



# Square Setup for Mobile POS

2019 - Summer Edition

## User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Accessing the Tool](#)

[Square App Credentials](#)

[Sandbox](#)

[Configure API access with Clubessential POS App](#)

[Add Bank Info \(Get Paid\)](#)

[Configure Processor in Office](#)

[Charge Settlement Type](#)

[Setup Area\(s\) for Square Processor](#)

[FAQs](#)

[Best Practices](#)

# Overview

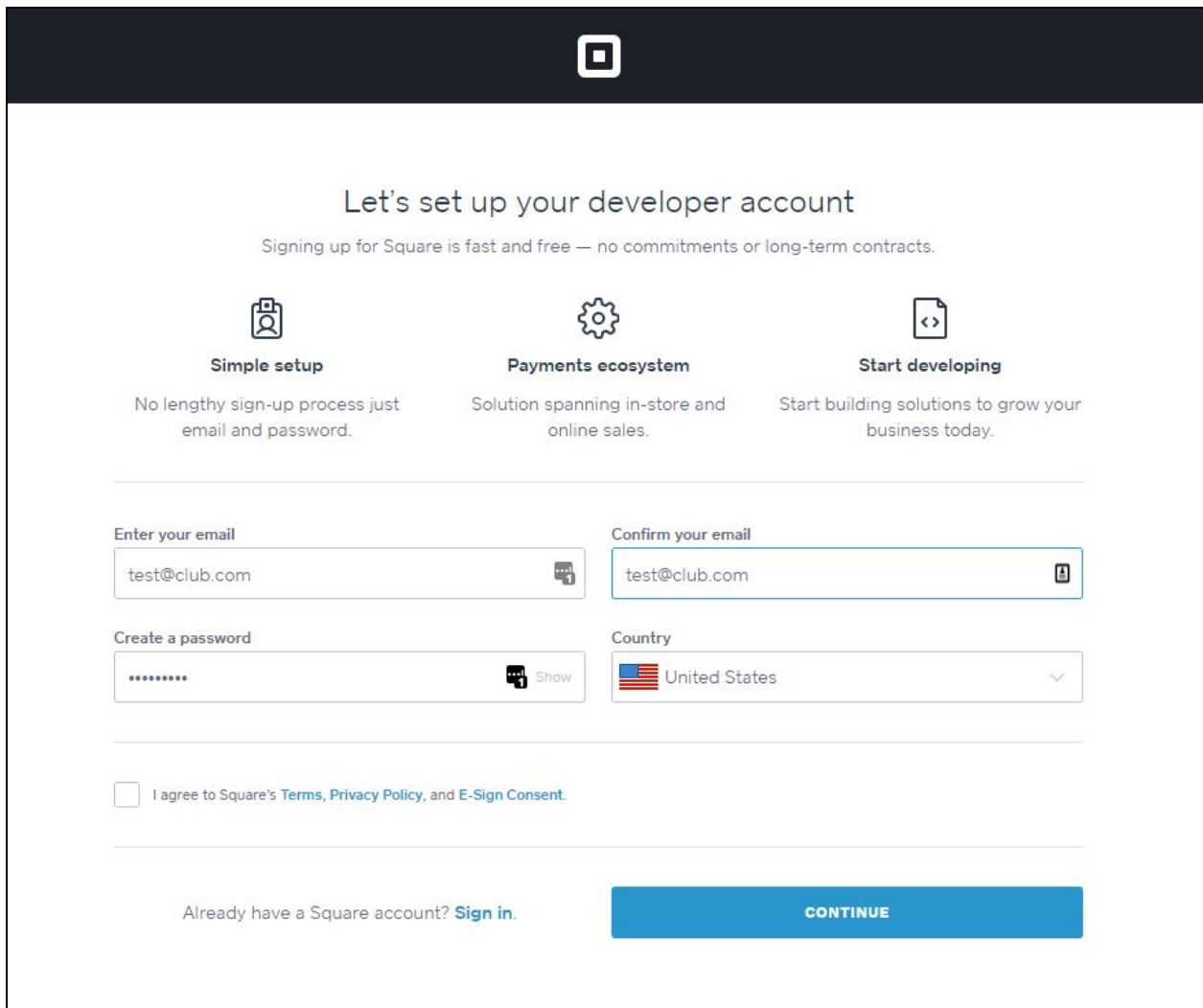
The Square App enables Clubs to accept Credit Card payments on the Clubessential Mobile POS application/device.

## Use Case(s)

The Club would like the ability to process Credit Card payments via their Mobile POS.

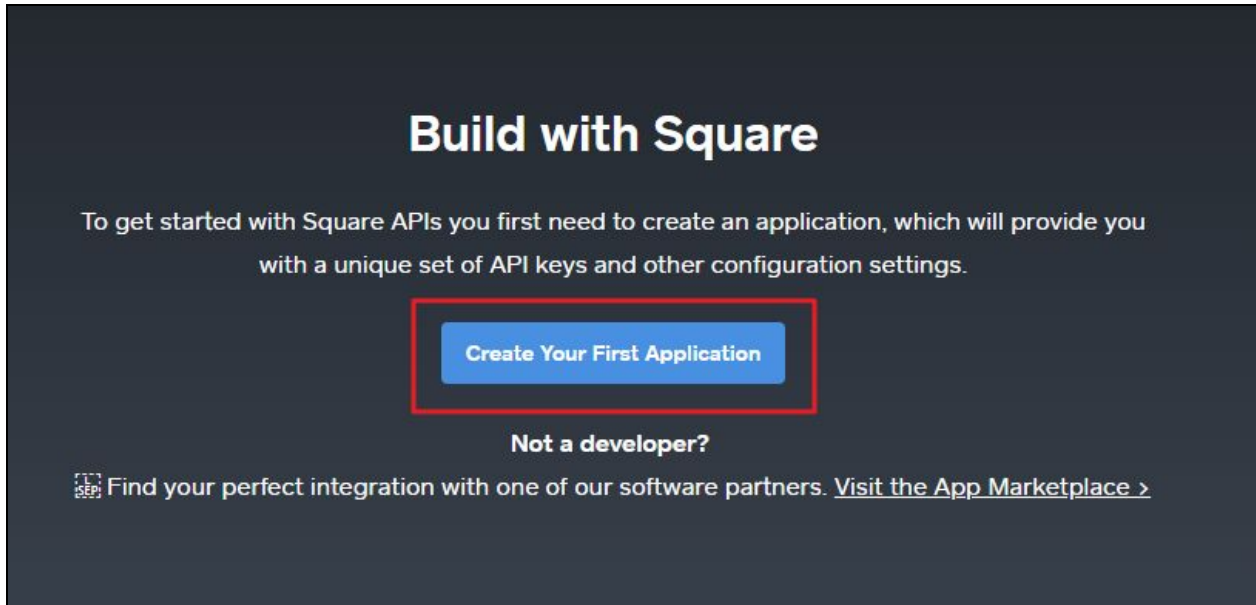
# Accessing the Tool

Navigate to <https://connect.squareup.com/apps> and create a **Developer Account**.



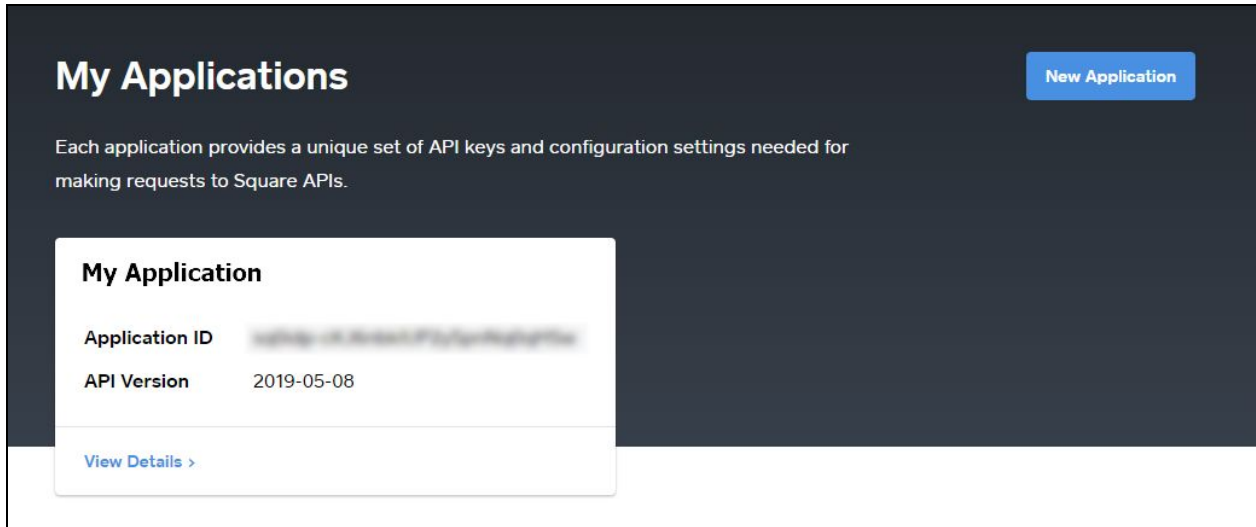
The screenshot shows the Square developer account setup page. At the top, there is a dark header with the Square logo. Below the header, the main heading reads "Let's set up your developer account" with a subtext: "Signing up for Square is fast and free — no commitments or long-term contracts." There are three columns of options: "Simple setup" (No lengthy sign-up process just email and password), "Payments ecosystem" (Solution spanning in-store and online sales), and "Start developing" (Start building solutions to grow your business today). Below these options are input fields for "Enter your email" (test@club.com), "Confirm your email" (test@club.com), "Create a password" (masked with dots), and "Country" (United States). At the bottom, there is a checkbox for "I agree to Square's Terms, Privacy Policy, and E-Sign Consent." and a blue "CONTINUE" button. A link "Already have a Square account? Sign in." is located to the left of the button.

## Select **Create Your First Application**



**Name** the application in accordance with Club standards, review the Square Developer Terms of Service and select Agree, then select **Create Application**.

Once the Square App is created, you access it from the **Application Dashboard**.



## Square App Credentials

Once you create your Square App, please note these two items as listed on the Credentials page:

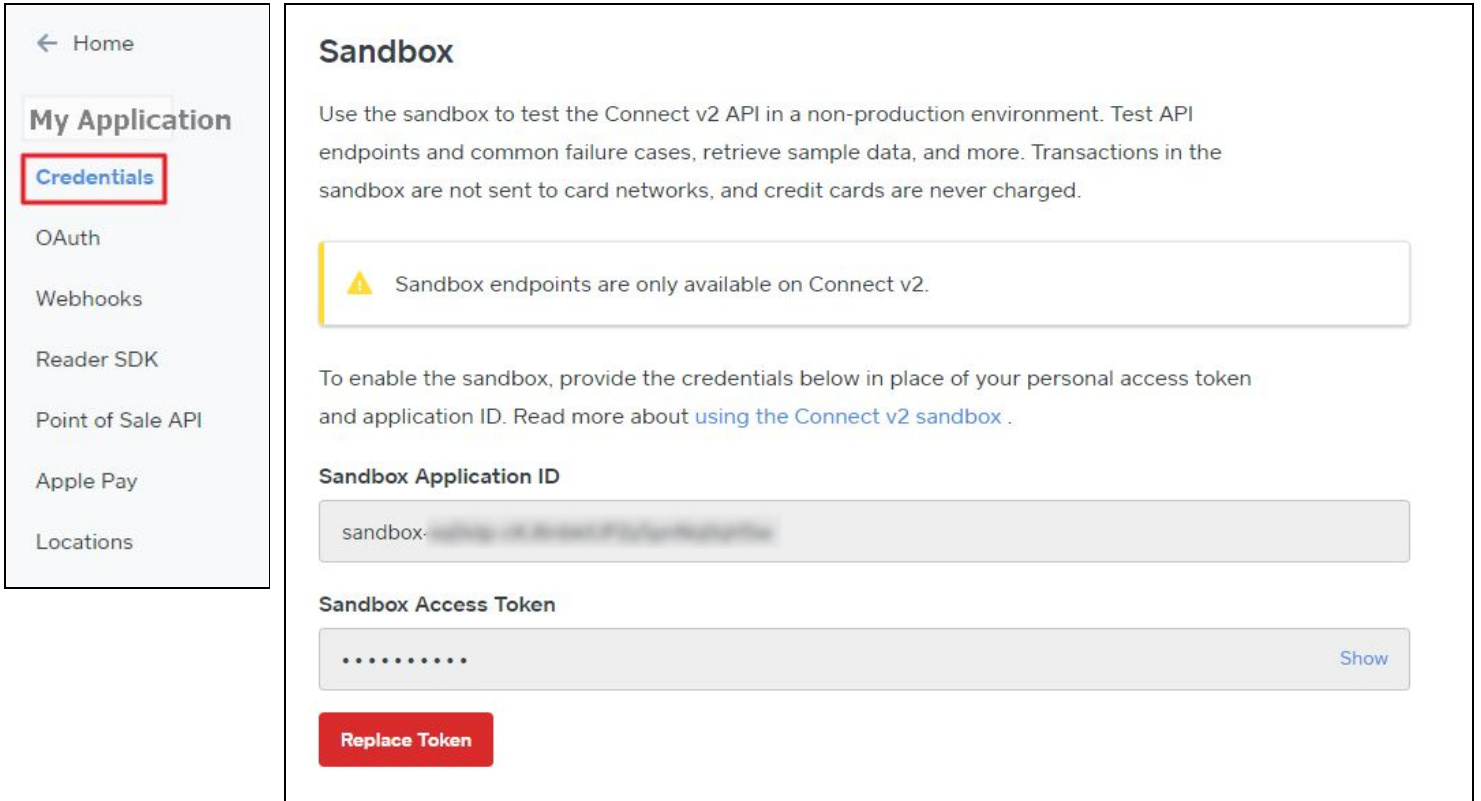
1. **Application ID**
2. **Personal Access Token.**

**Please Note:** To access your Personal Access Token, you will need to select Show (to the right of the field).



## Sandbox

Square also provides a Sandbox area for testing. The credentials for this area are provided in the **Credentials** menu on the lefthand side, as seen below.



**Sandbox**

Use the sandbox to test the Connect v2 API in a non-production environment. Test API endpoints and common failure cases, retrieve sample data, and more. Transactions in the sandbox are not sent to card networks, and credit cards are never charged.

**⚠** Sandbox endpoints are only available on Connect v2.

To enable the sandbox, provide the credentials below in place of your personal access token and application ID. Read more about [using the Connect v2 sandbox](#).

**Sandbox Application ID**

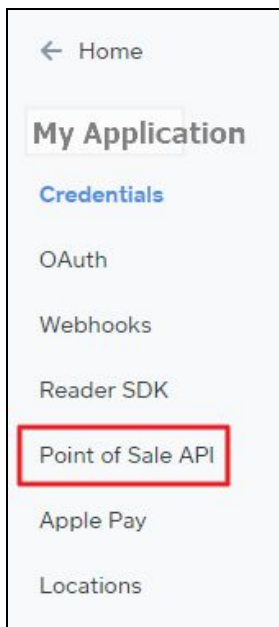
sandbox-

**Sandbox Access Token**

[Show](#)

**Replace Token**

## Configure API access with Clubessential POS App



← Home

**My Application**

**Credentials**

OAuth

Webhooks

Reader SDK

**Point of Sale API**

Apple Pay

Locations

Within the Square application, navigate to the **Point of Sale API** tab along the lefthand navigation.

Enter “com.clubessential.posale” into the box labeled **iOS App Bundle IDs**.

Then enter “clubessential-posale” in the box labeled **iOS App URL Schemes**.

## Point of Sale API

The Square Point of Sale API lets developers integrate with Square Point of Sale to accept payments in native and mobile web applications for iOS and Android.

Read more about [Point of Sale for Web](#) , [Point of Sale API for iOS](#) , and [Point of Sale API for Android](#) .

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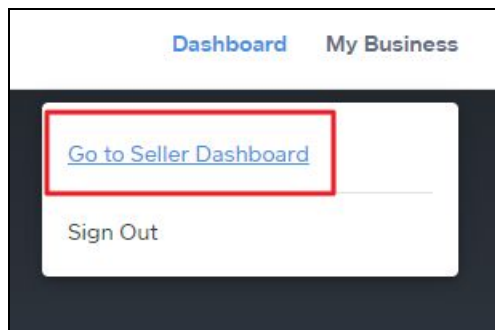
### iOS

**iOS App Bundle IDs**

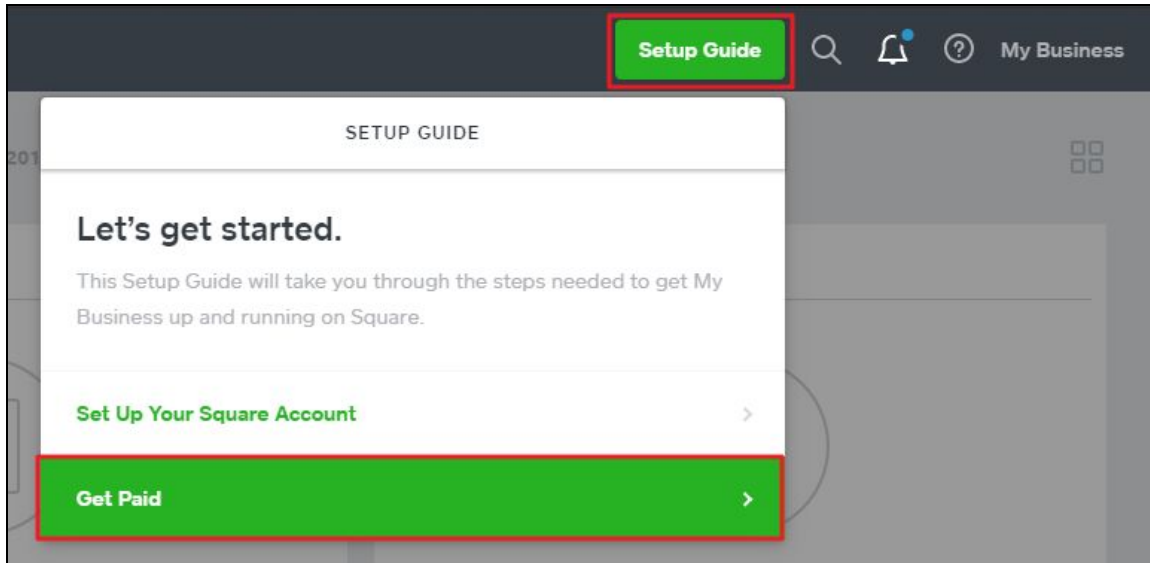
**iOS App URL Schemes** [?](#)

## Add Bank Info (Get Paid)

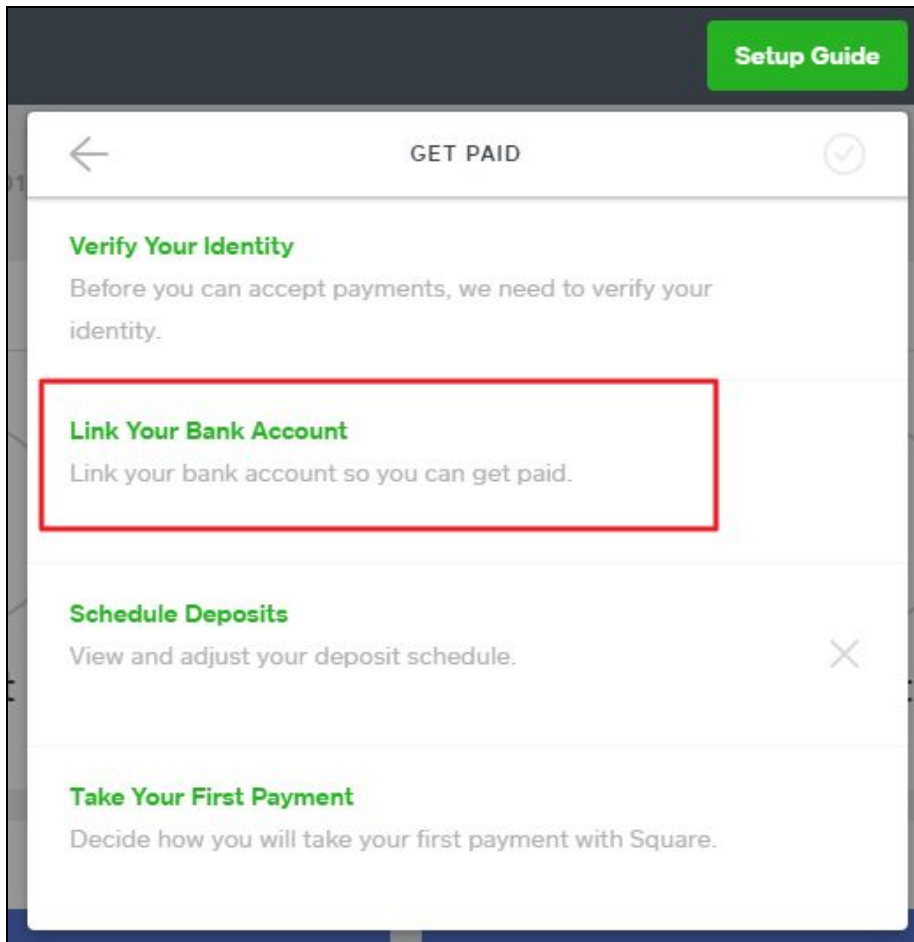
Square must have a bank account in which to send money accepted via the Square Reader. To set this up, please click **My Business** and then **Go to Seller Dashboard** in the top right corner.



Click **Setup Guide** and then **Get Paid**.

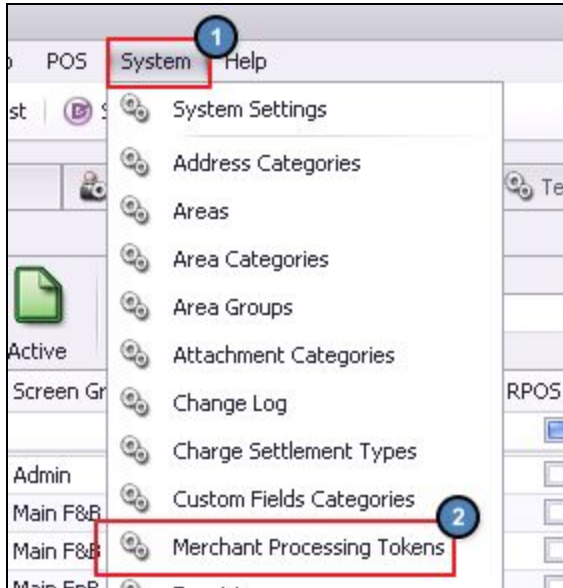


Within the **Get Paid** menu, Users can access a multitude of features to make getting your funds easy. Select **Link Your Bank Account** to get started!

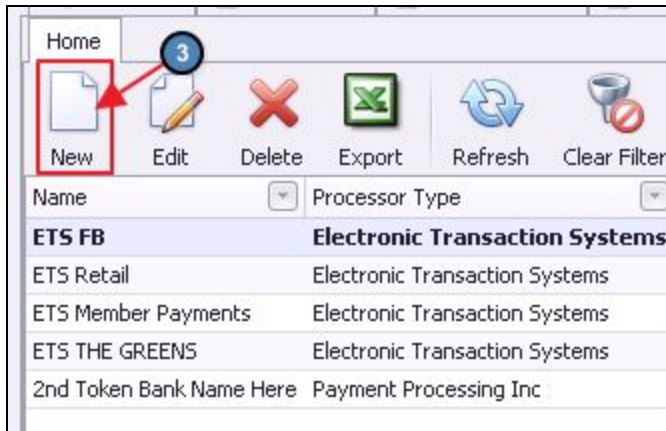


# Configure Processor in Office

Within Office, navigate to **System** then **Merchant Processing Tokens**.

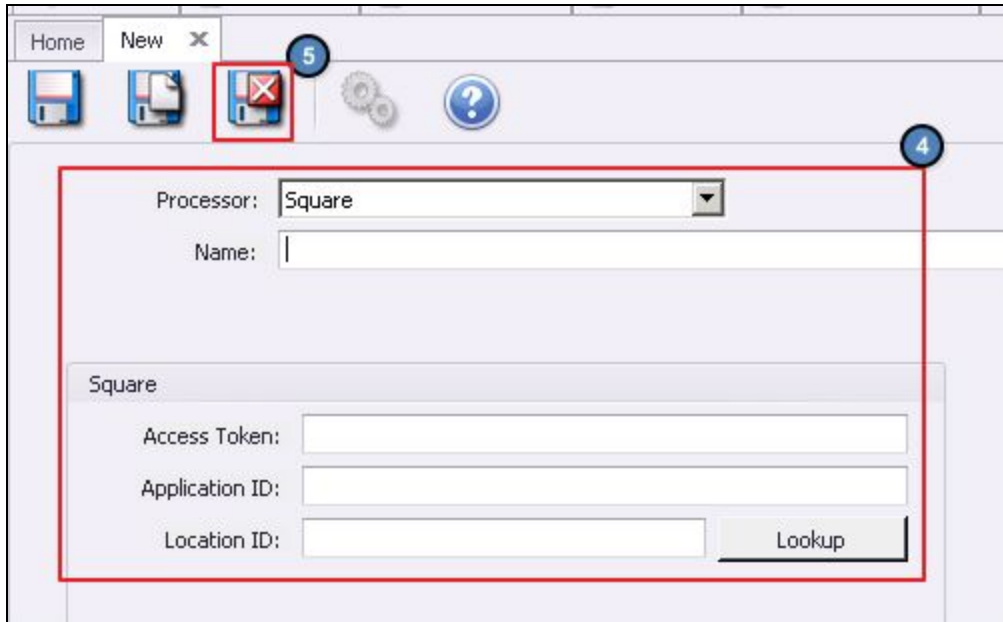


Then, create a **new** token with “Square” set as the processor.



Enter the **Access Token** and **Application ID** from your [Square App Credentials](#) page, retrieved previously. Then select **Lookup** and the location ID will auto-populate.





Click **Save and Close** when finished.

Once saved, you will have created your **Merchant Processing Token**. You will need to reference this token to set up area(s) for the Square Processor in the next step.

## Charge Settlement Type

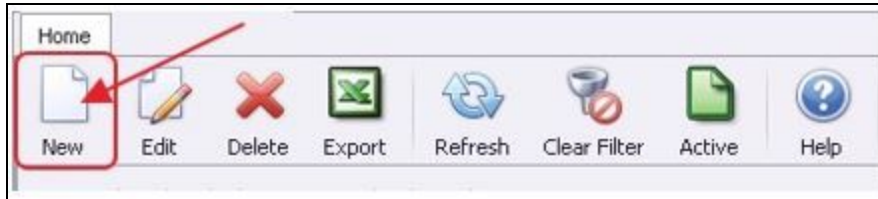
Users must set up the **Charge Settlement Type** in Office for the corresponding Area. Setting up the charge Settlement Type will effectively set up a POS button for Square charges on specific devices in specific Areas.

To access, click **System** then **Charge Settlement Types**, as seen here.



To Create a Charge Settlement Type, navigate to the Charge Settlement Types Grid and perform either of the following to launch the Charge Settlement Type setup screen:

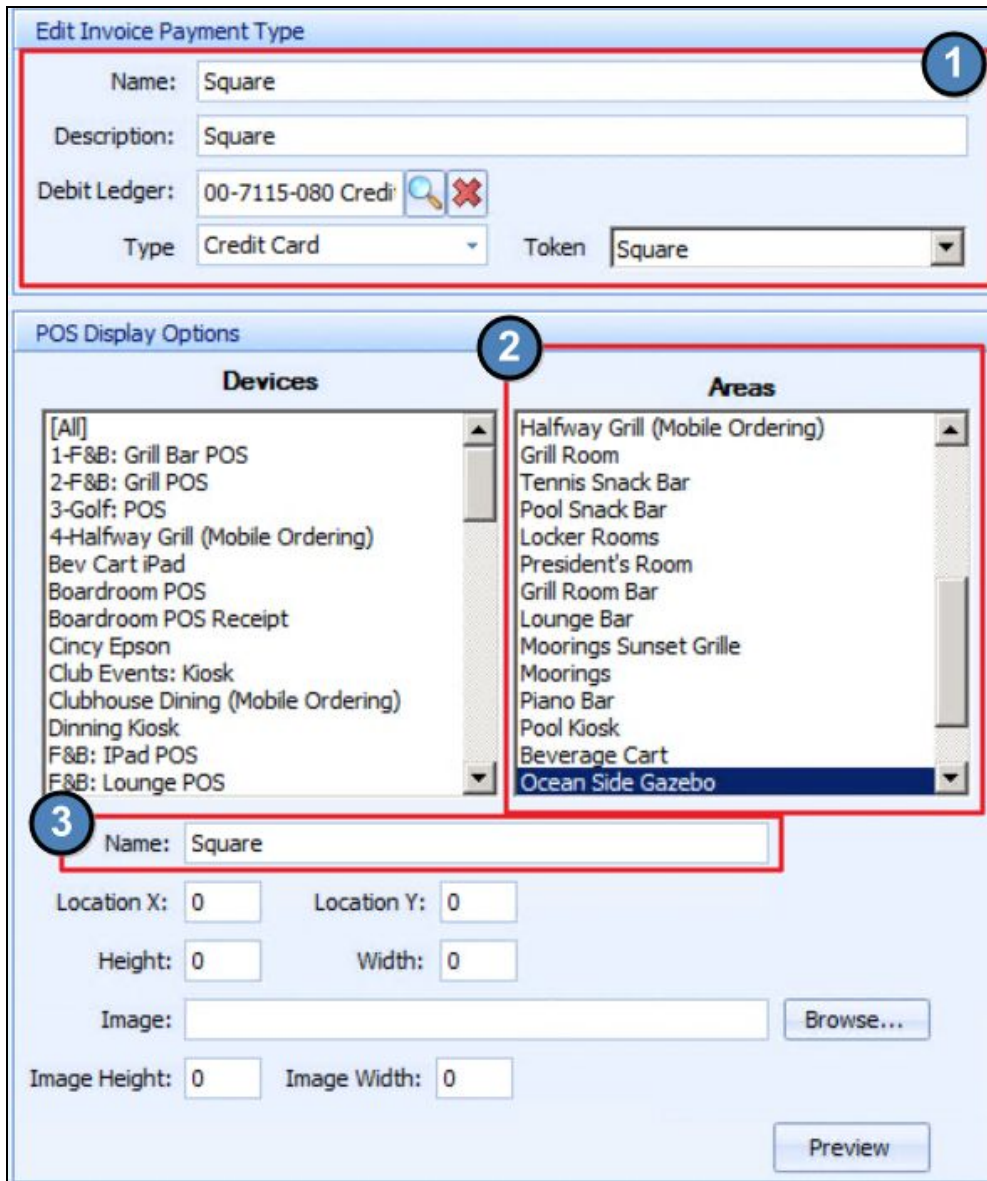
Click the **New** icon on the toolbar.



Right-click anywhere on the Member Types Grid and select **New**.



Next, name your payment type (1), for this example, we have named it Square. Then set the Debit Ledger to the Club's Primary **Operating Account** (If you have questions on what this account should be, please consult with your Club Accountant).



**Edit Invoice Payment Type**

Name: Square

Description: Square

Debit Ledger: 00-7115-080 Credit

Type: Credit Card

Token: Square

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**POS Display Options**

Devices	Areas
[All]	Halfway Grill (Mobile Ordering)
1-F&B: Grill Bar POS	Grill Room
2-F&B: Grill POS	Tennis Snack Bar
3-Golf: POS	Pool Snack Bar
4-Halfway Grill (Mobile Ordering)	Locker Rooms
Bev Cart iPad	President's Room
Boardroom POS	Grill Room Bar
Boardroom POS Receipt	Lounge Bar
Cincy Epson	Moorings Sunset Grille
Club Events: Kiosk	Moorings
Clubhouse Dining (Mobile Ordering)	Piano Bar
Dinning Kiosk	Pool Kiosk
F&B: iPad POS	Beverage Cart
F&B: Lounge POS	<b>Ocean Side Gazebo</b>

Name: Square

Location X: 0      Location Y: 0

Height: 0      Width: 0

Image:

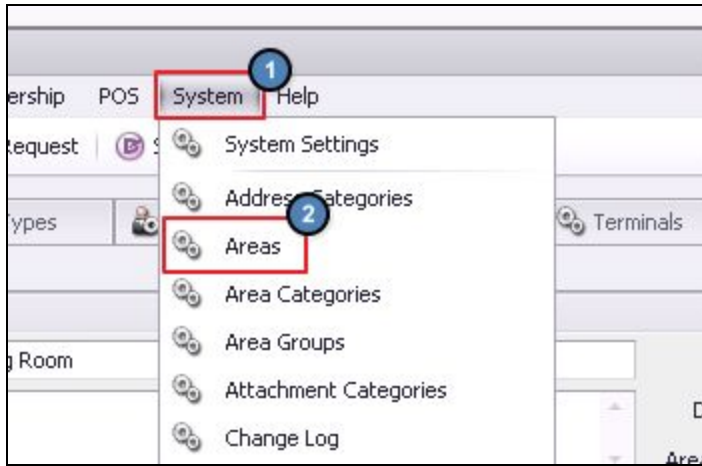
Image Height: 0      Image Width: 0

Select the corresponding **Area** (2) from the list in accordance with where the Square reader will be taking payments. For this example, we are using the Ocean Side Gazebo. Leave the remaining fields alone.

**Please Note:** The **Name** section highlighted above (3) is the Display Name of the Square option in the POS.

## Setup Area(s) for Square Processor

Next, configure each area(s) that will accept Credit Card Payments via the Mobile POS appropriately. To do this, go to **System** then **Areas**.



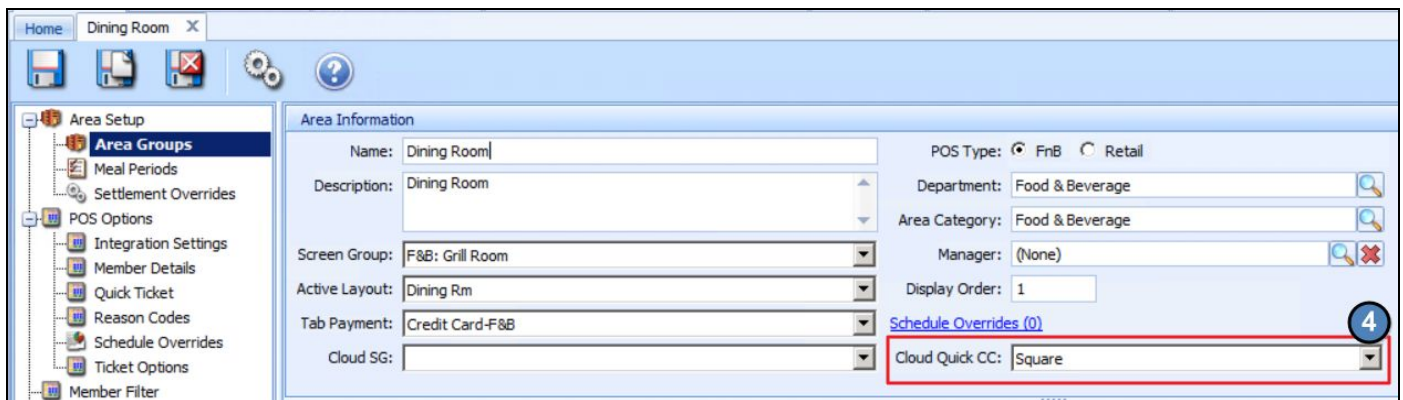
Home

New Edit Delete Export Refresh Clear Filter Active Help Search: [ ] All Words Any Word

ID	Name	Active Layout ID	Screen Group File	RPOS	Disable Gratuity Settlement	POS Check In	Pay Ticket ID	Settle Ticket ID	Use Coursing	Use Firing
1	Administration		Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		28	29	<input type="checkbox"/>
28	Banquet Member		Main F&B	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		28	29	<input checked="" type="checkbox"/>
29	Banquet Non-Member		Main F&B	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		28	29	<input type="checkbox"/>
33	Bar	Din Rm Layout	Main FnB with Pics by Carlie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	29	<input checked="" type="checkbox"/>	<input type="checkbox"/>
36	Bar 2	Din Rm Layout	Main FnB with Pics by Carlie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	29	<input checked="" type="checkbox"/>	<input type="checkbox"/>
26	Beverage Cart	Dining Rm Easter	Beverages	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	3	<input type="checkbox"/>	<input type="checkbox"/>
27	Carlie's F&B Area	Din Rm Layout	Main FnB with Pics by Carlie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	29	<input type="checkbox"/>	<input checked="" type="checkbox"/>
24	Carlie's Retail Area	BR Pasta Buffet	Golf	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4	3	<input type="checkbox"/>	<input type="checkbox"/>
4	Club Functions Ballroom	Ballroom	Easter Buffet New	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28	29	<input type="checkbox"/>	<input type="checkbox"/>
10	Club Functions Dining Rm	Dining Rm Easter	Easter Buffet New	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28	29	<input type="checkbox"/>	<input type="checkbox"/>
11	Club Functions Hill-AGB	Hill-AGB Easter	Easter Buffet New	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28	29	<input type="checkbox"/>	<input type="checkbox"/>
2	Dining Room	Robin FB	Popshack	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	29	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	Fitness		Fitness New	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	47	48	<input type="checkbox"/>	<input type="checkbox"/>
22	Golf	0	Golf	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	47	29	<input type="checkbox"/>	<input type="checkbox"/>
7	Golf	AGB Layout	Main F&B	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	29	29	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select the **Area** you wish to set up with Square processing capabilities.

Set the **Cloud Quick CC** option to the Charge Settlement Type you set up in the previous [section](#).



**Save and Close** when finished. Repeat as needed for other areas.

## FAQs

**Q: The API setup only shows iOS in this guide, is this available for Android devices?**

A: The Mobile POS is only available on iOS/Apple devices currently.

**Q: We don't see the Square button on our terminal, why not?**

A: Ensure the user has logged out and logged back into the POS to see saved changes. Additionally, verify that the area(s) and/or terminal workstation(s) are configured properly to display the button.

## Best Practices

- Setting up the [Square App Sandbox](#) account is a great way to test the product and/or train employees before fully implementing into the Club's Mobile POS lineup.