

Using the Square App and Square Reader for Credit Card Sales

Read on for step-by-step instructions for using the Square app for credit card sales. Please print these instructions and follow along as you do a practice transaction. Following the instructions are troubleshooting tips, and suggestions for practicing using the app even if you do not have a Square reader attached. Please read through this entire email before starting up your app and practicing step by step.

The following instructions refer to icons, etc. as they appear on an iPhone. These icons may look different on an Android phone, but you should be able to match up what you have with the instructions as written. Just start pushing buttons, if needed!

1. Firmly insert the Square reader into your smartphone's headphone or lightning jack, as needed. The lightning connector is used for the iPhone 7 and later, but you can use the standard headphone jack reader on these phones if you have the lightening to headphone adapter (packaged with the iPhone 7) inserted between the lightening jack and the Square reader.

2. Start up the Square Point of Sale app. The "Checkout" screen should appear:

- "No Sale" appears at the top of the screen
- Below "No Sale" appears "Charge \$0.00" within a blue box
- Below the blue box appears a standard 10-digit numeric keypad, with a "C" (Clear) button and a "+" button in the bottom row. (Note: if the Item list appears, you are already at Step 3, below.)

(Login reminder: xxxxxx@gmail.com, password = xxxxxx)

3. *****VERY IMPORTANT FIRST STEP*****

Push the greyed-out menu icon called "Library" *below* the keypad to the *right edge of the screen*. The Item list will appear, as this is our "library" of items. The "Library" icon and the "Keypad" icon are toggle switches at the bottom of the Checkout screen. You must have the Library icon selected and the items list showing in order to start a transaction.

Select the appropriate Item as follows:

- **Donation to MMQ** (purple): you are doing a practice transaction, and you would like to donate this dollar amount to MMQ, not receive a refund
- **Mercantile** (green): if you are selling Mercantile items, including books, patterns, & magazines
- **Potholders** (yellow): if you are selling potholders
- **Quilt Sales** (blue): if you are selling one or more quilts, the sales proceeds to go directly to the quilt maker/seller, not MMQ
- **Refundable Charge** (red): if you are doing a practice, and you would like me to refund the dollar amount back to your credit card. (Note: you can also practice voiding your own practice transaction; see Question A below.)

(-Redeem Rewards & Gift Cards (both gray) are not valid selections.)

Due to our accounting system limitations, YOU CAN SELECT ONLY ONE ITEM TYPE PER TRANSACTION. However, it is assumed that each transaction may be of multiple individual items. Select the Item type which represents the majority of the items being sold in the transaction. For example, if you were selling several mercantile items along with just 2 potholders, you would select "**Mercantile**" rather than "**Potholders**."

Upon selecting the Item type, the numeric keypad will appear, with the Item name at the top. If the keypad does not appear, hit the Keypad icon at the bottom of the Checkout screen to toggle to it.

4. Enter the total dollar amount of the transaction on the keypad, and check carefully that both the dollar amount above the keypad and the Item name at the top are correct. If either is incorrect, push the “X” at the top-left corner of the screen, to take you back to the Item list for a do-over.

5. Once you are sure the Item name and dollar amount are correct, push the “ADD” button in the blue box at the top right of the screen. You are taken back to the Item list (i.e. Library), and the total charge amount is shown within the blue box at the top of the screen labelled “Charge.” You must have the Item list (Library) showing in order to swipe the card in the next step.

6. Now you swipe the credit card through the reader. Make sure you swipe with the magnetic facing to the back of the card reader: the back of the reader has our MMQ identifier on it. After correctly swiping, the signature screen will appear. **(If you do not have a Square reader attached, you cannot swipe a credit card. Scroll down to question G below to find out how to complete your transaction with no Square reader attached.)**

7. Have the customer sign the screen with his/her finger, and push “Done Signing.”

8. Assuming the transaction is approved, the “All Done” screen appears and you can select “New Sale” at the top to start a new transaction. Remember, you want to get back to the Checkout screen with the Library (Item list) showing in order to start a new transaction. Start at Step 2 (above).

9. ******VERY IMPORTANT FOR QUILT SALES**

If you have recorded a quilt sale, **PLEASE** write the last four digits of the credit card number on the sales tag(s) which we keep for each quilt being sold in the transaction. This is necessary to ensure the correct quilt maker/seller is credited with the proceeds of that particular transaction.

Frequently Asked Questions/ Troubleshooting

A. I recorded a Mercantile sale, and after the customer signed the screen and the transaction was approved, we both realized the incorrect amount was charged. Can I void the transaction and do the whole thing over?

Yes! Start up the Square app, and from the Checkout screen or the Item List screen, you will see the main menu icon in the top-left corner. Touch that icon, and the main menu will appear. Select “Transactions” from the list. **All** MMQ transactions will appear, with the most recent at the top. Select the correct transaction you wish to void from the list, and double check with the customer the credit card type and number and the dollar amount shown. Select “Issue Refund” at the top of the screen. A list of refund options will appear. “Refund All Items” will be selected, or there may be other options for partial refund. Select whichever is appropriate, and click “Next” in the blue box at the top right of the screen. A list of options will appear for the reason for the refund; select as appropriate. At this point you can again verify the credit card number with the customer. Then push the “Refund” button which has appeared at the top right of the screen. The refund will process; press “Done” to finish.

Now you can record a whole new transaction.

Except in the case of an error as described above, please do not void any actual listed transactions, except your own practice transaction!

B. My customer would really like a receipt, besides just the “MMQ” notation on her credit card and Mindy’s phone number to call. Can I email her a receipt?

Yes! Again, start up the Square app, and push the main menu icon at the top left corner, or the main menu may appear when you start up the app. Just as with a refund, select “Transactions” from the main menu. Select the transaction from the list, and confirm with the customer that you have the correct transaction based on the credit card type and card number, and the dollar amount of the transaction. Select “New Receipt” at the top of the transaction

description. “Resend Receipt” will appear, even if no receipt had previously been sent. Select either “Text Receipt” (a numeric keypad will appear) or “Email Receipt” (a qwerty keyboard will appear) and enter the customer’s phone number or email address as appropriate. Then hit “Send” next to your typing. “Message Sent” will appear, and the customer will get his/her receipt almost immediately.

C. Whenever I have my card reader inserted, as soon as I start up the Square app a black box with “Reader Connected. Swipe Card to Charge” in it appears on screen. Should I start my transaction by swiping the credit card?

NO, NO, NO! If you swipe the card first, you do not have the option to enter the Item type (Bazaar, Potholders & Books, Quilt Sales, Donation to MMQ, or Refundable Charges) for the transaction. To help us determine which sales are most profitable for us, and to properly credit the quilt maker/seller with quilt sales proceeds, you must start your transaction at the Item List screen at Step 3 (above.) Please do not start any transactions by swiping the credit card.

D. How do I get back to the “Checkout” screen of Step 2 (above) to start a transaction? I can’t find it!

The initial “Checkout” screen is the top menu item in the main menu. From most screens you get to the main menu by touching its icon in the upper left corner. If, instead, there is a left-facing arrow in the upper left corner (go back), you can tap that and it will take you back to a screen that most likely will have a main menu icon in the upper left corner. Once the main menu appears, select the top item: “Checkout.”

E. Remind me: how do I get to the Item List so I can select an item type for the transaction? (Step 3 above.) I can’t find it!

From the “Checkout” screen (Step 2 above, or question D above), ***push the grayed out “Library” icon in the lower right*** of the screen. This will take you to the Item List to select the Item for the current transaction. This is the only way you can get to the Item List for a particular transaction! Note that once this list is up, that icon on the lower right is now bright. In fact, those two icons on the bottom are used to toggle back and forth between the numeric keypad screen and the “Item List” screen. We always start a transaction by selecting an Item type on this screen, then enter the dollar amount on the new keypad which appears.

F. In the main menu, “Items” is one of the menu items, and when I select it I get an Item List. Can’t I start a transaction by selecting an Item here?

NO, NO, NO! If you select an item here, you get the Edit Item screen, not the screen to select that item type for a transaction, nor the keypad to enter the dollar amount of the transaction. You must get to the Item List by pushing the Library icon at the lower right of the “Checkout” screen (Step 3 above & question E above) in order to start a transaction. Don’t get into the Item list from the main menu at all; it is for editing the Items only, and they should not be edited.

G. I don’t have a Square reader to use for practicing. Can I still practice?

Yes! As you start a transaction, go through Steps 1 - 5 above. If you had a reader, you would then swipe the card in Step 6, have the customer sign with their finger in Step 7, and push “New Sale” in Step 8. With no credit card reader, push the blue “Charge \$X.00” button at the top of the Item list screen for Step 6. Now you can enter a credit card number (the first selection) to complete the transaction just as if you had swiped it. We do not use any of these options, however, so for practice your transaction ends at this point. Hit the back arrows at the top left of these screens to return to your Item List with the Charge in blue at the top, then hit the grayed-out icon at the bottom left of this screen to toggle back to your original “Point of Sale” screen. Now you can hit the “C” at the bottom left to clear the charge amount, and start a new transaction with Step 3 above.

You can examine voiding transactions (Question A above) and sending receipts (Question B above) with no card reader attached. **Please do not void any actual transactions while practicing!** You can practice issuing a receipt for any transaction; just enter your own email address or phone number to get a receipt for any listed transaction.

H. I’ve been using my phone for credit card charges, and my battery is running low. What now?

I'm afraid you're dead in the water. The Square reader uses lots of battery power. Be sure to arrive at the quilt show with your phone fully charged. Turn off your phone whenever you're not doing an actual transaction. Try not to use your phone for calls during the day. Do not practice using Square during your shift at the show. People tried to charge their phones during the day last year, and it took too long to recharge to be of any use later in the day. You should use Square for one 2-hour shift, then plan to pass the reader on to a different person. You may get more than 2 hours of use from one phone charge, but you shouldn't plan on it.

I. I'm having trouble using Square at the show, or with a particular transaction. Who can I contact?

- Be sure to take these instructions with you to the show so you can refer to them as needed. I will also have copies available at the show, so call me to bring one to you. Mindy Wolfman 916-216-6463

- I can come help you during the show, if I'm not working on some other crisis at the time! Call me, Mindy Wolfman, at 916-216-6463. I also have additional Square readers to give you if for some reason your reader quits working. Often the reader is working fine, but the user is forgetting that the Item list (Library) **must** be showing in order to swipe the card.

- Ask other MMQ Square users!

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- Contact me at any time before the show to get help setting up or practicing using Square.

Good luck, and don't be afraid of Square!

-Mindy