<u>Square Set up on a Computer</u>

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Step 1: Go to the Square Website

- Open your web browser and go to the Square website: www.squareup.com/ca/en

- Make sure you are on the Canadian version of the website to avoid any confusion about payment processing or fees.

Step 2: Sign Up for an Account

- Click on Sign In in the top-right corner of the page.

- Click on Sign Up beside 'New to Square?" in the middle of the page.

- You'll need to provide your email address and create a password.

- Click the check box beside 'I agree to Square's Terms, Privacy Policy and E-Sign Consent.'

- Click Create account.

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. If unsure, select Casual Use.

- Choose your business category. If unsure, select Miscellaneous Goods.

- Click Start using Square.

Step 4: Get Set Up to Check Out Customers

- On the right side of the page, select Start beside Get approved to accept payments.

- Under What kind of business are you select Individual/Sole Proprietor.

- On the next page, add your cell phone number and select Send code.

- Enter the verification code sent to your cell phone.

- Square will prompt you to verify your identity. You can do this by:

  o Provide a photo of your government-issued ID, a photo of yourself and provide other information such as your date of birth home address and contact information.
  o 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.

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.

- On the left-hand side of the page, select:

    o Settings

    o Account settings

    o Money

    o Bank accounts

- Select Link an account – Add external bank account.

- Input the requested information.

    o Enter your bank account number and transit number.

    o If you are using a personal banking account, under Account owner's role, select other.

    o Once all information has been entered, double check the numbers are right and select verify.

Step 6: Customize Your Account (Optional)

- Once your account is set up, you can add optional details like your business logo or product/service listings.
- For casual use, you may not need to set up inventory management or detailed reporting, but it's available if you want 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:
    o From the navigation bar at the bottom of your screen, tap Transactions.
    o Tap Settings > Hardware > Device Name.
    o Enter a device name.
- To name your reader on an iOS device:
    o Open your device settings.
    o Tap General > About > Name.
    o 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 devises, 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 you're your bank account.