How to set up team permissions in Square POS

This guide explains how to set up team permissions in Square POS, starting from the Square Dashboard and finishing on your point of sale (POS) device. You add a team member, assign a permission set, and configure passcodes and access points. You also create a custom permission set and add a team member directly from your POS.

Prerequisites

Before you begin, make sure you have the following:

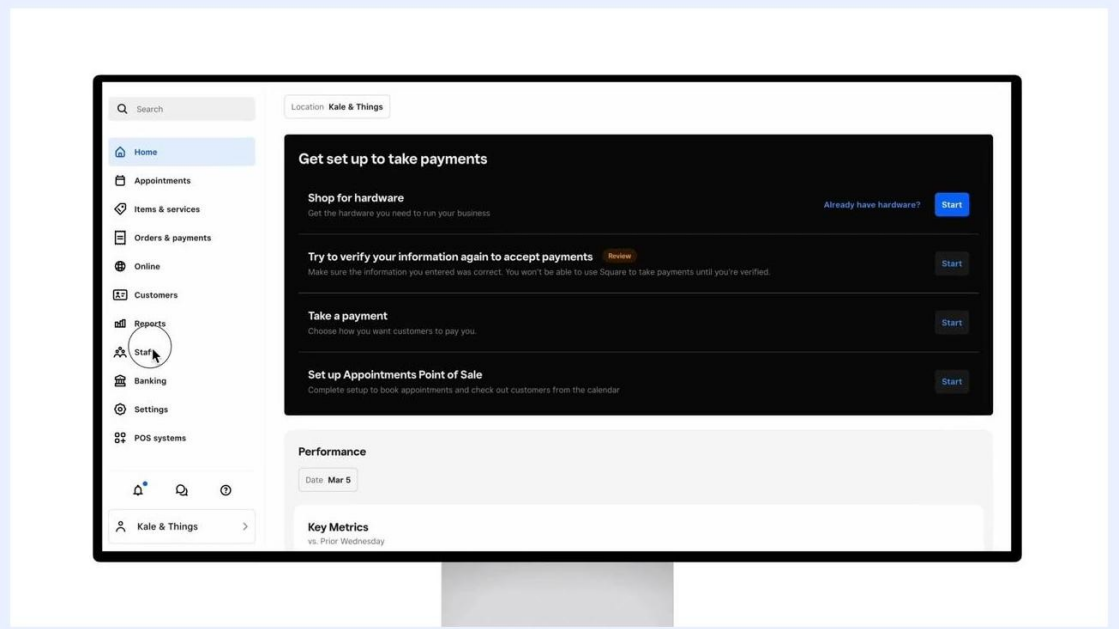
- Access to your Square Dashboard in a web browser.
- Your owner passcode, which you need to turn on passcodes from your POS.
- The **Team Management** add-on on your POS device, for the steps that add team members from the POS. Step 16 shows how to check this.

Add a team member and assign permissions in Square Dashboard

Step 1: Open the Team section in Square Dashboard

1. Open your web browser and log in to your Square Dashboard.
2. In the left-hand navigation menu, click **Staff**.
3. Under Staff, select **Team**.

4. Click **Add Team Member**.



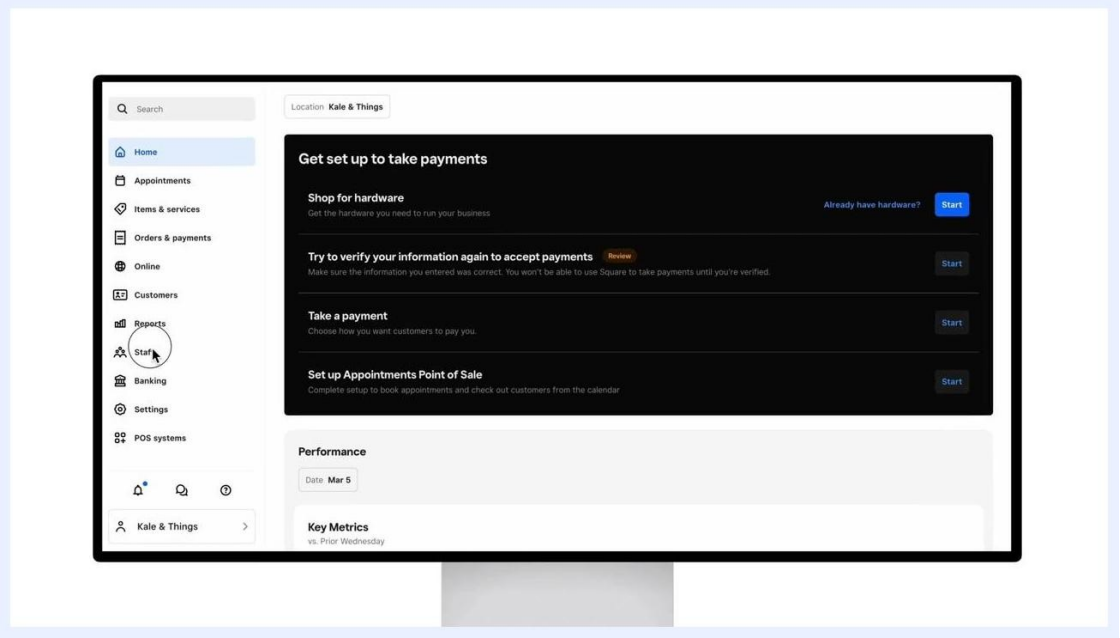
The Square Dashboard with the left navigation menu open and the cursor hovering over Staff, next to the "Get set up to take payments" panel.

Step 2: Enter the team member's profile details

Fill in the following fields:

- **Preferred name:** Cliff
- **Last name:** Bowman
- **Phone number:** Leave blank if not available.
- **Email:** bowman7498@yahoo.com
- **Team member ID (optional):** Leave blank if not needed.

Click **Next** to proceed.



The profile screen for a new team member with the preferred name, last name, email, and optional fields filled in, and the Next button highlighted in the top right.

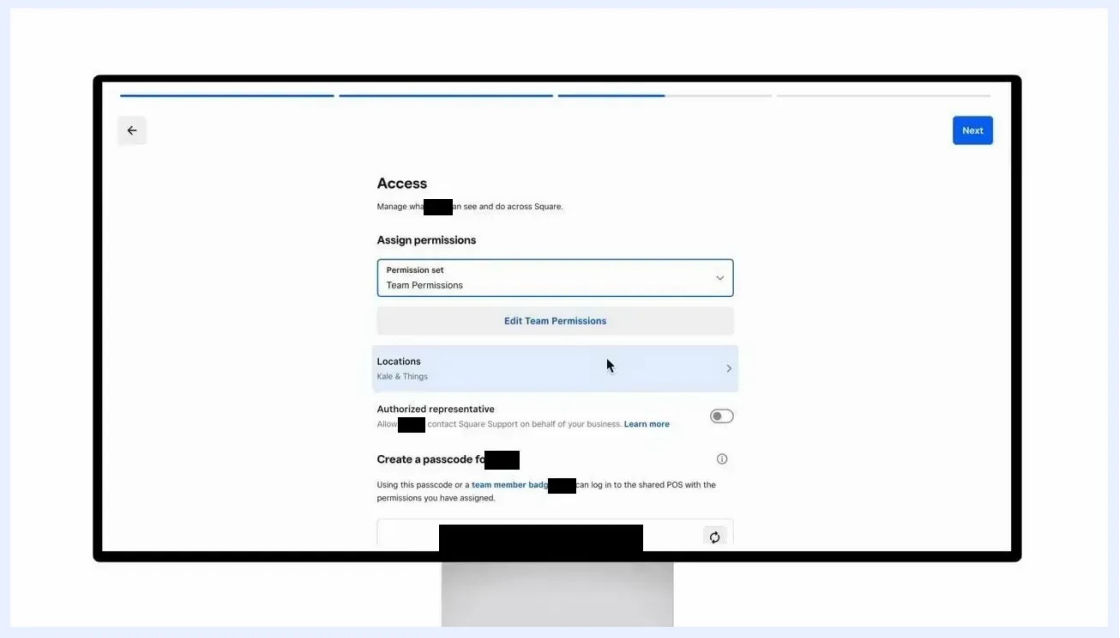
Step 3: Assign job details

Set the job title for the team member and specify the wage for the role. Then indicate whether the role is **TIP eligible** by turning the toggle on or off as appropriate.

Step 4: Choose a permission set

1. In the **Assign permissions** section, select a **Permission set** from the dropdown menu. For example, choose **Team Permissions**.

2. Click **Edit Team Permissions** to customize access.

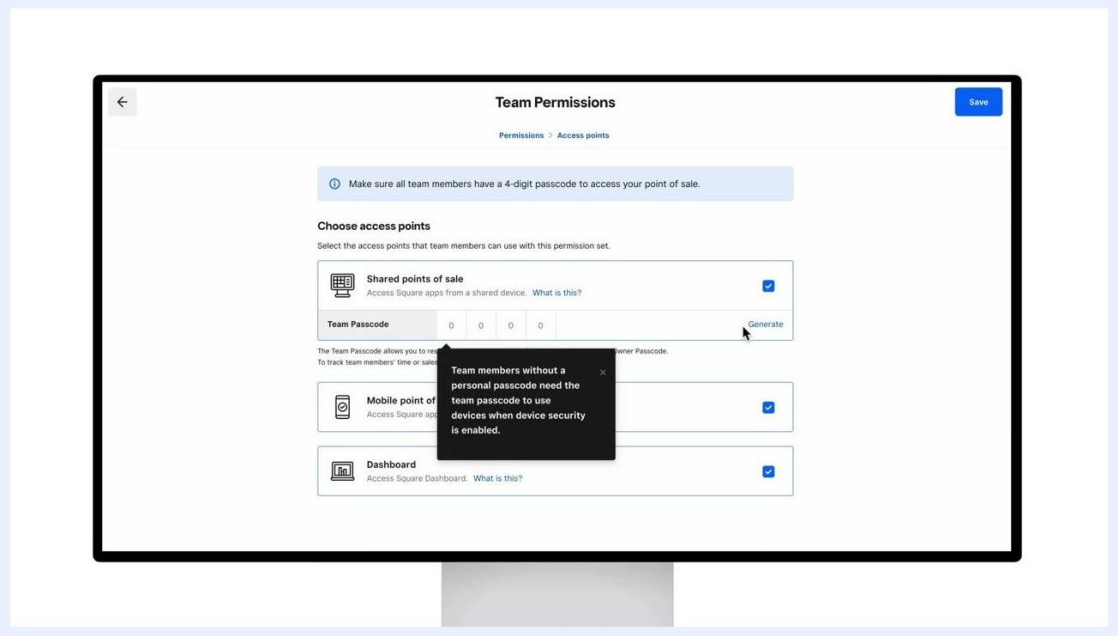


The access settings for a team member, showing the Permission set dropdown, the location, the Authorized representative toggle, and the field to create a passcode.

Step 5: Customize team permissions

In the Team Permissions screen, enable or disable access for individual features. For example, turn on the **Orders** and **Transactions** permissions. Under **Checkout**, make sure "Take payments" and "Take itemized payments" are checked.

Click **Continue** when you finish.



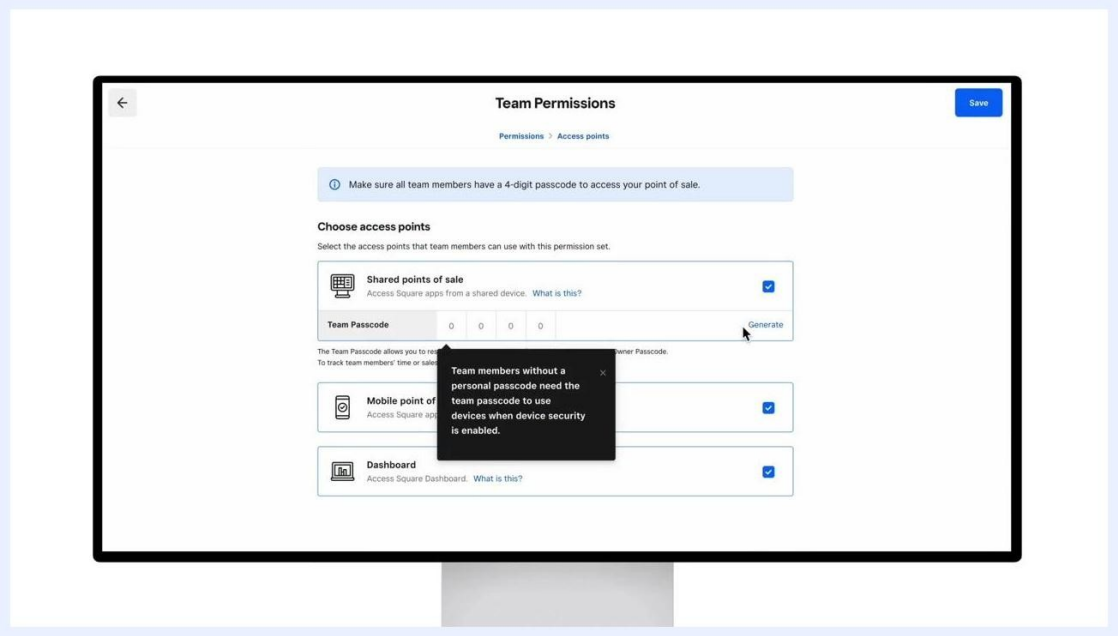
The Team Permissions screen with a list of permission categories on the left and the Checkout options, such as Take payments and Take itemized payments, on the right.

Step 6: Set passcodes and access points

Make sure all team members have a 4-digit passcode to access your point of sale. Under **Choose access points**, select which access points the team member can use:

- **Shared points of sale:** Enter or generate a Team Passcode (for example, 0000).
- **Mobile point of sale:** Check this box to allow access.
- **Dashboard:** Check this box to allow access.

Team members without a personal passcode need the team passcode to use devices when device security is enabled.



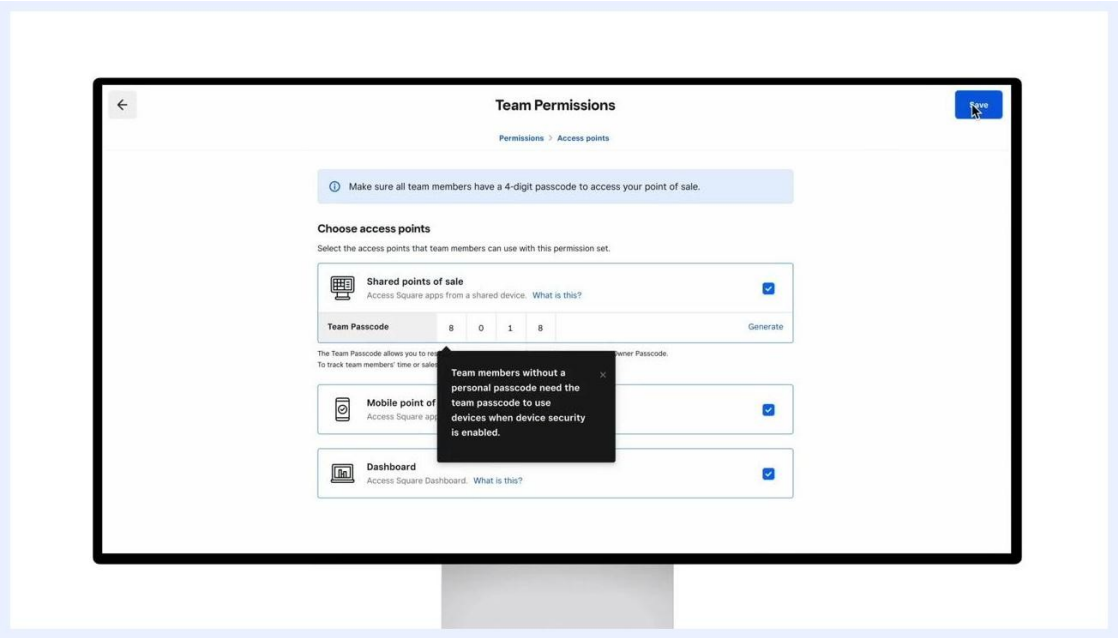
The access points screen with Shared points of sale, Mobile point of sale, and Dashboard all checked, and a tooltip about the team passcode.

Step 7: Set up a personal passcode

Use a personal passcode if you need to track time, sales, or activity by individual team members. You set it up while you create the team member. You can either:

- Let Square generate a unique passcode automatically.
- Enter a custom 4-digit passcode for the team member.

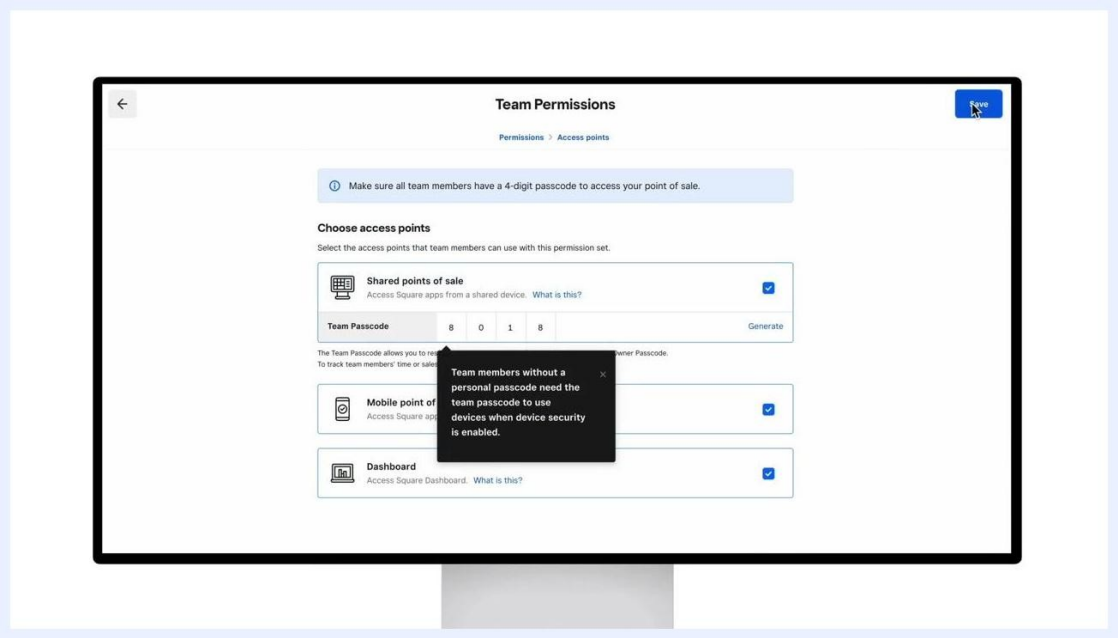
Team members without a personal passcode need to use the team passcode to access devices when device security is enabled.



The access points screen with Shared points of sale, Mobile point of sale, and Dashboard all checked and the Save button highlighted.

Step 8: Turn on the Authorized representative toggle

In the Access section, turn on the **Authorized representative** toggle. This allows the team member to contact Square Support on behalf of your business, which is useful for delegating support responsibilities.

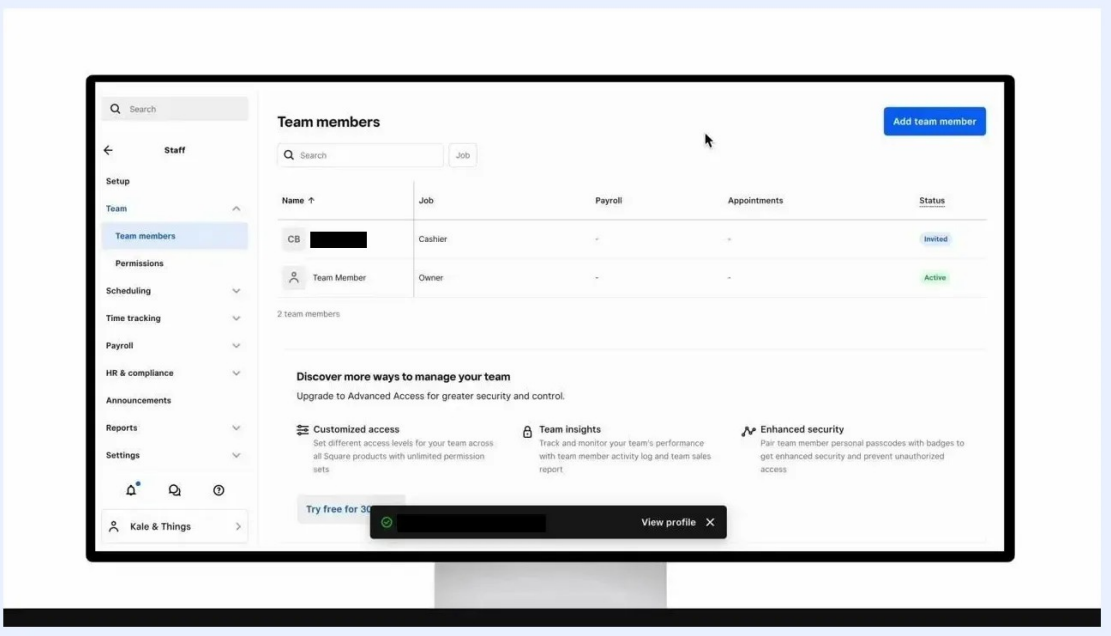


The Access screen with the permission set, location, and a passcode entered, and the Authorized representative toggle turned on.

Step 9: Complete the team member setup

1. After you enter all required information and configure permissions and passcodes, click **Next** or **Save** as prompted.
2. If your Square subscription includes Payroll or Appointments, you see options to set these up for the new team member.
3. Review the summary screen. It confirms that the team member is an authorized representative and that all required steps are complete.

4. Click **Done** to finalize the setup.



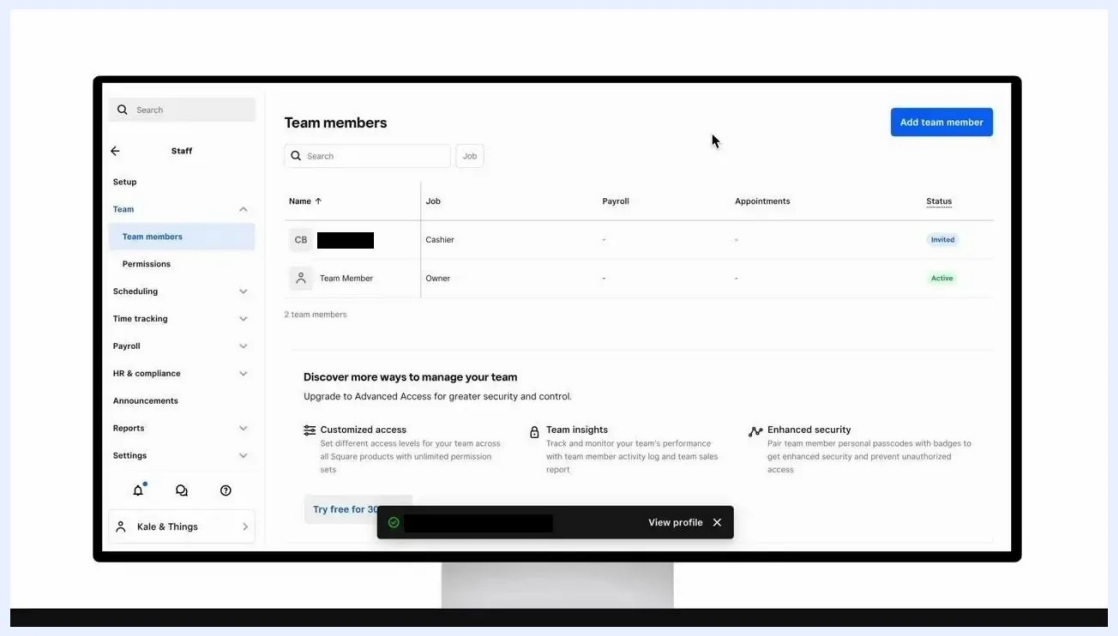
The summary screen with Profile, Jobs, and Access marked complete, Payroll and Appointments optional, a banner confirming the authorized representative, and the Done button highlighted.

Step 10: Turn on passcodes for secure access

After you create your first team member, Square prompts you to turn on passcodes. You can do this from the Square Dashboard or directly from your POS device. To turn on passcodes from your POS:

1. Go to **More > Settings > Security**.
2. Turn on **Passcodes**.
3. Enter your owner passcode to activate the setting.

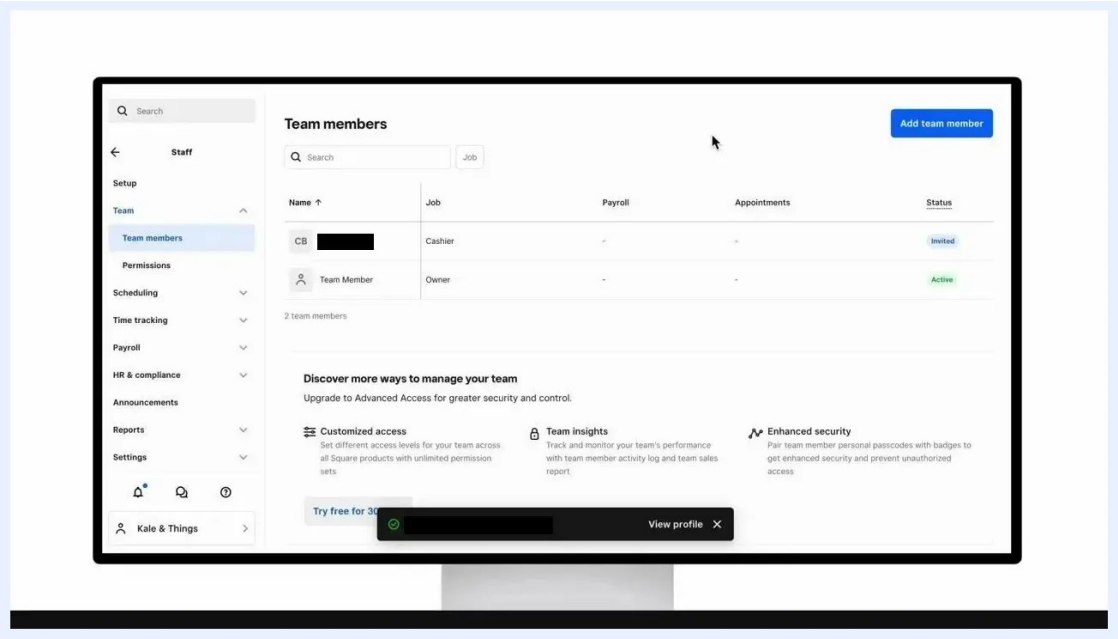
Make a note of your owner passcode. You need it to log in and to perform sensitive actions like overrides.



A dialog with instructions for turning on passcodes from the POS: go to More > Settings > Security, then turn on Passcodes.

Step 11: Verify the team member was added

Return to the **Team members** list in the Staff section of the Square Dashboard. Confirm that the new team member (for example, Cliff Bowman) appears with the correct job title and status, such as Invited. A confirmation message reads "Cliff Bowman added to the team."



The Team members list showing Cliff Bowman as Invited, the owner as Active, and the confirmation message "Cliff Bowman added to the team."

Create a custom permission set

Step 12: Create a permission set for advanced access

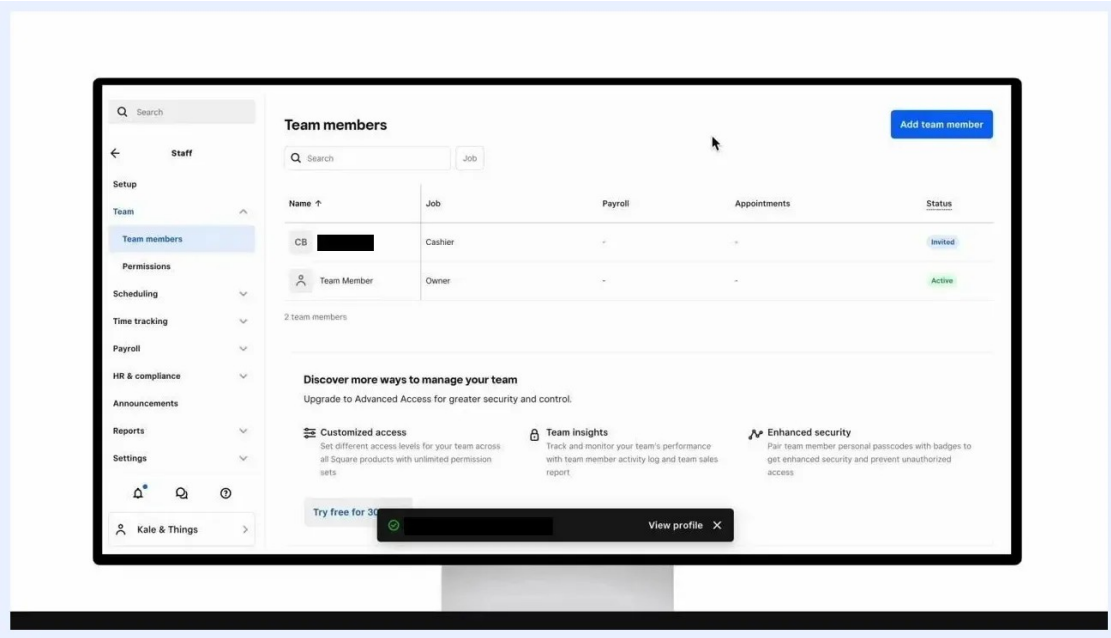
If you need more granular access control, create a custom permission set:

1. Go to **Team Permissions** and click **Create Permission Set**.
2. Enter a **Permission set name** (for example, Manager).
3. Select a **Permission level**.
4. Click **Customize** to tailor permissions further if needed.
5. Click **Save** to create the permission set.

The permission levels are:

- **Standard:** Basic permissions for taking transactions at the point of sale (for example, cashiers and baristas).

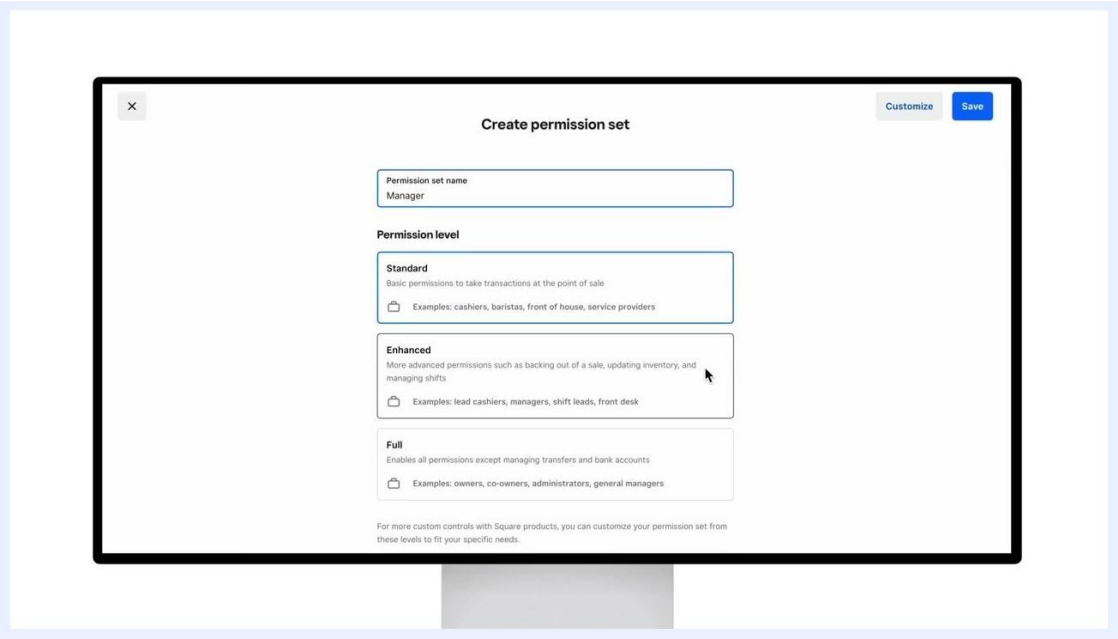
- **Enhanced:** Additional permissions such as backing out of a sale, updating inventory, and managing shifts (for example, lead cashiers and managers).
- **Full:** All permissions except managing transfers and bank accounts (for example, owners and administrators).



The Create permission set screen with the name "Manager" entered, the Standard, Enhanced, and Full levels listed with examples, and the Save and Customize buttons visible.

Step 13: Disable specific permissions for data security

To limit access to sensitive data, turn off permissions such as **Customer** and **House Account** within the permission set. This restricts access to customer and account data for the selected role. Review and adjust other permissions as needed to fit your business requirements.



The Create permission set screen with "Manager" as the name and the Enhanced permission level being selected.

Step 14: Configure detailed permissions

On the **New permission set** screen, review the list of available permissions. You can turn permissions on or off for these modules:

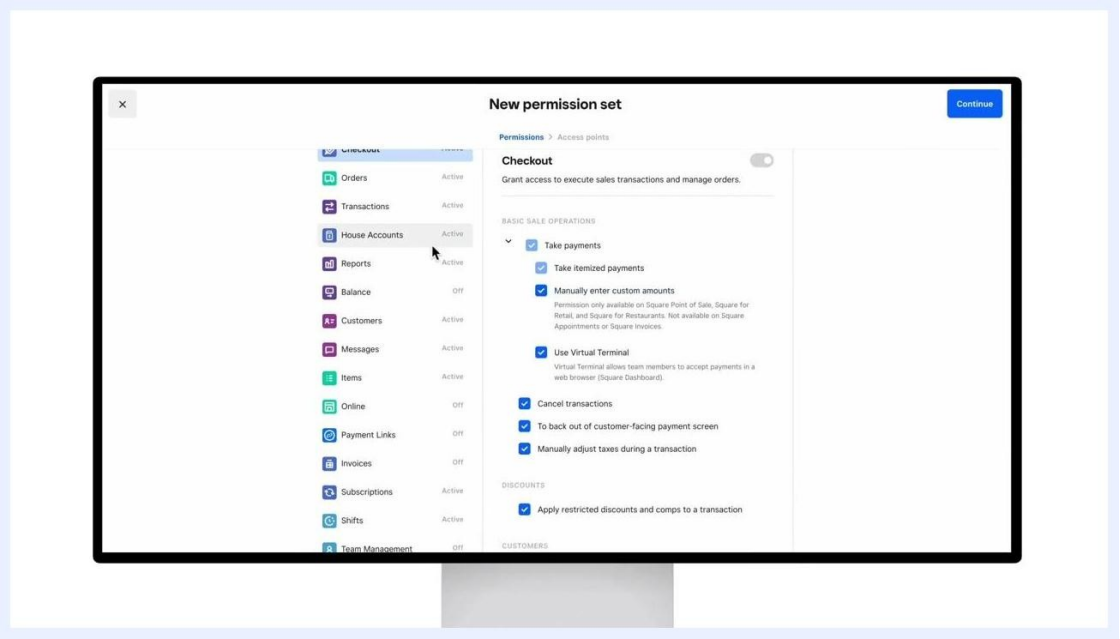
- Checkout
- Orders
- Transactions
- House Accounts
- Reports
- Balance
- Customers
- Messages
- Items
- Online
- Payment Links
- Invoices

- Subscriptions
- Shifts
- Team Management

For **Checkout**, you can allow these actions:

- Take payments
- Take itemized payments
- Manually enter custom amounts
- Use Virtual Terminal
- Cancel transactions
- Back out of customer-facing payment screen
- Manually adjust taxes during a transaction
- Apply restricted discounts and comps to a transaction

Turn off permissions for modules you want to restrict, such as House Accounts and Customers.



The New permission set screen listing permissions for Checkout, Orders, Transactions, House Accounts, Reports, and other modules, with the Checkout permissions expanded.

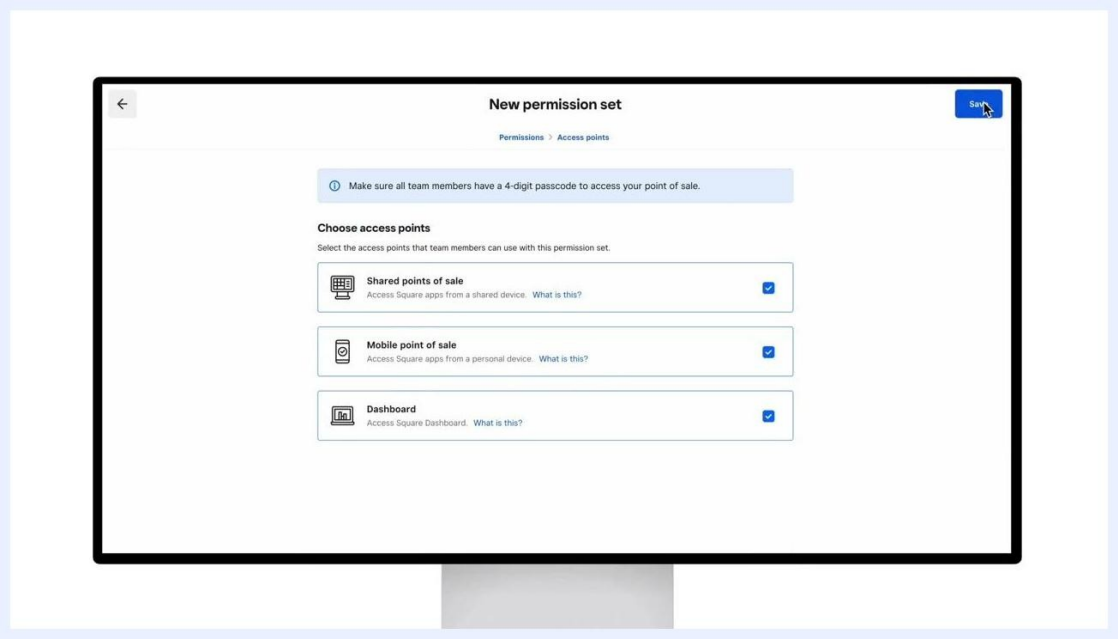
Step 15: Save the permission set and assign access points

1. After you configure permissions, click **Continue**.
2. On the **Access points** screen, select which Square apps team members can use with this permission set.

3. Make sure all team members have a 4-digit passcode to access your point of sale.
4. Click **Save** to finalize the permission set.

The access points are:

- **Shared points of sale:** Access Square apps from a shared device.
- **Mobile point of sale:** Access Square apps from a personal device.
- **Dashboard:** Access Square Dashboard.



The access points screen for the new permission set with Shared points of sale, Mobile point of sale, and Dashboard all checked and the Save button highlighted.

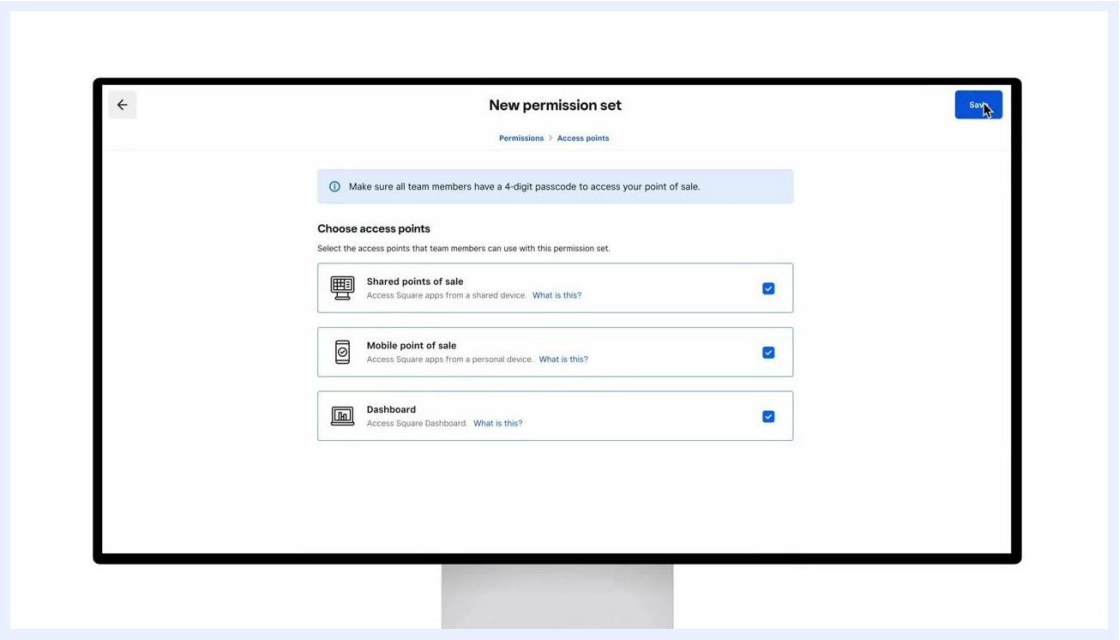
Add a team member from your Square POS

Step 16: Verify the Team Management add-on

On your POS device, make sure the **Team Management** add-on is installed:

1. From the home screen, tap **Add-ons**.
2. Confirm that **Team Management** is listed as "Added" (highlighted in green).

3. If it isn't, add it to enable team scheduling, management, and payroll features.

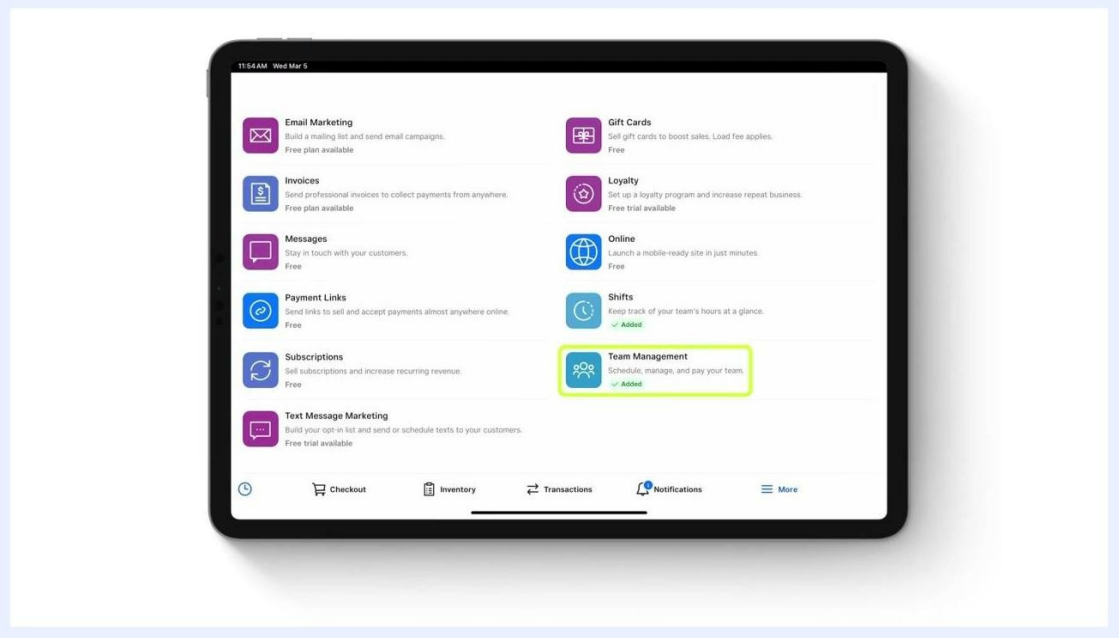


The POS home screen with the Add-ons menu open and the Team Management add-on highlighted in green and marked "Added".

Step 17: Open Team management on the POS

1. From the POS home screen, tap **More** in the bottom navigation bar.
2. Select **Team** to access team management features.

3. Tap the **plus (+) sign** to add a new team member.



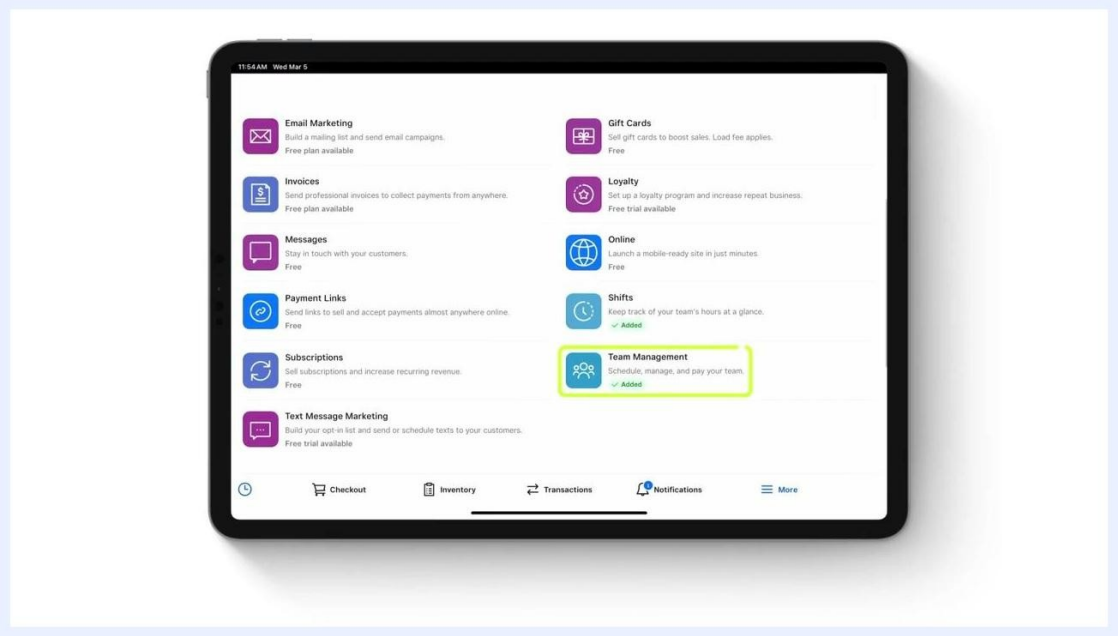
The POS Add-ons screen with the Team Management add-on highlighted in green and marked "Added".

Step 18: Enter the new team member's details

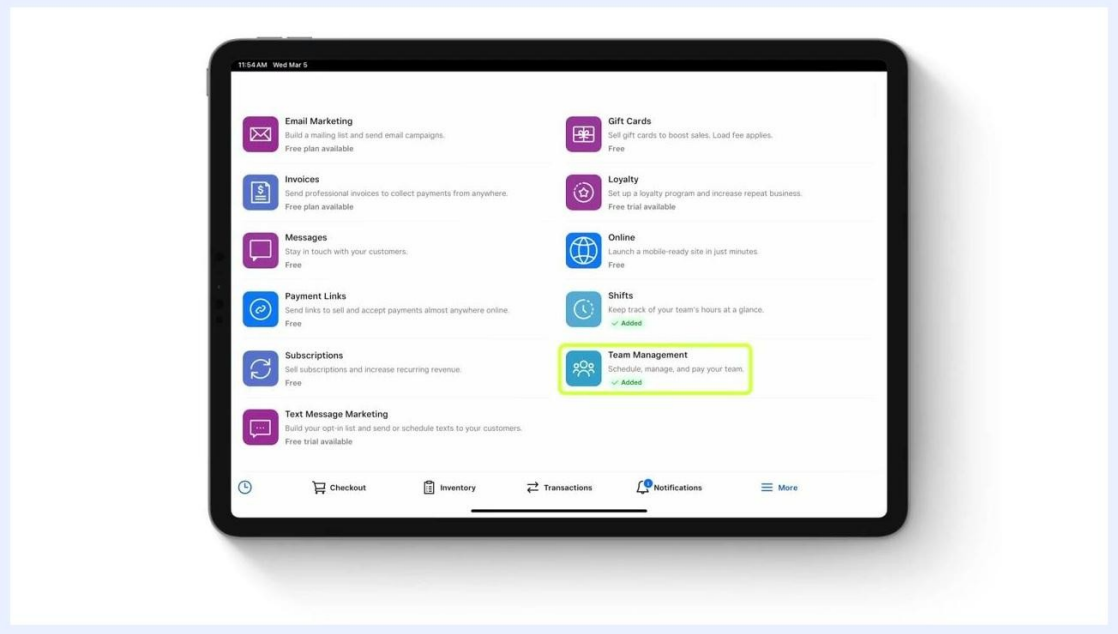
On the **Create team member** screen, enter the following information:

- **Preferred name:** For example, Brittany.
- **Last name:** For example, Chin.
- **Phone:** Optional.
- **Email:** Enter the team member's email address.

If the team member already has a Square account from a previous job, use the same email to streamline access across different Square sellers.



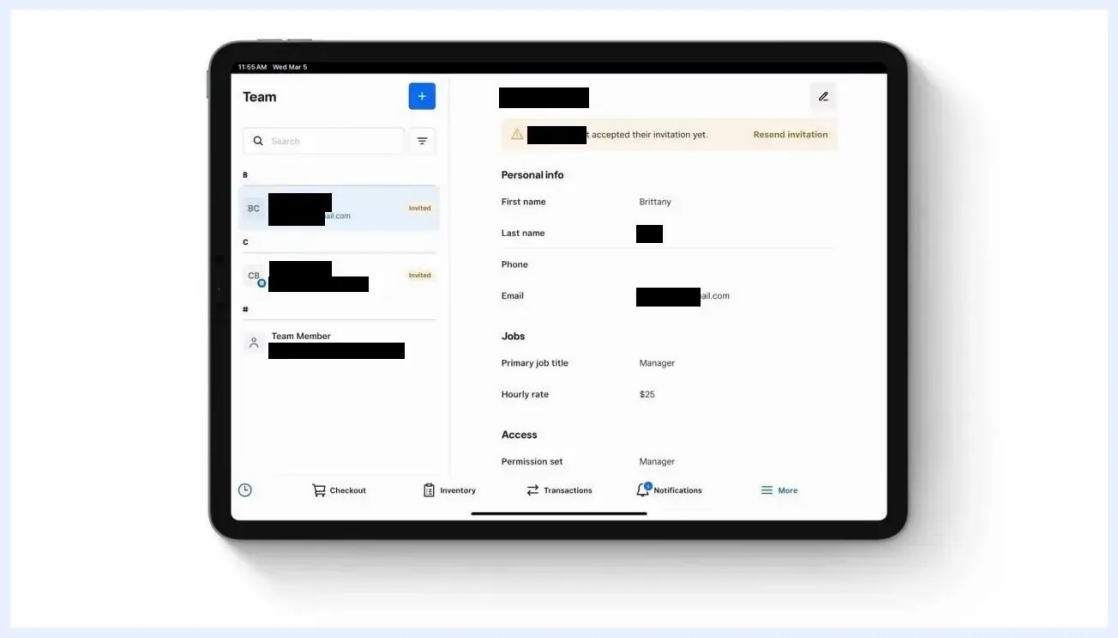
The Create team member screen with the preferred name and last name entered, the Email field active, and the on-screen keyboard visible.



The Create team member screen with the preferred name, last name, and email address all entered and the on-screen keyboard visible.

Step 19: Assign a job title and wage

1. On the **Create job** screen, enter the job title for the new team member in the **Job title** field (for example, Manager).
2. Use the on-screen keyboard to type the job title.
3. Tap **Save** in the upper right corner to confirm the job title.



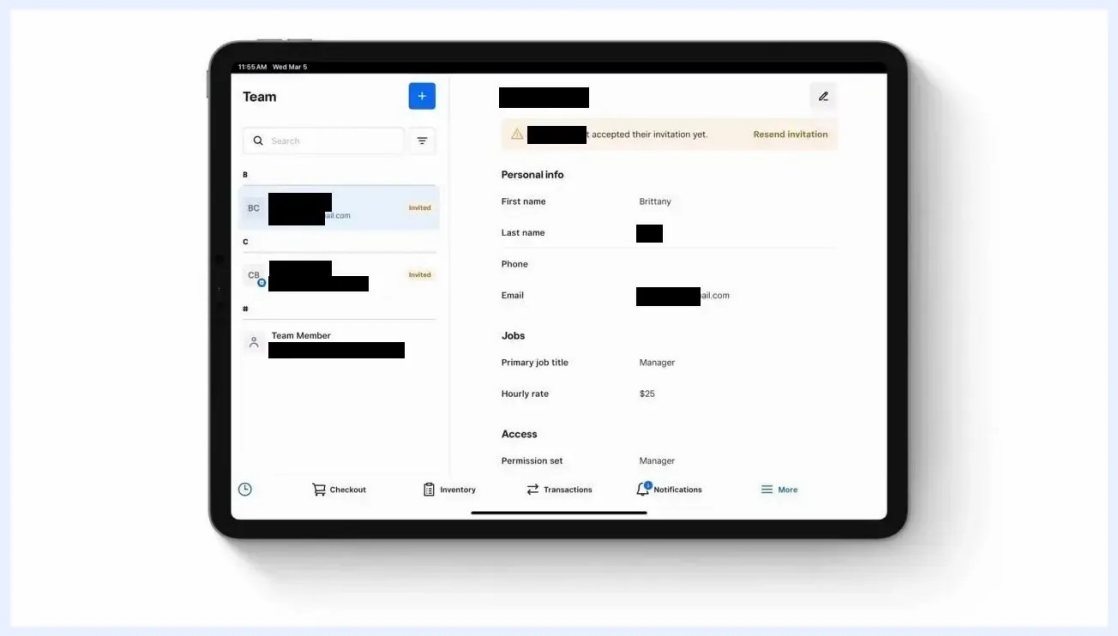
The Create job dialog with "Manager" entered as the job title, the on-screen keyboard visible, and the Save button highlighted.

Step 20: Review the permission set, passcode, and location

On the **Create team member** summary screen, review all entered details:

- **Primary job title:** Manager
- **Hourly rate:** $25.00
- **Add another job:** Optionally tap this if the team member has multiple roles.
- **Permission set:** Manager (tap to change if needed).
- **Security:** Passcode (for example, 2356).
- **Location:** Kale & Things (tap to assign a different location if necessary).

Make sure all information is accurate and complete. Then tap **Save** in the upper right corner to finalize the team member setup.



The Create team member summary screen showing the job title, hourly rate, permission set, passcode, and location, with the Save button visible.

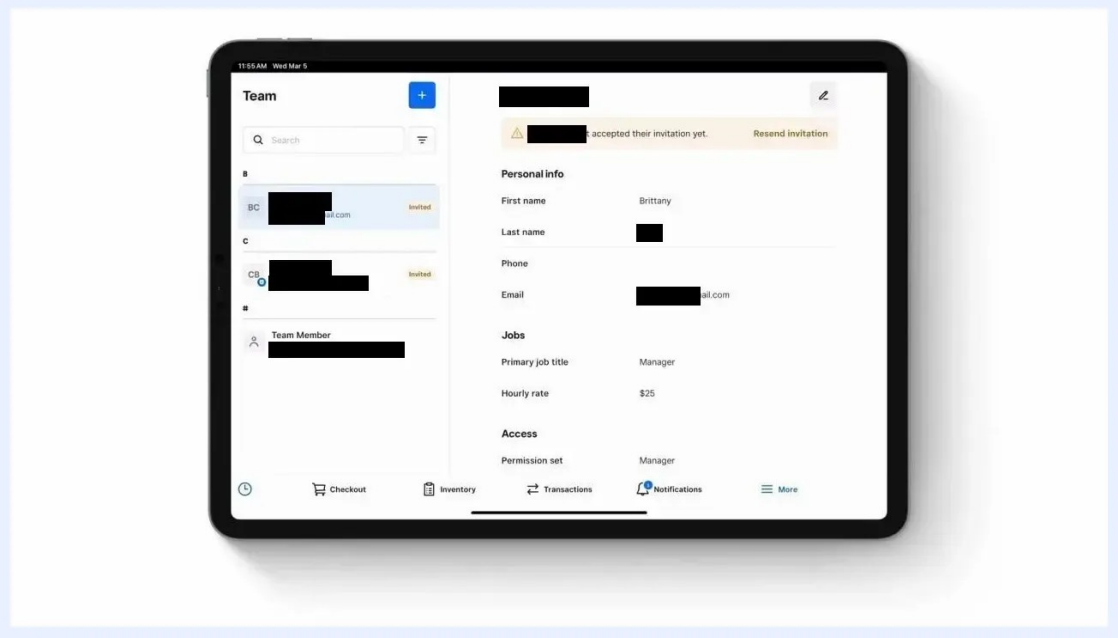
Step 21: Verify the team member and invitation status

1. After you save, view the updated **Team** list.
2. Find the new team member (for example, Brittany Chin) in the list on the left.
3. Check the invitation status. If it shows "Invited," the team member has not yet accepted their invitation.
4. Review the team member's details on the right.
5. If needed, tap **Resend invitation** to prompt the team member to accept their invite.

The details include:

- **Personal info:** First name, last name, and email.
- **Jobs:** Primary job title (Manager) and hourly rate ($25).

- **Access:** Permission set (Manager).



The Team management screen showing Brittany Chin as "Invited" with her job title, hourly rate, and permission set details, and the option to resend the invitation.

Summary

You now know how to set up team permissions in Square POS. You added a team member in the Square Dashboard, assigned a permission set, and configured passcodes and access points. You also turned on the Authorized representative toggle, created a custom permission set, and added a team member directly from your POS. Together, these steps give your team role-based, secure access to your point of sale and dashboard.

What's next

- Create additional custom permission sets as your business grows.
- Set up Payroll or Appointments for team members if your Square subscription includes them.
- Use **Resend invitation** to follow up with team members who still show as "Invited."