Square Setup for Mobile POS

2019 - Summer Edition

User Guide - Table of Contents

Overview

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

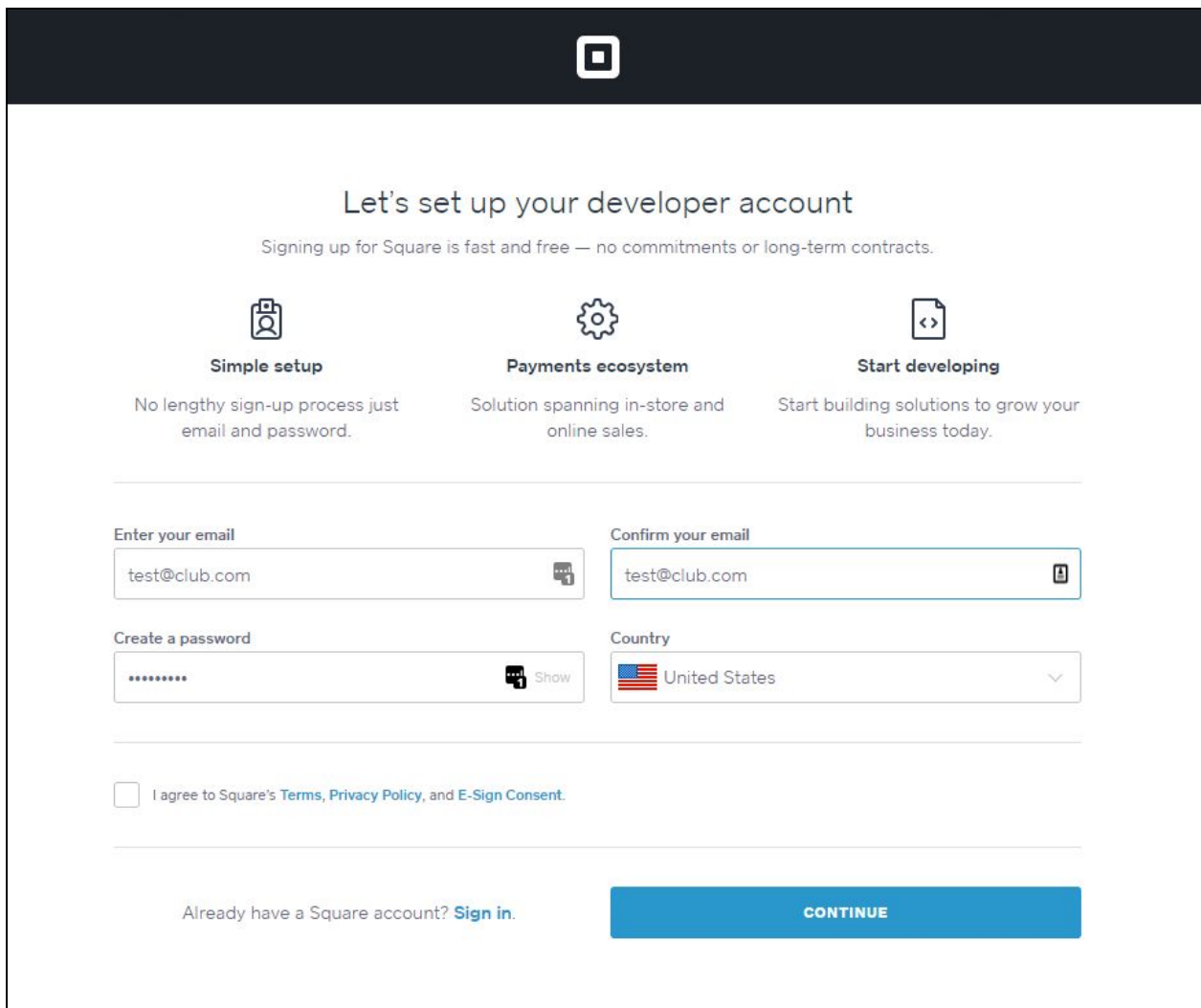## Use Case(s)

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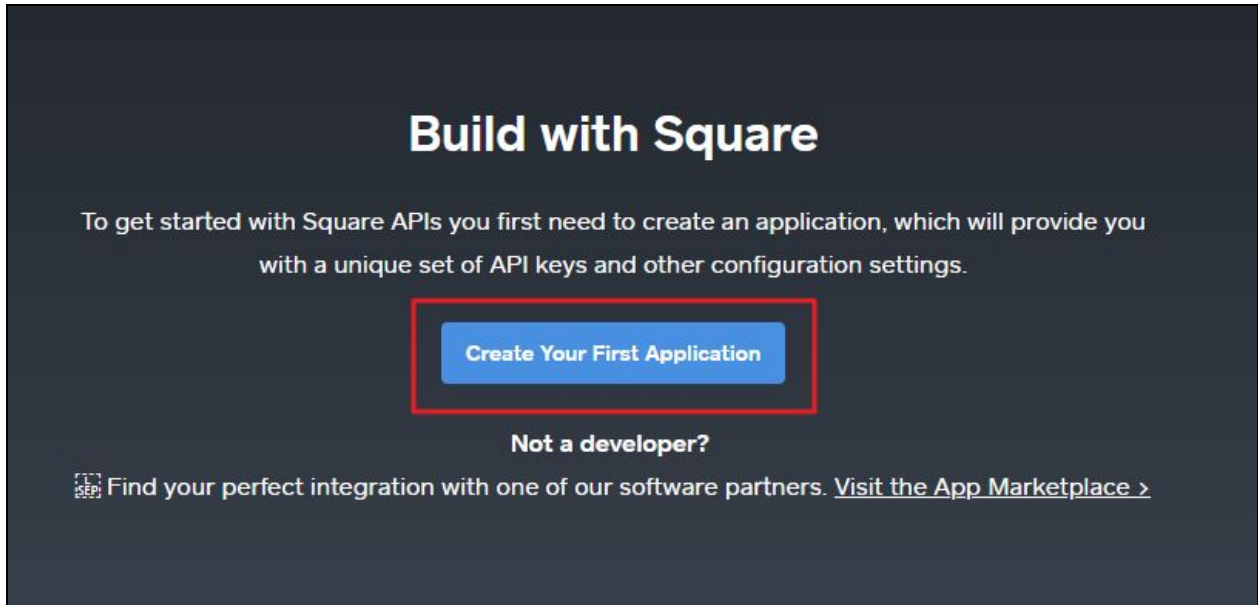
Accessing the Tool

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

Please Note: *This setup must be completed on a desktop. The settings will not save properly if using a tablet or mobile device.*
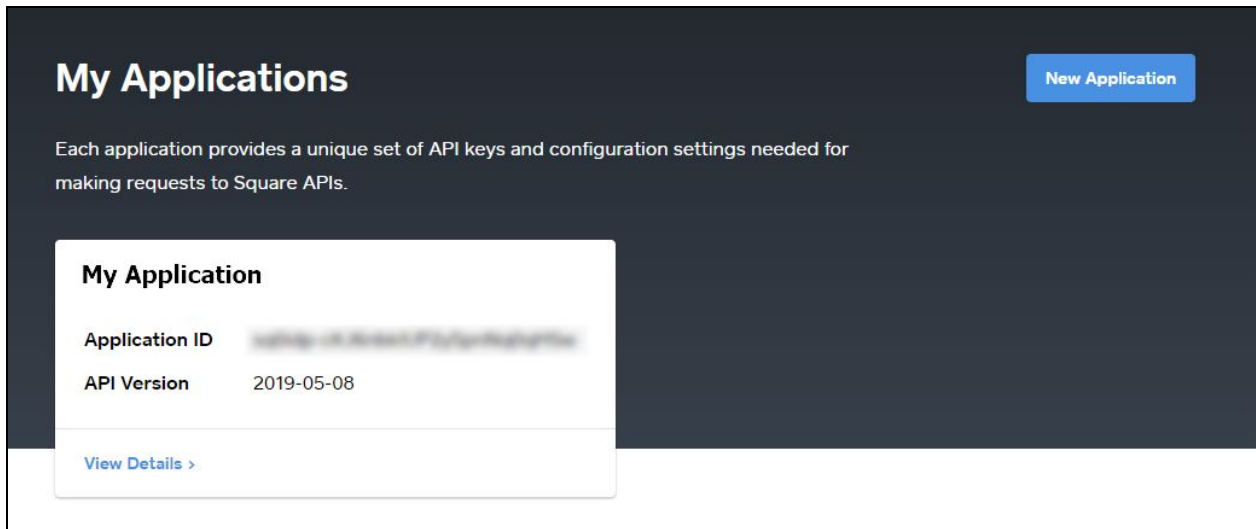
Select **Create Your First Application**

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

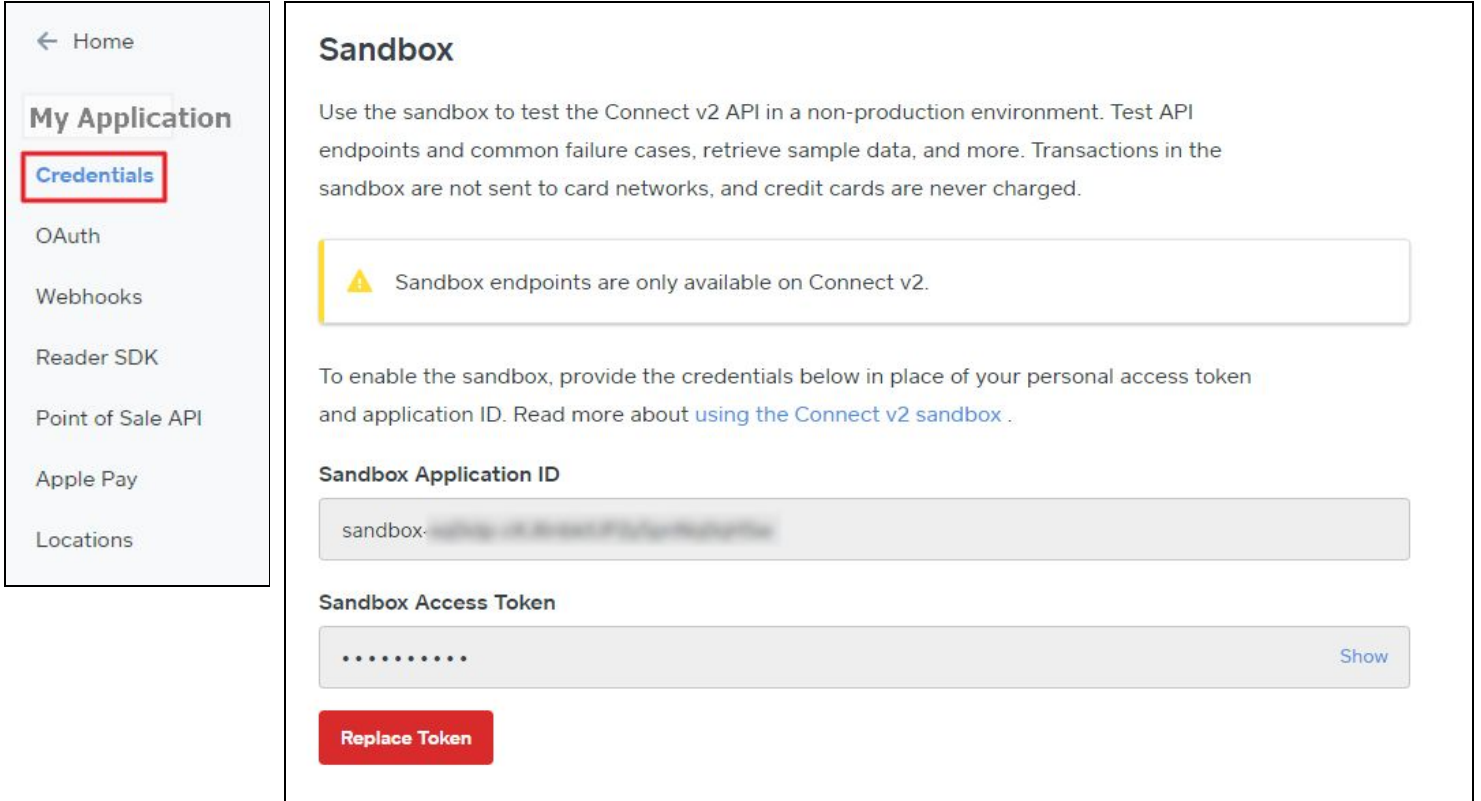Once you create your Square App, please note these two items as listed on the Credentials page:

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.

Configure API access with Clubessential POS App

Within the Square application, navigate to the **Point of Sale API** tab along the left-hand 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 .
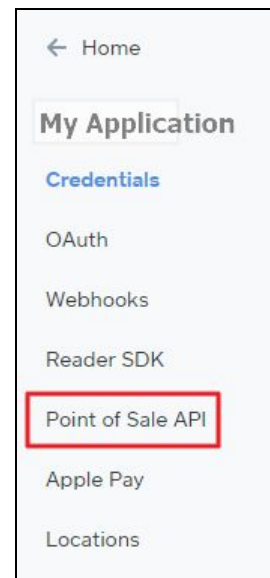
iOS

iOS App Bundle IDs

> e.g. com.example.jsmith.HelloSquare

iOS App URL Schemes ⓘ

> e.g. hellosquare

Android API Access

Within the Square application, navigate to the Point of Sale API tab along the left-hand navigation.

From the Point of Sale API menu, scroll down to the **Android** setup section, shown below.

← Home

My Application

Credentials

OAuth

Webhooks

Reader SDK

Point of Sale API

Apple Pay

Locations

Please Note: Enter both of the following sets of information for Android setup.

**Package Name**: com.clubessential.pointofsale

Fingerprint: 84:00:77:79:BB:E3:EE:47:8A:9B:B6:99:12:E7:9E:E5:81:F6:37:10

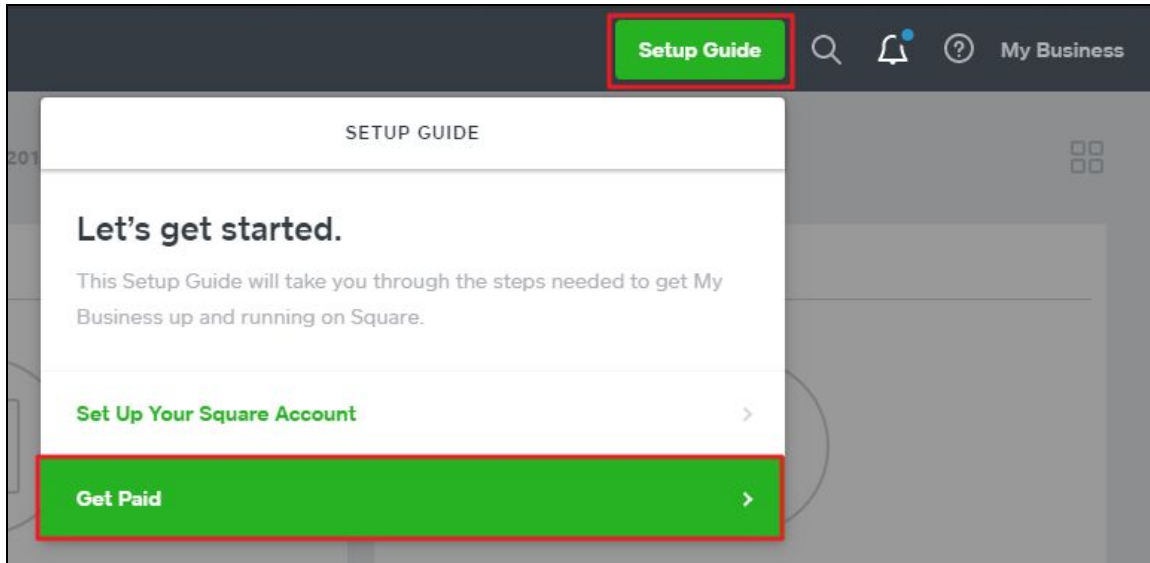**Package Name**: com.clubessential.pointofsale

Fingerprint: D5:47:F1:C7:36:0C:E9:3D:81:24:2F:16:D9:F1:D2:F5:A2:77:D6:FA


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.
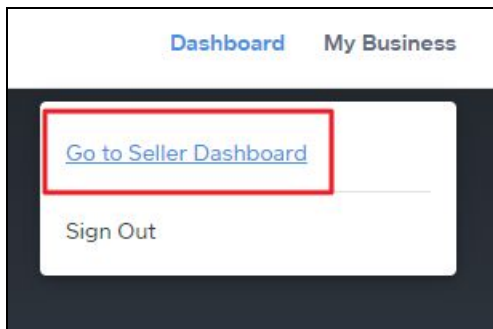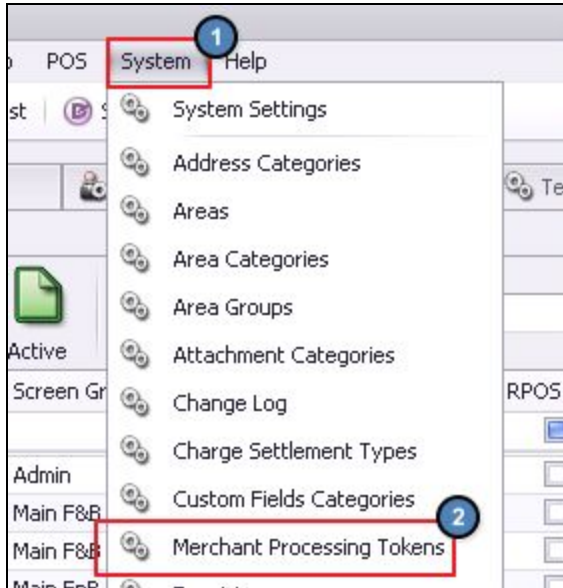

Click **Setup Guide** and then **Get Paid.**

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!
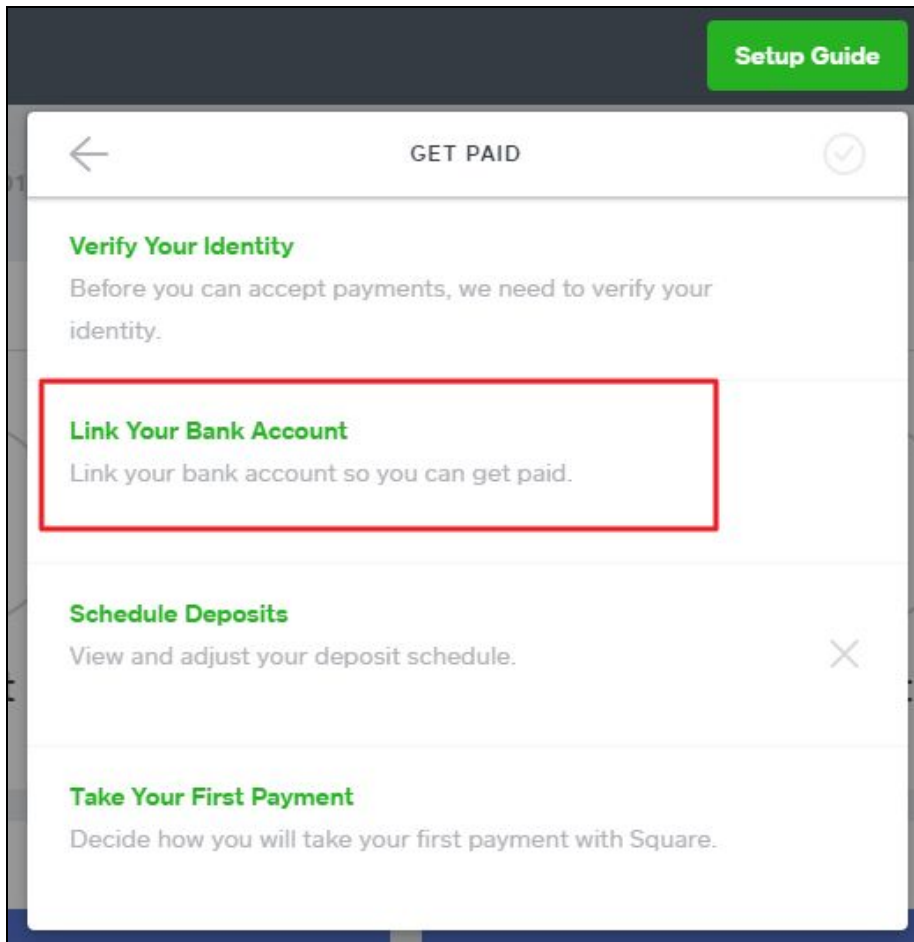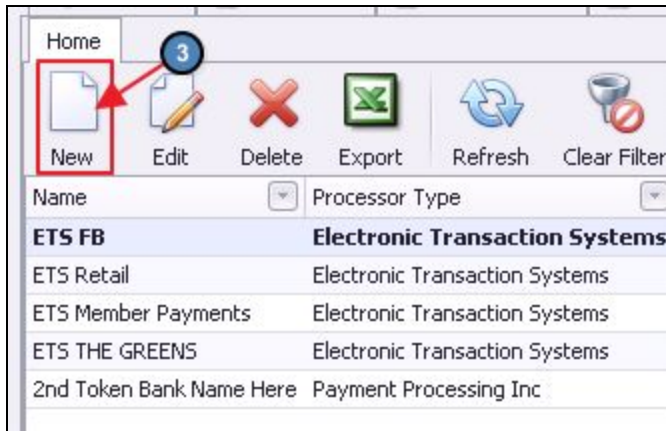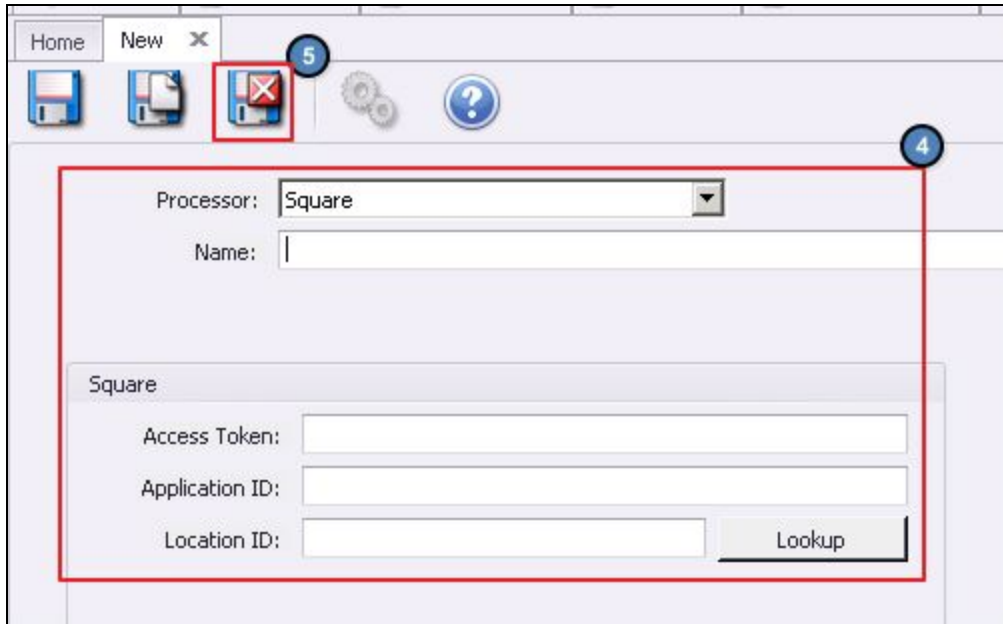
Configure Processor in Office

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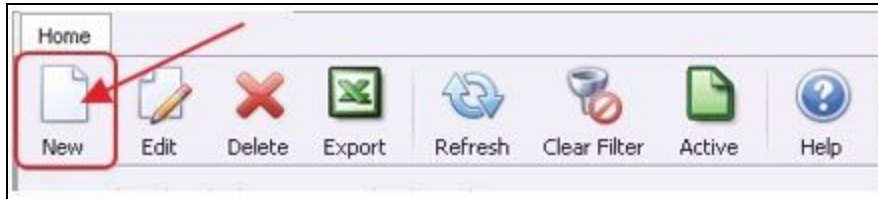
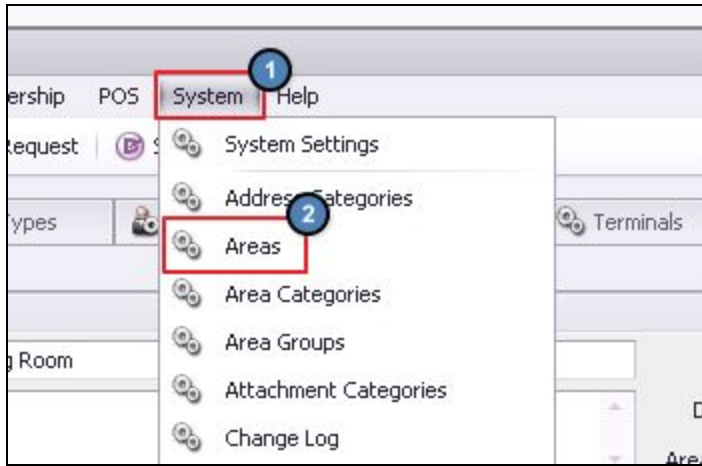Right-click anywhere on the Member Types Grid and select **New**.

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).

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.
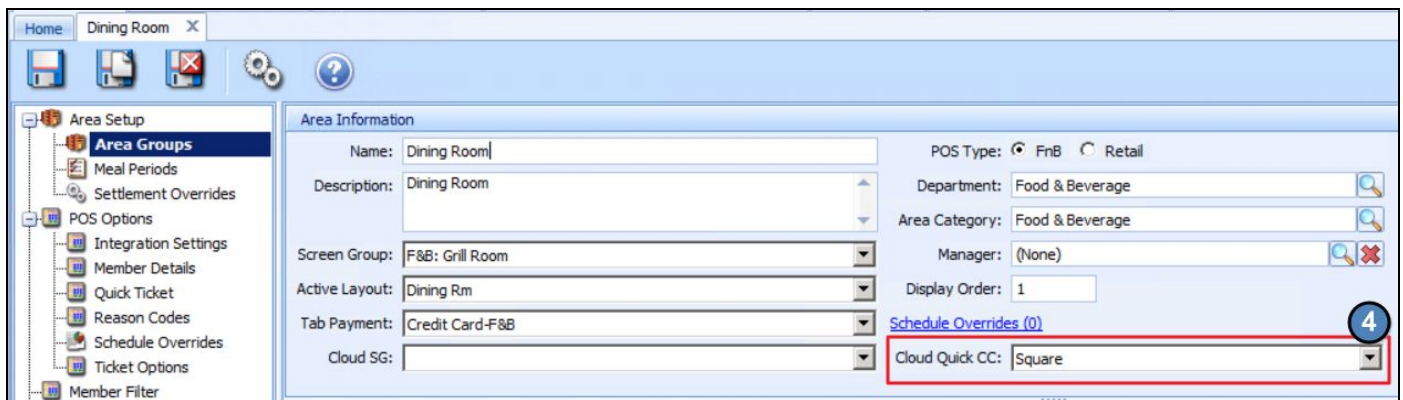
Setup Area(s) for Square Processor

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

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.
- This setup must be completed on a desktop. The settings will not save properly if using a tablet or mobile device.