

Square Payroll Data Acquisition

Employee Information

Employee Demographic

- Can get SSN/EE Address by generating W-2 preview
 - Tax Forms
 - Generate Draft W-2s (On the right)
 - Download
- The rest of the info, (DOB, email address) will need to be dummied or client can provide or employees can update themselves.
 - Same for Start Date and Pay Rate

Download Fireshot plugin from Chrome to take full page screenshots of Employee profiles. Make sure to unmask the SSN numbers.

Employee Bank: There's no report that has this

- No reports, will need to send direct deposit links

Employer Information

Closed Quarter

- History & Reports
- Payroll Reports (on the right)
 - Report Type = Employee Totals (XLSX)
 - Pay Date Range = Run for each closed quarter
 - Q1 (1/1 – 3/31)
 - Q2 (4/1 – 6/30)
 - Q3 (7/1 – 9/30)
 - Q4 (should never be closed quarter)
 - Team Members = All Team Members
- Run the Company Totals report to get the totals.

Open Quarter

- History & Reports
- Payroll Reports (on the right)
 - Report Type = Paycheck Details (XLSX)
 - Pay Date Range = RUN FOR EACH PAYROLL SEPARATELY
 - Team Members = All Team Members