

How to use Square's Point of Sale App

PAIRING A DEVICE TO POINT OF SALE APP

1. United Way of Greater Greensboro will add you as a Team member on Square. You will receive an email from Square asking you to set up your account.
2. Download the Square Point of Sale app on your phone/device. ([Click here](#) to make sure your device is compatible). Log in to the app with the username and password you created.
3. Any Square device can be used. UWGG will provide you with a Square device if you need one. Open and log into the app to connect your device to the Square reader and accept payments.

There are two readers you can use to accept a payment. To connect the reader to your phone:

- a. PREFERRED: The chip "dip" reader (This method is safer for credit card users)
 - i. Go to your device settings and make sure Bluetooth is turned on.
 - ii. Open the Square app and tap More from the navigation bar at the bottom of your screen.
 - iii. Tap Settings > Hardware > Card Readers > "Connect a Reader."
 - iv. Put your reader into pairing mode by pressing the reader's button for 3-10 seconds.
 - v. Remove your finger as soon as you see orange flashing lights. If you see red flashing lights, you've held the button too long and you'll need to try again.
 - vi. When connected, the reader will be listed as Reader Ready in-app.
 - vii. Before using, ensure the dip reader is fully charged.**If you are using the dip for multiple days, make sure you charge it overnight using the USB cord included in your Square box*
- b. BACK-UP: The swipe reader
 - i. Plug the reader firmly into the headset jack until you hear it click
 - ii. Your phone may ask for permission to access your device's microphone. Allow this.

Now you're ready to take payments! See the following pages for how.

NOTES:

Use the Items assigned to your company to ensure your company gets proper credit for each transaction you make. If the item is not applied to payments, please notify UWGG staff immediately so we can make documentation of the charge.

Once dipped/swiped, all cards are automatically charged. All transactions from the day are deposited overnight to United Way's bank account. You do not need to provide a summary of Square transactions back to United Way at the end of your campaign. We will record the summary back to your campaign's total.

All transactions will be recorded as special event money to you company's campaign. We do not tie gifts made back to individual donors. If a donor wishes to make a credit card donation as their annual gift, please connect him/her with your United Way contact.

So that your Square access is not accidentally used for a personal/alternative function, please sign out of the Square / Point of Sale app at the conclusion of your fundraising event each day. At the conclusion of your workplace campaign, your United Way square account will be deactivated.

HOW TO COMPLETE A TRANSACTION:

Make sure your reader is connected to your device. Open the Square app and open the Checkout screen.

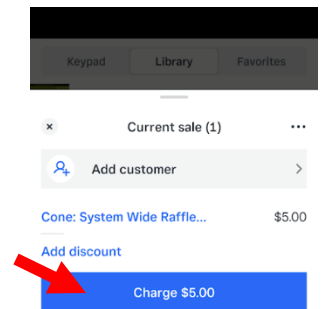
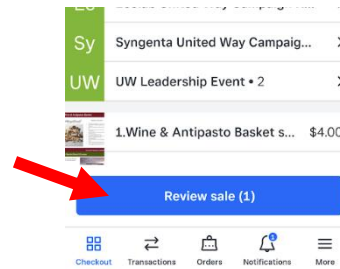
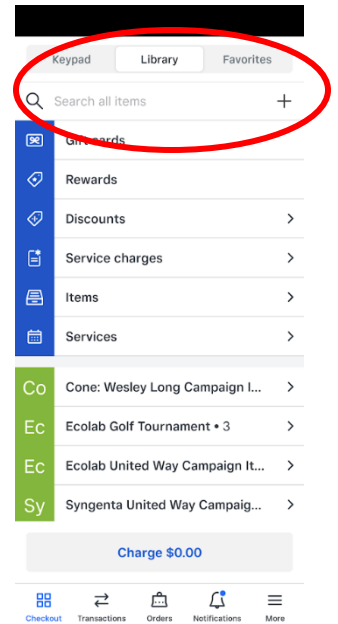
1. Select or "Add" the Item(s) for your current sale. Multiple items can be added to one transaction.
 - To find your Item(s):
 - Select it from either Library or Favorites, if your items have been added to Favorites.
 - You can also search for it by name from the Library.
 - Do not use the Keypad.
 - If you do not see your item, let your United Way contact know and we can create it for you. You can also create an item yourself. If you do, label your item as follows: Company name – Item Name. Add a price.
 - Ensure you use the Items assigned to your company to ensure your company gets proper credit for each transaction you make. If the item is not applied to payments, please notify UWGG staff immediately so we can make documentation of the charge.

2. Once item(s) have been selected, tap "Review Sale"

3. Review the transaction with the purchaser and tap "Charge"

4. Hold the credit card by the reader or insert it.

- Insert the chip card (chip-side first with the front of the card facing up) into the wide port on the top of your reader or tap the chip end on top of the reader. Leave the card in/on the reader until the reader beeps and shows 4 green lights, which means you can remove the card.
5. After the transaction is complete there will be a prompt to send a receipt. Confirm what the donor prefers (text or email).



See next page for how to run Reports.

REPORTS:

You do not need to provide a summary of Square transactions back to United Way at the end of your campaign. We will record the Square's summary back to your campaign's total.

From the Point of Sale app, you can view individual transactions or view gross sales reports.

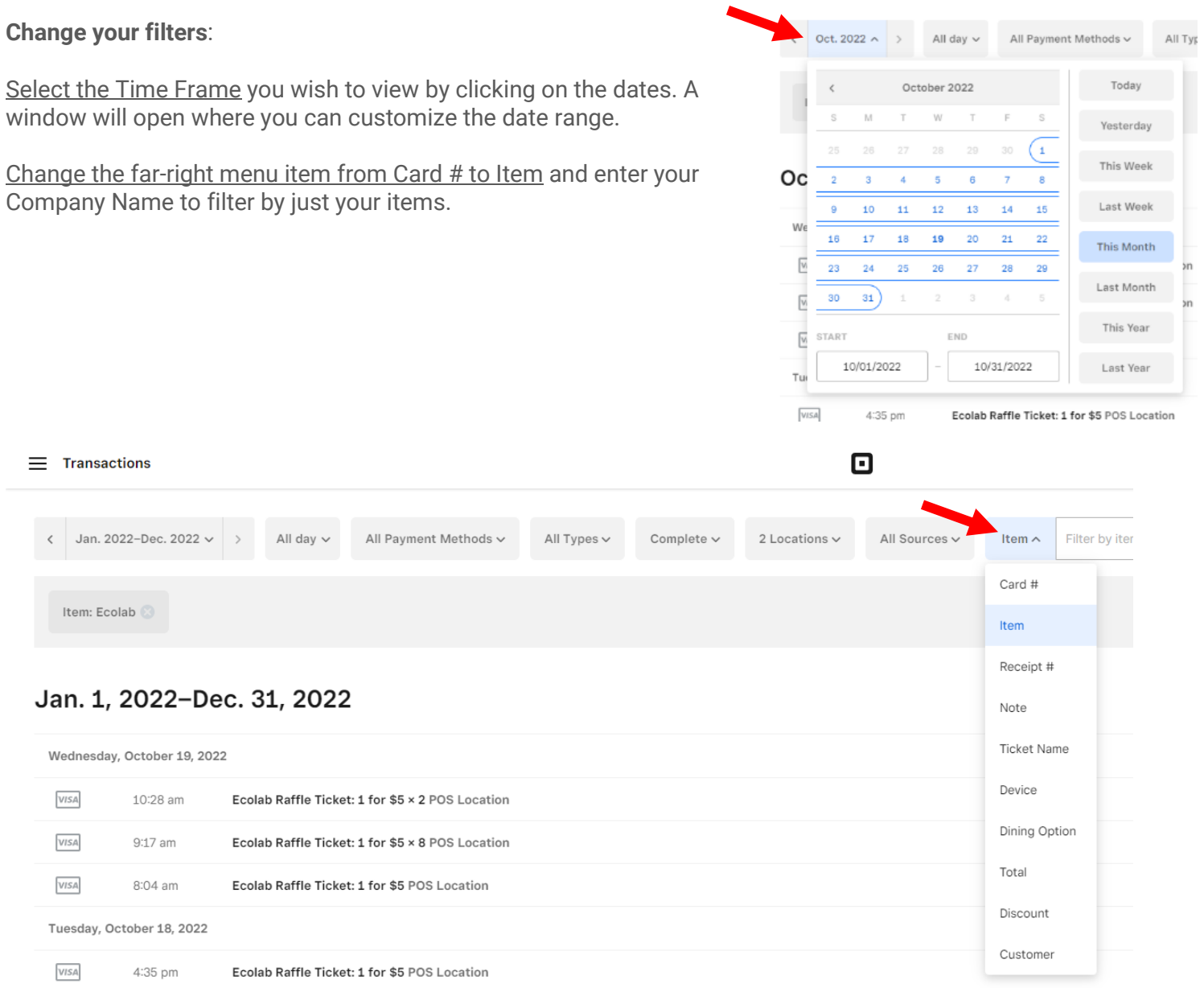
If you need a summary of Items sold for your company, log into the Square dashboard with your login credentials: www.squareup.com/login

From the Square dashboard, select  **Payments & invoices** then **Transactions**

Change your filters:

Select the Time Frame you wish to view by clicking on the dates. A window will open where you can customize the date range.

Change the far-right menu item from **Card #** to **Item** and enter your Company Name to filter by just your items.



The screenshot shows the Square Transactions dashboard. At the top, there are filters for 'Oct. 2022', 'All day', 'All Payment Methods', and 'All Types'. A red arrow points to the 'Oct. 2022' filter, which has opened a calendar for October 2022. The calendar shows the dates from October 1st to 31st, with the date range '10/01/2022' to '10/31/2022' selected. Below the calendar, there are buttons for 'Today', 'Yesterday', 'This Week', 'Last Week', 'This Month', 'Last Month', 'This Year', and 'Last Year'. The 'This Month' button is highlighted. Below the calendar, there is a table of transactions. The first transaction is 'Ecolab Raffle Ticket: 1 for \$5 POS Location' on Wednesday, October 19, 2022, at 10:28 am. The second transaction is 'Ecolab Raffle Ticket: 1 for \$5 x 8 POS Location' on Wednesday, October 19, 2022, at 9:17 am. The third transaction is 'Ecolab Raffle Ticket: 1 for \$5 POS Location' on Wednesday, October 19, 2022, at 8:04 am. The fourth transaction is 'Ecolab Raffle Ticket: 1 for \$5 POS Location' on Tuesday, October 18, 2022, at 4:35 pm. A red arrow points to the 'Item' filter in the top right corner of the dashboard. The 'Item' filter is currently set to 'Card #'. The 'Item' filter dropdown menu is open, showing options: 'Card #', 'Item', 'Receipt #', 'Note', 'Ticket Name', 'Device', 'Dining Option', 'Total', 'Discount', and 'Customer'. The 'Item' option is highlighted.

Once filtered, click on Export on the right side of the screen and select Items Detail CSV. You'll now have a list of all Items sold, by date and by purchaser. This includes any items purchased from the Square device and online check out links.

