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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".

E Device Management	Q	Q	۵	Ē	0	Cavallo	
Devices	Devices				A	dd de	vice
Profiles 🗸							
Device Codes	 Welcome to Remote Device Management - beta Monitor devices and manage settings across all your locations. 						
Kiosk	Learn more						

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

Name 个	Status 个	Battery 个	Location	Last $ \uparrow $ updated
Cavallo	Online	100% 🛑	Cavallo	Jul 26, 2024, 9:23 AM EDT

• Navigate to "Device Codes" along the lefthand menu to verify the setup and the device code.

		× ··· Reset			
Devices	Device codes	Square Terminal			
Profiles 🗸	 Welcome to Remote Device Management - beta 	Login date: Jul 18, 2024, 4:20 PM EDT			
Device Codes Kiosk	Monitor devices and manage settings across all your locations. Learn more	H H F V B P Copy			
	Q Search device code name Application All Locatio	Application Connected Square Terminal			
	Device code 1	Location Cavallo			
C Square Terminal		Created on Sep 28, 2021, 1:56 PM EDT			
		Paired device			
	resurts per page 10	Cavallo Device ID: 013CS108A6001707			

 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"

				· • • •			
	Applicatio	n Automatio	ns CaseTracker	CRM	Dispatch	Distribution BOM	Equipment Management
	Square Transaction Search	Ø Device Main	itenance				
	Lookups	Maintenar	ice				
	🛛 🚨 Customer Search	🗙 🛷 Squa	re Device Maintenance	×			
	📑 Close 🛛 ಿ Refre	esh 📑 🕂 Add Dei	vice 🏾 🦅 Assign Devi	ce 🛛 🛷 U	nassign Devic	e	
	Device Name		Device Code		Loca	tion Name	Device Status
Square Terminal		HHFVBP			llo	PAIRED	
Ч							

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

4		Sign in
	Sign in to Square	
Email ad	dress	
	Use a device code	
	Forgot password?	

• 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.

Payments										
Payments for ORDER	ORDST3143		Document Total:	199.00	Amount Remaining:	199				
PayFabric: 0.00	🔁 Credit Card: 0.00	🔗 Cash/Cheo	ck: 0.00 Gift Certificate:	: 0.00 🚺 🗖 Square:	0.00					
Actions										
New Auth New Cha	rge New Terminal	Charge	Payment 🔿 Deposit	Wallets: New Walle	t v Am	ount:				
Line Transactions										
🚳 Capture 🗱 Void	🚳 Capture 🗱 Void 🔿 Credit 📓 Create GP Payment									
Transaction Type	Card Name	Card Nu ≐	Amount	Transaction Time		Created By				

• 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.

