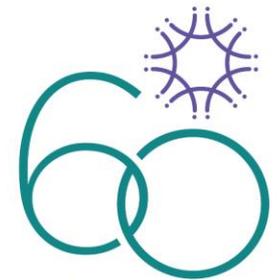# Square Reader
Information Booklet 2020

celebrating 60 years
of strength & support
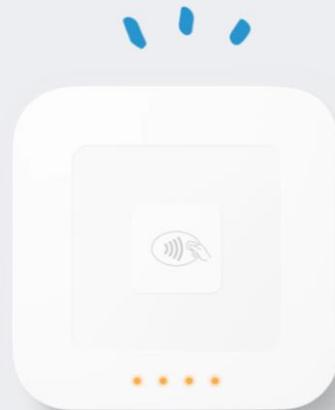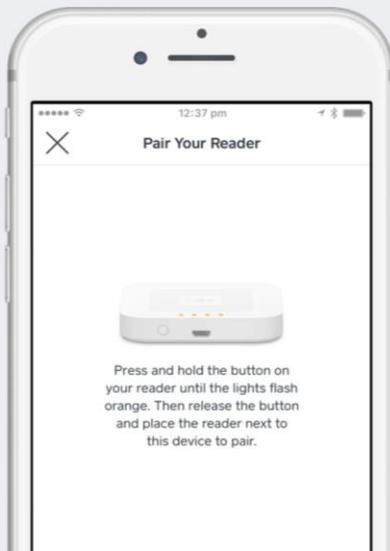
view

What is Square Reader?

Square

Square Reader for Contactless and Chip Cards can accept tap and go cards, chip cards, Apple Pay and Google Pay so you can accept payments from your customers quickly and easily.

Connecting to Device

Connect wirelessly. Sell instantly.

The reader connects wirelessly to your smartphone or tablet via **Bluetooth**.

As this device requires data usage we recommend connection to WiFi where possible.

Accepting Payments

Contactless cards
Customers simply hold their contactless cards near the reader to trigger payment.

Contactless devices
Accepts Apple Pay, Google Pay and other contactless smartphones and watches.

Chip cards
Insert chip cards into the payments machine, then leave them in place for the duration of the sale.

Sending Digital Receipts

With every successful payment, you can provide customers with a **digital receipt** via text message or email.

You will be able to customise your digital receipt in your Square Dashboard.
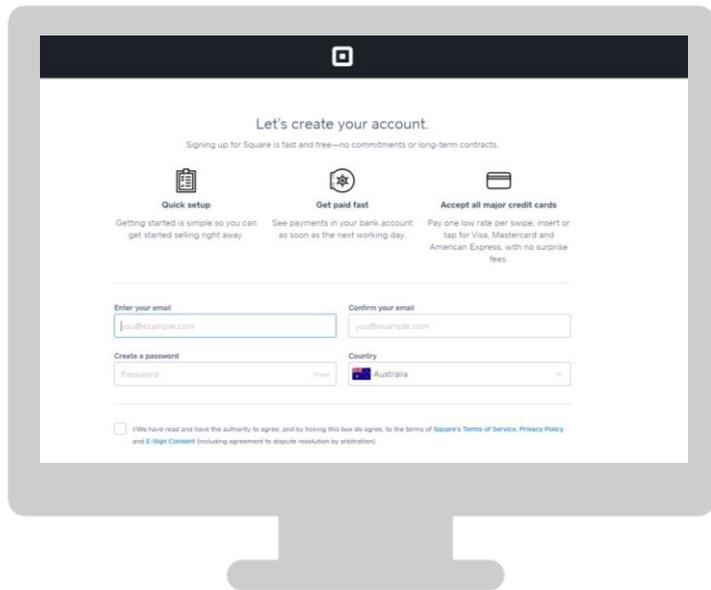
Fees Involved

After the initial purchase –
**No ongoing fee for a device,
No long-term contracts,
No monthly recurring fees.**

There is a single flat fee of **1.9% per transaction.**

Note: this fee will be automatically deducted before Square deposit funds to your account.

Signing up on Square's website

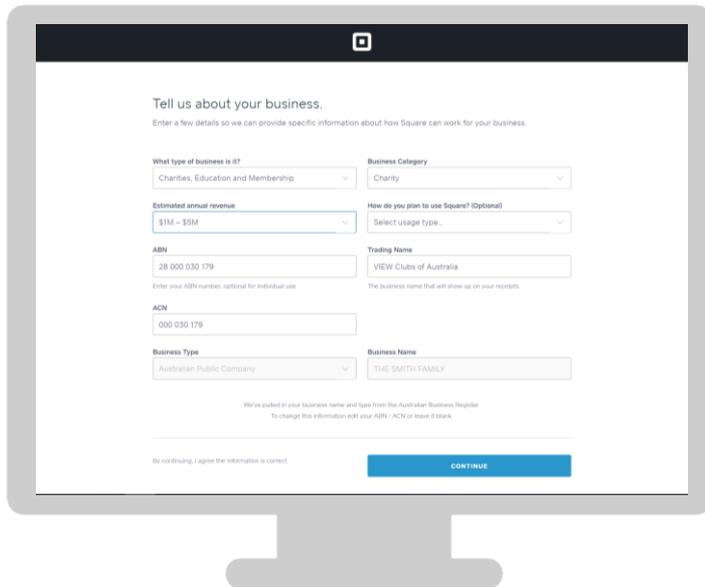Register your purchased Square Reader device at https://squareup.com/au/en

In the sign up form, enter your **Club email address** and **create a password**.

As Square reader can be linked to more than one device we recommend to save password for future users.

Users of Square Reader will need to know the email address and password.

Setting Up your Square Account

Set up the Square account for "__Business__".
Follow all steps in order.

Club will be required to provide:

- **Estimated annual revenue** – enter your Club's income for a year
- **ABN number** – by providing The Smith Family ABN number ACN, Business Type and Business Name will be automatically populated.
- **Trading Name** (the business name that will show up on your receipt) - enter your Club name.

Club __must__ link the reader device to their Club account and Club email address.

Using the Square Reader Device

Steps to use a Square Reader

|	
1	Turn on the Square Reader device (little button next to charging port)
2	Open the Square App on your smartphone or tablet by tapping on it
3	Make sure the phone and reader connect to each other (orange strip at top of screen – it will tell you that it is connected). Pair the device with your smartphone or tablet device if required
4	Make sure you untick the GST component in the Settings before you start to use the Square Reader
5	Put in the amount you are charging and press charge at top of screen (blue). Wait for green light to come on the Square
6	Get customer to tap (on the top) the white square (device) or insert (on the side) If using insert option, customer will be asked to select **Chq/Savings/Credit** and enter their pin number and then press the green tick on the phone). Wait until payment is approved.
7	Ask customer if they need a receipt. • **If yes**, press either phone number: on screen (top) or email and enter the address (ask customer) • **If no**, press the no thanks at bottom of screen
8	Press new sale (ready for next transaction)
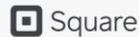
▣ Square

Step by Step guide will be provided to each Club.

Things to remember before using the device:

- Square App should be downloaded on your smartphone or tablet device.

- The Square Reader should be paired with your device.
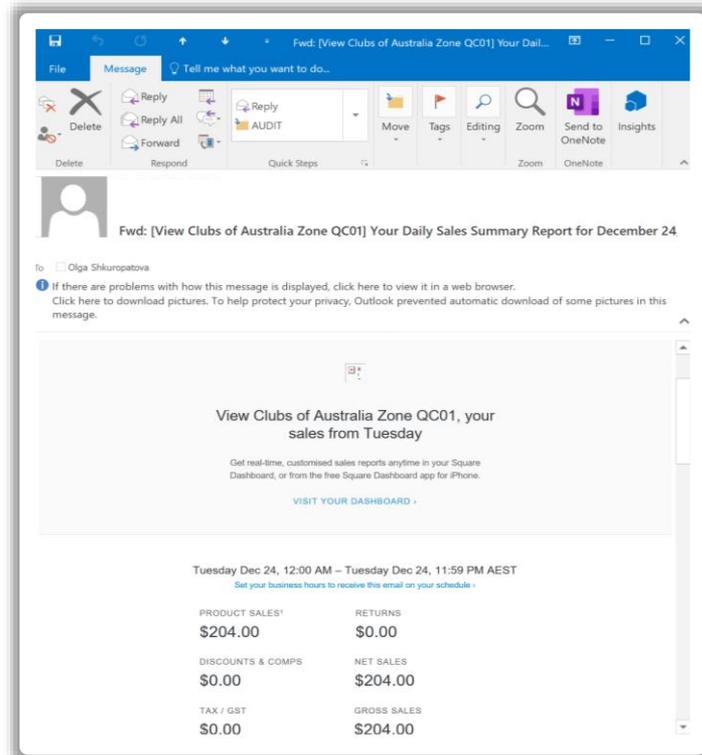
Square Dashboard

Sign in to your **Square Dashboard** from any computer to access important data from anywhere.
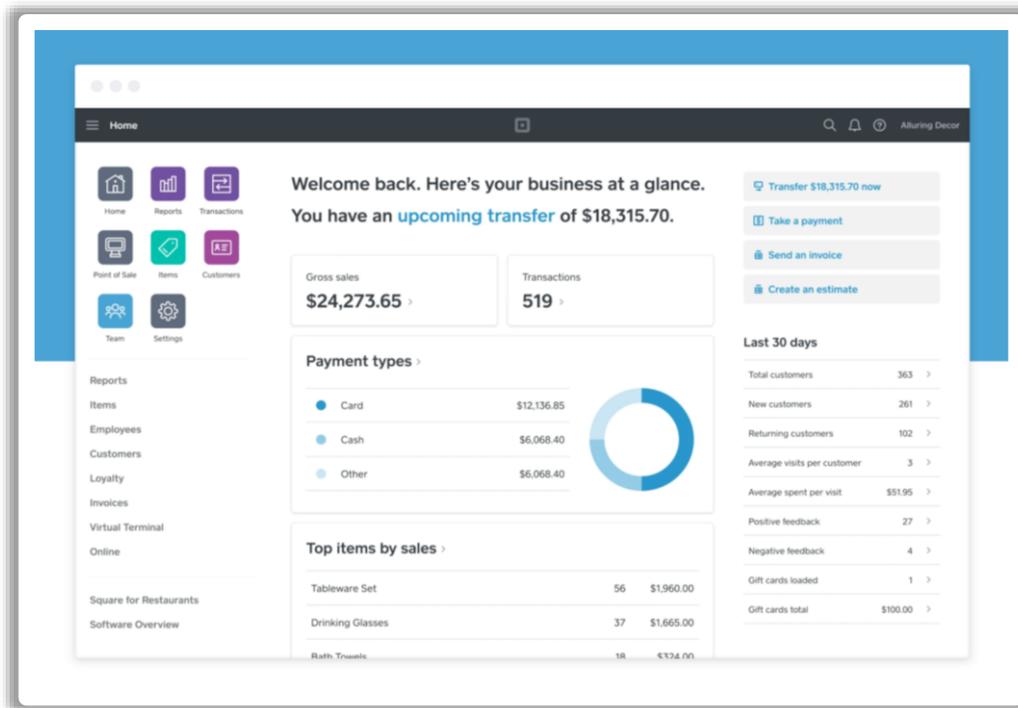
Real-time reports give you a live view of your transactions.

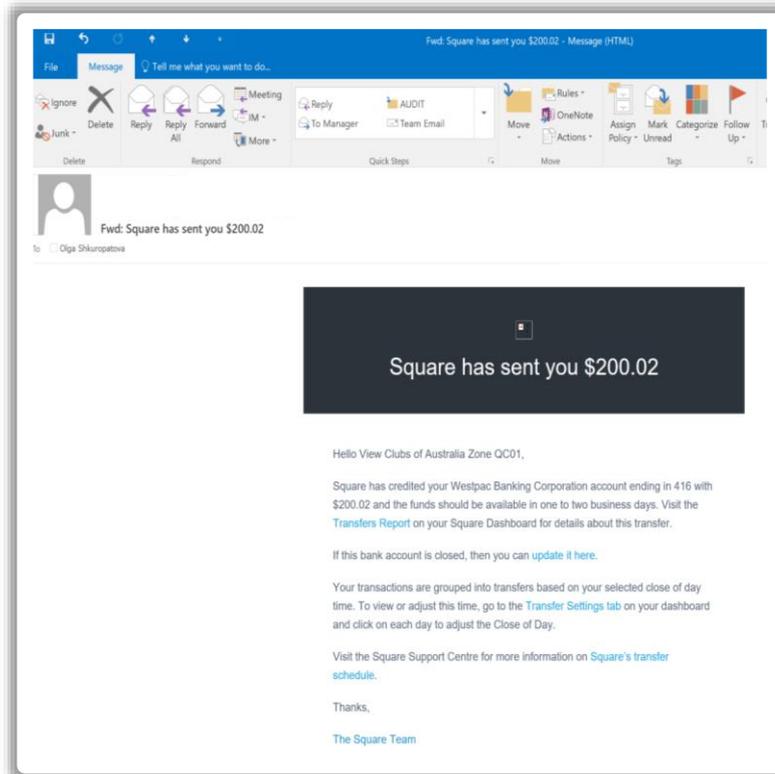# Getting Reports

Get real-time, customised sales reports anytime in your Square Dashboard.

You will receive an email to your registered email address with transaction summary each time you use the device.

Getting Notifications

See payments in your bank account as soon as the next working day.

You will be notified by email when funds are transferred to your nominated Club account.

Bank Statement Transaction

Each transaction from Square will be shown on your Bank Statement.

Deposit Square Au Pty Lt

Reconciliation and Recording in VIEW Cashbook
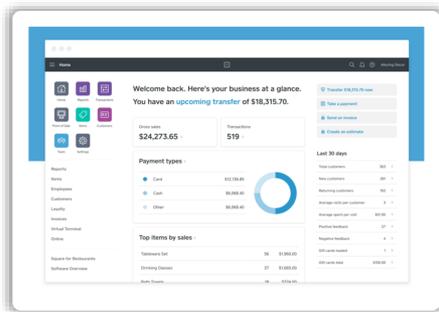
Reconcile Square transactions against your Bank Statement
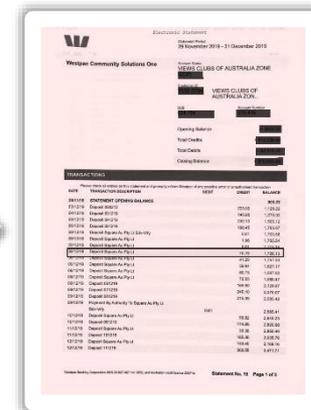
Record all transactions in VIEW Cashbook
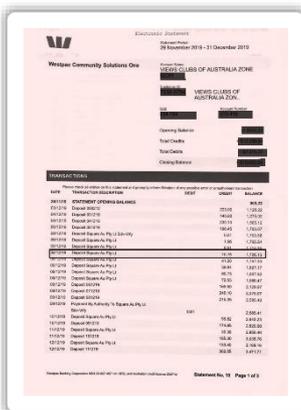
Where to Buy Square Reader

Square

Officeworks

Apple Store

JB HI-FI

$59
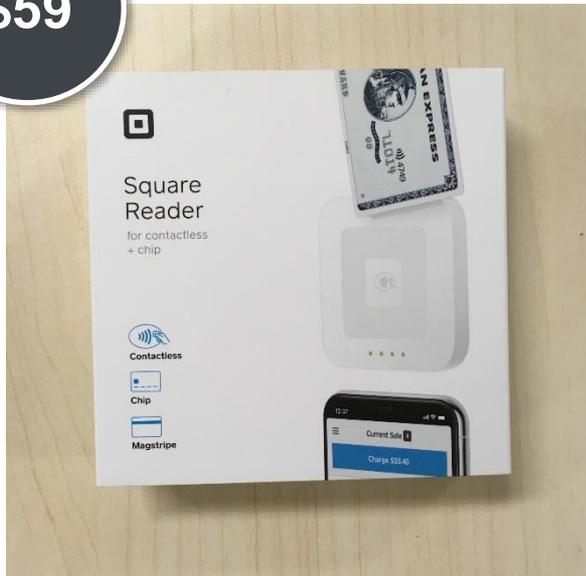
What's inside

- Contactless + chip
- Magstripe
- Manual
- USB charger

60 view

Square Reader Serial Number

Each device has a **Serial Number** located at the bottom of the reverse side.

Club would need to provide a serial number of their device to National Office.

Providing Support to Set Up and Use Square Reader

Evelyn Berg, National Councillor Area QC

Evelyn is the first VIEW member who successfully piloted Square Reader device at Christmas wrapping fundraising activity in December in 2019 in QLD.

Evelyn will be **VIEW Square Reader Liaison** and able to assist and support Clubs with setting up and using Square Reader device.

 ncqc01view@gmail.com

> *"…In December 2019 during Christmas wrapping our members found this device easy to use. It helped us raise more funds because many people preferred cashless transactions…"*

FAQ...

Does Club need to notify National Office before purchasing Square Reader for a Club use?
Yes, Club needs to get permission before purchasing this device. Once permission is granted and device purchased Club needs to send the serial number of the device to National Office.

Who pays for the purchase of the Square Reader?
Club pays for this device from the Club funds.

Can Club buy more than one device?
No, only one Square Reader can be purchased.

Who can be responsible for maintaining this device?
Treasurer/Assistant Treasurer (preferably) or other designated member who has the ability to use this device and link it to their smartphone or tablet. For multiple users each user would need to know the password and install Square App.

Who can set up the account?
Only one of the designated members needs to set up the account with Square.

When using a device who needs to be connected to it?
Only one designated member who is using the device on the day would need to connect the Square Reader to their smartphone or tablet and process all transactions.

FAQ

If I accidently put a wrong amount and transaction was approved will I be able to refund it?

Yes, you can process refunds directly from the Square App or your online Square Dashboard. When you issue a refund, your customer will be refunded their full purchase amount, and you will be refunded Square's processing fee.

Will I be able to print a receipt?

No. With every successful payment, you can provide customers with a digital receipt via text message or email. The customer would need to provide you their email or phone number if they paid by card. If the transaction was made via Apple Pay or Google Pay the receipt will automatically go to their phone.

How often do I need to charge this device?

The battery can last up to one week if you use it daily. However we recommend to check the battery level (green indicators) each time before you plan to use it. The green lights on the Square Reader will give you and indication as to how full the battery is (4 lights fully charged - 1 light very low battery).

Who pays 1.9% fee for each transaction?

This fee falls onto the individual member, not the Club, so members are required to pay this 1.9% transaction fee if using this payment facility. **When a member pays their meals or annual subscriptions etc. by tap and go cards, chip cards, Apple Pay or Google Pay, 1.9% needs to be added to the charged amount.** The 1.9% transaction fee is deducted by Square from any payment made prior to being transferred to Club account. Therefore it is the members responsibility to pay when using this option and not the Clubs.

Useful Resources

Set Up the Square Contactless + Chip Card Reader

https://squareup.com/help/au/en/article/5639-set-up-the-square-reader-for-contactless-and-chip

Square Get Started Guide

https://squareup.com/help/au/en/article/5123-square-get-started-guide

Getting Started with the Square Contactless and Chip Reader

https://www.youtube.com/watch?v=729_7hcIve0

NOTES