School User Guide (Web)

zed

Connecting your business to payments
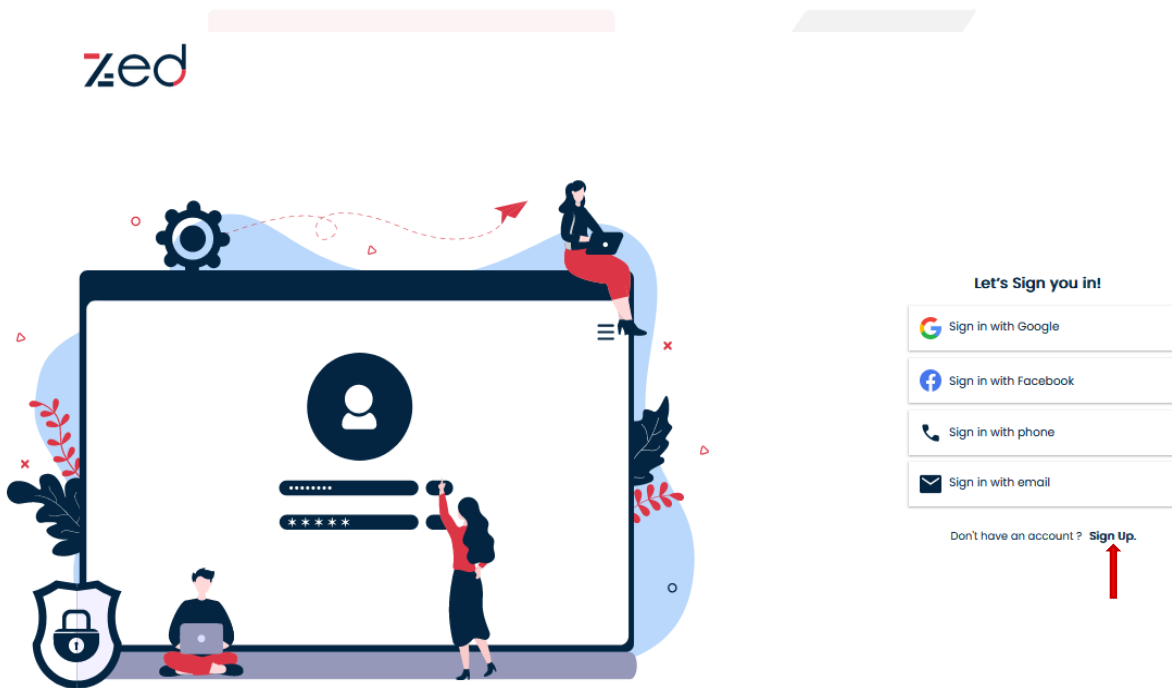
Table of Contents
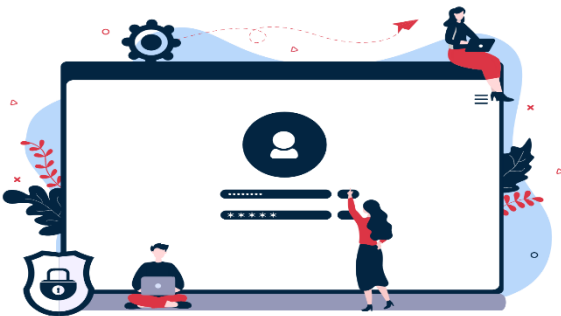
Zed Sign Up process via web

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.

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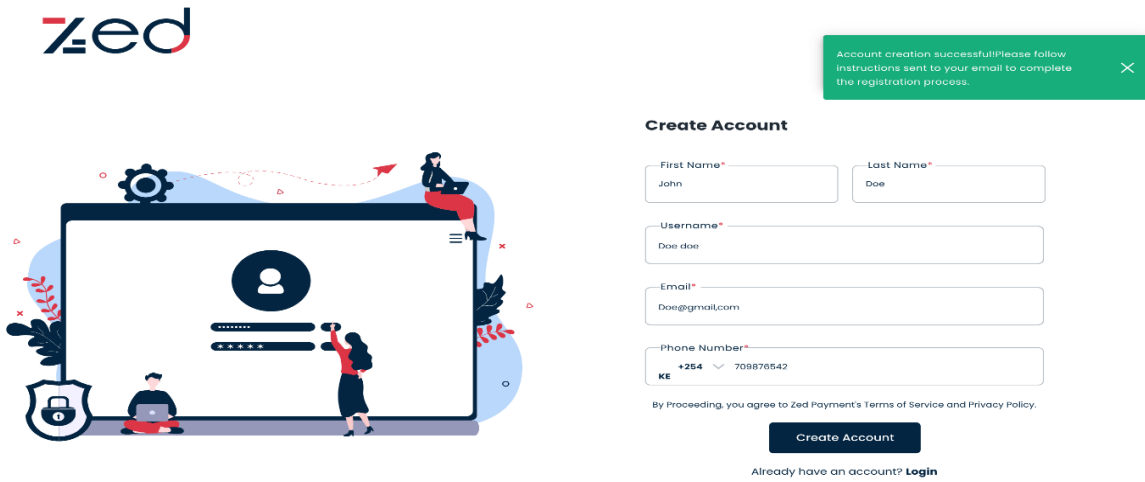
How to Change Pin:

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).

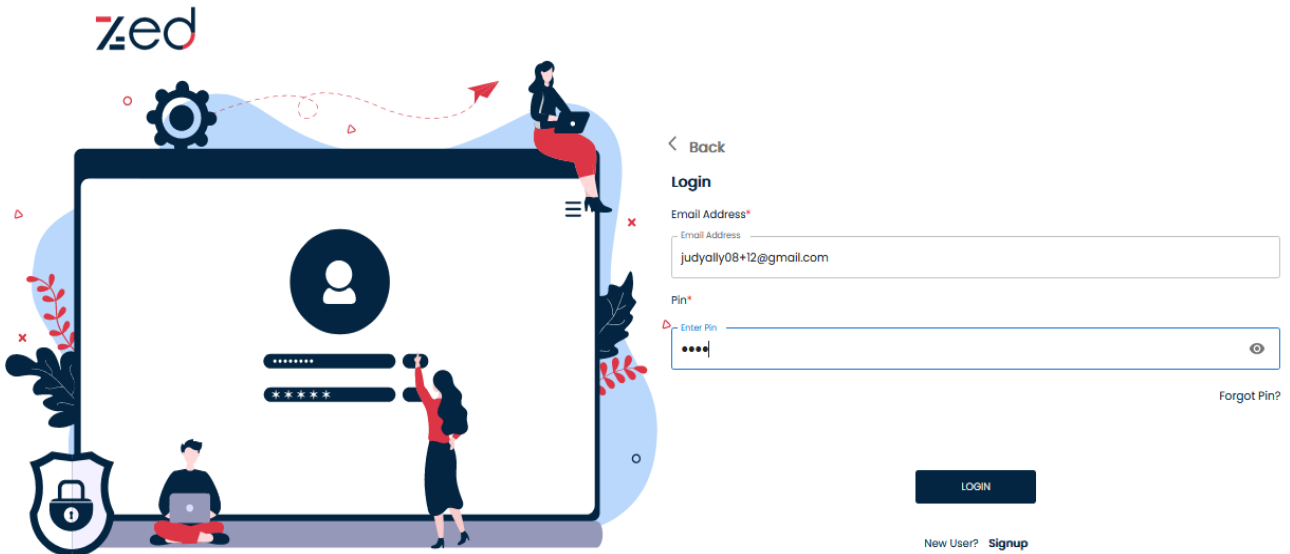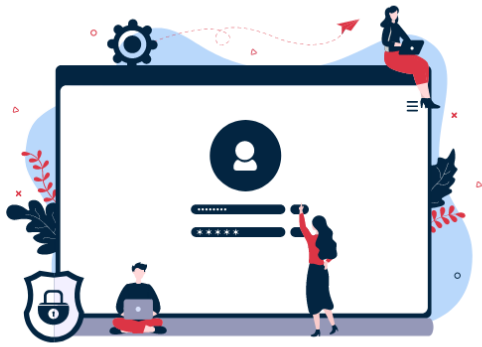iii.   Provide your login credentials and click 'Login'.

iv. Upon logging in, you'll be prompted to change your pin.
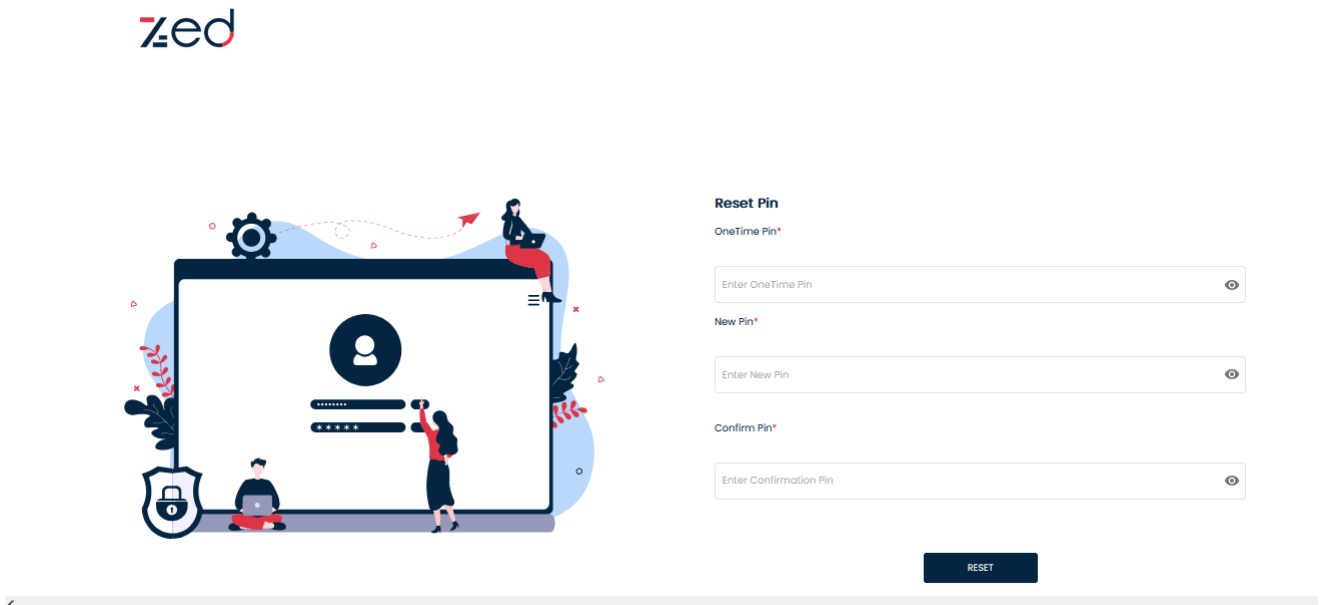
v. Enter the 'Onetime Pin' sent during registration.

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'

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

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.

ii.   Select the school type, i.e., primary, secondary, college and university.

iii.   Enter school name, director, phone number, email, location, country, and currency

iv.   Select and click 'done.'

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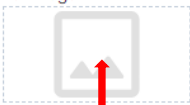
i. Click inside the outline of the logo at the top right to add the school logo.

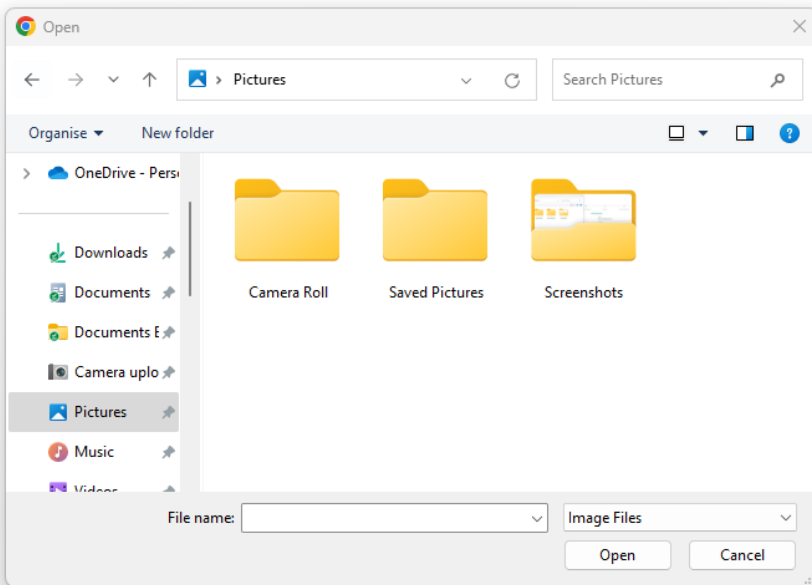ii. Browse your computer for the logo image.

iii. Select the image and upload it.

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

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

School Type
Kindergarten/Junior/High School

School Name
Trinity Educational Centre

Director
Prof Mineh

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, PP1, PP2, Playgroup,

Email
zpaymentsltd@gmail.com

Location
Nairobi

Country
Kenya

Currency
KES

Phone Number
+254769607456

EDIT   NEXT

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

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

Red

CANCEL   SAVE

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✓ Stream Added Successfully ✕

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Dashboard ● Grades & Streams

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

Streams   Grades   ADD STREAM

🔍 Search .... Streams

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".

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

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Dashboard • Service Categories

Category Name	Category Description	Action
Fees	School Fees	REMOVE
Transport Charge	School Transport Charge	REMOVE

Service Categories

CREATE CATEGORY

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 *

Grade 1 Term 1 Fee

Service Category *

Fees   ▾

Amount Type *

Fixed

Amount *

20000

Select Grade *

Year (Grade) 1   ▾

Term *

Term 1   ▾

Service Description

Grade 1 Term 1 Tuition Fee

SAVE

ii.   Click the 'Save' button.

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

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

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

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

<u>For Bank Option:</u>

- Choose and click on "Bank" and then select the specific bank.

    a) Mobile Money:

i.   Choose Mobile Money and input your till number.

ii.   Verify the till number and save details.

iii. Details will be updated successfully.

b) Bank Deposit:

i. Click on "Bank", select the specific bank and choose 'Bank Deposit'.

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

<u>Card Payment Set Up:</u>

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.

<u>eCitizen Setup:</u>

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.

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< **Create Business**

Dashboard • Payment Options

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

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 Account ID

Ecitizen Key

Ecitizen Key

Ecitizen Secret 👁

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**

Dashboard • Payment Options

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

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.

Cancel   **Activate**

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.

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

To Add Parent/ Guardian & Student:

i. One can choose to either drag and drop CSV File or;

ii. Select and click on "Browse Files"
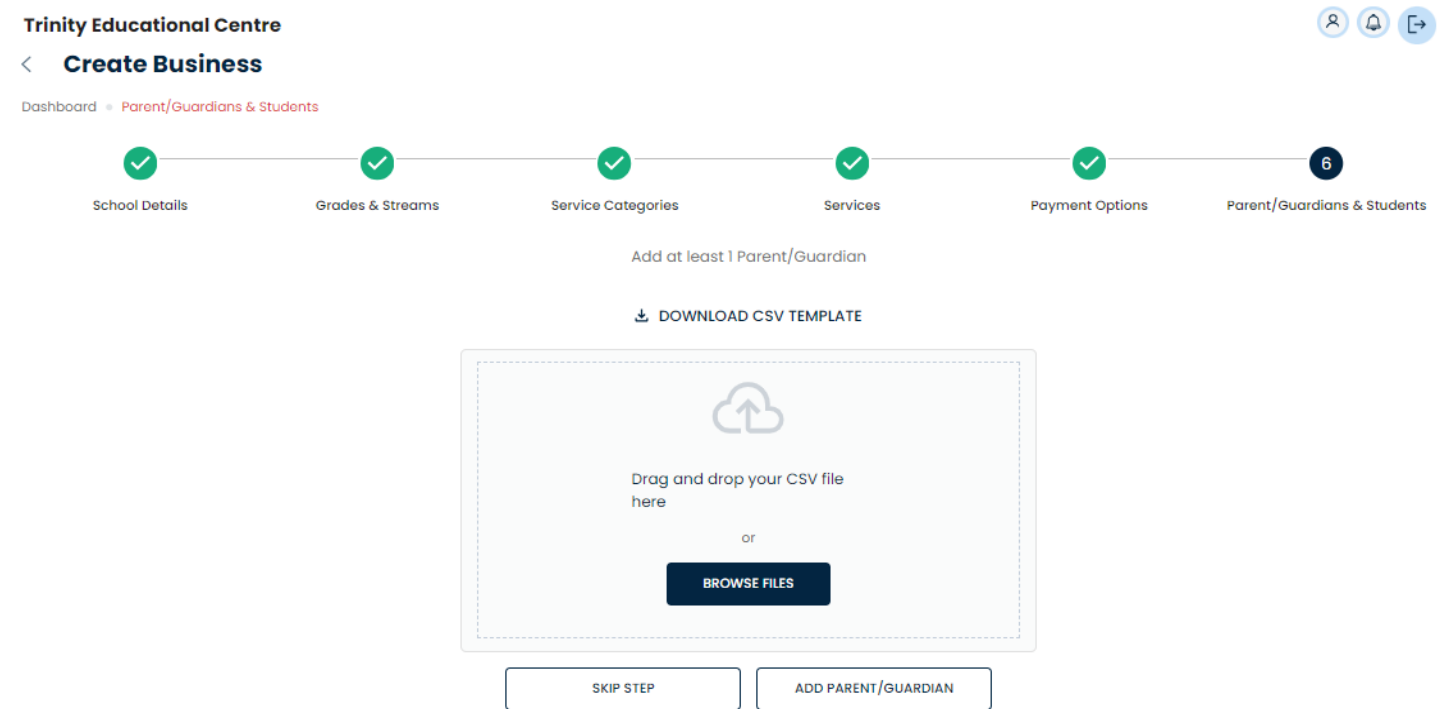
iii. Select the excel file from your computer's saved files.

iv. Click on Add Parent/ Guardian and save your information.
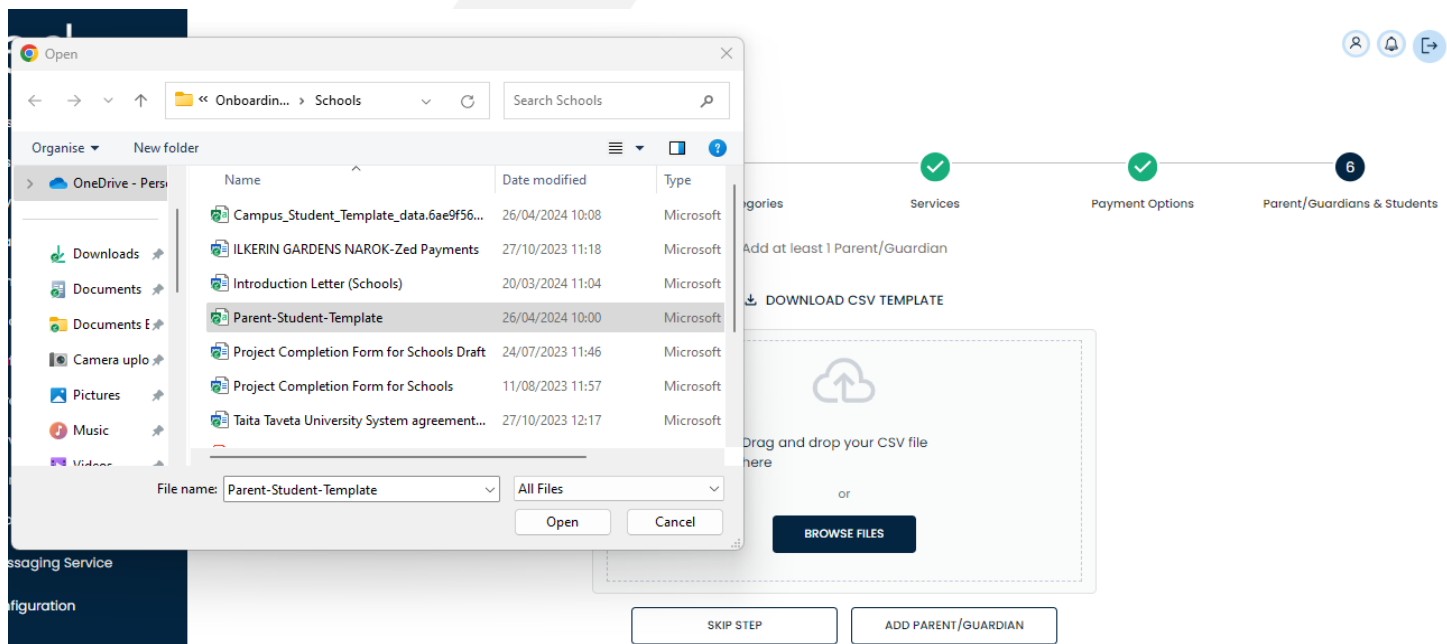
The information will be uploaded successfully to your school's Zed account.

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.

a)

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

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.

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

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.

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Generate Invoices

Dashboard • Invoices • Generate Invoice

Generate Invoices:

○ Grade   ◉ Student

🔍 Search:	All ▼	**GENERATE**

	Service Name	Description	Grade	Term	Amount	
☑	Piano Lessons	Piano Lessons			1	
☐	Swimming Lessons	Swimming Lessons			1	
☑	Skating Class	Skating Class			1	
☐	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

[UPLOAD BALANCES] [**CREATE INVOICE**]

APPROVED   **PENDING APPROVAL**   DECLINED

🔍 Search:	School Type ▼	EXPORT ⋮

Batch No	Created On	Total Invoices	Total Amount	Action
TrinityEducationalCentre_2	May 23, 2024 11:38:58 AM	1	2	✓ ✕

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.

- 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

Invoice Batch

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

Search: 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

Trinity Educational Centre

← **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

☐ **Apply Discount**

Subtotal	KES 20,000.00
Discount	KES 0.00
Total	**KES 20,000.00**

Accepted Payment Methods

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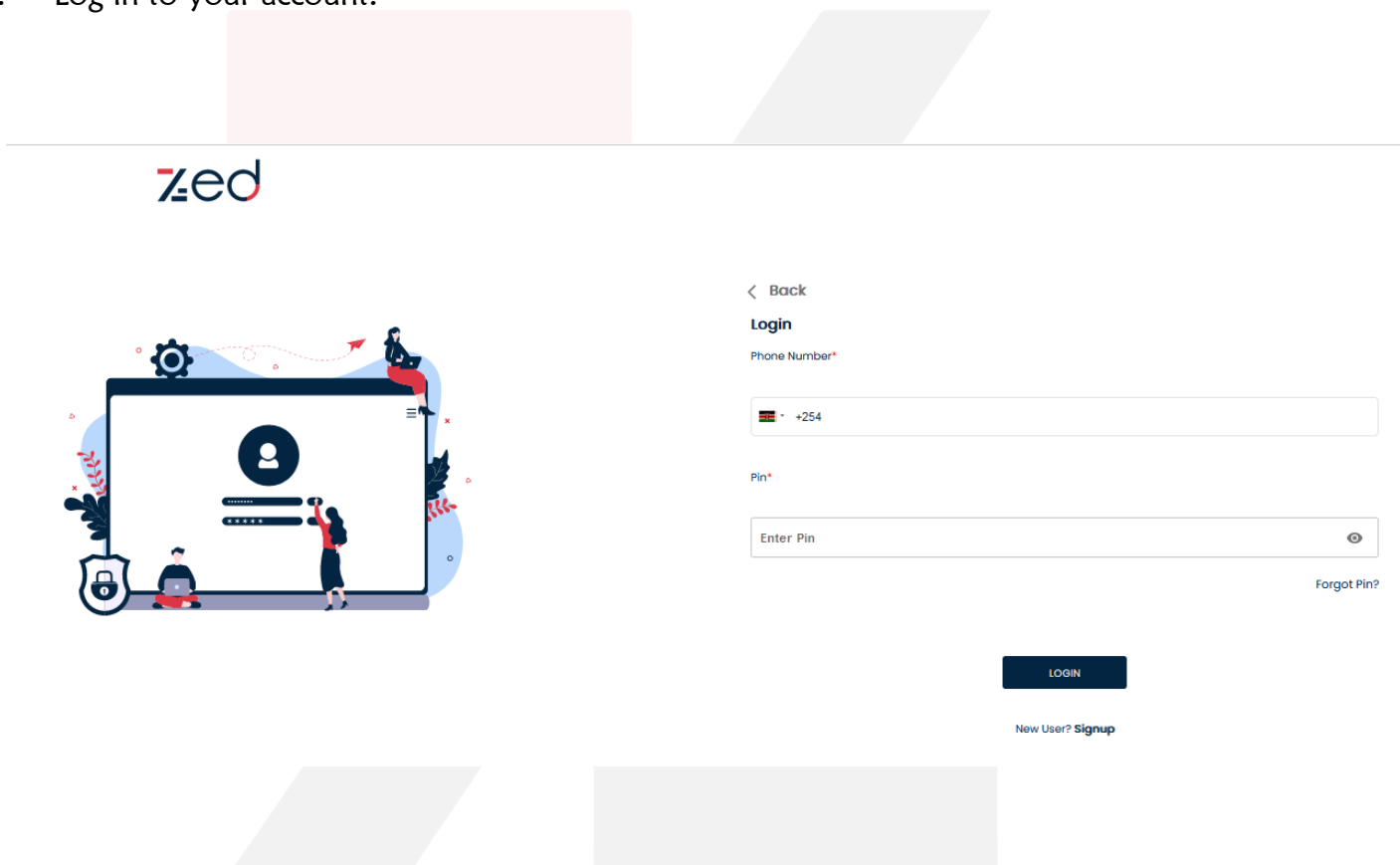
iii. On the menu, click 'Student Promotion.'
iv. Click the 'Promote Students' button.

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.

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

(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.

Bango Primary School

Configurations

Dashboard • Configurations

Search:

Enable Zed Accou...
Enable Inventory
Enable Payables

Enable Payables?

Enabling payables will allow your business to pay suppliers, vendors and track internal payments through petty cash.

- Assign one or more approvers to transactions made from the business.
- Pay directly to suppliers and vendors from the app.
- Make petty cash payments and track them.

Cancel   Enable

Dashboard
Users
Businesses
Service Charges
Parent Accounts
Reports
Sms
Payment Setup
Configurations

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

- Once done, a confirmation will appear, and the Payables button turns green.
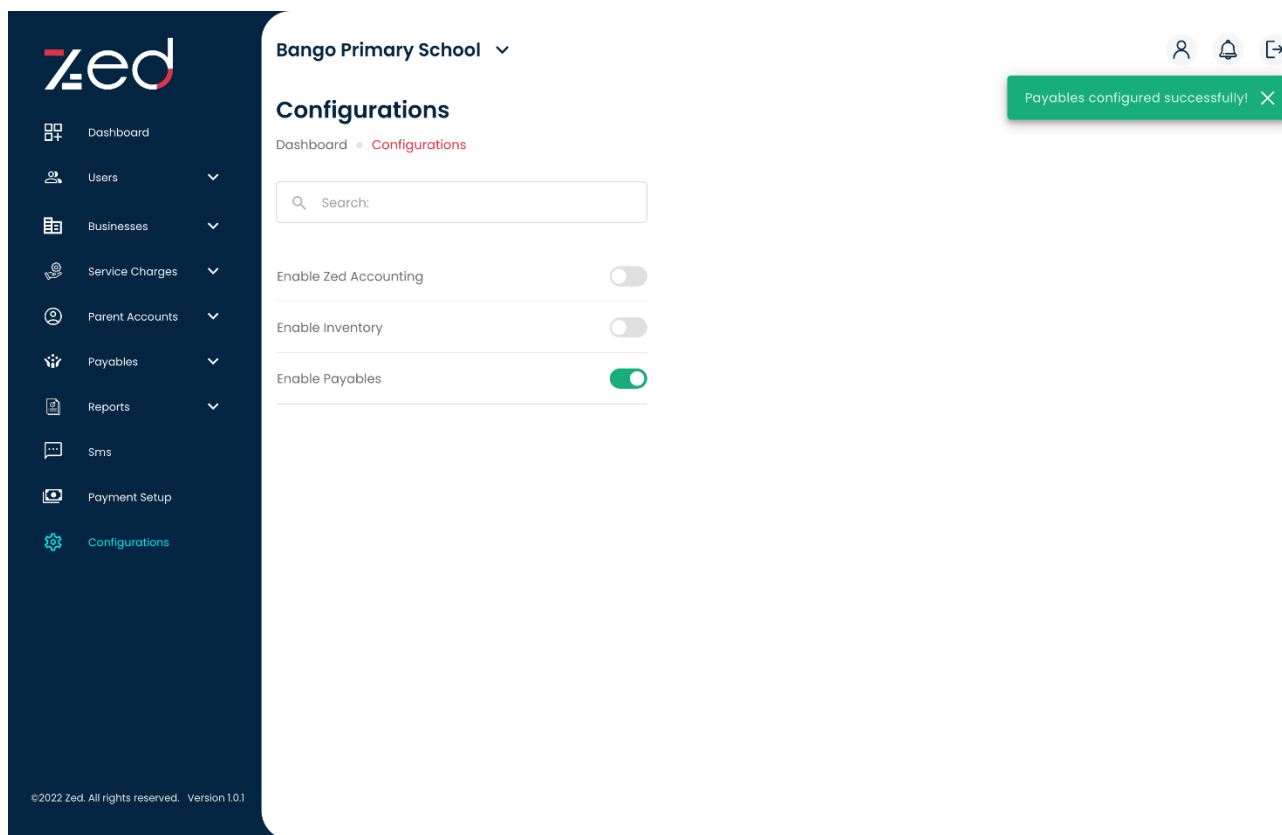
- Return to the side menu, and voila! You'll see the newly added "Payables" menu.

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.
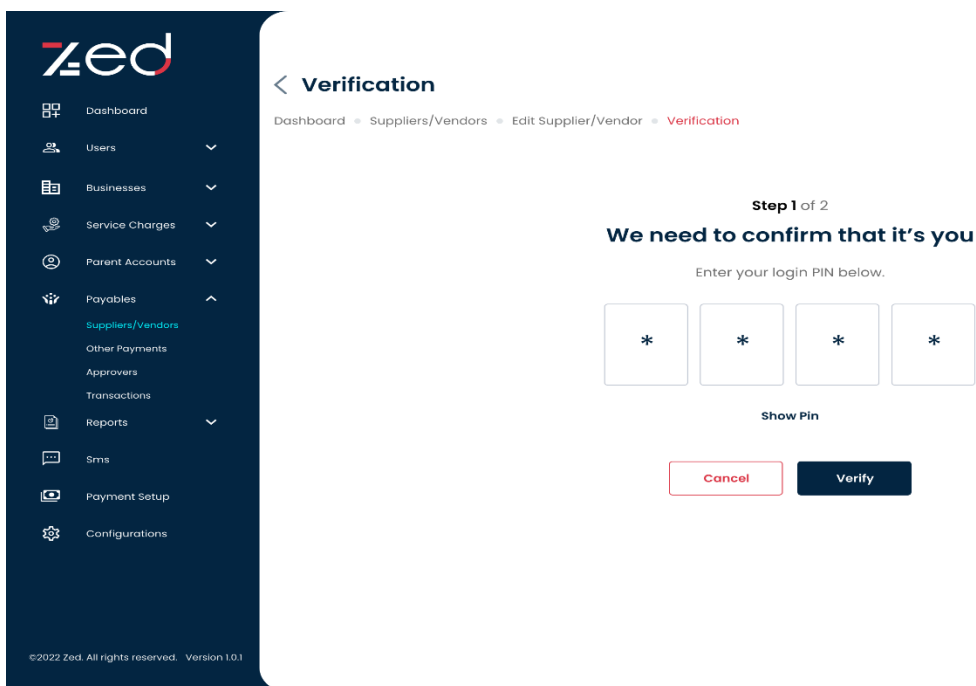
- Get a one-time pin on both WhatsApp and email for verification.
- Enter the 6-digit code for verification.
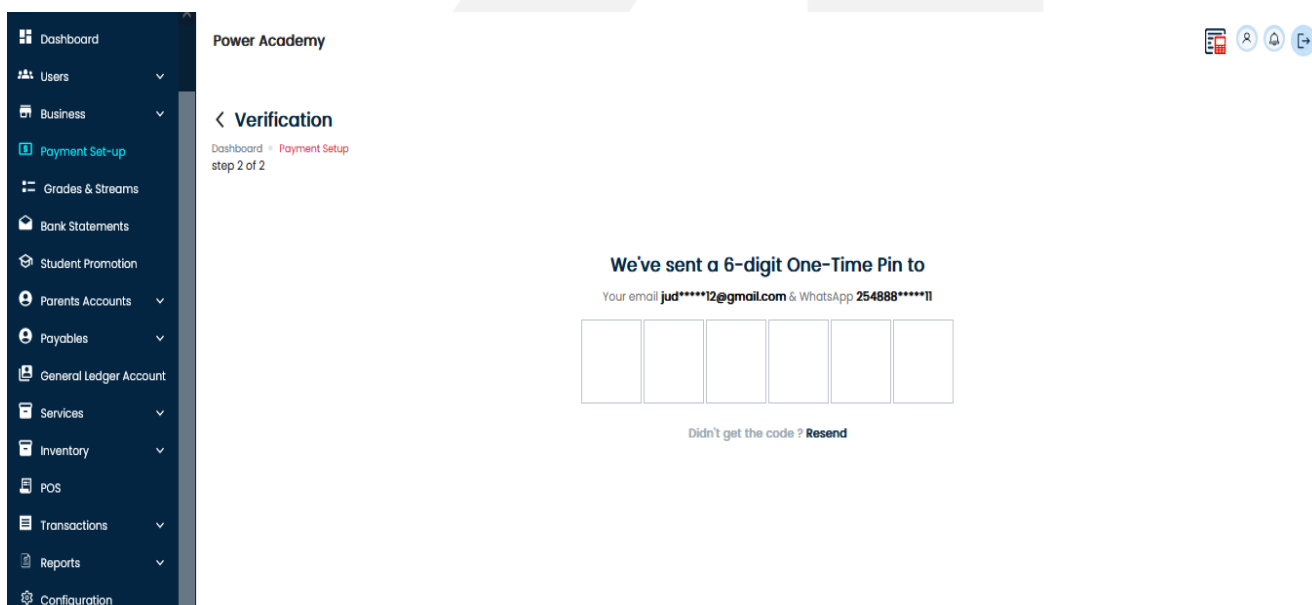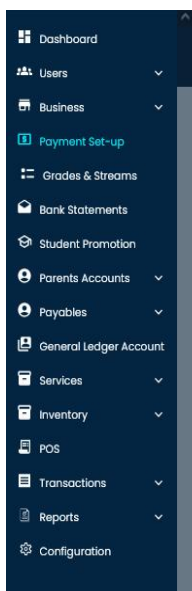
- Click 'Bank' and select your bank from the provided list (e.g., KCB).
- Opt for 'Debit Accounts' to set up the account for handling payments.

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

- Click 'Add Account' to save your configuration.

- 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.'

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

- 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.'

- 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.

- 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.

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

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.

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

- 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.

<u>For Inputters:</u>

- Log in to Zed Payments.

- From the menu select 'Payables' and choose 'Raise Payment.'
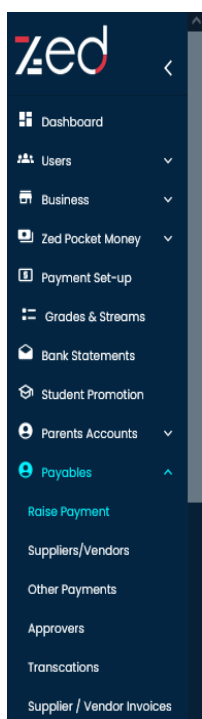
- Select a supplier from the list and click 'Add Invoice.'

- Enter the Invoice Date and Click 'Add Items'.

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

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.

- Click on the specific transaction to preview it.
- After reviewing the details, click the 'Approve' button to approve the payment.

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

- 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.

- 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.

Payable Transactions

Bango Primary School ⌄
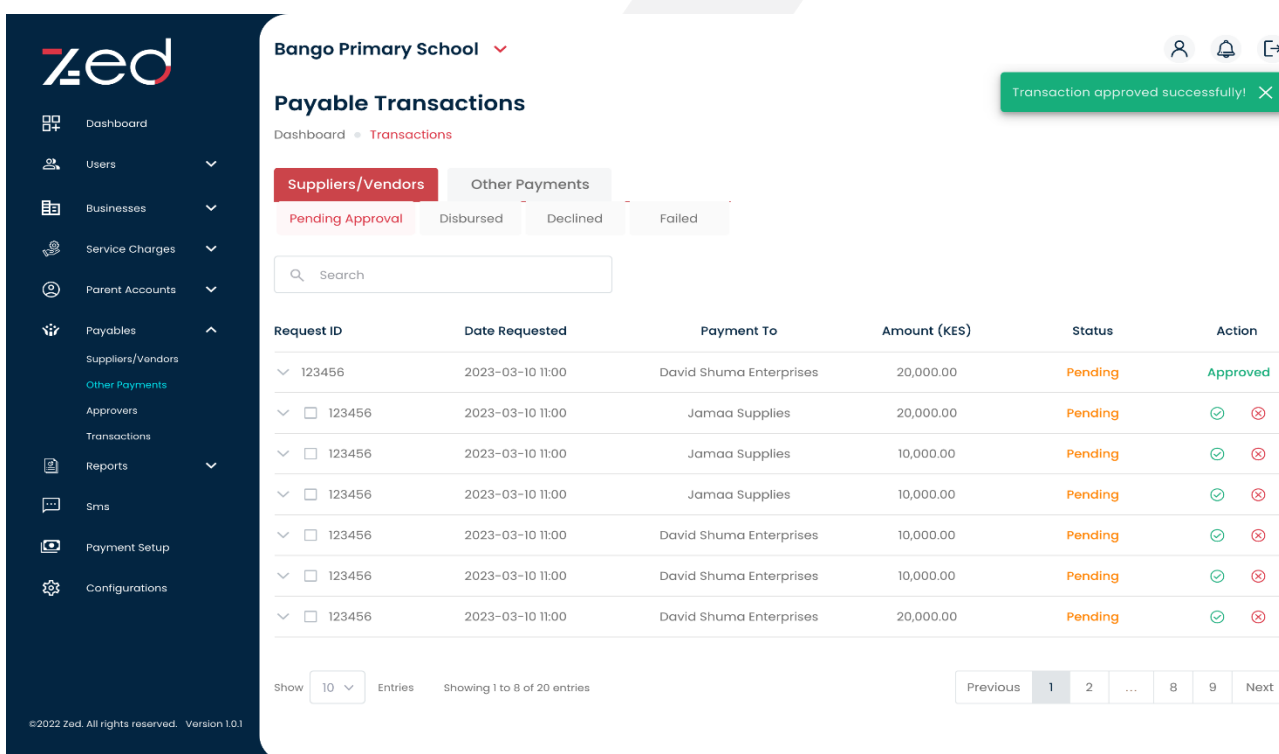
Suppliers/Vendors | Other Payments

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

Previous | 1 | 2 | ... | 8 | 9 | Next

Bango Primary School ⌄

‹ Preview Payable Transaction

Status: Disbursed

Request ID:	Requested On:
123456	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

Receipt1234124Ixxa.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

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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.

<u>For Inputters:</u>

- 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.

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

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

- Click 'Add Invoice'.

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

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

<u>For Approvers:</u>

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.

- 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.

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

- 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.

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.

iii.   In the provided fields, enter the Name, Code, and Classification for your GL account.
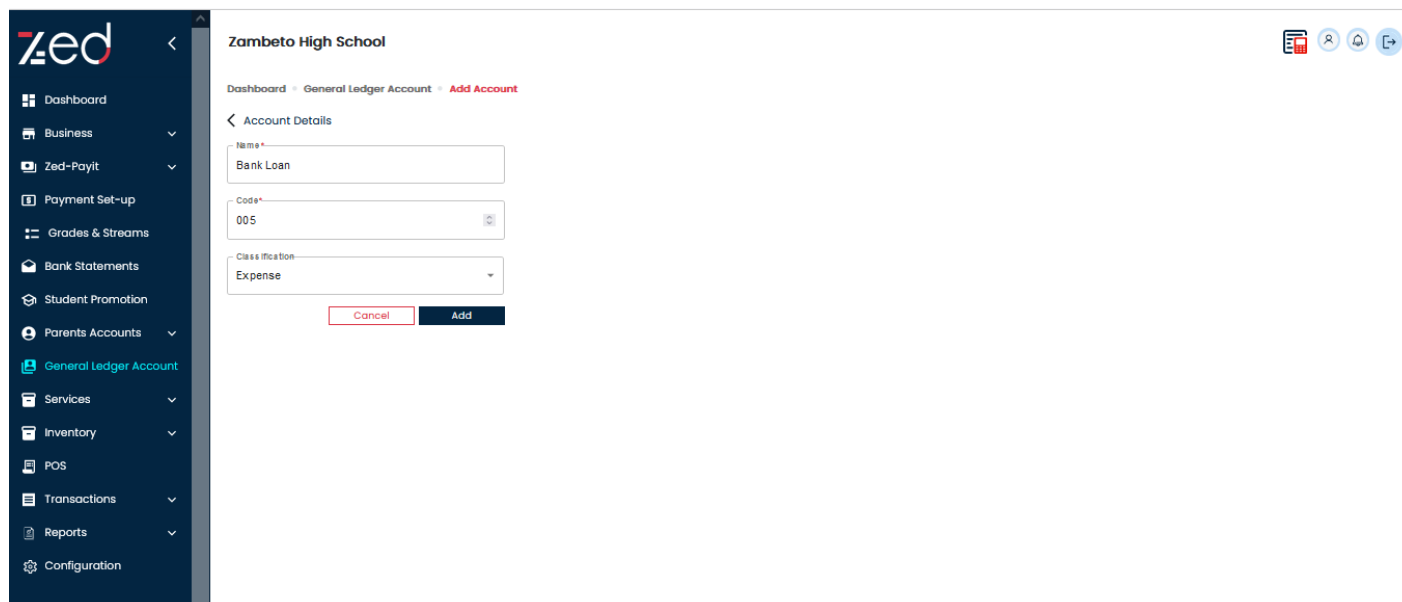
iv. Save your changes by clicking the 'Add' button, and your General Ledger account will be created successfully.