

School User Guide (Web)



Connecting your **business**
to payments

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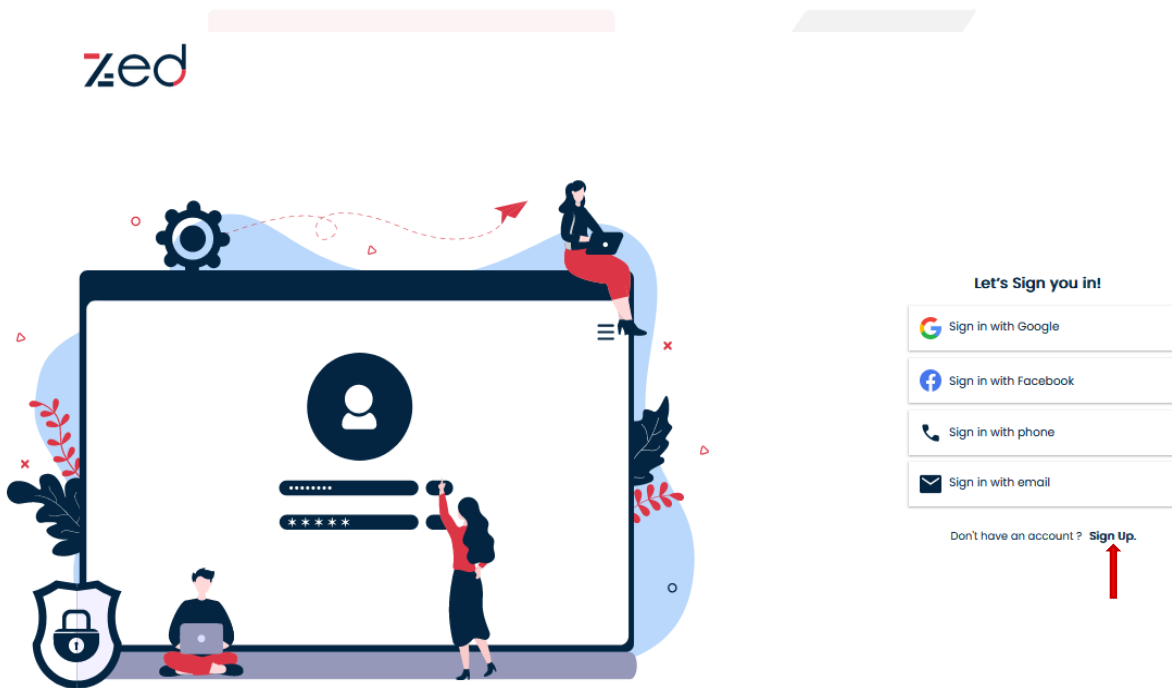


Zed Sign Up process via web

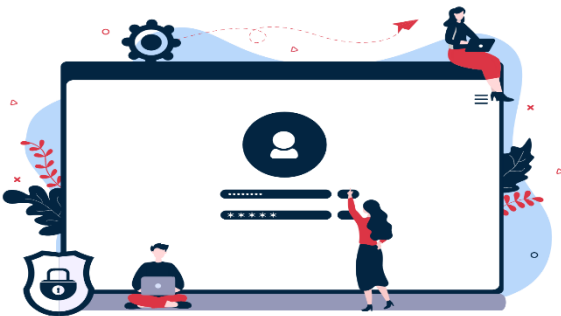

Welcome to Zed! Here's a simple guide to help you sign up, receive your login details, and even change your pin.

How to Sign Up:

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



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



Create Account

First Name* Last Name*

First name Last name

Username*

Username

Email*

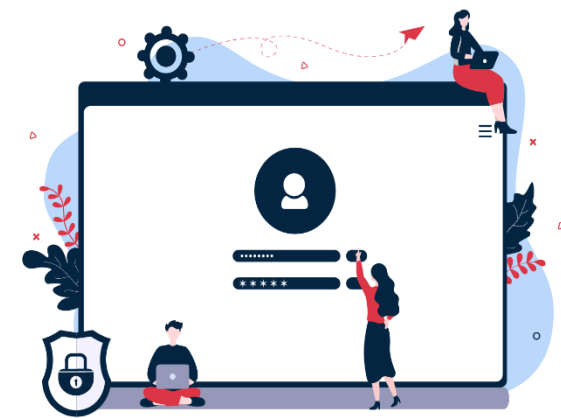

User Email

Phone Number*

KE +254 Enter your phone number

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

Already have an account? [Login](#)



Create Account

First Name* Last Name*

John Doe

Username*

Doe doe

Email*

Doe@gmail.com

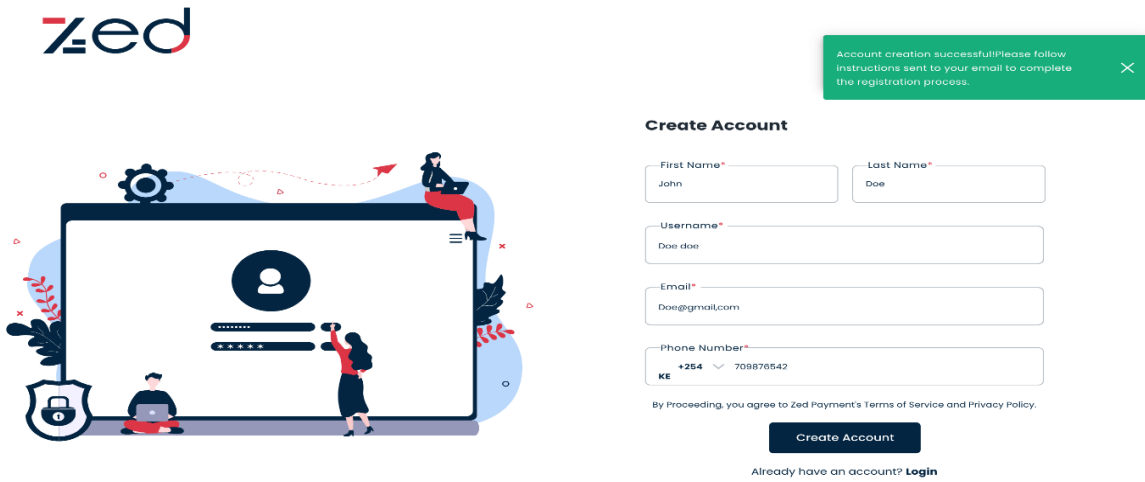
Phone Number*

KE +254 709876542

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

Already have an account? [Login](#)

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

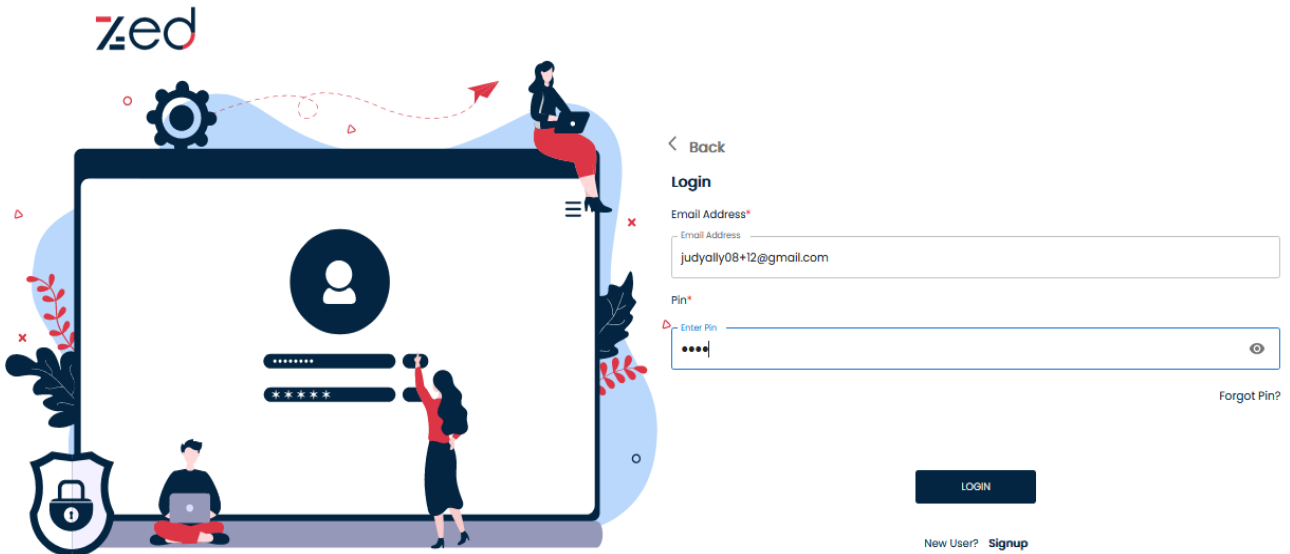


How to Change Pin:

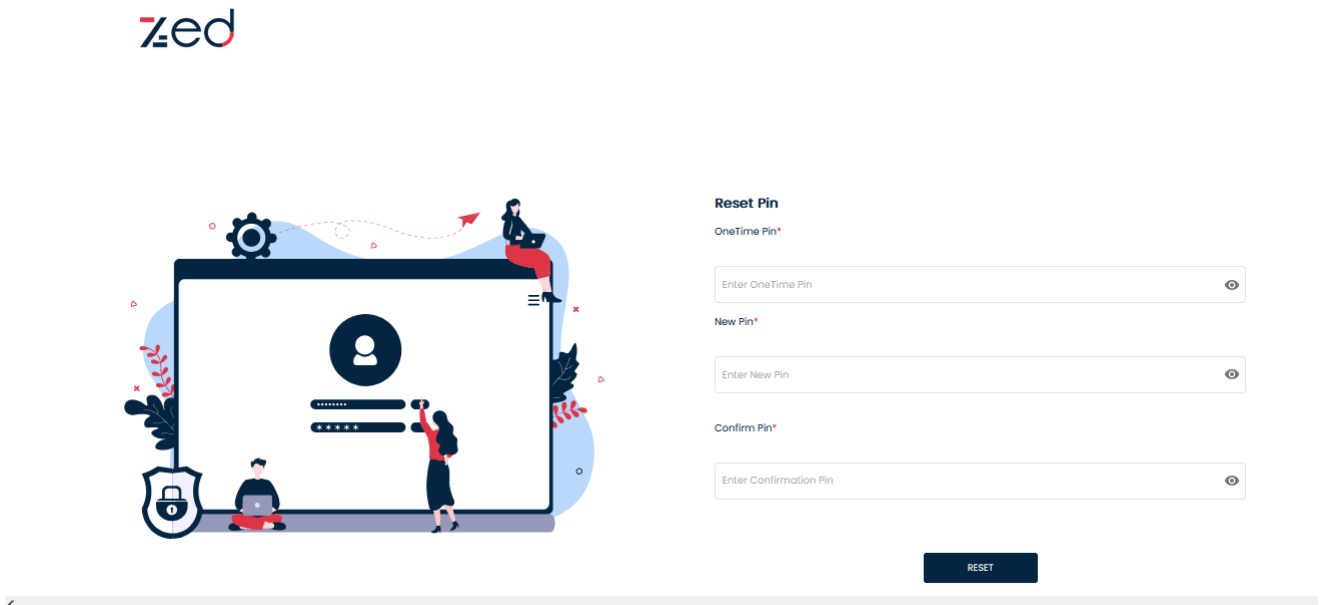
- i. Your login credentials will be sent to your email and WhatsApp after successful registration.
- ii. Return to the homepage and choose your preferred sign-in option (Google, Facebook, Phone, or Email).



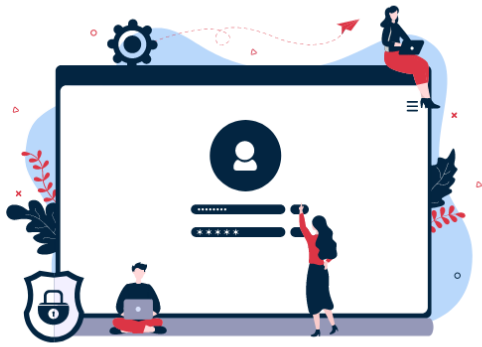
- iii. Provide your login credentials and click 'Login'.



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



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



Reset Pin

OneTime Pin*

New Pin*

Confirm Pin*

RESET

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

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

The screenshot shows the Zed portal dashboard. On the left is a dark blue sidebar with the Zed logo at the top and a menu with the following items: Dashboard, Businesses (with an upward arrow), Add Business, Requests to Join Business, Approve Join Requests, My Businesses, and Branches. The main content area is white and features a large smiley face icon. Below the icon, it says "Welcome John Doe." followed by the text "We are here to help you create a business and accept payments easily." Below this is a link that says "Create Business Today or Request to Join one". At the bottom of the main content area are two buttons: "Join Business" (a white button with a black border) and "Create Business" (a solid dark blue button). In the top right corner of the dashboard, there are three icons: a person, a bell, and a share icon. At the bottom left of the sidebar, there is a small copyright notice: "©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
- Businesses**
- Add Business
- Requests to Join Business
- Approve Join Requests
- My Businesses
- Branches

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Create your business Today!

Select your business type

- | | | | | | | |
|--------------------------------|------------------|-----------------------------------|------------------|--------------------|----------------------|-----------------|
|
Eatery, Bar and Restaurant |
Hotel |
Service Station (Gas Station) |
Pharmacy |
Hardware |
Liquor Shop |
Retail Shop |
|
Wholesale Shop |
Manufacturer |
Suppliers and Vendors |
Distributors |
School/College |
Rental & Housing | |



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 <

Businesses ^

My Business

POS

About ZED

Logout

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< **Create Business**

Dashboard > School Details

1 School Details 2 Grades & Streams 3 Service Categories 4 Services 5 Payment Options 6 Parent/Guardians & Students

Set-up your business details.

School Type* Secondary School Name* School Name

Director* School Owner Phone Number* +254

Email* Email Location* Location

Select Country

Country* Country Currency* Currency

CANCEL DONE

- 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 Business

Dashboard • School Details

1 School Details 2 Grades & Streams 3 Service Categories 4 Services 5 Payment Options 6 Parent/Guardians & Students

Set-up your business details.

School Type*	School Name*
<input type="text" value="Kindergarten/Junior/High School"/>	<input type="text" value="Trinity Educational Centre"/>
Director*	Phone Number*
<input type="text" value="Prof Mineh"/>	<input type="text" value="+254 123 456 789"/>
Email*	Location*
<input type="text" value="trinityec@gmail.com"/>	<input type="text" value="Nairobi"/>
Select Country	
<input type="text" value="Kenya"/>	
Country*	Currency*
<input type="text" value="Kenya"/>	<input type="text" value="KES"/>

- iv. Select and click 'done.'



Logo:

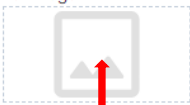
- i. Click inside the outline of the logo at the top right to add the school logo.

< **Create Business** 👤 🔔 📄

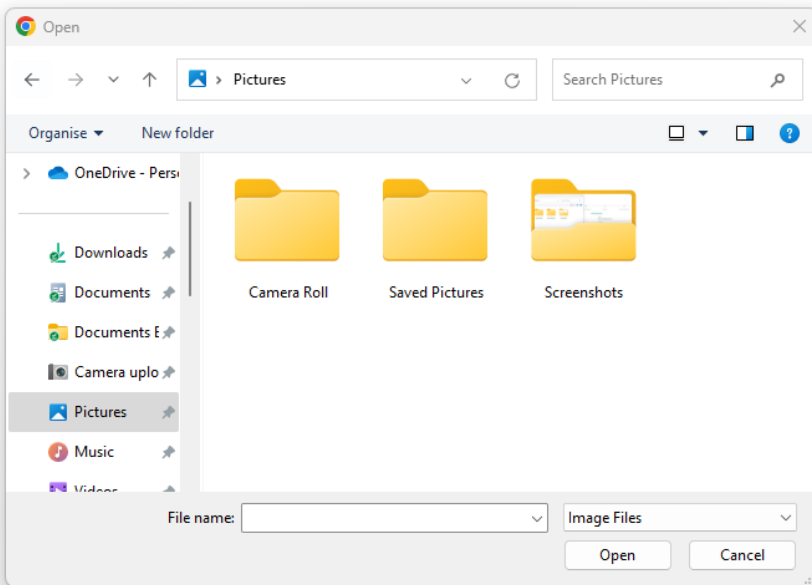
Dashboard • School Details

1 School Details 2 Grades & Streams 3 Service Categories 4 Services 5 Payment Options 6 Parent/Guardians & Students

School Summary

Your Logo	Email
	zpaymentsltd@gmail.com
School Type	Location
Kindergarten/Junior/High School	Nairobi
School Name	Country
Trinity Educational Centre	Kenya
Director	Currency
Prof Minoh	KES
Grades	Phone Number
Year (Grade) 1, Year (Grade) 2, Year (Grade) 3, Year (Grade) 4, Year (Grade) 5, Year (Grade) 6, Year (Grade) 7, Year (Grade) 8, Year (Grade) 9, Year (Grade) 10, Year (Grade) 11, Year (Grade) 12, PPI, PP2, Playgroup,	+254769607456

- ii. Browse your computer for the logo image.
- iii. Select the image and upload it.



Progress bar with steps 5 and 6. Step 5 is 'Payment Options' and step 6 is 'Parent/Guardians & Students'. Below the progress bar are several input fields, some containing text like '@gmail.com'. At the bottom right are 'EDIT' and 'NEXT' buttons.

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

Create Business

Dashboard > School Details



School Summary

Your Logo



School Type

Kindergarten/Junior/High School

School Name

Trinity Educational Centre

Director

Prof Minah

Grades

Year (Grade) 1, Year (Grade) 2, Year (Grade) 3, Year (Grade) 4, Year (Grade) 5, Year (Grade) 6, Year (Grade) 7, Year (Grade) 8, Year (Grade) 9, Year (Grade) 10, Year (Grade) 11, Year (Grade) 12, PPI, PP2, Playgroup,

Email

zpaymentsstd@gmail.com

Location

Nairobi

Country

Kenya

Currency

KES

Phone Number

+254769607456

'EDIT' and 'NEXT' buttons.

Grades and Streams:

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

i. To add streams, click the 'Add Stream' button.

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

< **Create Business**

Dashboard » Grades & Streams





Trinity Educational Centre

< **Create Business**

Dashboard » Grades & Streams

Stream Added Successfully



Streams Grades

[ADD STREAM](#)

Streams	ACTION
Red	Edit Delete
Blue	Edit Delete

1-2 of 2 < >

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

Service Categories:

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

Trinity Educational Centre

School details added successfully. X

< **Create Business**

Dashboard > Service Categories



Create a Service Category

Category Name*

Category Type*

Category Description*

SKIP
CANCEL
PREVIEW

Trinity Educational Centre



< **Create Business**

Dashboard > Service Categories



Create a Service Category

Category Name*

Category Type*

Category Description*

SKIP
CANCEL
PREVIEW (2)

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

< **Create Business**

Dashboard > Service Categories



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



Create a Service

Service Name* Service Category*

Amount Type* Amount*

Select Grade* Term*

Service Description

SAVE



- 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

List Of Services **CREATE SERVICE**

Service Name	Service Category	Price Type	Amount	Grade	Term	Service Description	Action
Grade 1 Term 1 Fee	Fees	Fixed	20000	Year (Grade) 1	Term 1	Grade 1 Term 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



Add at least 1 payment method.

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

SKIP

NEXT

< **Mpesa Setup**

Do you have Mpesa Daraja set up for your business?

NO

YES

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

< **Create Business**

Dashboard > Payment Options



Add at least 1 payment method.

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

SKIP

NEXT

< **Mpesa Daraja Setup**

Business Name *	Business Shortcode *
<input type="text" value="Trinity Educational Centre"/>	<input type="text" value="12345"/>
Consumer Key *	
<input type="text" value="....."/>	
Consumer Secret *	Account Reference *
<input type="text" value="....."/>	<input type="text" value="12345"/>
Pass Key *	
<input type="text" value="....."/>	

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

Cancel

Activate

- 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**

Dashboard » Payment Options



Add at least 1 payment method.

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

SKIP

← **Banks**

- KCB Bank ^
- Mobile Money Not Set
- Bank Deposit Not Set
- Debit Accounts Not Set >
- Equity Bank COMING SOON v
- Co-operative Bank COMING SOON v

- i. Choose Mobile Money and input your till number.

Add at least 1 payment method.

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

SKIP

← **Banks**

- KCB Bank ^
- Mobile Money Not Set
- Bank Deposit Not Set
- Debit Accounts Not Set >
- Equity Bank COMING SOON v
- Co-operative Bank COMING SOON v

Setup Mode*

KCB MOBILE MONEY

Vooma Till

Vooma Till No.

Verify Vooma Till No.

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

< **Create Business**

Dashboard > **Payment Options**



Add at least 1 payment method.

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

SKIP **NEXT**

← **Banks**

- KCB Bank
 - Mobile Money Active
 - Bank Deposit Not Set
 - Debit Accounts Not Set >
- Equity Bank COMING SOON v
- Co-operative Bank COMING SOON v

b) Bank Deposit:

- i. Click on “Bank”, select the specific bank and choose ‘Bank Deposit’.

Add at least 1 payment method.

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

SKIP **NEXT**

← **Banks**

- KCB Bank
 - Mobile Money Active
 - Bank Deposit Not Set
 - Debit Accounts Not Set >
- Equity Bank COMING SOON v
- Co-operative Bank COMING SOON v

Account Name

Account Number

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 Centre 👤 🔔 ➔

< **Create Business**

Dashboard » Payment Options

✓
School Details

✓
Grades & Streams

✓
Service Categories

✓
Services

5
Payment Options

6
Parent/Guardians & Students

Add at least 1 payment method.

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

SKIP
NEXT

← Card Setup

Merchant ID

Merchant Key

Merchant Secrete Key

SAVE

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.

< Create Business

Dashboard » Payment Options



Add at least 1 payment method.

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

SKIP **NEXT**

Ecitizen Setup

Ecitizen Account ID

Ecitizen Key

Ecitizen Secret 👁

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

Dashboard » Payment Options



Add at least 1 payment method.

- Mpesa Active
- Bank Not Set
- Card Not Set
- Cash Not Set
- MTN MoMo Pending
- Ecitizen Active
- Paypal Not Set

SKIP **NEXT**

← Paypal Setup

Client ID

Access Token

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

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 Business**

Dashboard > Payment Options



Add at least 1 payment method.

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

< **MTN MoMo Setup**

Merchant Name*

Subscription Name*

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

SKIP

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

Trinity Educational Centre

< **Create Business**

Dashboard > Payment Options



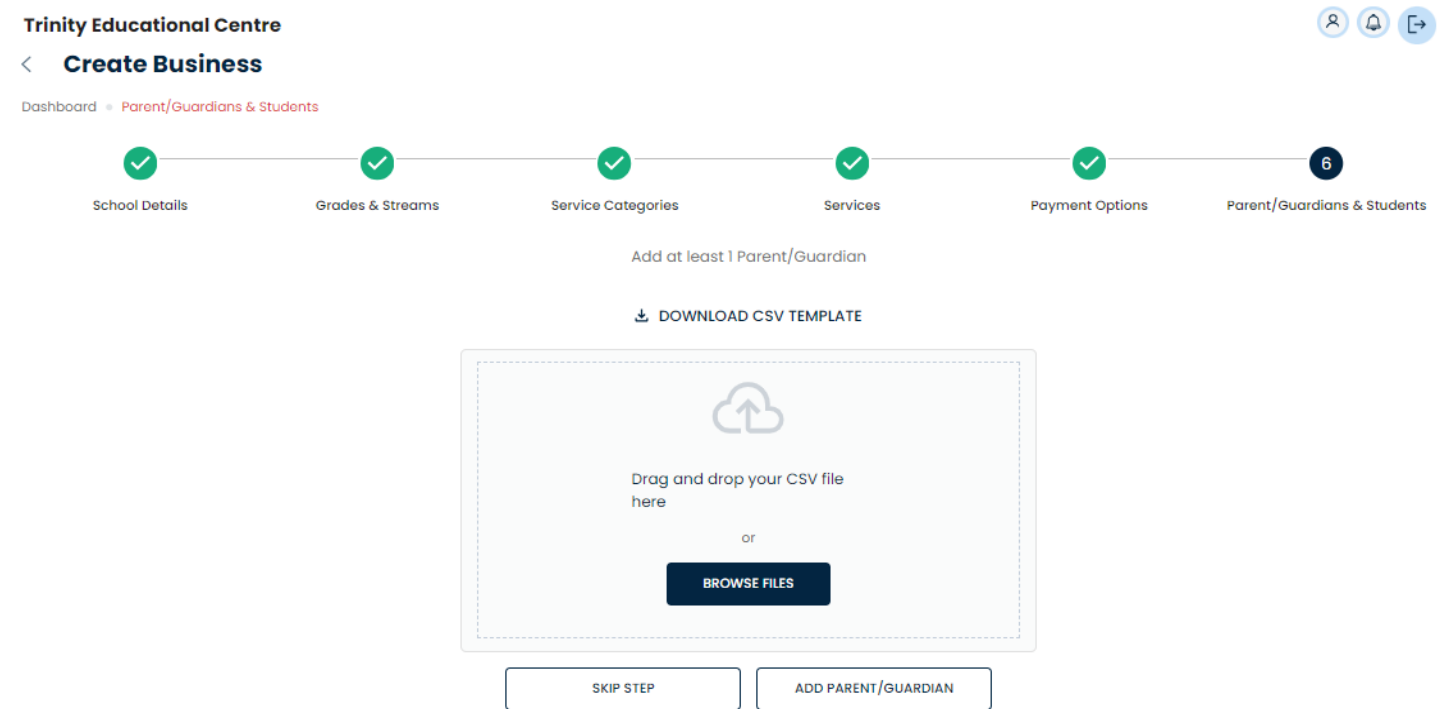
Add at least 1 payment method.

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

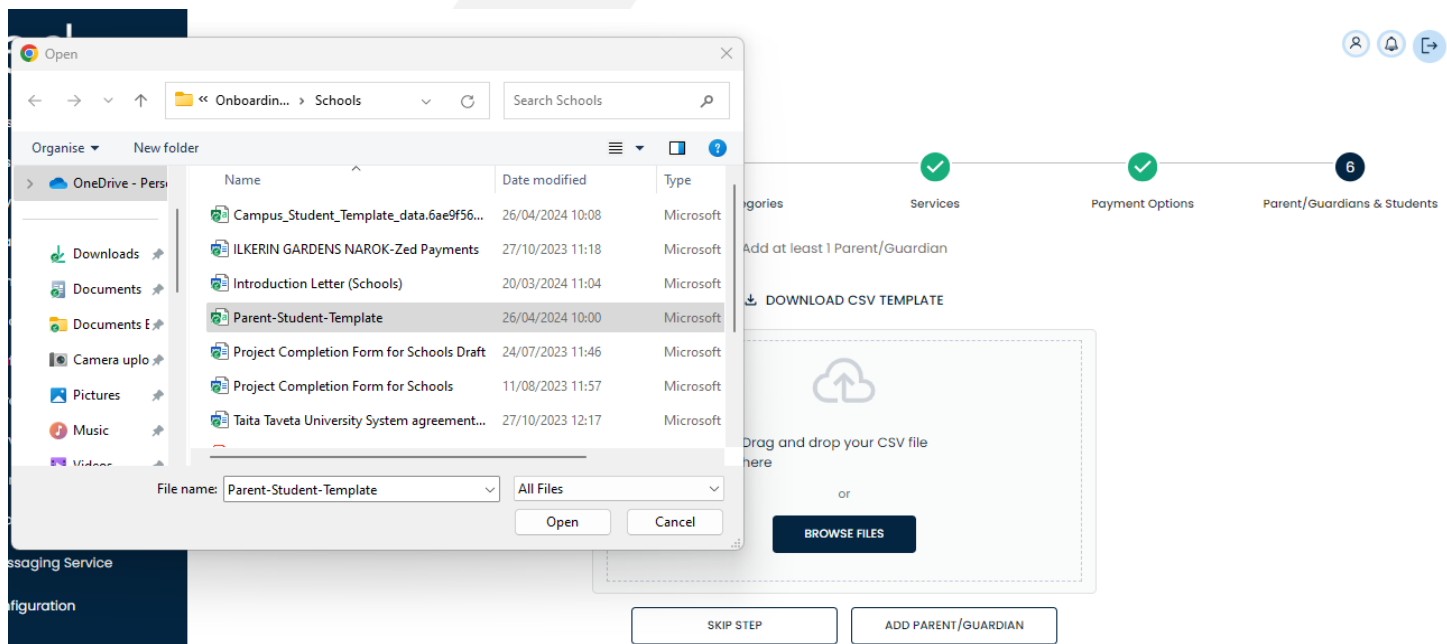
SKIP

To Add Parent/ Guardian & Student:

- i. One can choose to either drag and drop CSV File or;
- ii. Select and click on “Browse Files”



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



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.

Trinity Educational Centre

Invoices

Dashboard » Invoices

APPROVED PENDING APPROVAL DECLINED

Batch List Search: School Type EXPORT

Batch No	Approved On	Total Invoices	Total Amount	Paid Invoices	Paid Amount	Invoices Due	Amount Due
No Data to Display							

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
- Bank Statements
- Student Promotion
- Staff
- Parents Accounts
- Parents/Guardians
- Students
- Invoices
- Receipts
- Services
- Transactions
- Reports
- Messaging Service
- Configuration

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Generate Invoices

Dashboard > Invoices > Generate Invoice

Generate Invoices:

Grade Student

Grade*

Term*



- Grades & Streams
- Bank Statements
- Student Promotion
- Staff
- Parents Accounts
- Parents/Guardians
- Students
- Invoices
- Receipts
- Services
- Transactions
- Reports

Trinity Educational Centre

Generate Invoices

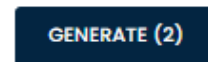
Dashboard > Invoices > Generate Invoice

Generate Invoices:

Grade Student

Grade*

Term*



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

Invoices

Dashboard » Invoices

APPROVED **PENDING APPROVAL** DECLINED

UPLOAD BALANCES CREATE INVOICE

Search: School Type EXPORT

Batch No	Created On	Total Invoices	Total Amount	Action
TrinityEducationalCentre_1	May 23, 2024 11:00:19 AM	2	40004	<input checked="" type="checkbox"/> <input type="checkbox"/>

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

Batch Approved Successfully, Invoice(s) Sent

Invoices

Dashboard » Invoices

APPROVED PENDING APPROVAL DECLINED

UPLOAD BALANCES CREATE INVOICE

Batch List Search: School Type EXPORT

Batch No	Approved On	Total Invoices	Total Amount	Paid Invoices	Paid Amount	Invoices Due	Amount Due
TrinityEducationalCentre_1	May 23, 2024 11:02:50 AM	2	40004	0	KES 0.00	2	KES 40,004.00

Rows per page: 10 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.

Trinity Educational Centre



Generate Invoices

Dashboard > Invoices > Generate Invoice

Generate Invoices:

Grade Student

<input type="checkbox"/>	Admission No	Student Name	Grade
<input type="checkbox"/>	002	Bart Simpson	Year (Grade) 1
<input checked="" type="checkbox"/>	001	Mickey Mouse	Year (Grade) 1

< PREVIOUS 1 NEXT >

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

Trinity Educational Centre



Generate Invoices

Dashboard » Invoices » Generate Invoice

Generate Invoices:

- Grade
 Student

Service Name	Description	Grade	Term	Amount
<input checked="" type="checkbox"/> Piano Lessons	Piano Lessons			1
<input type="checkbox"/> Swimming Lessons	Swimming Lessons			1
<input checked="" type="checkbox"/> Skating Class	Skating Class			1
<input type="checkbox"/> Zone 1 Transport	Zone 1 Transport			1

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



Invoices

Dashboard » Invoices



APPROVED
PENDING APPROVAL
DECLINED

Batch No	Created On	Total Invoices	Total Amount	Action
TrinityEducationalCentre_2	May 23, 2024 11:38:58 AM	1	2	<input checked="" type="checkbox"/> <input type="checkbox"/>

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.

Trinity Educational Centre

Batch Approved Successfully, Invoice(s) Sent

Invoices UPLOAD BALANCES CREATE INVOICE

Dashboard » Invoices

APPROVED PENDING APPROVAL DECLINED

Batch List 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	0	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 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	0	KES 0.00	2	KES 40,004.00

Rows per page: 10 1-2 of 2 < >

Invoice Batch

Dashboard • Invoices • Invoice Batch

Batch No: TrinityEducationalCentre_1	Status: APPROVED	Invoices: 2	Total Amount: KES 40,004.00	Amount Paid: KES 0.00	Amount Due: KES 40,004.00
--	----------------------------	-----------------------	---------------------------------------	---------------------------------	-------------------------------------

EXPORT

Invoice No	Admission No	Student Name	Grade	Term	Invoice Amount	Discount Amount	Amount Paid	Amount Due	Delivery Status
INV_1686	002	Bart Simpson	Year (Grade) 1	Term 1	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



[← Preview Invoice](#)

[REQUEST PAYMENT](#)
[RESEND INVOICE](#)

INVOICE

Date:
Thursday, May 23rd, 2024

Unpaid

Invoice No:
INV_1689

From:
 Trinity Educational Centre
 NairobiKenya
 zpaymentsltd@gmail.com
 +25454769607456

Billed to:
 Homer Simpson
 homer@yahoo.com
 +254445567888

STUDENT ID: 002	STUDENT NAME: Bart Simpson	GRADE: Year (Grade) 1	TERM: Term 1
------------------------	-----------------------------------	------------------------------	---------------------

Description	Price (KES)	Qty	Total (KES)
Grade 1 Term 1 Fee	KES 20,000.00	1	KES 20,000.00

<input type="checkbox"/> Apply Discount	Subtotal	KES 20,000.00
	Discount	KES 0.00
	Total	KES 20,000.00

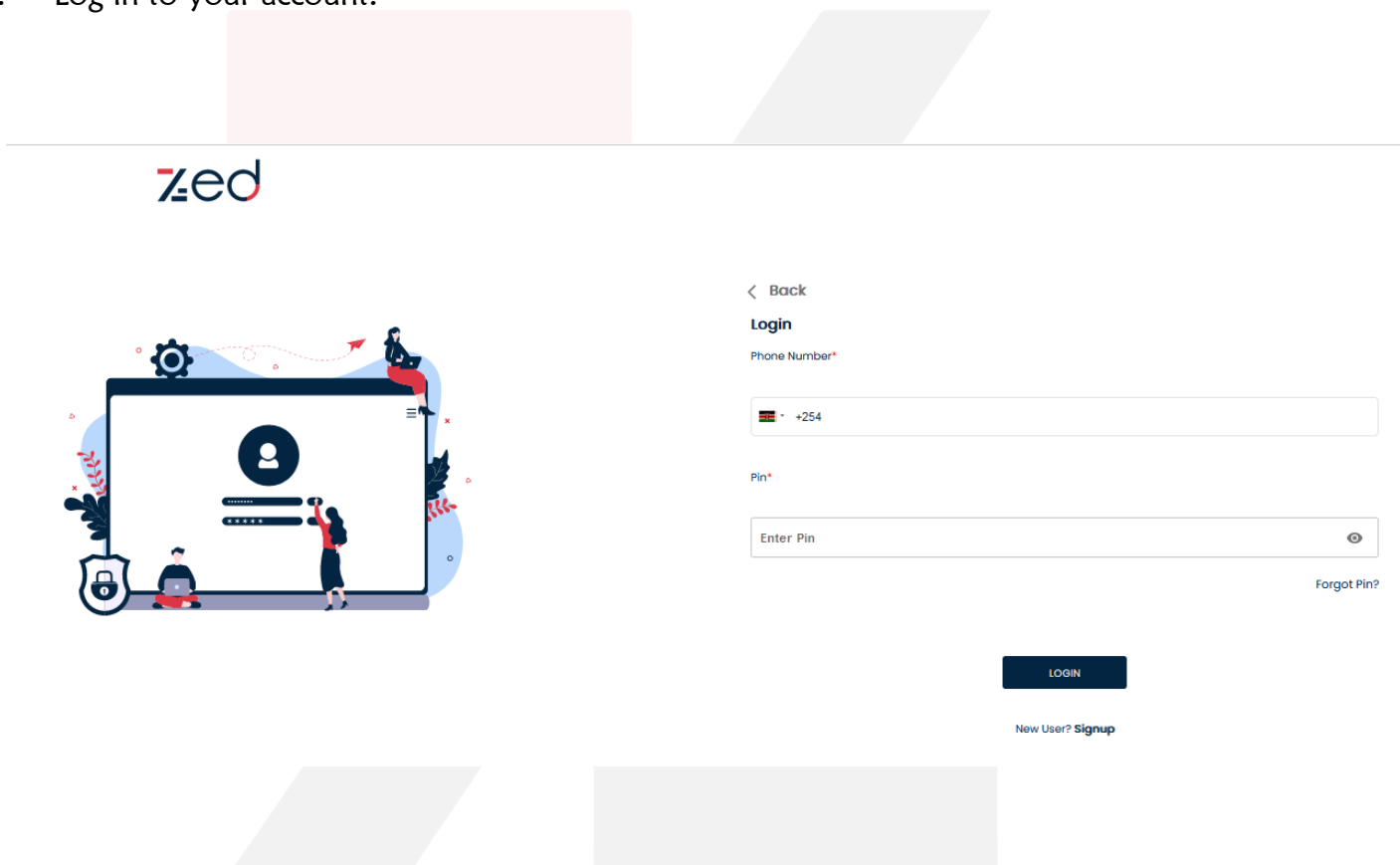


Student Promotion

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 <http://web.zed.business>
- ii. Log in to your account.



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

- Dashboard
- Users
- Businesses
- Service Charges
- Bank Statements
- Parent Accounts
- Student Promotion**
- Reports
- Sms
- Payment Setup
- Configurations

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Bango Primary School



Student Promotions

Dashboard > Student Promotions

- Previous Activity
- Student History

No Activity

Promote students and track the activities here!

Promote Students

- Dashboard
- Users
- Business
- Zed Pocket Money
- Payment Set-up
- Grades & Streams
- Bank Statements
- Student Promotion**
- Parents Accounts
- General Ledger Account
- Services
- Inventory
- Product Categories
- Product /Services
- Stock
- POS
- Transactions

Elite Educational Centre



Promote Students

DashBoard > Student Promotion > Promote Student

Change Type
Grade

Grade To

Search Students
search

<input checked="" type="checkbox"/> Admission No	Student Name

Rows per page: 10 0-0 of 0

Promote to Next Grade Promote to Next Term

- 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.

The screenshot shows the 'Promote Students' page in the Zed system. The breadcrumb trail is 'Dashboard > Student Promotion > Promote Student'. The 'Change Type' dropdown is set to 'Grade'. The 'Grade' dropdown is set to 'Year (Grade) 2' and the 'To' dropdown is set to 'Year (Grade) 3'. The 'Search Students' field is empty. A table lists four students with their admission numbers and names, all of whom have their selection checkboxes checked:

<input checked="" type="checkbox"/>	Admission No	Student Name
<input checked="" type="checkbox"/>	1004	Florence Kirk
<input checked="" type="checkbox"/>	1003	Emma Harris
<input checked="" type="checkbox"/>	1002	Mickey Mouse
<input checked="" type="checkbox"/>	1001	Daisy Duck

At the bottom, there are two buttons: 'Promote to Next Grade' and 'Promote to Next Term'. The 'Promote to Next Grade' button is highlighted in blue.

The screenshot shows the 'Promote Students' page in the Zed system. The breadcrumb trail is 'Dashboard > Student Promotion > Promote Student'. The 'Change Type' dropdown is set to 'Term'. The 'Grade' dropdown is set to 'Year (Grade) 2' and the 'Term' dropdown is set to 'Term 1'. The 'From Term' dropdown is set to 'Term 1' and the 'To Term' dropdown is set to 'Term 2'. The 'Search Students' field is empty. A table lists four students with their admission numbers and names, all of whom have their selection checkboxes checked:

<input checked="" type="checkbox"/>	Admission No	Student Name
<input checked="" type="checkbox"/>	1004	Florence Kirk
<input checked="" type="checkbox"/>	1003	Emma Harris
<input checked="" type="checkbox"/>	1002	Mickey Mouse
<input checked="" type="checkbox"/>	1001	Daisy Duck

At the bottom, there are two buttons: 'Promote to Next Grade' and 'Promote to Next Term'. The 'Promote to Next Term' button is highlighted in blue.

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

- Dashboard
- Users
- Businesses
- Service Charges
- Bank Statements
- Parent Accounts
- Student Promotion**
- Reports
- Sms
- Payment Setup
- Configurations

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Bango Primary School

Student Promotions

Dashboard > Student Promotions

Previous Activity

Student History

Previous Activity

- Grade 1 Students Promote to Grade 2**
23 Students in Grade 1 were promoted to Grade 2 by Jane Joe.
16-05-2023 11:00am
- Grade 3 Students Promote to Term 2**
50 Students in Grade 2 were promoted to Term 2 by Jane Joe.
16-05-2023 11:00am
- Grade 1 Students Promote to Grade 2**
23 Students in Grade 1 were promoted to Grade 2 by Jane Joe.
16-05-2023 11:00am
- Grade 3 Students Promote to Term 2**
50 Students in Grade 2 were promoted to Term 2 by Jane Joe.
16-05-2023 11:00am



Students promoted successfully! X

Promote Students

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

The students will be successfully promoted to the next level.

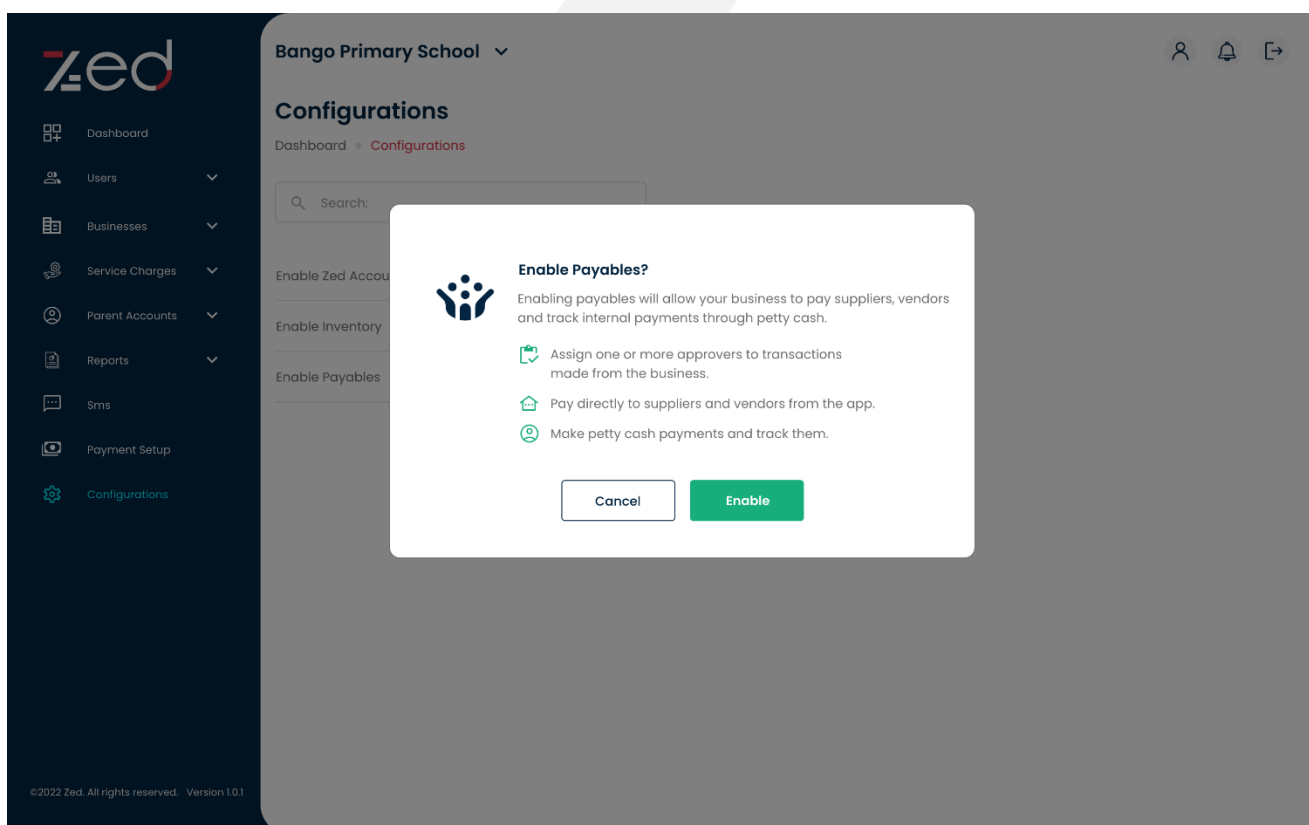
Zed Payables

(Web)

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.

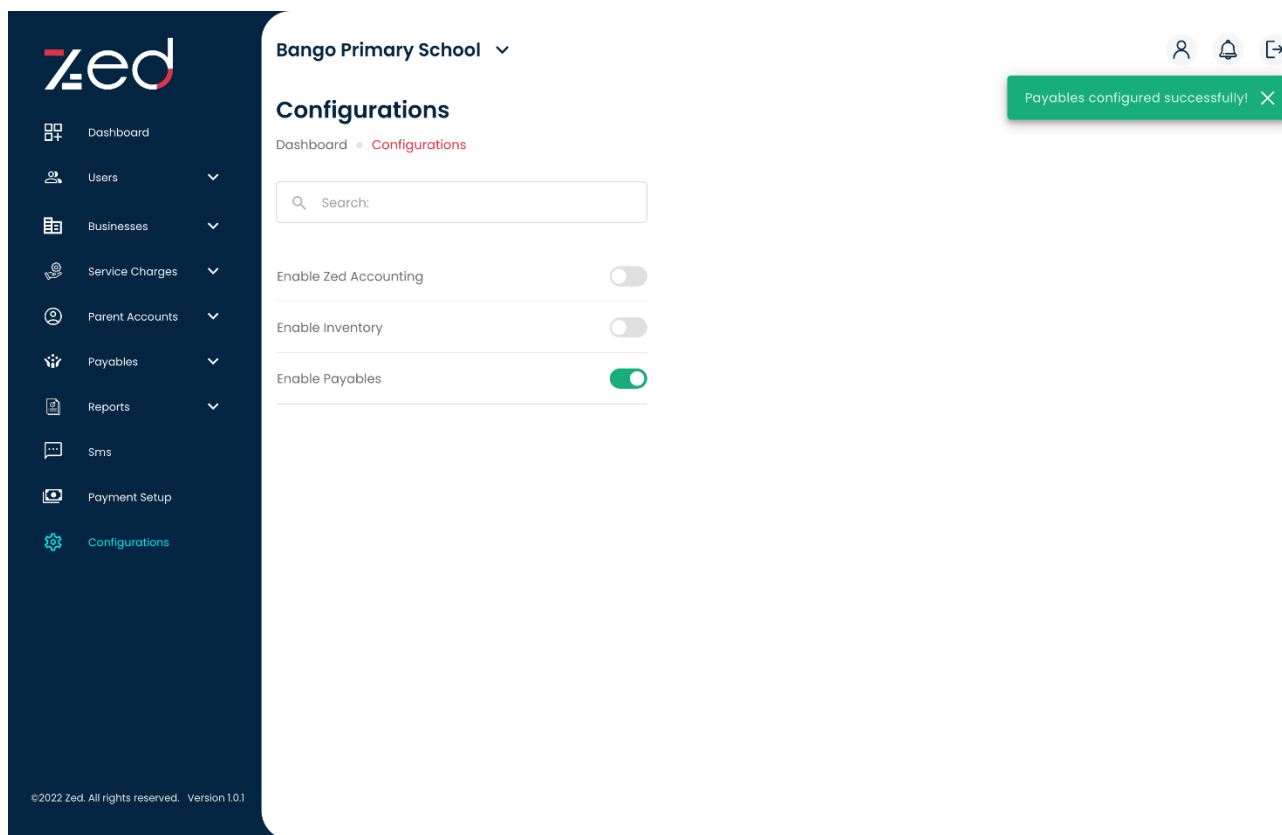
Configuring Payables

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



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

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



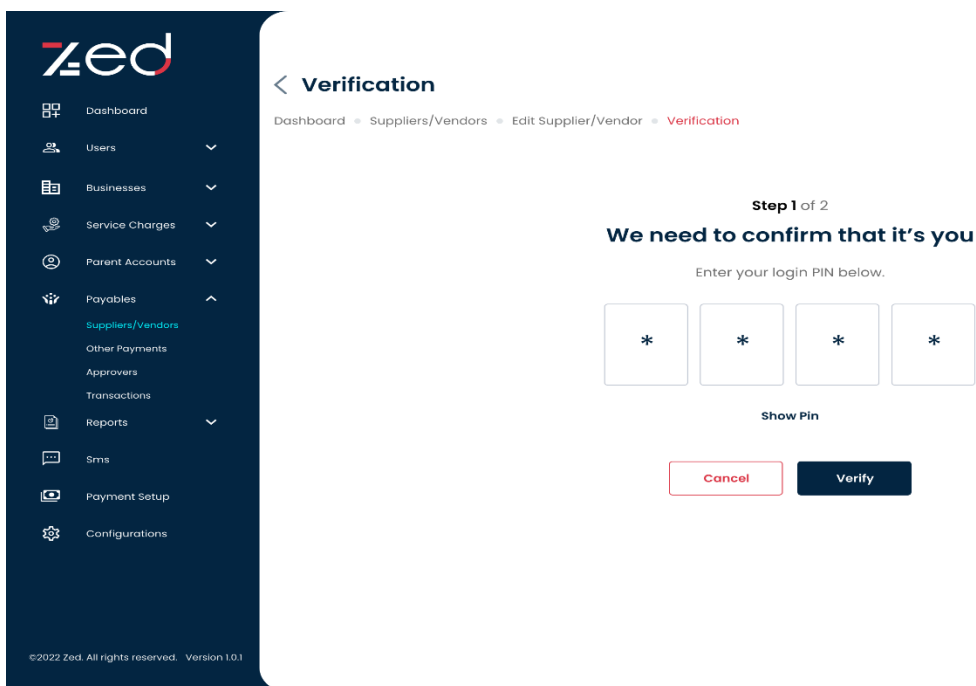
The screenshot shows the Zed software interface for Bango Primary School. The left sidebar menu is visible, with 'Payables' highlighted in blue. The main content area shows the 'Configurations' page, which includes a search bar and three toggle switches: 'Enable Zed Accounting' (off), 'Enable Inventory' (off), and 'Enable Payables' (on). The footer of the sidebar indicates '©2022 Zed. All rights reserved. Version 1.0.1'.

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

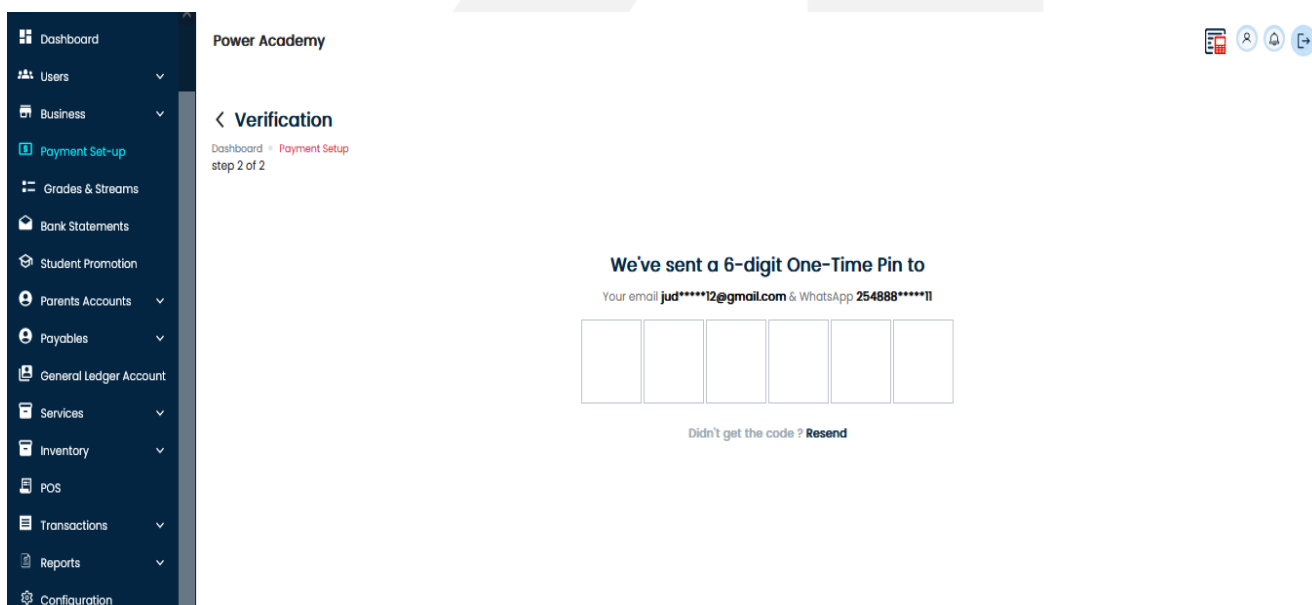
Debit Account Set up

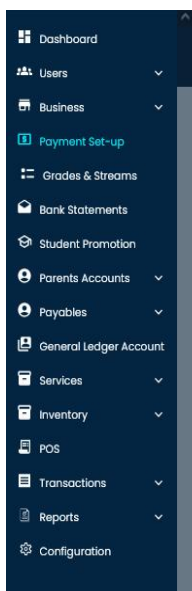
Follow these steps to establish a Debit Account for handling payments to suppliers and service providers:

- 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.





< Verification

Dashboard > Payment Setup
step 2 of 2

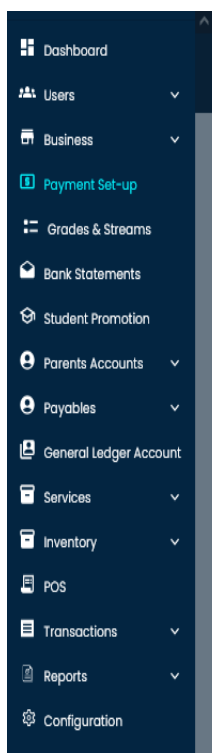
We've sent a 6-digit One-Time Pin to

Your email **jud****12@gmail.com** & WhatsApp **254888****11**

●	●	●	●	●	●
---	---	---	---	---	---

Didn't get the code? [Resend](#)

- 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.



Add at least 1 payment method.

Mpesa	Active <input checked="" type="checkbox"/>	<p>← Banks</p> <p>KCB Bank <input type="checkbox"/></p> <p>Mobile Money <input type="checkbox"/></p> <p>Bank Deposit <input type="checkbox"/></p> <p>Debit Accounts <input type="checkbox"/></p> <p>Equity Bank COMING SOON <input type="checkbox"/></p> <p>Co-operative Bank COMING SOON <input type="checkbox"/></p>
Bank	Not Set <input type="checkbox"/>	
Card	Not Set <input type="checkbox"/>	
Cash	Active <input checked="" type="checkbox"/>	
MTN MoMo	Not Set <input type="checkbox"/>	
Paypal	Not Set <input type="checkbox"/>	
Pocket Money Setup	Not Set <input type="checkbox"/>	

zed

Dashboard

Businesses

Add Business

Requests to Join Business

Approve Join Requests

My Businesses

Branches

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Create School

Dashboard > Payment Options

School Details Service Categories Services **Payment Options** Parent/Guardians & Students

Add at least 1 payment method. **Complete**

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

Add KCB Bank Debit Account

Name* Company Code*

Name Company Code

Account Number*

Account Number

KCB Key*

KCB Key

KCB Secret*

KCB Secret

Cancel **Add**

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

zed

Dashboard

Businesses

Add Business

Requests to Join Business

Approve Join Requests

My Businesses

Branches

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Create School

Dashboard > Payment Options

School Details Service Categories Services **Payment Options** Parent/Guardians & Students

Add at least 1 payment method. **Complete**

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

Add KCB Bank Debit Account

Name* Company Code*

Suppliers Debit Account 001

Account Number*

012345678910

KCB Key*

KCB Key

KCB Secret*

KCB Secret

Cancel **Add**

- Click 'Add Account' to save your configuration.

zed

Dashboard

Businesses

Add Business

Requests to Join Business

Approve Join Requests

My Businesses

Branches

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Create School

Dashboard > Payment Options

Debit Account added successfully. X

1 School Details 2 Service Categories 3 Services 4 Payment Options 5 Parent/Guardians & Students

Add at least 1 payment method. Complete

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

KCB Bank Debit Accounts

Setup you KCB Bank Debit accounts and pay your suppliers, vendors and other payments!

Suppliers Debit Account	Edit Remove
012345678910	

Done Add Account

- 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.'

- Dashboard
- Users
- Business
- Payment Set-up
- Grades & Streams
- Bank Statements
- Student Promotion
- Parents Accounts
- Payables**
- Raise Payment
- Suppliers/Vendors
- Other Payments
- Approvers
- Transactions
- Supplier / Vendor Invoices
- General Ledger Account

Power Academy

Suppliers

Dashboard > Suppliers

Active Suspended

Name	Mobile Phone	Email	Location	Actions
No rows				

Rows per page: 5 0-0 of 0

ADD SUPPLIER RAISE PAYMENT

- Dashboard
- Users
- Business
- Payment Set-up
- Grades & Streams
- Bank Statements
- Student Promotion
- Parents Accounts
- Payables**
- Raise Payment
- Suppliers/Vendors
- Other Payments
- Approvers
- Transactions
- Supplier / Vendor Invoices
- General Ledger Account

Power Academy

< Suppliers

Dashboard > Suppliers > Edit Supplier

Select Supplier Type

New Supplier

Add the supplier name, contact details and locations

Supplier in ZED

Search for suppliers already registered in ZED and easily add them to your list

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

- Dashboard
- Users
- Business
- Payment Set-up
- Grades & Streams
- Bank Statements
- Student Promotion
- Parents Accounts
- Payables**
- Raise Payment
- Suppliers/Vendors
- Other Payments
- Approvers
- Transactions
- Supplier / Vendor Invoices
- General Ledger Account
- Services
- Inventory

Power Academy

Suppliers

Dashboard > Suppliers > [Add Supplier](#)

Supplier Name

+254

Email Address

Add a location

Select Bank Name

Bank Account Number

Bank Account Number

[Add](#)

- Dashboard
- Users
- Businesses
- Service Charges
- Parent Accounts
- Payables**
- Suppliers/Vendors
- Other Payments
- Approvers
- Transactions
- Reports
- Sms
- Payment Setup
- Configurations

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Add Supplier/Vendor

Dashboard > Suppliers/Vendors > [Add Supplier/Vendor](#)

Select Supplier/Vendor Type

New Supplier / Vendor Supplier/Vendor in ZED

Supplier Name*
Fast Suppliers Limited

Phone Number* +254 712345678 Email Address* info@fastsuppliers.com

Location*
State Building, Kangundo Road

Bank* KCB Bank Account Number* 0743848U4393494

Description*
Stationery Supplier

[Cancel](#) [Add](#)

- 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.'

zed

Bango Primary School

Other Payments

Dashboard • Other Payments

Active Suspended

Search:

Name	Mobile No.	Email	Action
No records to display. Add payees and view them here.			

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- 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.

zed Bango Primary School ▼ 👤 🔔 ➦

< Add Payee

Dashboard • Other Payments • Add Payee

Add Payee Details

First Name* First Name	Last Name* Last Name
Phone Number* +254 Phone Number	Email Address* Email Address
Bank(Optional) Bank ▼	Account Number* Account Number
Verify Account Number* Verify Account Number	Description Description

Cancel Add

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The screenshot shows the Zed software interface for Bango Primary School. The main menu on the left includes Dashboard, Users, Businesses, Service Charges, Parent Accounts, Payables (with sub-items: Suppliers/Vendors, Other Payments, Approvers, Transactions), Reports, Sms, Payment Setup, and Configurations. The 'Add Payee' form is displayed, with the following fields and values:

Field	Value
First Name*	John
Last Name*	Doe
Phone Number*	+254 7123456789
Email Address*	john.doe@mail.com
Bank(Optional)	KCB Bank
Account Number*	12345678910
Verify Account Number*	12345678910
Description	Description

Buttons: Cancel (red outline), Add (dark blue fill).

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- 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.

The screenshot shows the Zed software interface for Bango Primary School. The sidebar menu on the left includes: Dashboard, Users, Businesses, Service Charges, Parent Accounts, Payables, Suppliers/Vendors, Other Payments, Approvers (highlighted), Transactions, Reports, Sms, Payment Setup, and Configurations. The main content area is titled 'Approvers' and includes a sub-header 'Dashboard • Approvers'. Below this is a description: 'Assign approvers who will allow payments made from your business to suppliers, vendors or petty cash.' There are two dropdown menus: 'Select Approval Range*' with 'Select Range' and 'Select Approval Levels*' with 'Select Approval Levels'. The footer of the sidebar contains the text: '©2022 Zed. All rights reserved. Version 1.0.1'.

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

Bango Primary School ▾

Approvers

Dashboard ▾ Approvers

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

Select Approval Range*
Ksh 1 - 1,000,000

Select Approval Levels*
2

Inputters ⊕ Assign Inputter

No inputters added yet.

Level 1 Approvers ⊕ Assign Approver

No inputters added yet.

Level 2 Approvers ⊕ Assign Approver

No inputters added yet.

Cancel Confirm

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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.

Bango Primary School ▾

Approvers

Dashboard ▾ Approvers

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

Select Approval Range*
Ksh 1 - 1,000,000

Select Approval Levels*
2

Inputters ⊕ Assign Inputter

John Doe	+254 712 345 678	⊖
June Sisley	+254 712 345 678	⊖

Level 1 Approvers ⊕ Assign Approver

No inputters added yet.

Level 2 Approvers ⊕ Assign Approver

No inputters added yet.

Cancel Confirm

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Inputters added successfully! ✕

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

- Dashboard
- Users
- Businesses
- Service Charges
- Parent Accounts
- Payables
- Suppliers/Vendors
- Other Payments
- Approvers
- Transactions
- Reports
- Sms
- Payment Setup
- Configurations

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Bango Primary School
⌵

Approvers

Dashboard » Approvers

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

Select Approval Range*

Ksh 1 - 1,000,000

Select Approval Levels*

2

Inputers ⊕ Assign Inputer

John Doe	+254 712 345 678	🗑️
June Sisley	+254 712 345 678	🗑️

Level 1 Approvers ⊕ Assign Approver

John Doe	+254 712 345 678	Normal	🗑️
June Sisley	+254 712 345 678	Mandatory	🗑️

Level 2 Approvers ⊕ Assign Approver

John Doe	+254 712 345 678	Super Approver	🗑️
----------	------------------	----------------	----

Cancel

Confirm

- Dashboard
- Users
- Businesses
- Service Charges
- Parent Accounts
- Payables
- Suppliers/Vendors
- Other Payments
- Approvers
- Transactions
- Reports
- Sms
- Payment Setup
- Configurations

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Bango Primary School
⌵

Approvers

Dashboard » Approvers

Range	Levels	Inputers	Approvers	Action
Ksh 1 - 250,000	1	5	6	✎ 🗑️
Ksh 1 - 500,000	2	2	3	✎ 🗑️
Ksh 1 - 1,000,000	3	1	3	✎ 🗑️
Ksh 1 - 5,000,000	3	2	4	✎ 🗑️

Approvers added successfully! ✕

Add Approvers

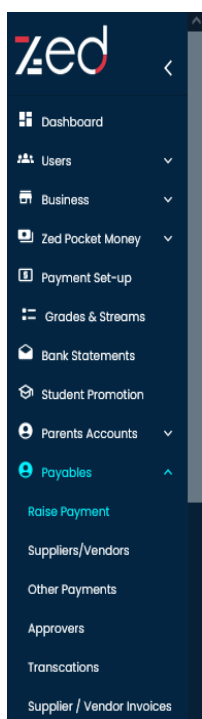
- That's it! You've successfully managed Approvers in Zed.

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.'



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

The sidebar menu is dark blue with white text. It includes the Zed logo at the top, followed by a list of menu items: Dashboard, Users, Business, Zed Pocket Money, Payment Set-up, Grades & Streams, Bank Statements, Student Promotion, Parents Accounts, Payables (highlighted in green), Raise Payment (highlighted in blue), Suppliers/Vendors, Other Payments, Approvers, Transactions, and Supplier / Vendor Invoices.

Power Academy



Raise Supplier/Vendor Payment

Dashboard > Supplier/Vendors > Raise Payment

Select Supplier/Vendor

Diff General Suppliers
KCB Bank

KES 0.00
0 Invoices

Invoices

[Add Invoices](#)

No Invoices

The sidebar menu is dark blue with white text. It includes the Zed logo at the top, followed by a list of menu items: Dashboard, Users, Business, Zed Pocket Money, Payment Set-up, Grades & Streams, Bank Statements, Student Promotion, Parents Accounts, Payables (highlighted in green), Raise Payment (highlighted in blue), Suppliers/Vendors, Other Payments, Approvers, Transactions, and Supplier / Vendor Invoices.

Power Academy



Add Invoice to Supplier/Vendor

Dashboard > Supplier Payments > Raise Payment > Add Invoice

Invoice Details

Invoice Date

Invoice Item

[Add Items](#)

Items : 0

Total: KES : KES 0.00

Add items to invoice and preview them here!

Cancel

Preview Invoice

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

Progress Group of Schools

Add Item

Dashboard » Supplier Payments » Raise Payment » Add Invoice » Add Items

Search Category

Stationery

PRODUCT NAME	BUYING PRICE	QUANTITY	TOTALPRICE
Pencil	20	2	40
A4 Exercise Book	20	2	40

1 row selected Rows per page: 10 1-2 of 2

Cancel Add

Progress Group of Schools

Add Invoice to Supplier/Vendor

Dashboard » Supplier Payments » Raise Payment » Add Invoice

Invoice Details

Zed Gen Suppliers Invoice Date: 06/12/2023

Invoice Item Add Items

Items	Quantity	Total: KES : KES 400.00
Pencil	20	
A4 Exercise Book	20	

Cancel Preview Invoice

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

Progress Group of Schools

← Preview Invoice

SAVE INVOICE PAY NOW

INVOICE

Unpaid
Invoice Number

Date: 06/12/2023 16:08:37

From:
Progress Group of Schools
Nairobi, Kenya
judyallo8@gmail.com
+25454708753016

Billed to:
Zed Gen Suppliers
judymwihagzed.business
254708753016

Description	Price (KES)	Qty	Total (KES)
Pencil	KES 20.00	10	KES 200.00
A4 Exercise Book	KES 20.00	10	KES 200.00
			ADD PRODUCTS
			Subtotal
			Total KES 400.00

Accepted Payment Methods

M-PESA Card 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.

- Dashboard
- Users
- Businesses
- Service Charges
- Parent Accounts
- Payables
 - Suppliers/Vendors
 - Other Payments
- Approvers
- Transactions
- Reports
- Sms
- Payment Setup
- Configurations

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Bango Primary School



Payable Transactions

Dashboard > Transactions

Suppliers/Vendors

Other Payments

Pending Approval

Disbursed

Declined

Failed

Request ID	Date Requested	Payment To	Amount (KES)	Status	Action
123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00	Pending	
123456	2023-03-10 11:00	Jamaa Supplies	20,000.00	Pending	
123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Pending	
123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Pending	
123456	2023-03-10 11:00	David Shuma Enterprises	10,000.00	Pending	
123456	2023-03-10 11:00	David Shuma Enterprises	10,000.00	Pending	
123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00	Pending	

Show 10 Entries Showing 1 to 8 of 20 entries

Previous 1 2 ... 8 9 Next

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Bango Primary School



Payable Transactions

Dashboard > Transactions

Suppliers/Vendors

Other Payments

Pending Approval

Disbursed

Declined

Failed

Request ID	Date Requested	Payment To	Amount (KES)	Status	Action
123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00	Pending	
<p>Inputter</p> <p>Ann 006 2023-03-10 11:00</p> <p>Level 1 Approval Pending</p> <p>Level 2 Approval Pending</p> <p>Level 3 Approval Pending</p>					
123456	2023-03-10 11:00	Jamaa Supplies	20,000.00	Pending	
123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Pending	
123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Pending	
123456	2023-03-10 11:00	David Shuma Enterprises	10,000.00	Pending	
123456	2023-03-10 11:00	David Shuma Enterprises	10,000.00	Pending	
123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00	Pending	

Show 10 Entries Showing 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.

Bango Primary School ▾

Preview Payable Transaction

Dashboard ▸ Transactions ▸ Preview Transaction

Status: Awaiting 3 Approvers

Request ID: 123456 Requested On: 2023-01-02 11:00

Supplier Details

Payment To: David Shuma Enterprises
Amount: KES 90,000.00
Bank: KCB Bank

Transaction Details

Transaction Type: Internal KCB Bank Transfer (IF)
Debit Account: KCB Bank 01234567890
Description: May payments

Attachments

Receipt1234124xxa.jpg [Preview](#)

Approval History 3 Pending

None

[Decline](#) [Approve](#)

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

Verification

Dashboard ▸ Suppliers/Vendors ▸ Edit Supplier/Vendor ▸ Verification

Step 1 of 2

We need to confirm that it's you

Enter your login PIN below.

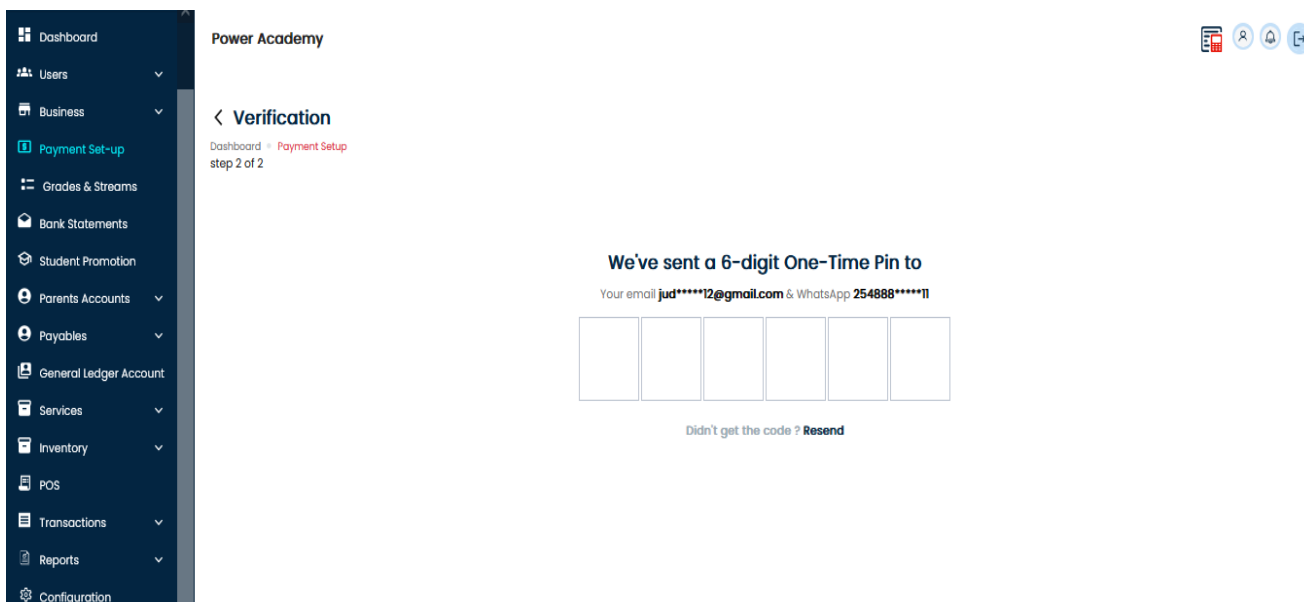
* * * *

Show Pin

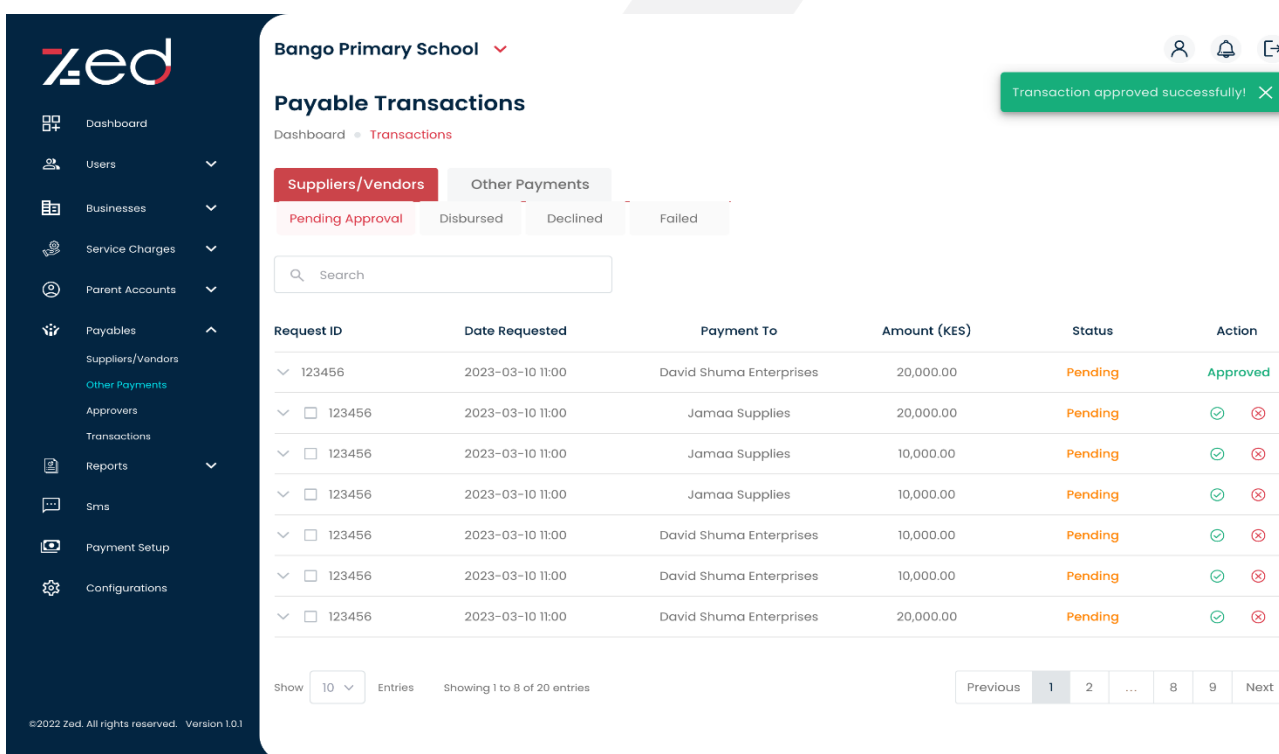
[Cancel](#) [Verify](#)

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- 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.



- 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.



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



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Bango Primary School
Profile
Notifications
Logout

Payable Transactions

Dashboard > Transactions

Suppliers/Vendors
Other Payments

Pending Approval
Disbursed
Declined
Failed

Request ID	Date Requested	Payment To	Amount (KES)	Status	Action
123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00	Pending	Approved
Inputter					
Ann 006	2023-03-10 11:00				
Level 1 Approval		Completed			
Joan(You) 007		Approved			
Level 2 Approval		Pending			
Level 3 Approval		Pending			
123456	2023-03-10 11:00	Jamaa Supplies	20,000.00	Pending	✓ ✗
123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Pending	✓ ✗
123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Pending	✓ ✗
123456	2023-03-10 11:00	David Shuma Enterprises	10,000.00	Pending	✓ ✗

Show 10 Entries
Showing 1 to 8 of 20 entries

Previous
1
2
...
8
9
Next

- 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.

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Bango Primary School



Payable Transactions

Dashboard > Transactions

Suppliers/Vendors

Other Payments

Pending Approval Disbursed Declined Failed

Request ID	Date Requested	Payment To	Amount (KES)	Status	Date Disbursed
123456	2023-03-10 11:00	David Shuma Enterprises	20,000.00	Disbursed	2023-03-10 11:00
123456	2023-03-10 11:00	Jamaa Supplies	20,000.00	Disbursed	2023-03-10 11:00
123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Disbursed	2023-03-10 11:00
123456	2023-03-10 11:00	Jamaa Supplies	10,000.00	Disbursed	2023-03-10 11:00
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	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

Show 10 Entries Showing 1 to 8 of 20 entries

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Bango Primary School



Preview Payable Transaction

Dashboard > Transactions > Preview Transaction

Status: Disbursed

Request ID: 123456 Requested On: 2023-01-02 11:00

Supplier Details

Payment To: David Shuma Enterprises
 Amount: KES 90,000.00
 Bank: KCB Bank

Transaction Details

Transaction Type: Internal KCB Bank Transfer (IF)
 Debit Account: KCB Bank 01234567890
 Description: May payments

Attachments

Receipt12341241xxa.jpg [Preview](#)

Approval History

0 Pending

- Amount disbursed successfully. 2023-11-2023 13:00
- Joan 006 approved the transaction request. 2023-11-2023 13:00
- Isaac 008 approved the transaction request. 2023-11-2023 13:00

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

Bango Primary School ▾

Other Payments

Dashboard ▾ Other Payments

Active Suspended

Search:

Name	Mobile No	Email	Action
John Doe	+254712345678	johndoe@mail.com	
Marian Ann	+254712245633	marian.ann@mail.com	
Simple Joe	+254712245633	simple.joe@mail.com	
Mary Li	+254712245633	mary.li@mail.com	
Tom Sam	+254712245633	tom.sam32@mail.com	
Mathew Tom	+254712245633	mathewtom@mail.com	
Kate Lui	+254712245633	kate.lui@mail.com	

Show Entries Showing 1 to 8 of 20 entries

Previous **1** 2 ... 8 9 Next

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

- Dashboard
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 - Other Payments
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Bango Primary School



< Raise Payment

Dashboard > Other Payments > Raise Payment

Payee Details

Select Payee* Send To*

John Doe KCB Bank (0012233445566)

Invoice Items

[Add Items](#)

Add items to invoice and preview them here!

Attach an image [Upload File](#)

[Cancel](#) [Next](#)

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

- Dashboard
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- Businesses
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- Parent Accounts
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Bango Primary School



< Add Item

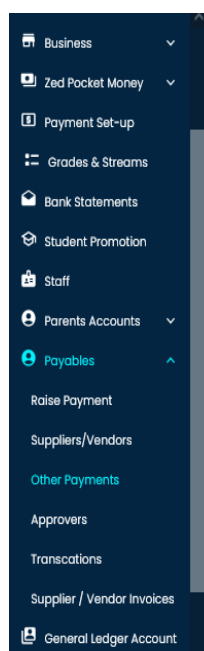
Dashboard > Other Payments > Raise Payment > Add Item

Select category to display products

- Cocktails >
- Beer >
- Stationery >
- Gin >
- Vodka >
- Whisky >
- Wine >
- Pure Drinking Water >

Products: 1			Total: KES 2,000.00
Product Name	Price (KES)	Quantity	Total (KES)
A4 Maths Books	100	<input type="text" value="20"/>	2000
A4 Writing Books	200	<input type="text" value="-"/>	-
Bic Red Pen	20	<input type="text" value="-"/>	-
Bic Blue Pen	25	<input type="text" value="-"/>	-
Bic Black Pen	25	<input type="text" value="-"/>	-
HB Pencils	45	<input type="text" value="-"/>	-
Staples	<input type="text" value="-"/>	<input type="text" value="-"/>	-
Stapler	<input type="text" value="-"/>	<input type="text" value="-"/>	-

[Cancel](#) [Add](#)



Power Academy

Raise Payment

Dashboard » Other Payments » Raise Payment

Payee Details

Select Payee *
 Marge Simpson KCB 1279287799

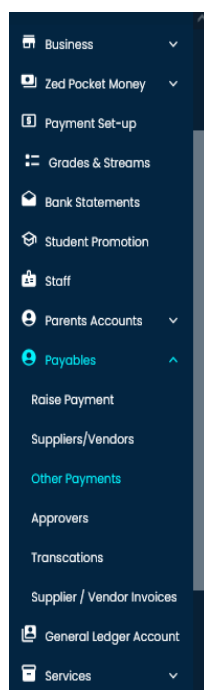
Invoice Item Add ItemsItems : 1 Total: KES : KES 1,600.00

Flour	1600	
-------	------	--

Attach an Image Upload File

Cancel

Add Invoice



Power Academy

Raise Payment

Dashboard » Other Payments » Raise Payment » Transaction Details

Payee Details

Payment To :	Marge Simpson
Amount :	KES 1,600.00
Payment Mode	KCB 1279287799

Transaction Details

Transaction Type *

Select Transaction Type

Account To Debit *

Select Account To Debit

Description *

Description

RAISE PAYMENT



- Fill in the Transaction type, Account to Debit and Description.
- Click 'Raise Payment'.

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Bango Primary School



Transaction Details

Dashboard > Other Payments > Raise Payment > Transaction Details

Payee Details

Payment To: John Doe
 Amount: KES 6,000.00
 Payment Mode: KCB Bank (00112233445566)

Transaction Details

Transaction Type*

Account To Debit*

Description*

Cancel Raise Payment

- Dashboard
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Bango Primary School



Other Payments

Dashboard > Other Payments

Payment request raised successfully! ✕

Add Payee Raise Payment

Active Suspended

Name	Mobile No	Email	Action
John Doe	+254712345678	johndoe@mail.com	
Marian Ann	+254712245633	marian.ann@mail.com	
Simple Joe	+254712245633	simple.joe@mail.com	
Mary Li	+254712245633	mary.li@mail.com	
Tom Sam	+254712245633	tom.sam32@mail.com	
Mathew Tom	+254712245633	mathewtom@mail.com	
Kate Lui	+254712245633	kate.lui@mail.com	

Show Entries Showing 1 to 8 of 20 entries

Previous 1 2 ... 8 9 Next

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

The screenshot shows the 'Power Academy' dashboard with the 'Payable Transactions' section. The 'Other Payments' tab is selected, and the 'Pending Approval' filter is active. A search bar is present above a table of transactions. The table has the following data:

Request ID	Date Requested	Payment To	Amount (KES)	Status
<input type="checkbox"/> FT353	13/12/2023 16:11:24	Marge Simpson	KES 1,600.00	Pending
<input checked="" type="checkbox"/> FT350	08/12/2023 11:52:26	Marge Simpson	KES 1,000.00	Pending

At the bottom right of the table, it says 'Rows per page: 10' and '11-2 of 2'.

- Approver can preview the transaction by clicking on it.

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

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

zed

< Verification

Dashboard » Suppliers/Vendors » Edit Supplier/Vendor » Verification

Step 1 of 2

We need to confirm that it's you

Enter your login PIN below.

* * * *

Show Pin

Cancel Verify

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

Power Academy

< Verification

Dashboard » Payment Setup step 2 of 2

We've sent a 6-digit One-Time Pin to

Your email **jud*****12@gmail.com** & WhatsApp **254888*****11**

Didn't get the code? **Resend**

- 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.

Power Academy

Payable Transactions

Dashboard » Transactions

Suppliers/Vendors **Other Payments**

Pending Approval **Disbursed** Declined Failed

Search Search business.

Request ID	Date Requested	Payment To	Amount (KES)	Status	Date Disbursed
FT353	13/12/2023 16:11:24	Marge Simpson	KES 1,600.00	Disbursed	13/12/2023 16:11:24

Rows per page: 10 11-1 of 1

Power Academy

Preview Payable Transactions

Dashboard » Transactions » Preview Transactions

Status : Transaction processed and funds disbursed to the account successfully

Request ID : FT353 Request On : 13/12/2023 16:11:24

Payee Details

Name : Marge Simpson

Amount : KES 1600

Bank Name : KCB 1279287799

Transaction Details

Transaction Type: Internal KCB Funds transfer

Debit Account: KCB 1291666699

Description: Payment

Attachment

Activity History

- Judy has created a Payee Payment transaction [FT353] for amount [Ksh 1600] 13/12/2023 16:11:24
- Judy a Super approver has approved a Payee Payment transaction FT353 for amount Ksh 1600 13/12/2023 16:23:26
- Your transaction request has been submitted to Bank successfully 13/12/2023 16:23:36
- Your transaction has been processed and Funds disbursed to the account successfully. 13/12/2023 16:23:55

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:

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

The screenshot displays the Zed Accounting web portal for Zambeto High School. The left sidebar menu has 'General Ledger Account' highlighted with a blue arrow. The main dashboard area shows the following data:

- Branch:** [Dropdown menu]
- New Students:** 1 Parents/Guardians
- Total Students:** 8 Parents/Guardians
- Students with Balances:** 8 Parents/Guardians
- Paid Invoices:** KES 163.00 (44 Invoices)
- Unpaid Invoices:** KES 4,802.00 (87 Invoices)

The **Calendar** section shows the total amount for each month in 2023:

Month	Total Amount
January	KES 0.00
February	KES 0.00
March	KES 0.00
April	KES 0.00
May	KES 0.00
June	KES 0.00
July	KES 5.00
August	KES 12.00
September	KES 119.00
October	KES 276.00
November	KES 0.00
December	KES 0.00

The **Transaction Summary** section shows 'No Payment Data' for the last 7 days. The **Recent Invoices** section lists several batches with their respective invoice counts and 'View' links:

Batch No	Invoices	Action
Batch No ZambetoHighSchool_29	1 Invoices	View
Batch No ZambetoHighSchool_28	8 Invoices	View
Batch No ZambetoHighSchool_27	8 Invoices	View
Batch No ZambetoHighSchool_30	8 Invoices	View
Batch No ZambetoHighSchool_26	8 Invoices	View

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Zambeto High School

General Ledger Account

Dashboard > General Ledger Account

Search:

Category Name	Classification	Action
Administrative Expenses (Expense)	expense	
Administrative Expenses (Income)	revenue	
Tuition (Expense)	expense	
Tuition (Income)	revenue	
Other Services (Expense)	expense	
Other Services (Income)	revenue	

Rows per page: 10 | 1-10 of 10

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

Zambeto High School

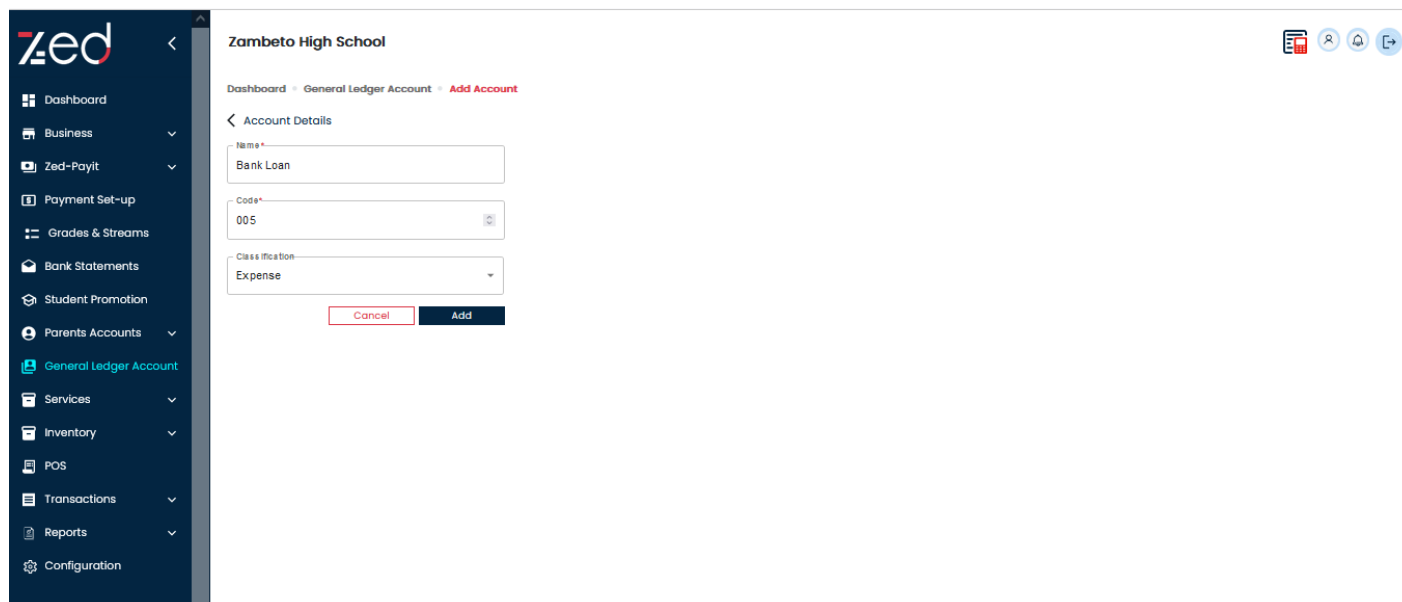
Dashboard > General Ledger Account > Add Account

Account Details

Name*

Code*

Classification



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