

## How to Set Up Your Square Point of Sale (Register) Device

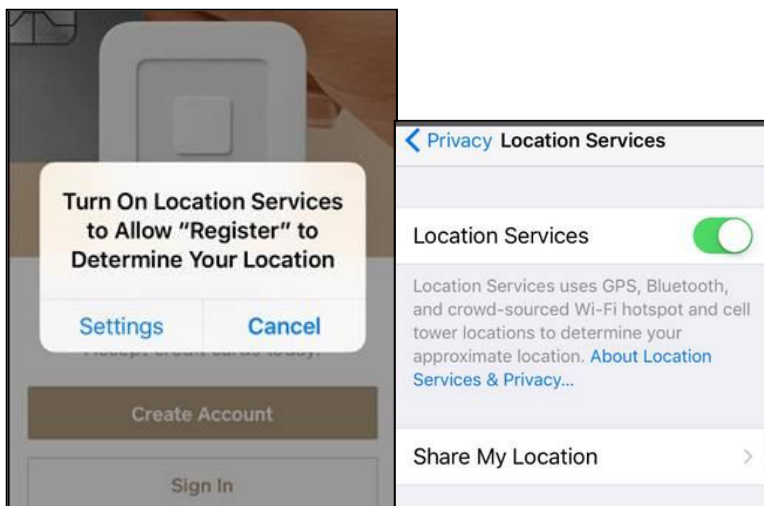
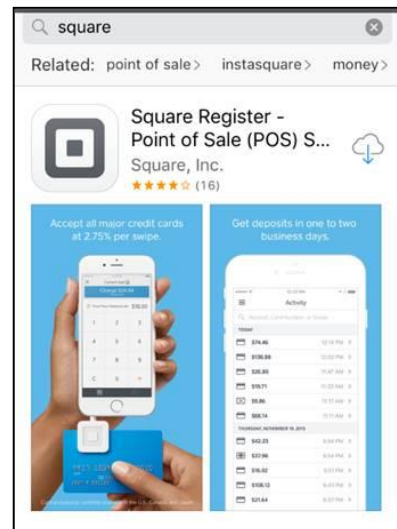
The Square Point of Sale (formerly Register) app allows you to accept debit and credit card payments via your cell phone or tablet and send those contributions directly to your COTA community campaign. This app is extremely useful for various events, such as for registering 5K participants the morning of a run. If your community campaign team would like to utilize a Square Reader for an upcoming event, please contact [CampaignInfo@cota.org](mailto:CampaignInfo@cota.org).

After confirming that a Square Reader device will be mailed to you, you will receive a device code specific to your account and device. Within 48 hours of receiving that device code please follow the instructions below in the 'Setup' section to set up your mobile device to use Square POS for processing debit and credit card contributions at your fundraising event. *If you are not able to complete these steps within 48 hours you will need to contact [CampaignInfo@cota.org](mailto:CampaignInfo@cota.org) to obtain a new device code as the one supplied to you will expire.* You do not need the actual swipe device to complete the 'Setup' steps but will for the 'Testing' steps, which can be completed any time after the 48 hour time frame. The Square Reader swipe device should arrive within five business days.

### Setup – No swipe device needed to complete these steps

These steps may vary slightly based on your mobile device type. If you run into any issues please contact [CampaignInfo@cota.org](mailto:CampaignInfo@cota.org) and we will be happy to help. The screenshots used in the steps below are taken from setup on an Apple iPhone.

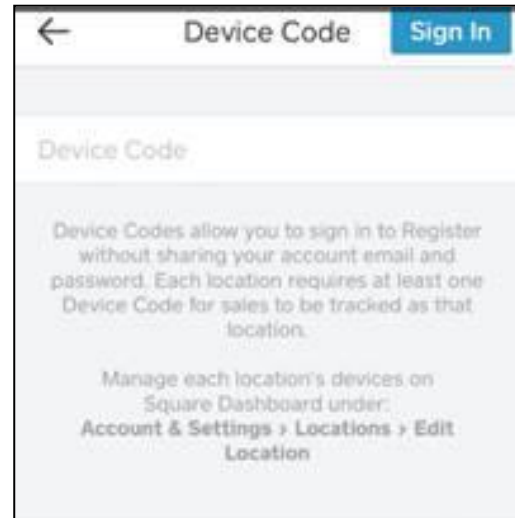
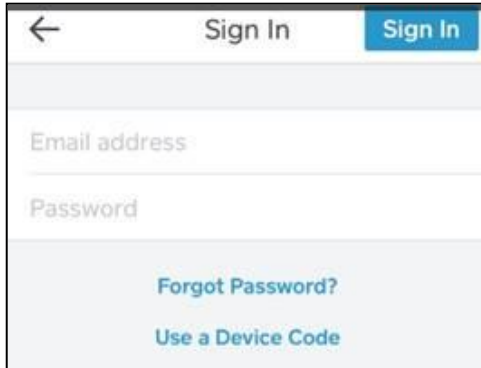
1. Access the app store for your device, search for the Square Point of Sale (Register) app and download the app.
2. Once the download is complete, open the app. You should be prompted by your device to enable location settings and to interact with the app. Click allow or adjust your settings to allow these changes.



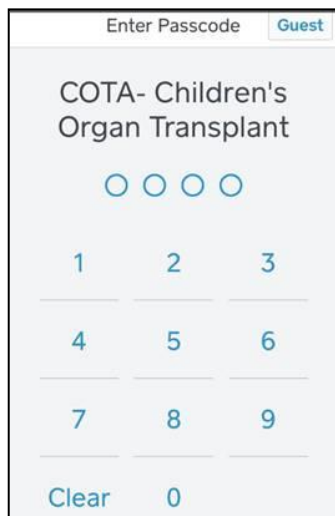
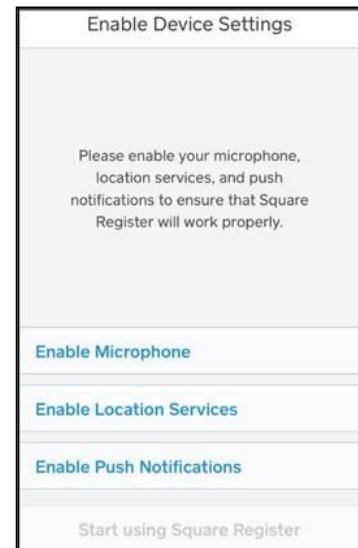
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3. You should be presented with two options: Create Account or Sign In. Click “Sign In.” Just below the login credentials area there is a link in small text that says “Use a Device Code.” Click “Use a Device Code” and enter the code sent to you via email. *Again, this step must be completed with 48 hours of receiving your device code to ensure your device registers and correctly allocates funds received to your fundraiser.*



4. You will be presented with three selections to enable interactions with the app. Click “Enable Microphone,” “Enable Location Services,” and “Enable Push Notifications” before selecting “Start Using Square Register” at the bottom of the screen.
5. At this point the app has been setup to delegate funds to your fundraiser so you can log in as a guest. To log in and be ready to accept debit and credit card payments, click the “Guest” button in the top right corner. There is a walk-through training



the app may prompt you to complete, but you can exit out of it if you choose not to go through that process.

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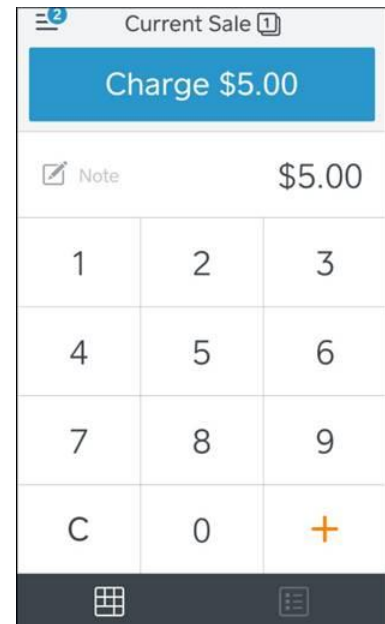
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### Testing – Must have received swipe device to complete these steps

*As a reminder, the swipe device will arrive at the address you provided within five business days of the confirmation email in which you received the device code.*

6. Firmly plug your swipe device into the headphone jack on your cell phone or tablet until you hear a click. You may need to remove your device's protective cover in order to fully insert the reader. If your login session has timed out, you may need to log in again following step 5 as outlined in the 'Setup' section above.
7. Please process one \$1 transaction as a test with one of your debit or credit cards following the process outlined below and then email [CampaignInfo@cota.org](mailto:CampaignInfo@cota.org) with confirmation that you have run a test transaction. We will verify that it was received when it comes through to ensure everything is ready to go.

- *Process a payment:* Type in the dollar amount you wish to charge the debit or credit card and then swipe the card. It will process the transaction and prompt for a signature. Have the user sign for the transaction and click "Submit." If the card has never been swiped with a Square Reader before, it will prompt the user with a choice to receive a receipt via email or text. Have the user enter that information and then click "Submit." You will receive an "all done" notification when the transaction is complete and the user will receive a receipt via the method he or she chose. To process another transaction, just begin again by entering another dollar amount before swiping another debit or credit card.



*Please Note: After the Square Point of Sale app and Square Reader device have been set up on your cell phone or tablet, there is no need to add the device code again unless you uninstall the app and need to reinstall it later. When the code has been entered once you only need to click the "Guest" button at the login screen. All gifts processed through the app will be allocated to your fundraiser.*

Once your event is over, email [CampaignInfo@cota.org](mailto:CampaignInfo@cota.org) and let us know how everything worked. We appreciate any feedback on how to improve this process and the technology. If you do not anticipate using the Square Reader device for future events, please return it to the following address:

Jordan Lewis  
Children's Organ Transplant Association  
2501 W. COTA Drive  
Bloomington, IN 47403