

Getting Started with Square

Downloading Square for iOS

- 1 Tap the App Store icon on your iPhone or iPad
- 2 In the bottom navigation bar, tap the search icon and search for Square Register
- 3 Tap Get and follow the prompts to complete downloading the app

Downloading Square for Android

- 1 Tap the Google Play icon on your device
- 2 Tap the search icon & search for Square Register
- 3 Tap install & follow prompts

Enable Tipping

- 1 Tap the three horizontal lines on the top left corner.
- 2 iOS: Settings > Tipping
- 3 Android: Account>Settings>Tipping
- 4 Toggle Collect Tips to on & select between showing your tip options on the signature screen or a separate screen

Linking a Bank Account

- 1 In your Dashboard, click the account icon on the top right hand corner.
- 2 Click on Account & Settings > Bank account
- 3 Enter your name, routing number & account number of your preferred account.

Accessing your Dashboard

Your Square Dashboard is where you go to access your Square account online.

- 1 Go to www.square.com
- 2 Click on Dashboard on the top right hand corner
- 3 Use your email & password combination to log in

Tips for Payment

- 1 Ring customers up by either selecting items to sell or entering a custom dollar amount.
- 2 Tap Charge to ring up a cash payment or simply swipe the card.
- 3 Have the customer sign and tip on the iPad.

Make sure:

- The Square logo is facing you and the magnetic stripe is facing away when using Square Reader.
- Enter the card from either side and run it smoothly across the bottom of the reader at a medium swipe speed.

Offline Mode

Offline Mode enables you to accept swiped card payments when your Internet connection is temporarily unavailable. Payments are processed automatically when you reconnect and expire if not processed in 72 hours.

When Offline Mode is enabled, OFFLINE MODE appears in a red bar at the top of the screen.

Ask your supervisor before enabling Offline Mode.

Issuing Refunds

- 1 Tap the three horizontal lines on the top left corner.
- 2 iOS: Tap Activity
- 3 Android: Tap Account > Activity
- 4 Scroll through your payment history, search the payment using the receipt or card number or simply swipe the card used for payment
- 5 Locate & tap on the payment you'd like to refund and tap Issue Refund

Sending invoices from Phone

- 1 Select items from your item library or enter custom amount using the keypad within Square app.
- 2 Tap Charge > Invoice
- 3 Enter the invoice details > tap Send Invoice
- 4 Scroll through your payment history, search the payment using the receipt or card number or simply swipe the card used for payment
- 5 Locate & tap on the payment you'd like to refund and tap Issue Refund

Create Items

- 1 Visit Items from your Dashboard & click Create Item at top right corner.
- 2 Fill in item information
- 3 Add item image, if applicable
- 4 Enable Inventory management, if applicable
- 5 Click Save