

## Square Set up on a Cell Phone

Note.that.verification.of.this.process.may.take.up.to.0.business.days.so.this.should.all.be.done.well.in.advance.of.needing.to.use.your.square;

### Step 1: Download the Square App

- Go to the App Store (iOS) or Google Play Store (Android) and search for Square Point of Sale.
- Download and install the app on your smartphone.

### Step 2: Open the App and Sign Up for an Account

- Open the Square Point of Sale app.
- Tap Create account to create a new account.
- Provide your email address and create a password.
- Select the country where you will take payments (Canada) and tap the checkbox to agree to Square's Seller Agreement and E-Sign Consent.
- Confirm your email address is correct.
  - If incorrect select Edit.
  - If correct select Confirm.
- Tap Create Account to continue.

### Step 3: Enter Your Business Details

- Square will ask for basic information about your business, such as its name, address. This can be your home address if you don't have a business address.
- Select business type Individual/Sole Proprietor.
- Enter your business name.
- Choose the type of business you run. If unsure, select Casual Use.
- Choose your business category. If unsure, select Miscellaneous Goods.
- Choose how you will accept payments. Select In person.
- Choose how customers will check out. Select Entering custom amounts.

### Step 4: Verify Your Identity and Get Set Up to Accept Payments

- Enter your legal name.
- Enter your cell phone number.
- Enter your home address.
- Enter your date of birth.
- Enter your Social Insurance Number (SIN). Although it is optional for you to enter your SIN, it can speed up the process for your account to be verified.
- Select Verify your identity.

### Step 5: Link and Verify Your Canadian Bank Account

- You'll need to link a Canadian bank account where Square will deposit your sales earnings. This step is crucial for transferring the money you make from Square to your personal or business bank account.
- Have your bank account number and transit number handy. This information can be found in your banking app or on a cheque. If you don't know this information, call your bank to get it.
- Select I have a mobile business.
- Press Continue.
- If you have already purchased a Square reader, select skip.
  - If you haven't already purchased a Square reader select Choose hardware which will take you to the square website to purchase. You can always skip this step here and purchase the reader later.
- Select Set up Point of Sale.
- To receive payments, you'll need to link a Canadian bank account where Square will deposit your earnings.
- Select Link bank account and enter your Square account password.
- Enter your bank account number and transit number.
- After entering all required information, double check the numbers are right, and tap Verify.

#### Step 6: Customize Your Account (Optional)

- After setting up your account, you can add optional details like your business logo or set up product/service listings.
- If you plan to sell casually, you may not need to set up inventory management or detailed reports, but they are available if you wish to keep track of your transactions.

#### Step 7: Naming Your Square Reader

- It is a good idea to name your reader, so you know which one to connect to.
- To name your reader on an Android Device:
  - From the navigation bar at the bottom of your screen, tap Transactions.
  - Tap Settings > Hardware > Device Name.
  - Enter a device name.
- To name your reader on an iOS device:
  - Open your device settings.
  - Tap General > About > Name.
  - Enter a device name.

#### Step 8: Connecting to Your Square Reader

- You will need to connect your reader to your smartphone via Bluetooth.
  - Press and release the button on your Square reader to turn it on.
  - Hold the button until the lights flash orange – the reader is sending a signal to connect to your phone.
  - Open the Settings app on your phone and turn Bluetooth on. Your reader will show up in the list at the bottom. Select your reader and it will connect to your phone.

OR

- Open your Square POS app and tap ≡ More > Settings > Hardware > Square Readers. Tap Connect a Reader. Your reader will show up in the list at the bottom. Select your reader and it will connect to your phone.
- Enable location services, phone management, nearby devices, and push notifications.
- If you are having trouble connecting the device to your phone again, try these steps:
  - Open your Square POS app and tap ≡ More > Settings > Hardware > Square Readers > Select your reader > Forget this Reader. It will turn red. Push it again.
  - Reconnect the reader with the steps above.
- If this doesn't work, you may also need to forget the reader from your phone. To do that:
  - Open the Settings app on your phone > Bluetooth > Select the Square reader > Unpair.
  - Reconnect the reader with the steps above.
- If that doesn't work, you can reset the device:
  - Hold down the power button for approximately 20 seconds.
  - The lights on your Square reader will flash orange, then red, and then they will stop flashing. Do not let go of the power button until after the red lights have stopped flashing.
  - Reconnect the reader with the steps above.

#### Step 9: Enable Location Services

- Open the Settings app on your phone.
- Scroll down and tap Privacy & Security.
- Tap Location Services.
- Make sure Location Services is turned ON (toggle should be green).
- Scroll down and find Square in the list of apps.
- Tap Square.
- Select "While Using the App" or "Always", depending on your preference.

#### Step 10: Start Using Square

- You're all set to start processing payments!
- The Square app will show you details of your transactions and allow you to generate reports to track your earnings.
- For online transactions, you can send invoices or payment links via email or text.
- Money in your account:
  - Square typically takes 1-2 business days to process payments for 2.65% fee (standard)
    - If you do a sale on Friday or Saturday, you are not likely to see the money in your account till Monday.
    - If you do a sale on Sunday, you likely won't see it until Tuesday.
  - You can pay an additional fee of 1.5% to have the funds instantly deposited to your bank account.