 Assign	Approver							
Payment Setup	Johr	Doe +25	54 712 345 678	Normal								
ស្ត្រី Configurations		Sisley +25	54 712 345 678	Mandatory	Ū							
	Leve	el 2 Approve	ers	🕀 Assign	Approver							
			54 712 345 678	Super Approv								
			Cancel	Conf								
zed	Bai	ngo Primo	ary School	~				_			4	-
	Ар	provers	5					A	oprovers addec		sfully! oprover	
	Dast	board • Ap	provers							Ασσ-Αμ	prover	
ය. Users	~											
Businesses	~	Search:										
Service Charges	Rang	je		Levels		Input	ers	Approvers		Ac	tion	
Parent Account:	s 🗸 Kshi	- 250,000		1		5		6		I		
😯 Payables	∧ Ksh⊺	- 500,000		2		2		3		I		
Suppliers/Vendor	s Kshi	- 1,000,000		3		1		3		ľ		
Other Payments Approvers	Ksh	I - 5,000,000		3		2		4		ľ		
Transactions												
Reports	~											
📰 Sms												
Payment Setup												

• That's it! You've successfully managed Approvers in Zed.

ŝ

©2022 Zed. All rights re

## 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.

#### For Inputters:

- Log in to Zed Payments.
- From the menu select 'Payables' and choose 'Raise Payment.'

zed	<	Power Academy	
Dashboard		< Raise Supplier/Vendor Payment	
🗥 Users	~	Dashboard   Supplier/Vendors   Raise Payment	
🖬 Business	~	Select Supplier/Vendor	
Zed Pocket Money	~	O Diff General Suppliers KES 0.00 KCB Bank 0 Invoices	
Payment Set-up			
🗄 Grades & Streams			
ᅌ Bank Statements			
Student Promotion			
Parents Accounts	~		
Payables	^		
Raise Payment			
Suppliers/Vendors			
Other Payments			
Approvers			
Transcations			
Supplier / Vendor Invo	ices		

- Select a supplier from the list and click 'Add Invoice.'
- Enter the Invoice Date and Click 'Add Items'.

Zed 📻 🗵 🖨 🕞 Power Academy Dashboard < Raise Supplier/Vendor Payment Users Dashboard . Supplier/Vendors . Raise Payment Select Supplier/Vendor Business Diff General Suppliers
 KCB Bank KES 0.00 Zed Pocket Money Payment Set-up •Add Invoices Invoices Grades & Streams No Invoices Bank Statements Student Promotion Parents Accounts Suppliers/Vendors Other Payments Approvers Transcations Supplier / Vendor Invoices zed 📻 😣 🖨 🕞 Power Academy Add Invoice to Supplier/Vendor Dashboard users oard + Supplier Payments + Raise Payment + Add Invoice Business Invoice Details Zed Pocket Money Diff General Suppliers 06/12/2023 Payment Set-up Grades & Streams Invoice Item • Add Items Items : 0 Total: KES : KES 0.00 Bank Statements Student Promotion Parents Accounts Add items to invoice and preview them here! Preview Invoice Suppliers/Vendors Other Payments Approvers Transcations Supplier / Vendor Invoices

- Select the products, indicate the quantity and click 'Add'.
- Click 'Preview Invoice'.

zed

zed (	Progress Group of Schoools						8
Dashboard	< Add Item						
Business ^	Dashboard 🔹 Supplier Payments 🌸 Raise Pay	ment 🔹 Add Invoice 🔹 Add Items					
My Business							
Request To Join Business	Q Search Category						
Approve Join Request			Products 2			Total KES 80.00	
Bank Statements	Stationery	<					
Student Promotion			PRODUCT NAME	BUYING PRICE	QUANTITY	TOTALPRICE	
Staff			Pencil	20	2 0	40	
Parents Accounts 🗸			A4 Execise Book	20	2	40	
Payables ^			1 row selected		Rows per pag	le: 10 ≠ 1−2 of 2 < >	
Raise Payment							
Suppliers/Vendors							
Other Payments							
Approvers							
Transcations					c	ancel Add	
Supplier / Vendor Invoices							
zed 🦾	Progress Group of Schoools						8
Dashboard	Add Invoice to Supplier/Ve	ndor					
Business ^	Dashboard   Supplier Payments   Raise Payme	nt • Add Invoice					
My Business	Invoice Details						
Request To Join Business	Zed Gen Suppliers	06/12/2023	ii i				
Approve Join Request							
Bank Statements	Invoice Item Items : 2		Add Items     KES : KES 400.00				
Student Promotion	items : 2	Total	: KES : KES 400.00				
Staff	Pencil	20	<b>i</b>				
Parents Accounts 🗸 🗸			-				
Payables ^	A4 Execise Book	20	Î				
Raise Payment		Cancel	Preview Invoice				
Suppliers/Vendors							
Other Payments							
Approvers							
Transcations							
Supplier / Vendor Invoices							

- Click 'Pay Now' to initiate the payment.
- Approvers will receive a notification to let them know about the request that needs their attention.

Zed

# zed

Zed (	Progress Group o	of Schoools					× @ ►
Dashboard		← Preview Inv	pice				
Business     My Business     Request To Join     Business		INVOICE Date: 06/12/2023 16:08:37				Invoice Number	
Approve Join Request Bank Statements Student Promotion		From: Progress Group of Schoool Nairobi, Kenya judyally08@gmail.com +25454708753016	s			Billed to: Zed Gen Suppliers judy.mwihidijted.business 264708753016	
Staff		Description		Price (KES)	Qty	Total (KES)	
Parents Accounts ~		Pencil		KES 20.00	10	KES 200.00 📋	
e Payables ^		A4 Execise Book		KES 20.00	10	KES 200.00	
Raise Payment Suppliers/Vendors Other Payments					ADD PRODUCTS	Subtotal KES 400.00 Total KES 400.00	
Approvers		Accepted Payment M	ethods				
Transcations Supplier / Vendor Invoices		M-Pesa	Credit Balance				

## 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:

- Log in to Zed Payments.
- Click 'Payables' and select 'Transactions.'
- Under 'Suppliers/Vendors,' you'll find the payment request listed under the 'Pending Approval' column.

									-	Ŭ
7	ed		Bango Primary So	chool 🗸				8	¢	[→
睅	Dashboard		Payable Trans							
Je	Users	~	Suppliers/Vendors	Other Payments						
₽	Businesses	~	Pending Approval	Disbursed Declined	Failed					
<sub>1</sub> 9	Service Charges	~								
0	Parent Accounts	~	Q Search							
ŵ	Payables	^	Request ID	Date Requested	Payment To	Amount (KES)	Status		Action	
	Suppliers/Vendors Other Payments		✓ □ 123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00	Pending	6	<u>&gt;</u> 8	9
	Approvers		∨ □ 123456	2023-03-10 11:00	Jamaa Supplies	20,000.00	Pending	6	<u>&gt;</u> (8	ð
9	Transactions Reports	~	∨ □ 123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Pending	6	2 🗵	9
	Sms		∨ □ 123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Pending	6	2 (8	9
0	Payment Setup		∨ □ 123456	2023-03-10 11:00	David Shuma Enterprises	10,000.00	Pending	6	<u>&gt;</u> (8	٥
<u>ا</u> ش	Configurations		∨ □ 123456	2023-03-10 11:00	David Shuma Enterprises	10,000.00	Pending	6	<u>&gt;</u> (8	٥
<i>ب</i> تر,	comgutations		∨ □ 123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00	Pending	6	<u>&gt;</u> (8	٥
			Show 10 V Entries	Showing 1 to 8 of 20 entries		Previous	s 1 2	8 9	Ne	∍xt
©2022 Ze	ed. All rights reserved. N	Version 1.0.1								
			Damage Deimonrus C					0	^	<b>F</b> .

7-	ed	Bango Primary Scho	ol 🗸				8 4	[→
	Dashboard	Payable Transac Dashboard • Transactions	tions					
	Users 💙 Businesses 💙	Suppliers/Vendors Pending Approval Dist	Other Payments	Failed				
۹	Service Charges 💙 Parent Accounts 💙	Q Search						
	Payables ^ Suppliers/Vendors Other Payments	Request ID	Date Requested	Payment To David Shuma Enterprises	Amount (KES)	Status Pending	Act	ion ⊗
_	Approvers Transactions Reports V	Inputter Ann 006 Level 1 Approval	2023-03-10 11:00 Pending					
	Sms Payment Setup	Level 2 Approval Level 3 Approval	Pending Pending					
鐐	Configurations	<ul> <li>✓ □ <u>123456</u></li> <li>✓ □ <u>123456</u></li> </ul>	2023-03-10 11:00	Jamaa Supplies Jamaa Supplies	20,000.00	Pending Pending	0 0	8
		<ul> <li>✓ □ <u>123456</u></li> <li>✓ □ <u>123456</u></li> </ul>	2023-03-10 11:00	Jamaa Supplies David Shuma Enterprises	10,000.00	Pending Pending	<ul> <li>⊘</li> </ul>	×
©2022 Zəd.	. All rights reserved. Version 1.0.1	<ul> <li>✓ □ <u>123456</u></li> <li>✓ □ <u>123456</u></li> </ul>	2023-03-10 11:00 2023-03-10 11:00	David Shuma Enterprises David Shuma Enterprises	10,000.00	Pending Pending	0	8
		Show 10 V Entries Sho	wing 1 to 8 of 20 entries		Previous	1 2	8 9	Next

Click on the specific transaction to preview it. •

• After reviewing the details, click the 'Approve' button to approve the payment.

Zed

7	ed		Bango Primo	ary School 🐱
			< Preview	Payable Transaction
87	Dashboard		Dashboard • Tra	Insactions • Preview Transaction
Ŋe	Users	~		
Þ	Businesses	~	Status: Awaitir	ng 3 Approvers
<u>_</u>	Service Charges	~	Request ID: 123456	Requested On: 2023-01-02 11:00
٩	Parent Accounts	~		
Ni7	Payables	^	Supplier Details	David Shuma Enterprises
	Suppliers/Vendors		Amount:	KES 90,000.00
	Other Payments		Bank:	KCB Bank
	Approvers			
	Transactions		Transaction Detai	
9	Reports	~	Transaction Type: Debit Account:	Internal KCB Bank Transfer (IF) KCB Bank 01234567890
	Sms		Description:	May payments
0	Payment Setup		Attachments	
ŝ	Configurations		Receipt12341241xxx	a.ipg • Preview
			K6061pt12341241XK	a.jpg <b>Grieview</b>
				Decline Approve
©2022 Ze	d. All rights reserved.	Version 1.0.1		

• Upon clicking 'Approve, enter your Login Pin for confirmation.

	Dashboard Users	~	<b>Verification</b> Dashboard • Suppliers/Ver	ndors = Edit Supplier/Ve	endor • `	Verification		
	Businesses	~						
==	Guanteaaea					Step 1	of 2	
19	Service Charges				Wene	eed to confi	irm that	it's you
٢	Parent Accounts	~				Enter your logi		-
Nir.	Payables	^						
					*	*	*	*
	Other Payments				*	*	*	*
	Approvers							
	Transactions					Show	Dim	
	Reports	~				Show	PIN	
	Sms					Cancel	Verify	
O	Payment Setup					Cancer	veniy	
ŝ	Configurations							
©2022 Ze	od. All rights resorved. N	Version 1.0.1						

- A 6-digit verification code will be sent to the approver's email.
- Input the received code into the designated field for verification.
- Click the 'Verify' button to confirm.

- Dashboard	Power Academy	📻 횑 🖨 🕞
🛎 Users 🗸 🗸		
🖬 Business 🗸 🗸	< Verification	
Payment Set-up	Dashboard # Payment Setup step 2 of 2	
Grades & Streams		
Bank Statements		
Student Promotion	We've sent a 6-digit One-Time Pin to	
Parents Accounts ~	Your email jud****12@gmail.com & WhatsApp 254888*****1	
\rm Payables 🗸 🗸		
General Ledger Account		
🖬 Services 🗸 🗸		
🖬 Inventory 🗸 🗸	Didn't get the code ? <b>Resend</b>	
🗏 POS		
Transactions 🗸		
🖻 Reports 🗸 🗸		
② Configuration		

• 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.

7	ed		Bango Primary So	chool 🗸			_			8	¢	[→
日二	Dashboard		Payable Trans	actions			Trans	action a	oprove	d succe:	ssfully	• ×
<u>_</u> +	Dashboara		Dashboard • Transactio	ons								
ð	Users	~	Suppliers/Vendors	Other Payments								
Ē	Businesses	~	Pending Approval	Disbursed Declined	Failed							
<b>,</b> @	Service Charges	~										
٢	Parent Accounts	~	Q Search									
ŝ	Payables	^	Request ID	Date Requested	Payment To	Amount (KES)		Statu	S		Act	ion
	Suppliers/Vendors Other Payments		√ 123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00		Pendi	ng		Appr	oved
	Approvers		∨ □ 123456	2023-03-10 11:00	Jamaa Supplies	20,000.00		Pendi	ng		$\odot$	$\otimes$
9	Transactions Reports	~	∨ □ 123456	2023-03-10 11:00	Jamaa Supplies	10,000.00		Pendi	ng		$\oslash$	$\otimes$
	Sms		∨ □ 123456	2023-03-10 11:00	Jamaa Supplies	10,000.00		Pendi	ng		$\oslash$	$\otimes$
0	Payment Setup		∨ □ 123456	2023-03-10 11:00	David Shuma Enterprises	10,000.00		Pendi	ng		$\odot$	$\otimes$
 \$	Configurations		√ □ 123456	2023-03-10 11:00	David Shuma Enterprises	10,000.00		Pendi	ng		$\oslash$	$\otimes$
~~			∨ □ 123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00		Pendi	ng		$\odot$	$\otimes$
			Show 10 V Entries	Showing 1 to 8 of 20 entries		Prev	ious	2		8	9	Next
©2022 Ze	ed. All rights reserved.	Version 1.0.1										

• From the Approval History an activity log will show you have approved the transaction and it will wait for others to approve.

7.6

7	ed		Bango Primary Sch	iool 🗸				8 4	E
			Payable Transc	actions					
睅	Dashboard		Dashboard • Transactions						
Ŋc	Users	~	Suppliers/Vendors	Other Payments					
1	Businesses	~	Pending Approval D	isbursed Declined	Failed				
<u>(</u> ))	Service Charges	~							
0	Parent Accounts	~	Q, Search						
ŵ	Payables	^	Request ID	Date Requested	Payment To	Amount (KES)	Status	Act	tion
	Suppliers/Vendors Other Payments		∧ <u>123456</u>	2023-03-10 11:00	David Shuma Enterprises	20,000.00	Pending	Арр	roved
	Approvers		Inputter						
_	Transactions		Ann 006	2023-03-10 11:00					
2	Reports	~	Level 1 Approval	Completed					
	Sms		Joan(You) 007	Approved					
o	Der werden bleiter		Level 2 Approval	Pending					
2	Payment Setup		Level 3 Approval	Pending					
ŝ	Configurations								
			✓ □ <u>123456</u>	2023-03-10 11:00	Jamaa Supplies	20,000.00	Pending	$\odot$	$\otimes$
			✓ □ <u>123456</u>	2023-03-10 11:00	Jamaa Supplies	10,000.00	Pending	$\odot$	$\otimes$
©2022 Ze	d. All rights reserved. \	Version 1.0.1	✓ □ <u>123456</u>	2023-03-10 11:00	Jamaa Supplies	10,000.00	Pending	$\odot$	$\otimes$
			✓ ☐ <u>123456</u>	2023-03-10 11:00	David Shuma Enterprises	10,000.00	Pending	$\odot$	$\otimes$
			Show 10 V Entries s	Showing 1 to 8 of 20 entries		Previous	1 2	8 9	Nex

- When all approvals are done and the payment process is complete, the status changes to 'Approved' and Awaits Disbursement.
- The transaction will be received in the bank for Funds disbursement.
- If successfully disbursed, transaction moves to "Disbursed" Tab.
- Transaction completed and Funds disbursed to Supplier's account.

# zed

7	ed		Bango Primary Sc	hool 🗸				8 ⊉ ⊡
			Payable Trans	actions				
87	Dashboard		Dashboard • Transaction	าร				
Ŋe	Users	~	Suppliers/Vendors	Other Payments				
₽	Businesses	~	Pending Approval	Disbursed Declined	Failed			
1 <sup>29</sup>	Service Charges	~						
٢	Parent Accounts	~	Q Search					
\$	Payables	^	Request ID	Date Requested	Payment To	Amount (KES)	Status	Date Disbursed
	Suppliers/Vendors Other Payments		∨ 123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00	Disbursed	2023-03-10 11:00
	Approvers		∨ 123456	2023-03-10 11:00	Jamaa Supplies	20,000.00	Disbursed	2023-03-10 11:00
S	Transactions Reports	~	∨ 123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Disbursed	2023-03-10 11:00
	Sms		∨ 123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Disbursed	2023-03-10 11:00
O	Payment Setup		∨ 123456	2023-03-10 11:00	David Shuma Enterprises	10,000.00	Disbursed	2023-03-10 11:00
ŝ	Configurations		∨ 123456	2023-03-10 11:00	David Shuma Enterprises	10,000.00	Disbursed	2023-03-10 11:00
			∨ 123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00	Disbursed	2023-03-10 11:00
©2022 Ze	d, All rights reserved. 1	Version 1.0.1	Show 10 V Entries	Showing I to 8 of 20 entries		Previous	1 2	8 9 Next

7	ed	
睅	Dashboard	
<u>]</u> e	Users	~
₽	Businesses	~
9	Service Charges	~
٢	Parent Accounts	~
ŵ	Payables	^
	Suppliers/Vendors	
	Approvers	
	Transactions	
S	Reports	~
	Sms	
0	Payment Setup	
ŝ	Configurations	

ngo Primo	ary School 🐱	
Preview	Payable Transaction	
hboard • Tra	Insactions • Preview Transaction	
atus: Disburs	sed	Approval History
uest ID: I <b>56</b>	Requested On: 2023-01-02 11:00	• Amount disbursed successfully. 2023-11-2023 13:00
plier Details		Joan 006 approved the transaction rec 2023-11-2023 13:00
ment To: ount:	David Shuma Enterprises KES 90,000.00	<ul> <li>Isaac 008 approved the transaction re- 2023-11-2023 13:00</li> </ul>
k:	KCB Bank	
nsaction Detai	ils	
nsaction Type:	Internal KCB Bank Transfer (IF)	
oit Account:	KCB Bank 01234567890	
escription: tachments	May payments	

©2022 Zed. All rights reserved. Version 1.0.1

8 4 [+

0 Pending

### 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.

#### For Inputters:

- Visit <u>http://web.zed.business</u> and log in to your Zed account.
- From the menu select 'Payables' and choose 'Other Payments'.
- Click the 'Raise Payment' button.

/=	ed		Bango Primary Schoo Other Payments	er Payments				
₽₽	Dashboard		Dashboard • Other Payment		Add Payee	Raise I	Payn	ment
je	Users	~	Active Suspended					
Þ	Businesses	~	Q Search:					
<sup>p</sup>	Service Charges	~	Section.					
0	Parent Accounts	~	Name	Mobile No	Email		Act	tion
ŵ	Payables	^	John Doe	+254712345678	johndoe@mail.com		ľ	2
	Suppliers/Vendors Other Payments		Marian Ann	+254712245633	marian.ann@mail.com		ľ	2
	Approvers		Simple Joe	+254712245633	simple.joe@mail.com		ľ	2
	Transactions		Mary Li	+254712245633	mary.li@mail.com		ľ	2
	Reports	~	Tom Sam	+254712245633	tom.sam32@mail.com		ľ	2
	Sms		Mathew Tom	+254712245633	mathewtom@mail.com		ľ	2
0	Payment Setup		Kate Lui	+254712245633	kate.lui@mail.com		ľ	2
鐐	Configurations							
			Show 10 V Entries Show	wing 1 to 8 of 20 entries	Previous 1 2	. 8	9	Ne

• Select the payee and the account to pay them to.

-/	ed		Bango Primary School 🗸					
/-			< Raise Payment					
睅	Dashboard		Dashboard • Other Payments • Rais	e Payment				
j.	Users	~	Payee Details					
₽	Businesses	~	Select Payee*	Send To*				
<u>1</u> 99	Service Charges	~	John Doe 🗸 🗸	KCB Bank (001122	233445566) 🗸			
9	Parent Accounts	~	Invoice Items		+ Add Items			
ŵ	Payables	^	Add items to invoice	Add items to invoice and preview them here!				
			Add items to invoice	and preview them h	ere:			
	Other Payments Approvers		Attach an image		Upload File			
	Transactions							
¢.	Reports	~		Cancel	Next			
	Sms							
0	Payment Setup							
錢	Configurations							
©2022 Ze	ed. All rights reserved.	Version 1.0.1						

- Click 'Add Items', select the products, indicate the quantity and click 'Add'.
- Click 'Add Invoice'.

-/	ed		Bango Primary School 🖌					8 4 [
/-			< Add Item					
晘	Dashboard		Dashboard 🔹 Other Payments 🔹 Raise Payment	Add It	em			
je	Users	~	Select category to display products					
₽	Businesses	~	Q Search Category Name					
ß	Service Charges	~						
٢	Parent Accounts	~	Cocktails	>	Products: 1			Total: KES 2,000.00
1	Payables	~	Beer	>	Product Name	Price (KES)	Quantity	Total (KES)
			Stationery	>	A4 Maths Books	100	20	2000
	Other Payments		Gin	>	A4 Writing Books	200	-	-
	Approvers Transactions		Vodka	>	Bic Red Pen	20	-	-
9	Reports	~	Whisky	>	Bic Blue Pen	25	-	-
	Sms		Wine	>	Bic Black Pen	25	-	_
O	Payment Setup		Pure Drinking Water	>	HB Pencils	45	-	-
ŝ	Configurations				Staples	-	-	-
					Stapler	-	-	-
							Cancel	Add
©2022 Ze	ed. All rights reserved.	Version 1.0.1						

Zed

🖬 Business 🗸 🗸	^	Power Academy		
🖳 Zed Pocket Money 🗸 🗸				
Payment Set-up		Raise Payment		
💶 Grades & Streams		Dashboard   Other Payments   Raise Payme	nt	
Bank Statements		Payee Details		
Student Promotion		Select Payee *	KCB 1279287799	
🔓 Staff		Marge Simpson	KCB 12/928/799	٣
Parents Accounts ~		Invoice Item		Add Items
e Payables		Items:1	Total: KES	S : KES 1,600.00
Raise Payment		Flour 1600		
Suppliers/Vendors				
Other Payments		Attach an Image		Upload File
Approvers			Cancel	Add Invoice
Transcations				
Supplier / Vendor Invoices				
General Ledger Account				
🗖 Business 🗸 🗸	^	Power Academy		
Zed Pocket Money ~		,		
Payment Set-up		Raise Payment		
Grades & Streams		Dashboard   Other Payments  Raise Paym	ent • Transaction Details	
Bank Statements		Payee Details		
😌 Student Promotion		Payment To : M	arge Simpson	
⊈ Staff		Amount : Ki	ES 1,600.00	
e Parents Accounts ✓		Payment Mode K	CB 1279287799	

• Fill in the Transaction type, Account to Debit and Description.

Ŧ

Ŧ

• Click 'Raise Payment'.

Transaction Details Transcation Type

Account To Debit

Description\*

Description

RAISE PAYMENT

Select Transaction Type

Select Account To Debit

Payables

Approvers

Transcations

Services

Supplier / Vendor Invoices

Raise Payment

Suppliers/Vendors

zed

	Bango Primary School	<b>~</b>		8 ₽ F→
Zed	< Transaction Deta			
Dashboard		Raise Payment   Transaction Details		
🕰 Users 🗸 🗸	Payee Details			
🗄 Businesses 🗸 🗸	Payment To: John Doe			
🥮 Service Charges 🗸 🗸	Amount: KES 6,000.00 Payment Mode: KCB Bank (0011	12233445566)		
Parent Accounts	Transaction Details			
Y Payables	Transaction Type* Internal KCB Funds Transfer (IF)	~		
Suppliers/Vendors Other Payments	Account To Debit*			
Approvers	KCB Bank: 01234567890	~		
Transactions	Description*			
Sms	John Doe			
- Payment Setup	Cancel	Raise Payment		
ស៊ែ Configurations				
	Damage Drive and Colored			
Dashboard	Bango Primary School	~	Payment request ra Add Payee	Raise Payment
💾 Dashboard	Other Payments Dashboard • Other Payments Active Suspended	~		nised successfully! $ imes$
문 Dashboard 음 Users 오	Other Payments Dashboard  Other Payments	~		nised successfully! $ imes$
문 Dashboard 옷 Users ~	Other Payments Dashboard • Other Payments Active Suspended	Mobile No		nised successfully! $ imes$
□ Dashboard         □ Dashboard         □ Users       ✓         □ Businesses       ✓         □ Service Charges       ✓	Other Payments       Dashboard     Other Payments       Active     Suspended       Q     Search:		Add Payee	aised successfully! X
Image: Dashboard       Imag	Other Payments         Dashboard       Other Payments         Active       Suspended         Q       Search:         Name	Mobile No	Add Payee Email	nised successfully! X Raise Payment Action
Image: Dashboard       Imag	Other Payments         Dashboard       Other Payments         Active       Suspended         Q       Search:         Name       John Doe	<b>Mobile No</b> +254712345678	Add Payee Email johndoe@mail.com	Action
Image: Dashboard	Other Payments   Dashboard   Active   Suspended     Q   Search:     Name   John Doe   Marian Ann	<b>Mobile No</b> +254712345678 +254712245633	Email johndoe@mail.com marian.ann@mail.com	Action
□ Dashboard         □ Users       ✓         □ Users       ✓         □ Businesses       ✓         □ Parent Accounts       ✓         □ Parent Accounts       ✓         □ Payables       ✓         □ Other Payments       ✓         □ Approvers       Transactions         □ Reports       ✓	Other Payments   Dashboard   Other Payments   Active   Suspended     Q   Search:     Name   John Doe   Marian Ann   Simple Joe	Mobile No +254712345678 +254712245633 +254712245633	Email johndoe@mail.com marian.ann@mail.com	Action Action
Image: Dashboard	Other Payments   Dashboard   Other Payments   Active   Suspended     Q   Search:     Name   John Doe   Marian Ann   Simple Joe   Mary Li	Mobile No           +254712345678           +254712245633           +254712245633           +254712245633           +254712245633	Email johndoe@mail.com marian.ann@mail.com simple.joe@mail.com mary.li@mail.com	Action Ac
Image: Base of the series	Other Payments   Dashboard   Active   Suspended     Q   Search:     Name   John Doe   Marian Ann   Simple Joe   Mary Li   Tom Sam	Mobile No           +254712345678           +254712245633           +254712245633           +254712245633           +254712245633           +254712245633           +254712245633	Add Payee         Email         johndoe@mail.com         marian.ann@mail.com         simple.joe@mail.com         mary.li@mail.com         tom.sam32@mail.com	Action Action Action A A A A A A A A A A A A A A A A A A A
Image: Dashboard	Other Payments   Dashboard   Active   Suspended     Q   Search:     Name   John Doe   Marian Ann   Simple Joe   Mary Li   Tom Sam   Mathew Tom   Kate Lui	Mobile No           +254712345678           +254712245633           +254712245633           +254712245633           +254712245633           +254712245633           +254712245633           +254712245633           +254712245633           +254712245633	Email johndoe@mail.com marian.ann@mail.com simple.joe@mail.com mary.il@mail.com tom.sam32@mail.com kate.lui@mail.com	Action Action

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

#### 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:

- Visit <u>http://web.zed.business</u> and log in to your Zed account.
- Click 'Payables' and select 'Transactions'.
- Under 'Other Payments' you'll find the payment request listed under the 'Pending' column.

	A							
- Business		Power Academy						📻 🗷 🖨 🕞
Zed Pocket Money								
Payment Set-up		Payable Transa	ctions					
Crades & Streams		Dashboard • Transactions						
ᅌ Bank Statements		Suppliers/Vendors	OtherPayments					
Student Promotion		Pending	Disbursed	Declined	Failed			
🖆 Staff		Approval	510501000	20011104	, and a			
Parents Accounts	~	Q Search						
Payables	^							
Raise Payment		Request ID		Date Requested		Payment To	Amount (KES)	Status
Suppliers/Vendors		□ ∨ <u>FT353</u>		13/12/2023 16:11:24		Marge Simpson	KES 1,600.00	Pending
Other Payments								
Approvers		✓ <u>FT350</u>		08/12/2023 11:52:26		Marge Simpson	KES 1,000.00	Pending
Transcations								Rows per page: 10 👻 11-2 of 2 < 🗸
Supplier / Vendor Invoi	ces							

• Approver can preview the transaction by clicking on it.

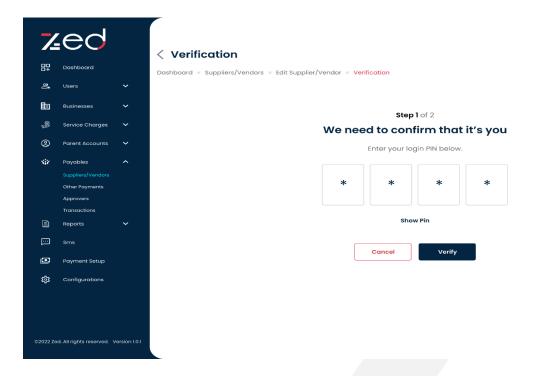
- Business	~	Power Academy				F 🖲 🙆
Zed Pocket Money	~					
Payment Set-up		C Preview Payable Trans				
Grades & Streams		Status : Your transaction request has been submitted to Bank succes			Activity History	
Bank Statements		Request ID :	Requ	uest On :	<ul> <li>Judy has created a Payee Payment transaction {FT350} for amount {Ksh 1000}</li> </ul>	
Student Promotion		FT350	08/1	12/2023 11:52:26	08/12/2023 11:52:26	
🔓 Staff		Payee Details			<ul> <li>Judy a Super approver has approved a Payee Payment transaction FT350 for amount Ksh 1000</li> </ul>	
Parents Accounts	~	Payee Details			08/12/2023 12:03:14	
Payables	~	Name	Marge Simpson		<ul> <li>Your transaction request has been submitted to Bank successfully</li> </ul>	
Raise Payment		Amount :	KES 1000		08/12/2023 12:03:17	
Suppliers/Vendors		Bank Name :	254708753016			
Other Payments		Transcation Details				
Approvers		Transaction Type:	Mobile Money			
Transcations		Debit Account:	KCB 1291666699			
Supplier / Vendor Invoid	ces	Description:	Transport			
🕒 General Ledger Acco	unt	Attachment				
Services	~			CANCEL		
Inventory	~					

• After previewing, tick the checkbox and click 'Approve'.

Business		Power Academy						🖬 😣 🚇	[→
Zed Pocket Money									
Payment Set-up		Payable Transc							
😄 Grades & Streams		Dashboard • Transactions							
Bank Statements		Suppliers/Vendors	OtherPayments						
Student Promotion		Pending	Disbursed	Declined	Failed				
🔓 Staff		Approval							
Parents Accounts	~	Q Search							
Payables	^								
Raise Payment		Request ID		Date Requested		Payment To	Amount (KES)	Status	
Suppliers/Vendors		✓ ∨ <u>FT353</u>		13/12/2023 16:11:24		Marge Simpson	KES 1,600.00	Pending	
Other Payments									
Approvers		✓ <u>FT350</u>		08/12/2023 11:52:26		Marge Simpson	KES 1,000.00	Pending	
Transcations							Row	s per page: 10 $\star$ 11–2 of 2 $\checkmark$ >	
Supplier / Vendor Invo	ices							APPROVE 1 DECLINE	1
General Ledger Acc	ount								
Services									
Inventory									

• Upon clicking 'Approve, enter your Login Pin for confirmation.

7.6



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

- Dashboard	Â	Power Academy	8 @ [→
±t Users	~		
G Business	~	< Verification	
Payment Set-up		Dashboard = Payment Setup step 2 of 2	
Crades & Streams		under z ni z	
Bank Statements			
Student Promotion	- 1	We've sent a 6-digit One-Time Pin to	
Parents Accounts	~	Your email jud*****12@gmail.com & WhatsApp 254888*****11	
Payables	~		
🕒 General Ledger Acc	ount		
Services	~		
Inventory	~	Didn't get the code ? <b>Resend</b>	
🗏 POS			
Transactions	~		
Reports	~		
蓉 Configuration			

• A pop-up confirmation message will indicate that the approval has been successful. A notification of the same will be sent to other approvers.

- From the Approval History an activity log will show you have approved the transaction and it will wait for others to approve.
- When all approvals are done and the payment process is complete, the status changes to 'Approved'.
- The transaction will be received in the bank for Funds disbursement.
- If successfully disbursed, transaction moves to "Disbursed" Tab.

🖬 Business 🗸 🗸	Power Academy								<b>.</b>	<b>A F</b>
🖳 Zed Pocket Money 🗸 🗸										
Payment Set-up	Payable Transaction	ns								
Grades & Streams	Dashboard • Transactions									
Bank Statements	Suppliers/Vendors Oth	herPayments								
Student Promotion	Pending Approval	Disbursed	Declined	Failed						
🖆 Staff										
Parents Accounts ~	Q Search		Search business.							
😫 Payables 🔷										
Raise Payment	Request ID	Date Requested	Payr	nent To	Amount (K	ES)	Status	Date Disbursed		
Suppliers/Vendors	✓ <u>FT353</u>	13/12/2023 16:11:24	Març	e Simpson	KES 1,600.00	1	Disbursed	13/12/2023 16:11:24		
Other Payments								Rows per page: 10 +	11–1 of 1	$\langle \rangle$
Approvers										
Transcations										
Supplier / Vendor Invoices										
General Ledger Account										
Services 🗸										
🖬 Business 🗸 🗸	Power Academy									
Zed Pocket Money ~	Preview Payable Tran									
<ul> <li>Payment Set-up</li> <li>Grades &amp; Streams</li> </ul>	Dashboard • Transactions • Previ		d to the geograph			Activity History				
Bank Statements	successfully	seu unu runus disbuiser	a to the account			<ul> <li>Judy has create</li> </ul>	ed a Payee Payment tr	ansaction {FT353} for		
Student Promotion	Request ID : FT353		Request On : 13/12/2023 16:11:24			amount {Ksh 16 13/12/2023 16:11:2	<b>00}</b> 24			
🖆 Staff	F1353		13/12/2023 16:11:24			transaction FT3	pprover has approved 53 for amount Ksh 160	a Payee Payment 0		
Parents Accounts ~	Payee Details					13/12/2023 16:23	:26 n request has been su	bmitted to Bank		
e Payables ^	Name	Marge Simpson				successfully 13/12/2023 16:23				
Raise Payment Suppliers/Vendors	Amount :	KES 1600				<ul> <li>Your transaction the account succession</li> </ul>		and Funds disbursed to		
Other Payments	Bank Name :	KCB 1279287799				13/12/2023 16:23	:55			
Approvers	Transcation Details									
Transcations	Transaction Type:	Internal KCB Funds transfe	ər							
Supplier / Vendor Invoices	Debit Account:	KCB 1291666699								
General Ledger Account	Description: Attachment	Payment								
Services Y	ALCICTITIENTE									
🗧 Inventory 🗸 🗸										

## **General Ledger**

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

\* This is for those who are using the Zed Accounting module.

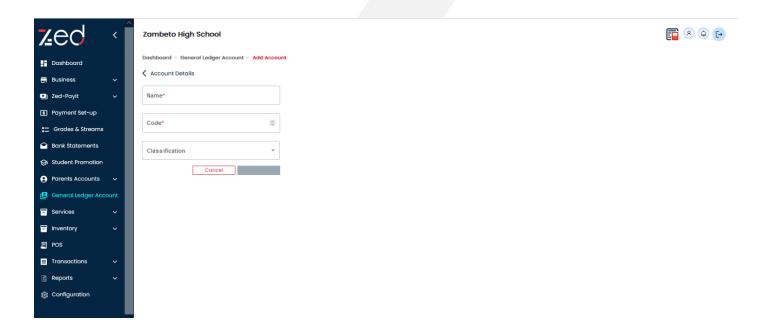
Creating a GL Account on Zed's web portal is straightforward:

- i. Log in to Zed, then select 'General Ledger Account' from the menu.
- ii. Click the 'Add New' button.

Unpoid Invoices KES 4,802.00 87 Invoices
Invoices KES 4,802.00
KES 4,802.00
87 Invoices
nary Last 7 Days
hSchool_29 1 Invoices hSchool_28 8 Invoices
hSchool_28 8 Invoices hSchool_27 8 Invoices
hSchool_30 8 Invoices
hSchool_26 8 Invoices
ligi ligi ligi

I	^				
Zed <	I	Zambeto High School			📻 🗷 🖨 🕞
Dashboard		General Ledger Account			
🖬 Business 🗸 🗸		Dashboard   General Ledger Account			Add New
🖭 Zed-Payit 🗸 🗸					
Payment Set-up		Q search			
🚍 Grades & Streams					
🔗 Bank Statements		Category Name	Classification	Action	^
Student Promotion		Administrative Expenses (Expense)	expansa	1	
Parents Accounts ~		Administrative Expenses (Income)	revenue	1	
General Ledger Account		Tuition (Expense)	expense	1	
🗧 Services 🗸 🗸		Tuition (Income)	revenue	/	
Tinventory ~		Other Services (Expense)	expanse	1	
POS		Other Services (income)	revonue	ľ	×
Transactions ~					Rows per page: 10 + 1-10 of 10 < >
🖻 Reports 🗸 🗸					
ĝ: Configuration					

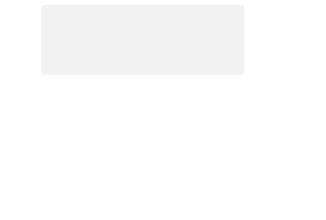
## iii. In the provided fields, enter the Name, Code, and Classification for your GL account.



zed

zed	<	Zambeto High School
Dashboard	- 1	Dashboard   General Ledger Account   Add Acco
- Business	~	Account Details
🖭 Zed-Payit	~	Bank Loan
Payment Set-up	- 1	- Code*
🚍 Grades & Streams	- 1	005
🖻 Bank Statements	- 1	Class ification Expense +
Student Promotion	- 1	Cancel Add
Parents Accounts	~	Cancel Add
😫 General Ledger Acc	ount	
Services	~	
Inventory	~	
POS		
Transactions	~	
Reports	~	
දි; Configuration		

iv. Save your changes by clicking the 'Add' button, and your General Ledger account will be created successfully.



zed