

How-to-Guide: Zettle Contactless Payment Device

Contents:

<u>Title</u>	<u>Page</u>
Activating your Zettle account	2
Downloading the Zettle app and setting up your card reader	2 - 5
Checking that you are connected to the CAFOD Zettle account	5
Taking donations using your Zettle Card Reader	6
Notes	7

This guide will show you:

- How to set up your Zettle account
- Download the Zettle App
- Link your phone (with the app) to the Zettle card reader
- Take donations using the Zettle app and card reader

You will need:

- To have open your activation e-mail from Zettle.
Please *do not* try to create your own account through the Zettle website.
Any problems or concerns, please contact CAFOD
- Your Zettle card reader and the provided USB power cable
- Your mobile phone
- An internet connection

Actions to take:

- Activate your Zettle account *before* downloading the app and trying to connect your devices
- Charge the Zettle card reader. You will need to have the Zettle card reader switched on, to link your account to the reader. Please charge the device first, using the USB power cable provided
- Please note: Zettle do not provide a plug. You can charge the device by connecting the reader and power cable to a computer/laptop or directly into a USB wall socket. It may well take a few hours for a full charge
- Once you have completed the set-up of your account and Zettle reader, please check you are correctly connected to CAFOD's Zettle account

Using your Zettle Reader and app:

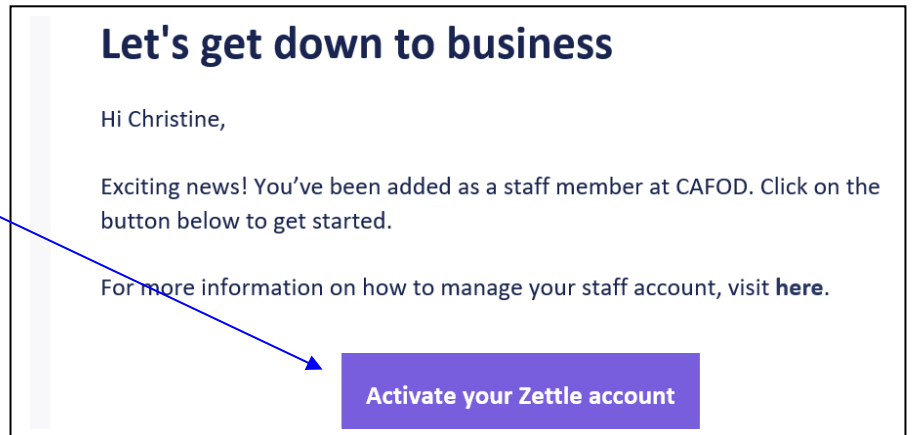
- Once you have worked your way through this guide, using the Zettle device for donations should be straight forward and pain free!
- Whilst taking donations in a church, you will need a mobile signal (3G/4G), with your location and Bluetooth options switched on. Do not worry if you do not have a Wi-Fi connection
- Taking donations via Zettle gives parishioners an alternative way to support CAFOD that is quick and easy, and you will be able to use the devices to support parish fundraising for CAFOD
- Please note that the Zettle devices are not capable of allowing Gift Aid and can only be used for CAFOD related activities

Activating your Zettle account

1. Open your activation e-mail from: hello@zettle.com

2. Click on the 'Activate your Zettle account' link.

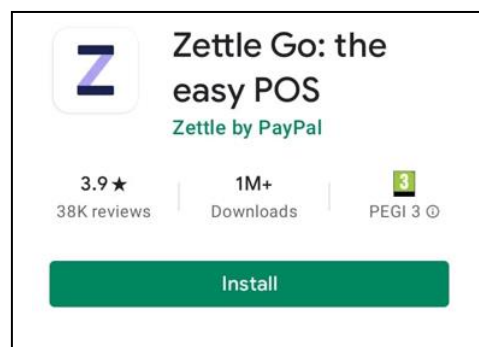
3. You will be prompted to enter in the e-mail address used to order your Zettle device from CAFOD



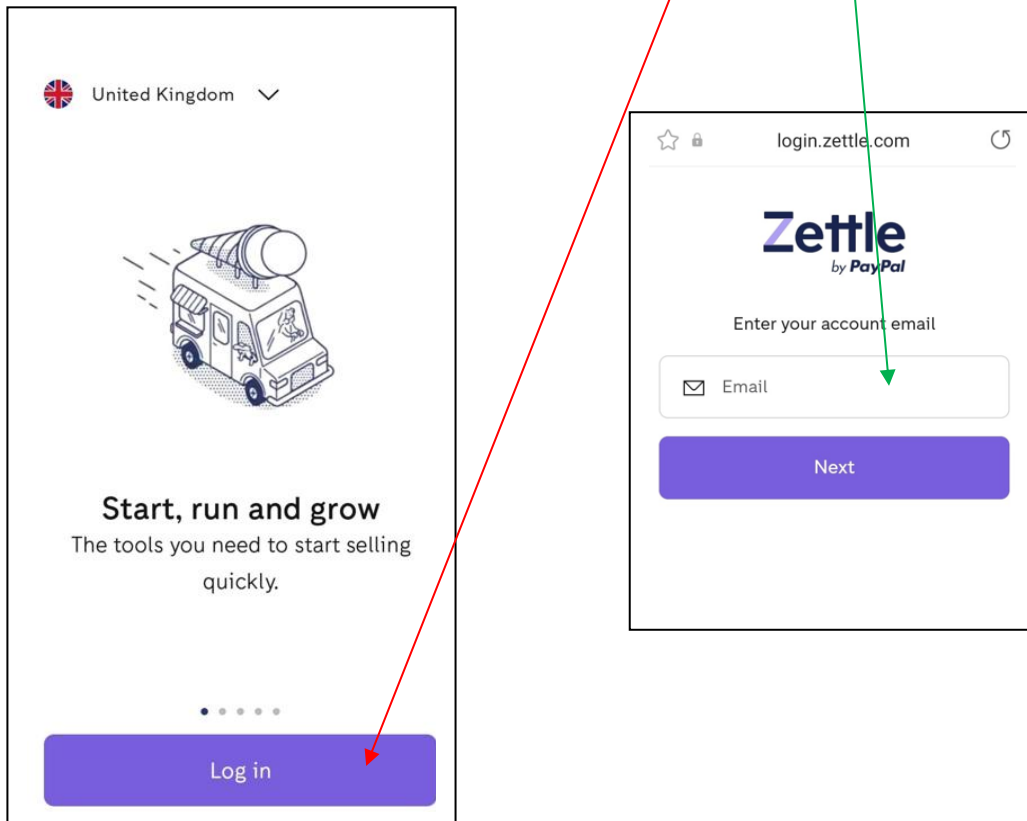
4. You will then be prompted to create and enter a password
5. Please keep a note of your e-mail address and password, as you will need these details to log into the Zettle app
 - Any queries with setting up your account: please e-mail contactless@cafod.org.uk
 - No question is 'silly' and we are more than happy to help!

Downloading the Zettle app and setting up your card reader

1. Before setting up your card reader, charge the device using the power cable supplied and then switch on the device (press and hold down the [power button](#) on the top right of the card reader), the reader will beep once
2. Switch on your mobile phone's Bluetooth and Location
3. Download and install the "Zettle Go: the easy POS" from your mobile phone's App store:



4. Once the app has downloaded, open and **press log in**. **Enter** your e-mail and password details from your activation e-mail

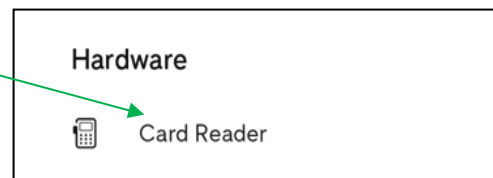
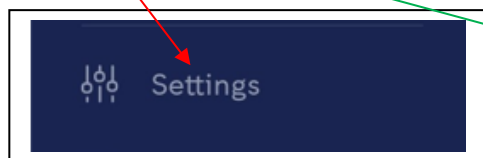


5. You may see information pages; scroll through to read and then close using the X on the top left of the screen

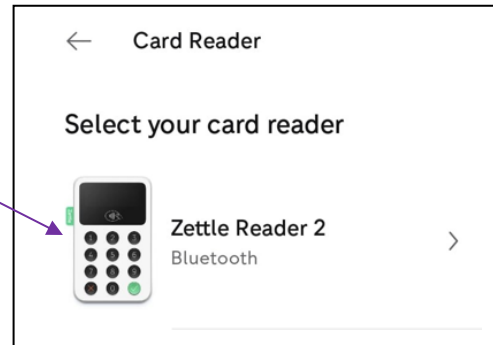
6. Press the 'hamburger' menu button (top left of screen)



7. Select:
Settings / **Card Reader**



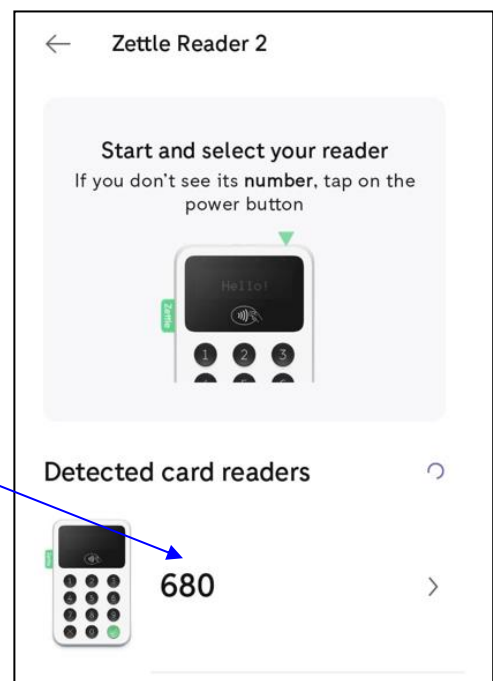
8. Select **Zettle Reader 2** and follow prompts on the app (which echo step 9, below)



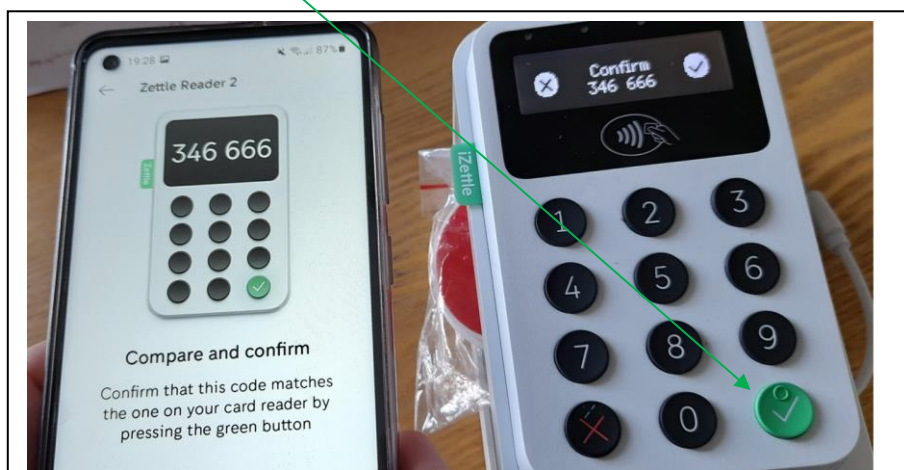
9. A 3-digit number will be displayed on your phone's Zettle app and the Zettle card reader. Check these numbers match

NB: if you see an error message saying that the reader cannot connect, please switch the reader off and on and try again

10. In the app, click on the **3-digit number** displayed and you will then see a 6-digit number

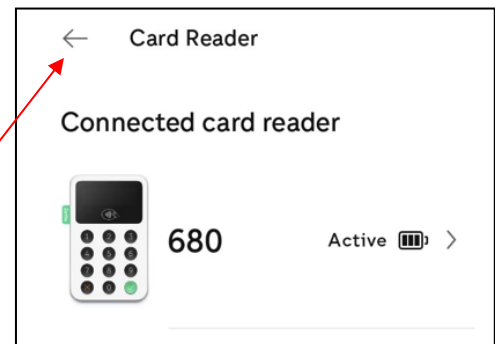


11. Check the 6-digit number matches on both your Zettle app and Zettle card reader
12. Press the **green arrow** on the bottom right of the Zettle card reader, to confirm:



13. You will then see the following screen:

If you select 'Active'; you will see a new screen that details device information such as serial number. These screens show that your phone and the Zettle card reader have 'paired' together and are connected. You can start taking donations!



14. Click the **back arrow** (top left), twice

15. Click the three-lines 'hamburger' menu

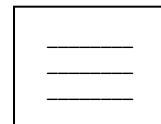
16. Click 'Sell' to call up the products page and take donations

17. To turn off the card reader – hold down the power button for a few seconds until it beeps once

18. Check you are correctly connected to CAFOD's Zettle account

Checking that you are connected to the CAFOD Zettle account

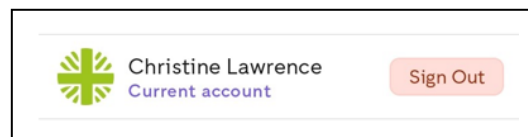
1. Press the '**hamburger**' menu button (on the top left of the app):



2. The CAFOD name and Caritas Cross logo should appear as follows and you will see the e-mail address that was used to activate your account:



3. If you press the **Green Caritas Cross**, you will see the title of your own Zettle account:



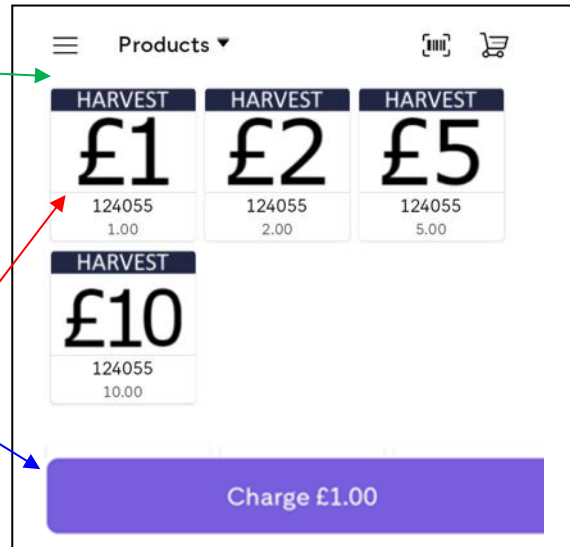
- See the next page for a guide on taking donations using the Zettle app and reader

Taking donations using your Zettle Card Reader

1. Switch on the card reader and open the Zettle app on your phone

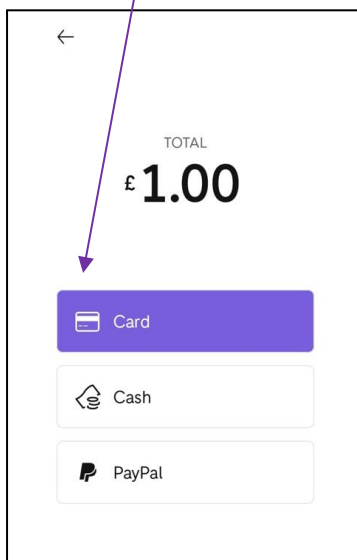
2. The app should open on the 'Products' page, as seen here:

NB: you can navigate to this page by pressing the main hamburger menu button and then 'Sell'



3. To take a donation (£1 for example):

- Press £1 on the products page
- Press the blue charge button
- Select 'card'
- Ask card holder to tap/insert bank card to make a donation
- Confirmation that the donation has been successfully made, will be seen on the card reader



Notes:

- NB: please ignore Cash and PayPal options. These can be switched off by selecting the main menu button and then clicking on settings / payment:
- Multiple product amounts can be entered into the 'shopping trolley cart' before a donation is taken. Simply press the required amounts. For example, to take a £15 donation, press the £5 product button and then the £10 product button and then follow the rest of the payment process
- Using products will help CAFOD assign donations to defined campaigns, such as the Lent appeal, a Family Fast Day at Harvest or for an emergency appeal
- Due to GDPR (data protection laws), please do not offer the option of sending a receipt when a supporter makes a donation
- To delete a donation amount (if entered incorrectly for example):
Select **trolley icon** and press **red image of a bin**

