



## CHAI AGENCY APPLICATION

**AGENCY BANKING APPLICATION**

**USER GUIDE**

**TO**

**CHAI SACCO SOCIETY LTD**

**BY**

**SKY WORLD LIMITED**

**P.O. Box 50455 – 00100 Nairobi, Kenya**

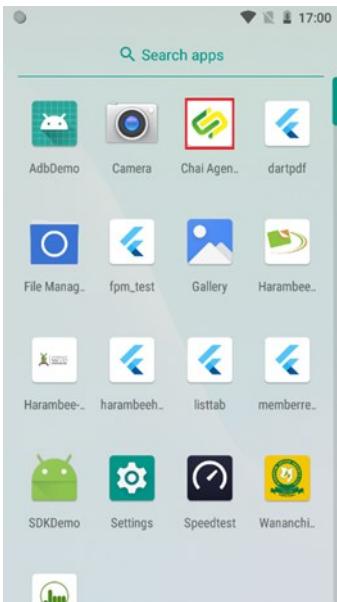
**Email: [info@skyworld.co.ke](mailto:info@skyworld.co.ke)**

**Date: 15 March 2022**

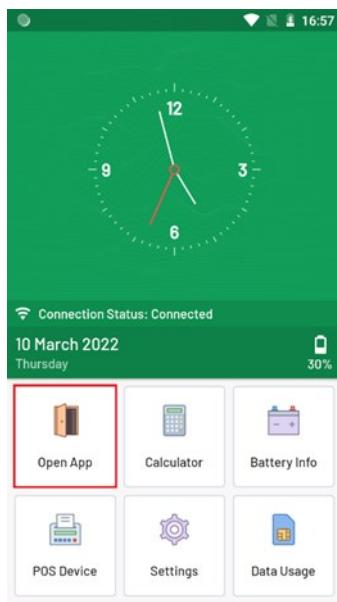
# Login

**Description:** This guide will enable the agent to securely log in to the **CHAI AGENCY Application**

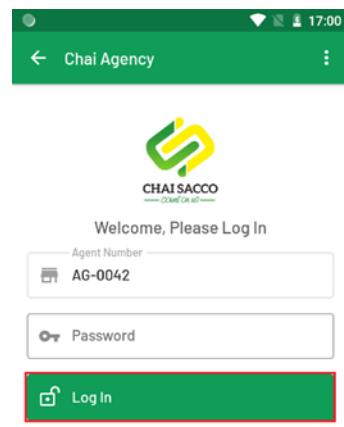
## Steps



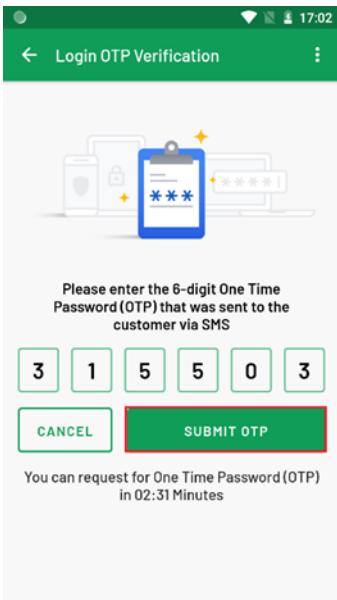
1. Tap on **Chai Agency Application.**



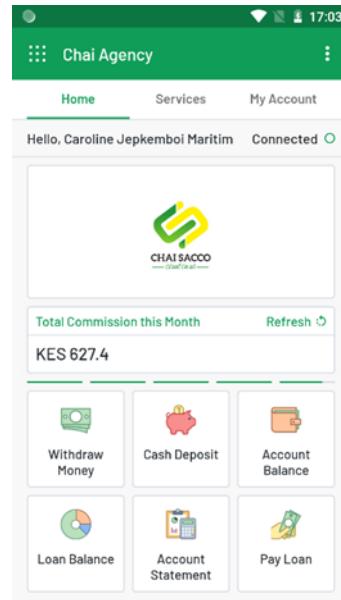
2. Tap on **Open App.**



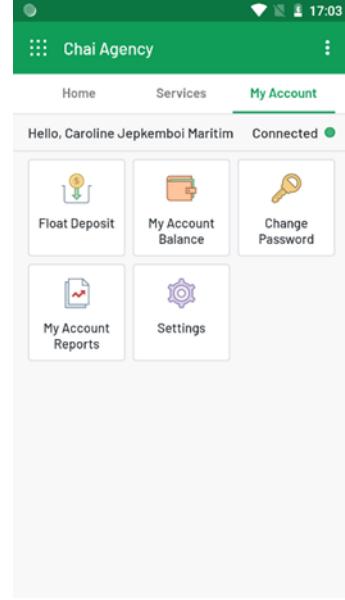
3. Enter the **Agent username** and **password** then Tap on **Log in**



4. Enter the **OTP** and Tap on **Submit OTP**.



5. You will receive the above Homepage as **Home**.

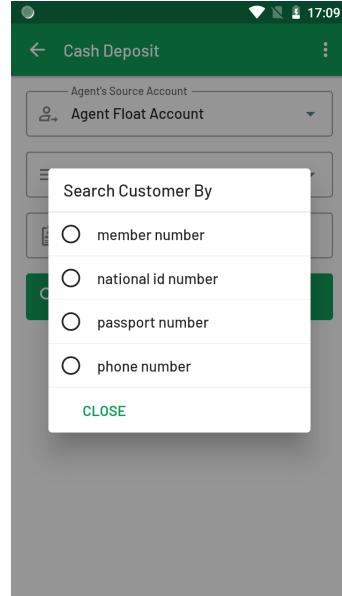
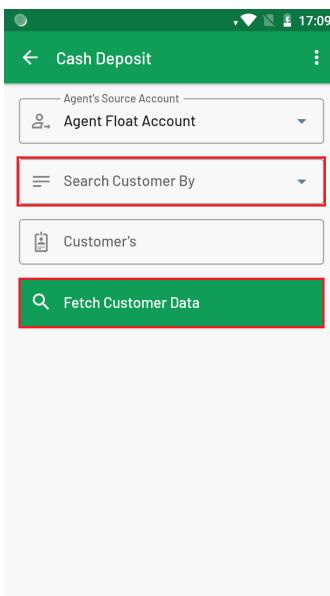
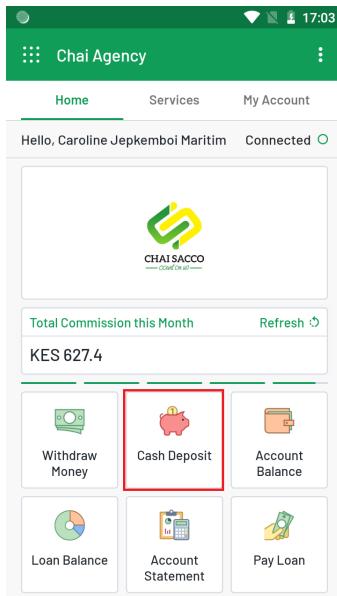


6. Under **My Account** you the page above is displayed.

# Cash Deposit

**Description:** This guide will enable the agent to deposit money to a selected customer's account at CHAI SACCO in exchange for Cash.

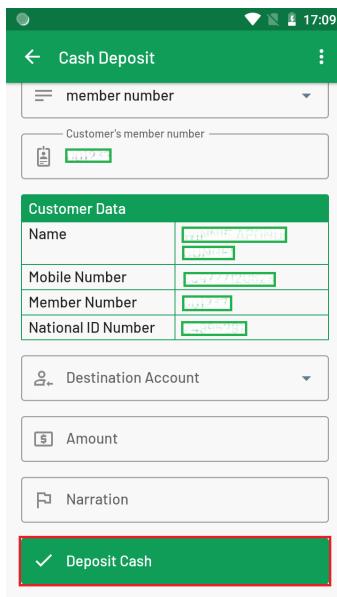
## Steps



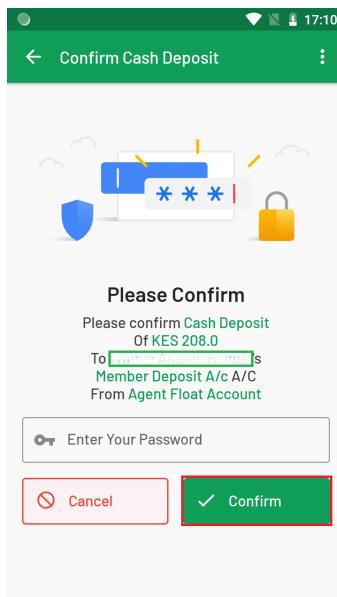
1. Tap on **Cash Deposit**.

2. Tap on **Fetch customer data**.

3. Select **Customer Search options**.



4. Enter the **Destination Account, Amount** and **Narration**. Then Tap on **Deposit Cash**



5. Enter **Password** and Tap **Confirm** Button

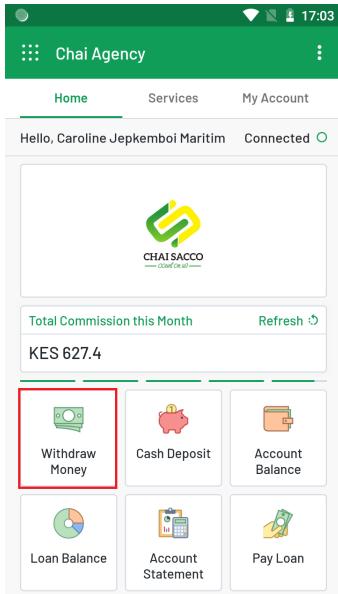


6. Tap on **Print Receipt** to get a printout.

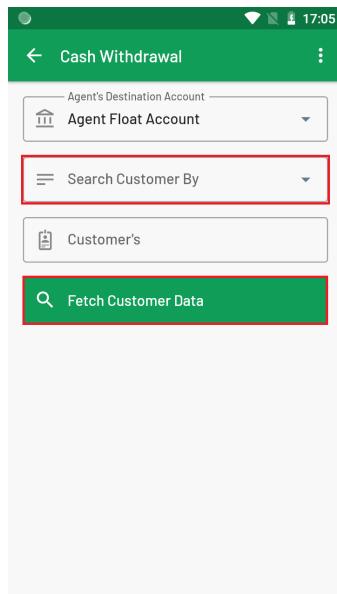
# Cash Withdrawal

**Description:** This guide will enable the agent to withdraw money from a selected customer's account at CHAI SACCO in exchange for Cash.

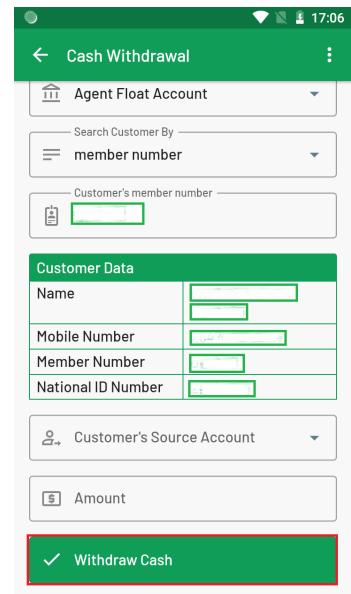
## Steps



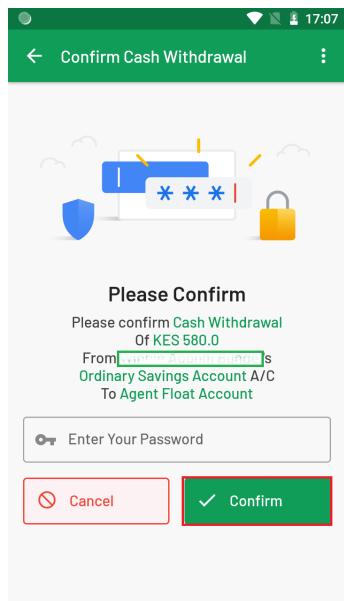
1. Tap on **Withdraw Money**.



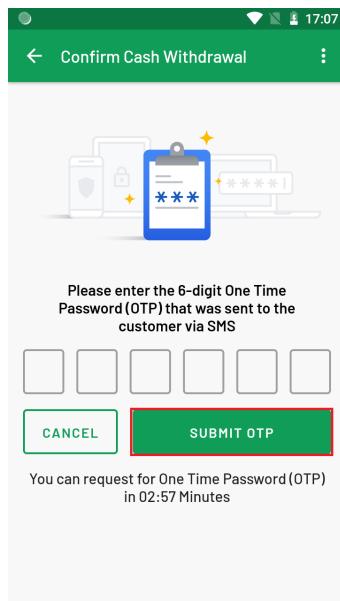
2. Select **Customer Search options** And enter **Customer's Data**. Then tap **Fetch customer data**



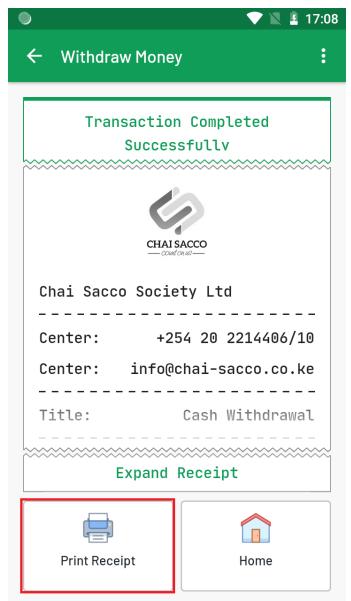
3. Enter the **Customer's account** and **Amount**, Then Tap on **Withdraw Cash**



4. Enter the **Agent Password** And Tap **Confirm**.



5. Enter the **OTP** received and Tap on **Submit OTP**.

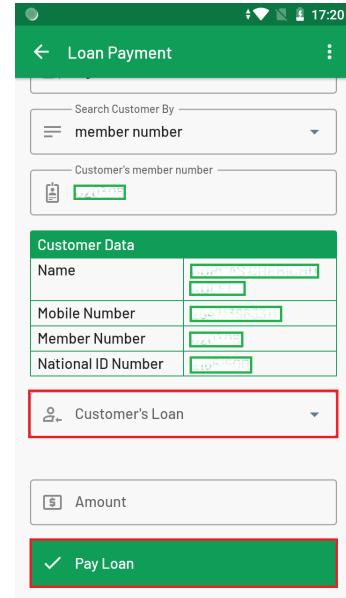
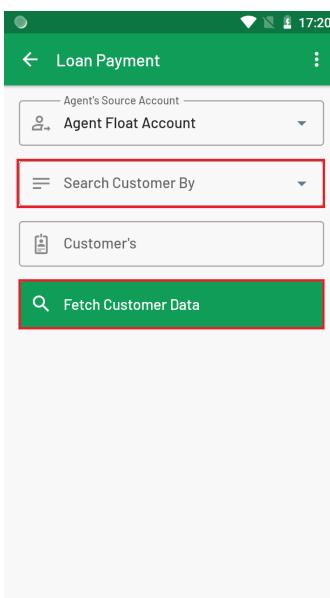
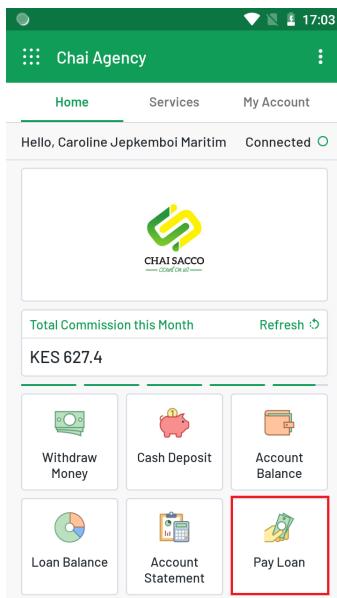


6. Tap on **Print Receipt** to get a printout.

# Pay Loan

**Description:** This guide will enable the agent to pay a selected customer's loan at CHAI SACCO in exchange for Cash.

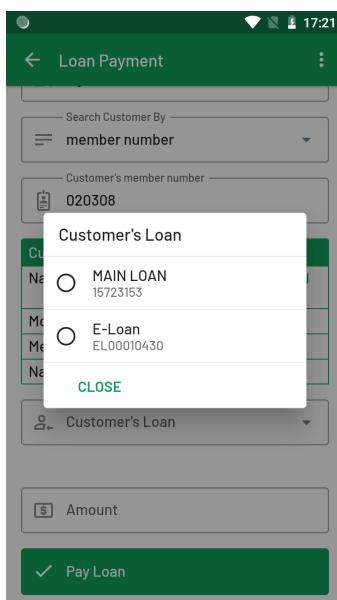
## Steps



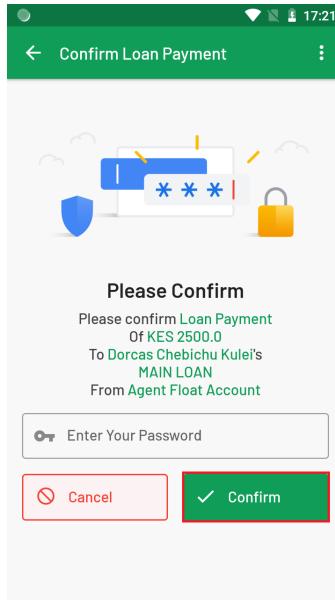
1. Tap on **Pay Loan**.

2. Select **Customer Search Option** and enter **customer data** Tap on **Fetch customer data**.

3. If successfully fetched Proceed to step 4.



4. Select **Customer Loan** and enter **Amount** and **Narration**. Then Tap on **Deposit Cash**



5. Enter **Password** and Tap **Confirm** Button

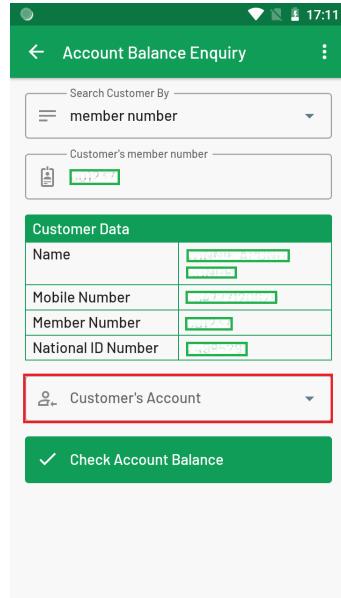
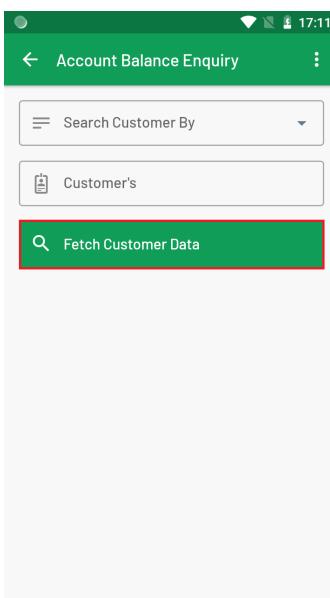
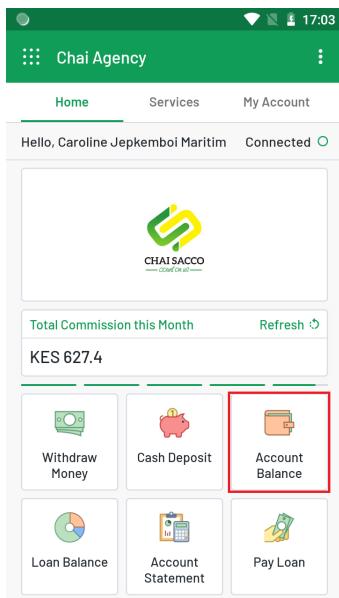


6. Tap on **Print Receipt** to get a printout.

# Account Balance

**Description:** This guide will enable the agent to check account balance for a selected customer's account at CHAI SACCO.

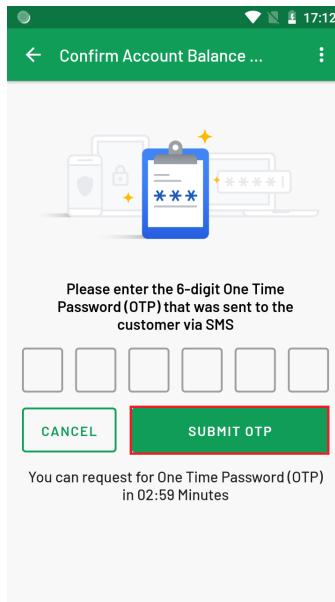
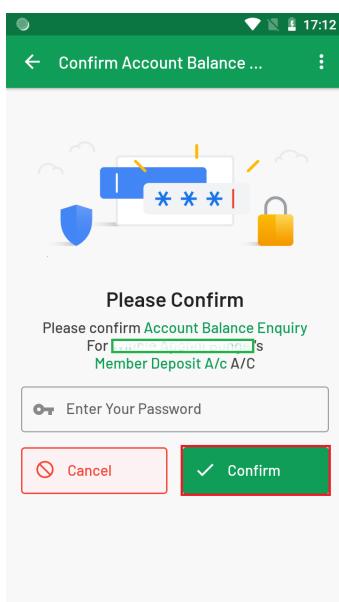
## Steps



1. Tap on **Account Balance**.

2. Select **Customer Search Option** and enter **Customer data** Tap on **Fetch customer data**.

3. Enter the **Customer's Account** and Tap on **Check Account Balance**



4. Enter **Password** and Tap **Confirm** Button

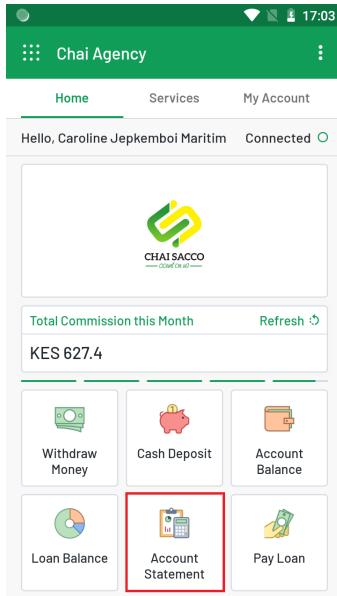
5. Enter **OTP** and Tap **Submit OTP** Button

6. Tap on **Print Receipt** to get a printout.

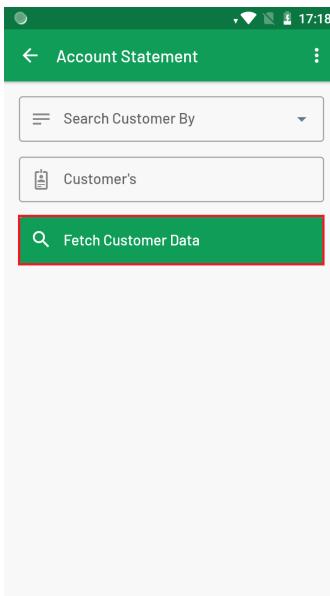
# Account Statement

**Description:** This guide will enable the agent to check account statement for a selected customer's account at CHAI SACCO.

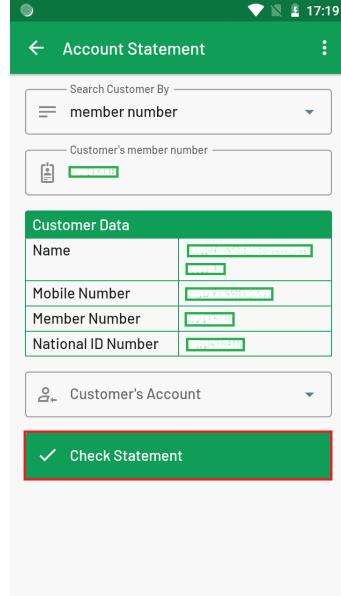
## Steps



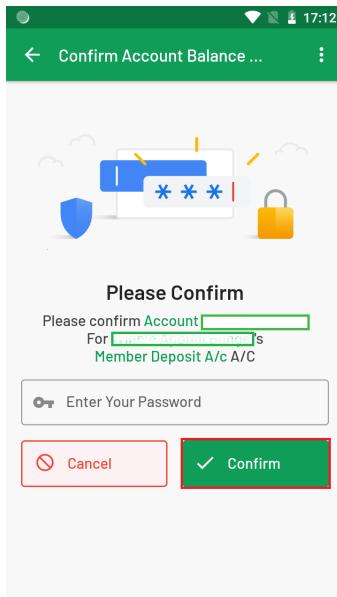
1. Tap on Account Statement.



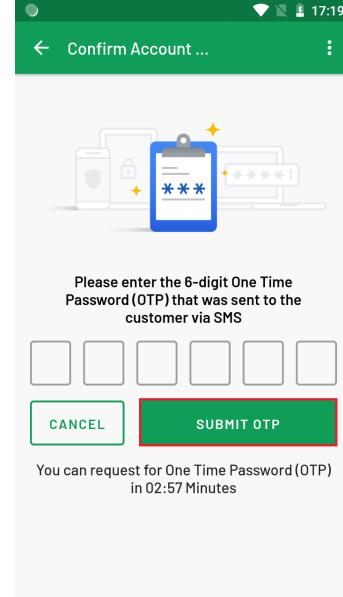
2. Select Customer Search Option and enter Customer data Tap on Fetch customer data.



3. Select the Customer's Account and Tap on Check Statement



4. Enter Password and Tap Confirm Button Proceed.



5. Enter OTP and Tap Submit OTP Button

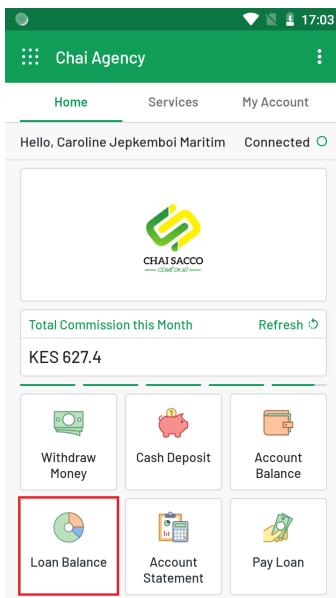


6. Tap on Print Receipt to get a printout.

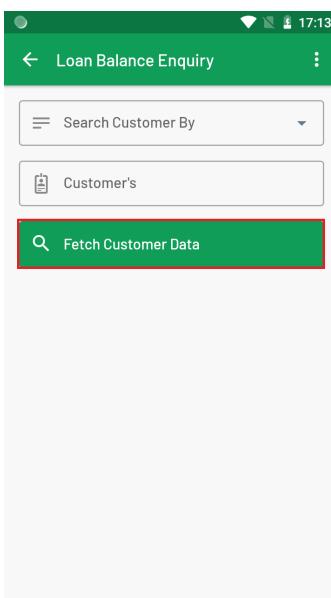
# Loan Balance

**Description:** This guide will enable the agent to check loan balance for a selected customer's loan at CHAI SACCO.

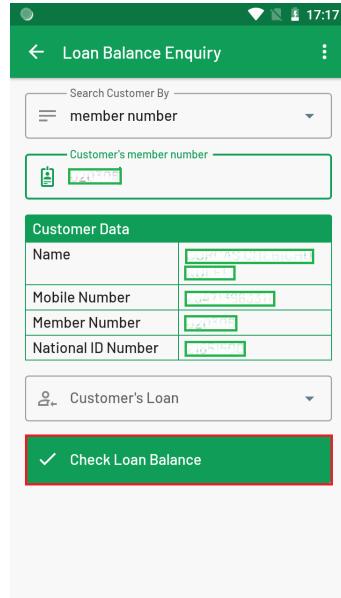
## Steps



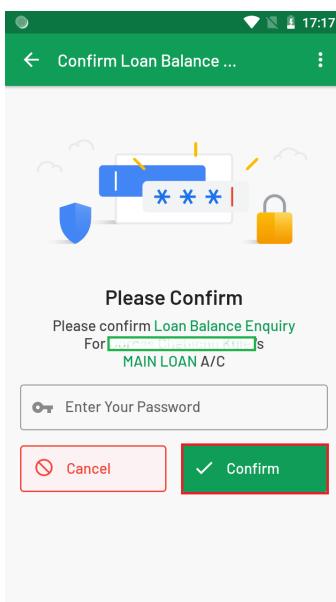
1. Tap on **Loan Balance**.



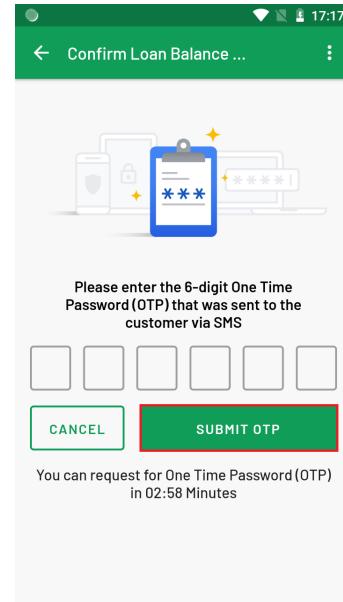
2. Select **Customer Search Option** and enter **Customer data** Tap on **Fetch customer data**.



3. Select the **Customer's Account** and Tap on **Check Loan Balance**



4. Enter **Password** and Tap **Confirm** Button Proceed.



5. Enter **OTP** and Tap **Submit OTP** Button

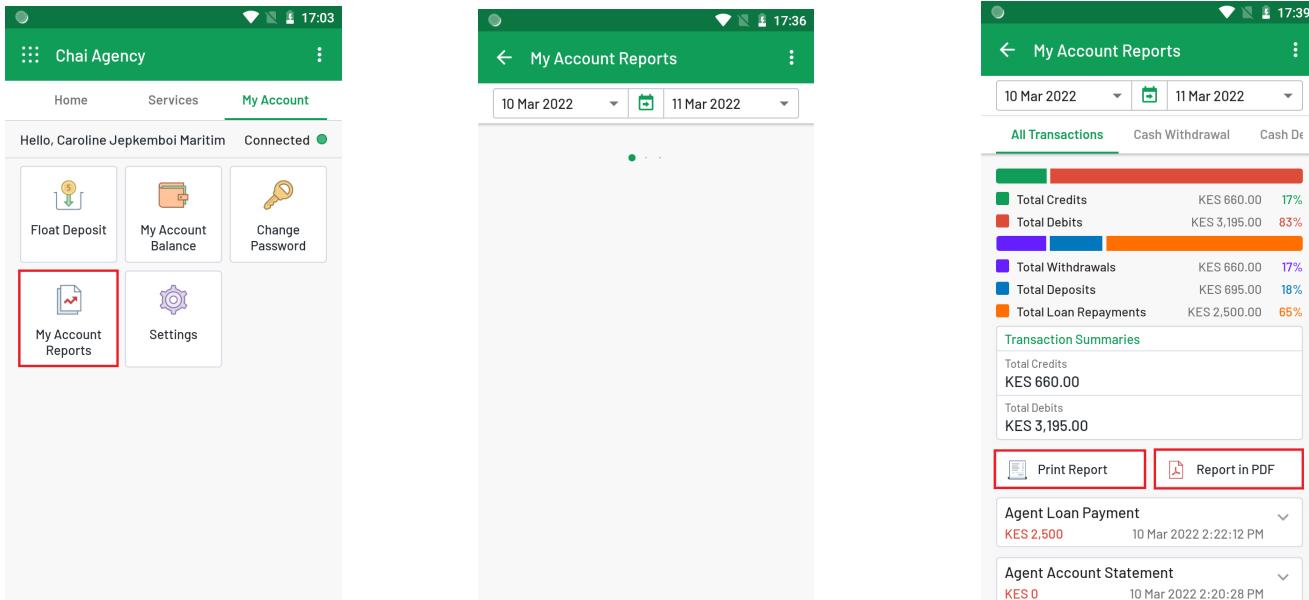


6. Tap on **Print Receipt** to get a printout.

# Agent Account Reports

**Description:** This guide will enable the agent to request account statements for all transactions performed on a specified account.

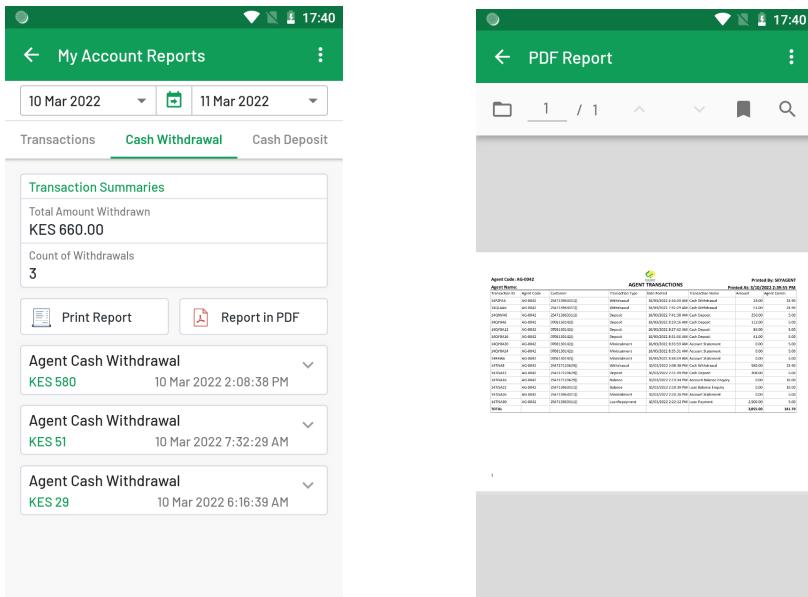
## Steps



1. Tap on **My account Reports**.  
Under **My account**.

## **2. Select Start Date and End Date.**

3. Tap on **Print Report** to  
Get print-out and **Report**  
**in PDF** to view it in PDF.



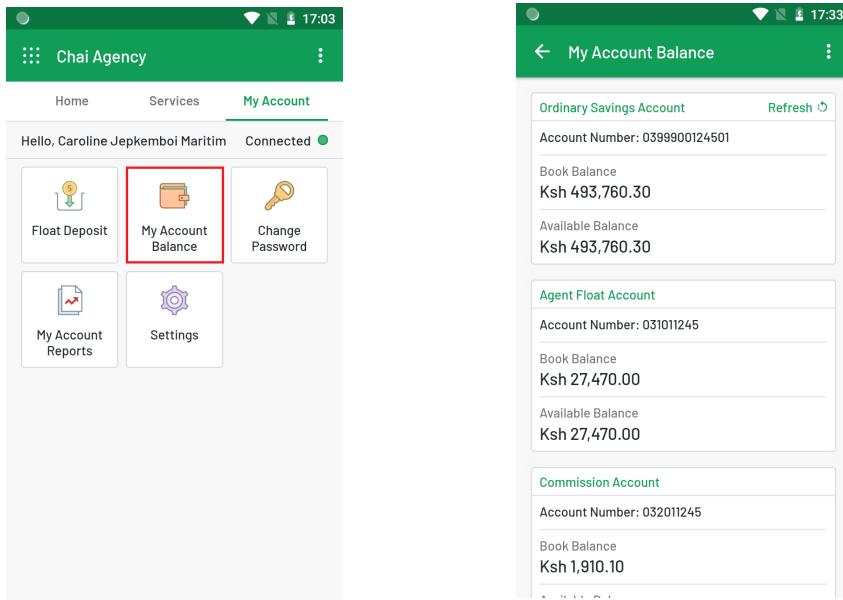
4. Navigate on the Reports and choose the transaction you wish to view report.

## 5. Report in PDF.

# Agent Account Balance

**Description:** This guide will enable the agent to request account statements for all transactions performed on a specified account.

## Steps



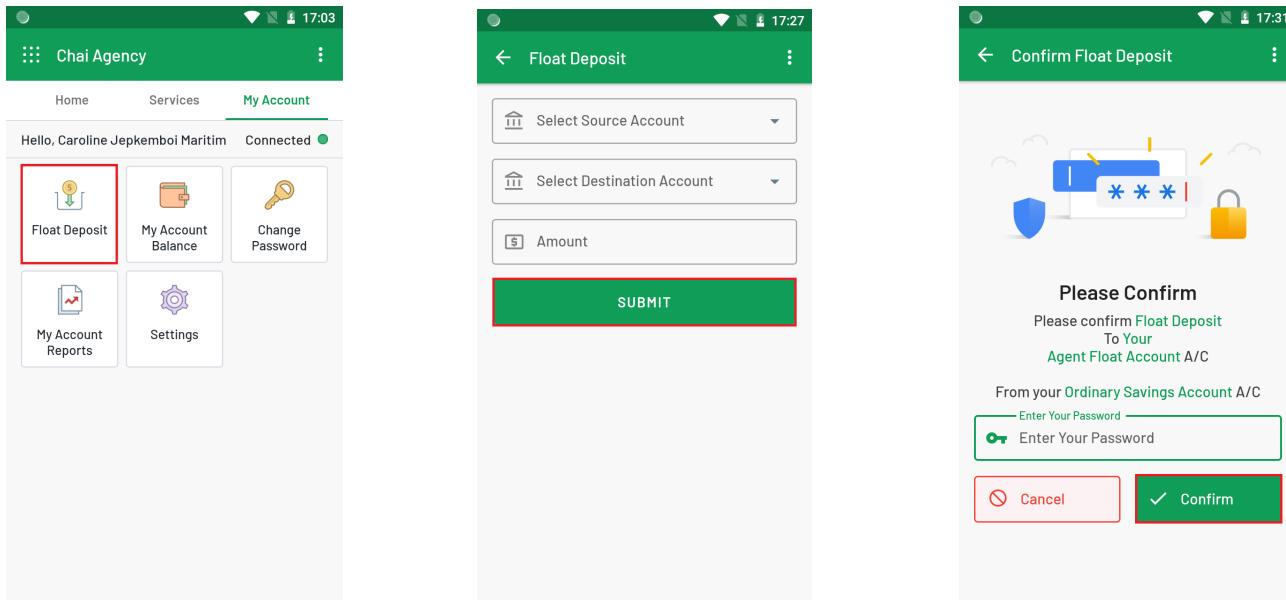
1. Tap on **My Account Balance**.  
Under **My account**.

2. **Account Balances.**

# Float Deposit

**Description:** This Option will allow the agent to top Up the float account using their CHAI SACCO Account.

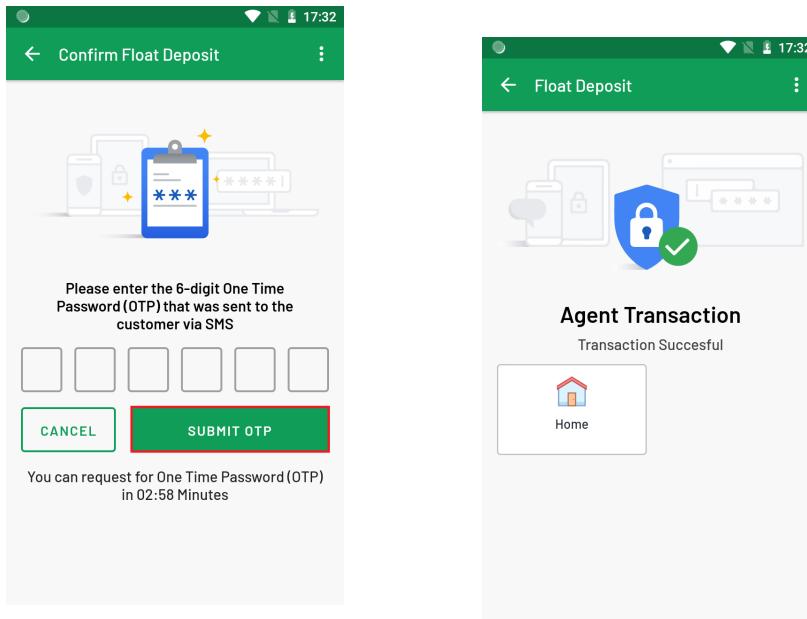
## Steps



1. Tap on **Float Deposit**. Under **My account**.

2. Choose **Source Account**, **Destination Account** and **Amount** then Proceed to Tap **Submit**.

3. Enter **Password** and Tap **Confirm**.



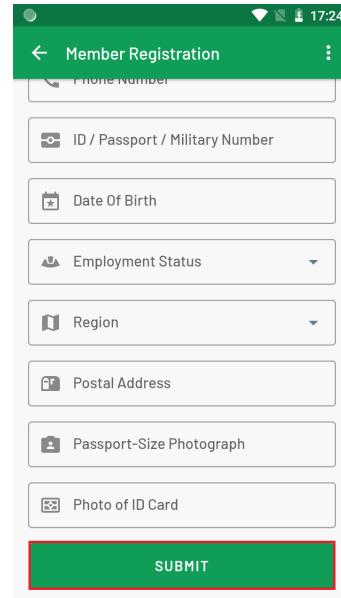
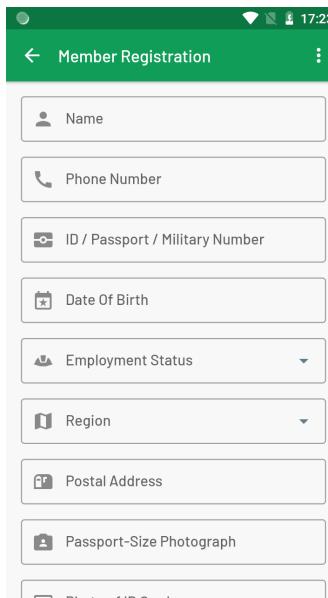
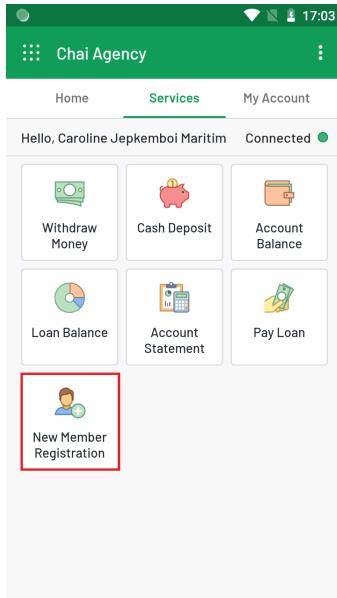
4. Enter the **OTP** sent and tap on **Submit OTP**.

5. Successful Float Deposit.

# New Member Registration

**Description:** This option will enable the agents to register new members to Chai Sacco.

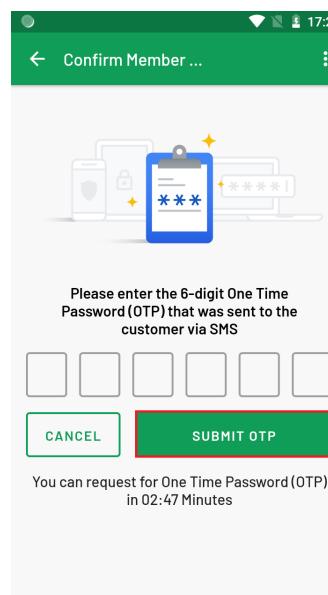
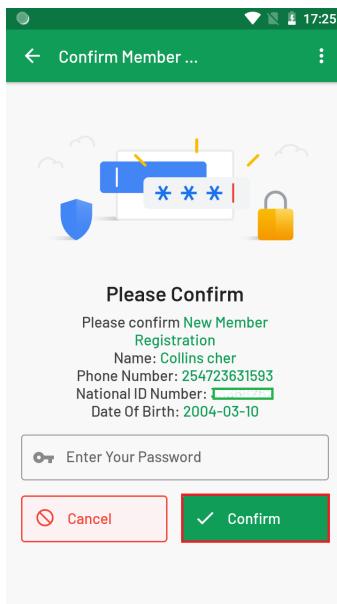
## Steps



1. Tap on **New Member Registration** . Under **Services**.

2. Choose **Details** in the required boxes.

3. Tap **Submit**.



4. Enter **Password** and Tap on **Confirm**.

5. Enter the **OTP** sent and tap on **Submit OTP**.

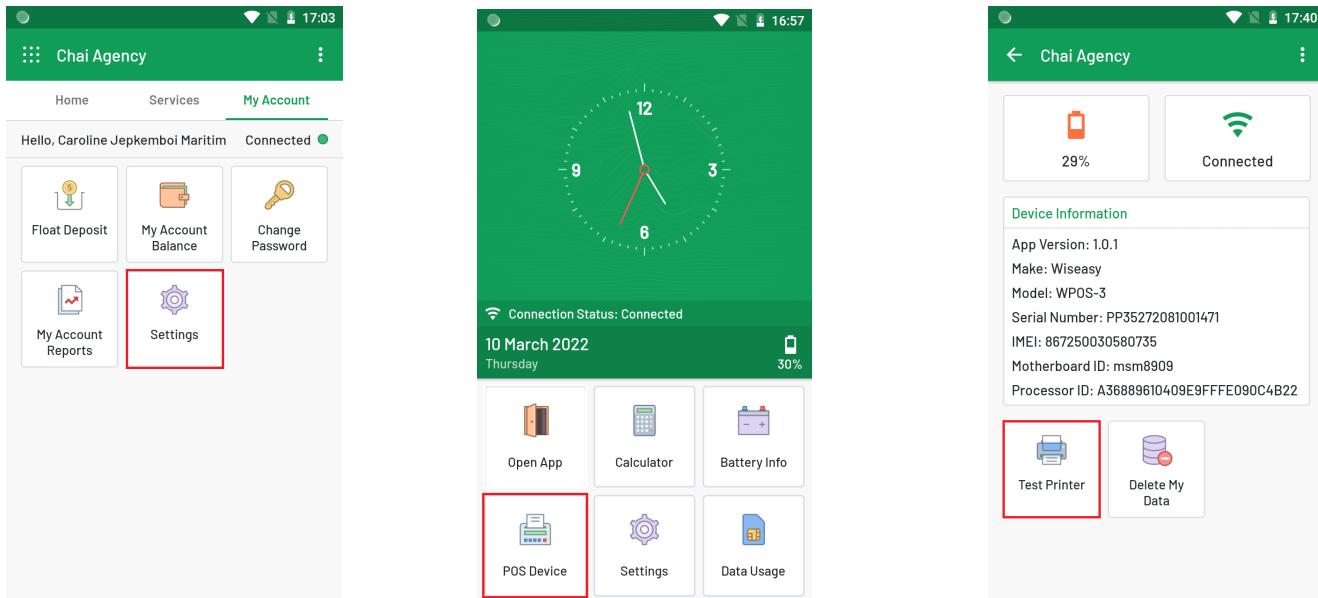


5. Tap on **Print Receipt** to get print out.

# Settings

## Test Printer

**Description:** This guide will enable agents to test in case there are printing issues in the device.



1. Tap on **Settings**. Under **My account**

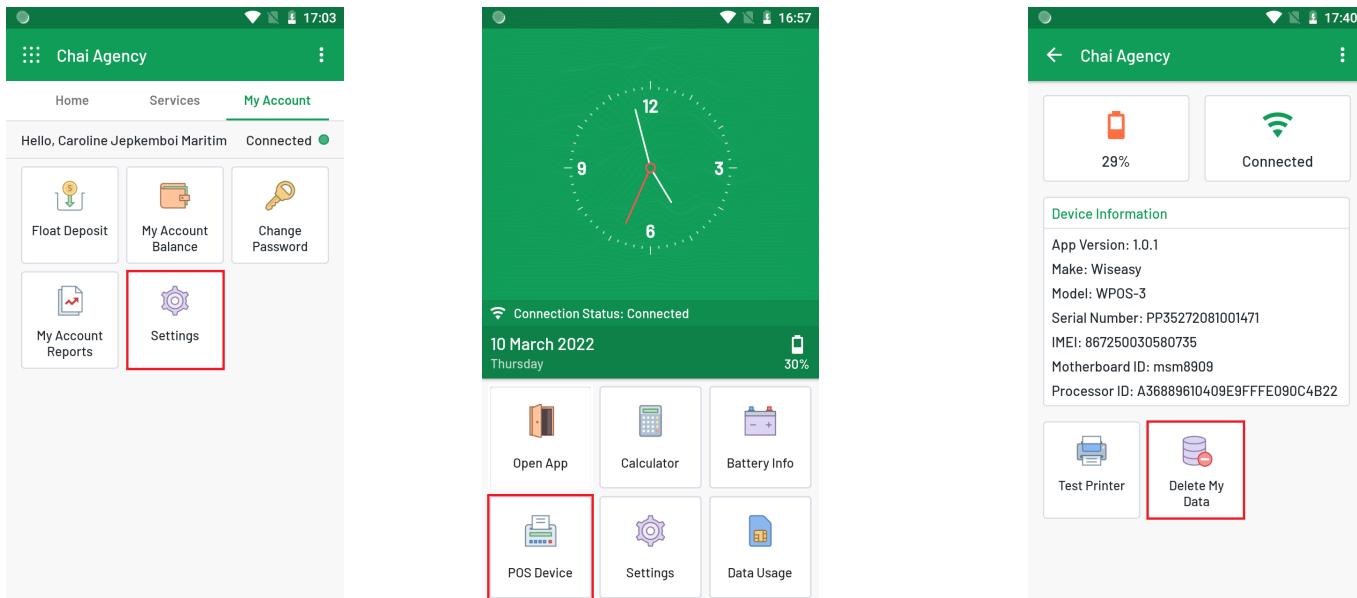
2. Similarly to Step 1. Tap on **POS Device** if not logged in.

3. Tap **Test Printer**.

You should get a printout from device.

## Delete My Data

**Description:** This guide will enable many agents to share one device to login.



1. Tap on **Settings**. Under **My account**

2. Similarly to Step 1. Tap on **POS Device** if not logged in.

3. Tap **Delete My Data**.  
Saved Logins will be deleted.