

Square setup

Requirements


To complete the setup, you will need:






1. A login for the Square account
2. A Square Terminal device
 - Note: the integration **does not** support the Square Reader

Square permissions

To pair SETLS with your Square account, your Square login must have "full access" as shown below. Permissions are set in the Square Dashboard under **Staff > Team > Permissions**.

Permissions > Access points


☐ **Full access** 
This enables all permissions except managing bank accounts. Only the account owner can manage bank accounts.

| | | |
|---|--------------|--------|
|  | Checkout | Active |
|  | Orders | Active |
|  | Transactions | Active |
|  | Reports | Active |
|  | Balance | Off |

Account & Settings

Grant access to view and edit business and device settings.

BUSINESS

- ☒ Manage subscriptions to Square services and integrations
- ☐ View and set up integrations in the App Marketplace 

Full access is required for this action.

When logging into Square, SETLS requests the following permissions on your Square account.

| Permission name | Used to |
|------------------------------|---------|
| MERCHANT_PROFILE_READ | |
| PAYMENTS_READ | |
| PAYMENTS_WRITE | |
| DEVICES_READ | |
| DEVICE_CREDENTIAL_MANAGEMENT | |

If you see the below screen, your permissions are not set correctly and you will need to see who in your team has full admin privileges for Square.

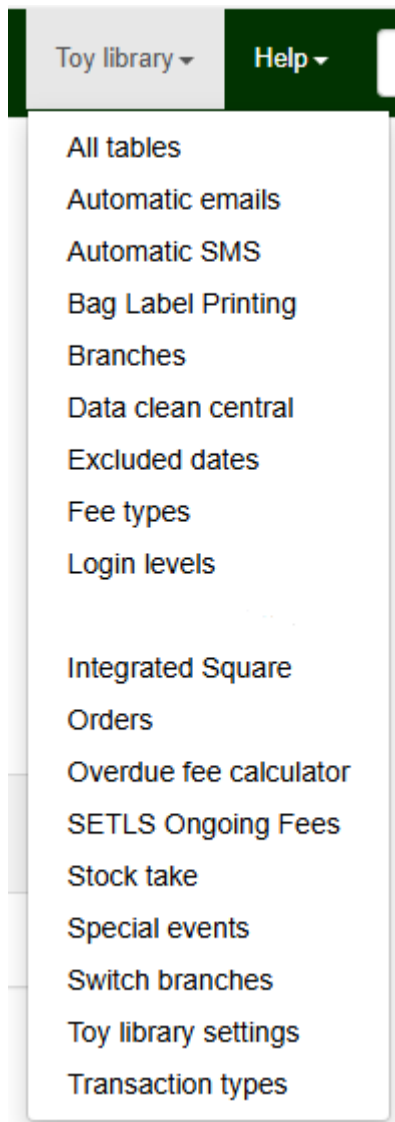
Error

Only the business owner can authorize applications for this Square account

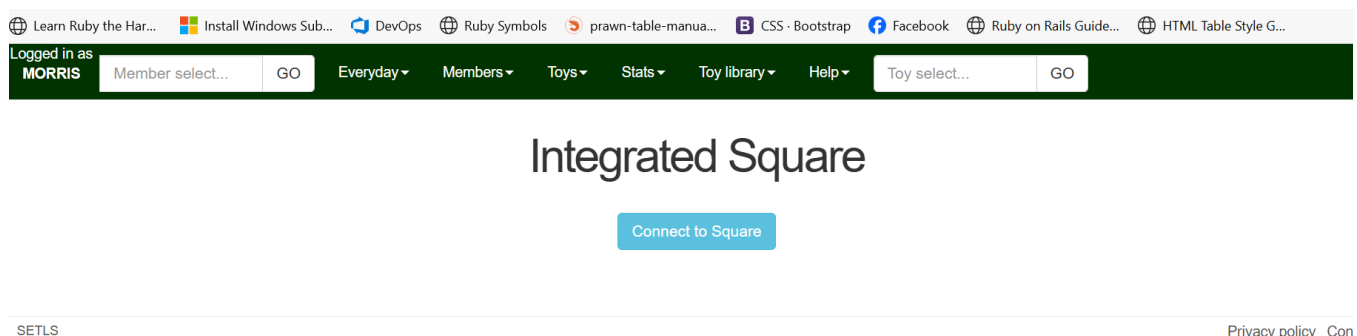
Process

1. In the "Toy library" menu, click "Integrated Square"

- If you don't see this option, please contact admin@setls.com.au



2. Click "Connect to Square" and log into Square



3. The Square status page will refresh and show:
 - Your Square "Business" and "Locations" details

- A new access token
4. Click "Add Square Terminal" and set:
- Device name
 - Branch (optional)
 - NB: we only support one Terminal per branch

Integrated Square

Basic

Advanced

Square fees

| | |
|-----------------------|------|
| Pass on Square fees | No |
| Square fee percentage | None |
| Square fee flat | None |

Change fee settings

Devices

Add Square Terminal

| ID | Name | Serial | Status | Location | Branch | Codes |
|----|------|--------|--------|----------|--------|-------|
|----|------|--------|--------|----------|--------|-------|

Note: only one Terminal is allowed per branch, and only one Terminal can have 'Any branch' selected.

Save devices

5. Follow the on-screen instructions to log into the Terminal with the device code. When the Terminal is successfully paired, the dialog will close automatically.

Logged in as MORRIS

Member select... GO

Everyday

Members

Toys

Stats

Toys library

Help

Toys select... GO

Basic

Advanced

Add Square Terminal ...

Device name

This will be displayed as 'Device Nickname' in the Square dashboard

Square Terminal

Branch

Any branch

Add

Cancel

Change fee settings

Devices

Add Square Terminal

| ID | Name | Serial | Status | Location | Branch | Codes |
|----|------|--------|--------|----------|--------|-------|
|----|------|--------|--------|----------|--------|-------|

Note: only one Terminal is allowed per branch, and only one Terminal can have 'Any branch' selected.

Save devices

6. The Square status page will display the device details

Integrated Square

Basic

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Square fees

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Change fee settings

Devices

Add Square Terminal

| ID | Name | Serial | Status | Location | Branch | Codes |
|-------------------------|----------------------|------------------|-----------|----------------------|--------------|-------------------|
| device:307CS145B3000038 | Square Terminal 0038 | 307CS145B3000038 | AVAILABLE | GOSNELLS TOY LIBRARY | Any branch ▾ | <div>HTAFFD</div> |

Note: only one Terminal is allowed per branch, and only one Terminal can have 'Any branch' selected.

Save devices

You're now ready to accept payments!

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