



Square Terminal Device Setup For SalesPad Desktop

Professional Services - 2024-11-22 - Extended Modules

Important: The device setup cannot be completed from the Sandbox account. The square account has to be moved to Production.

- From the Square Dashboard navigate to the “Settings” and “Device Management”.



- Select “Add Device”.



- Name the device. A device code will also generated at this time.



- Navigate to “Device Codes” along the lefthand menu to verify the setup and the device code.



- Within SalesPad Desktop navigate to the Square tab and select “Device Maintenance” From you will add the device and device code in to “Pair” the device with the Square Account. Ensure the Device status shows “PAIRED”



- Power on the device. You will see two sign-in options. Be sure to select “Use a device code”



- Enter the device code that was generated when you created the device from the Square account.



- Once successfully signed using the device code the setup is complete.
- The screen on the device will display only the Square Logo until a transaction is initiated. This is done by selecting “Terminal Charge” from the SalesPad Desktop Payment window.



- Once the payment is initiated the device screen will awake and show the payment amount and the customer can insert, tap, etc. to complete the payment.

