

USING SQUARE

Arlington Historical Society

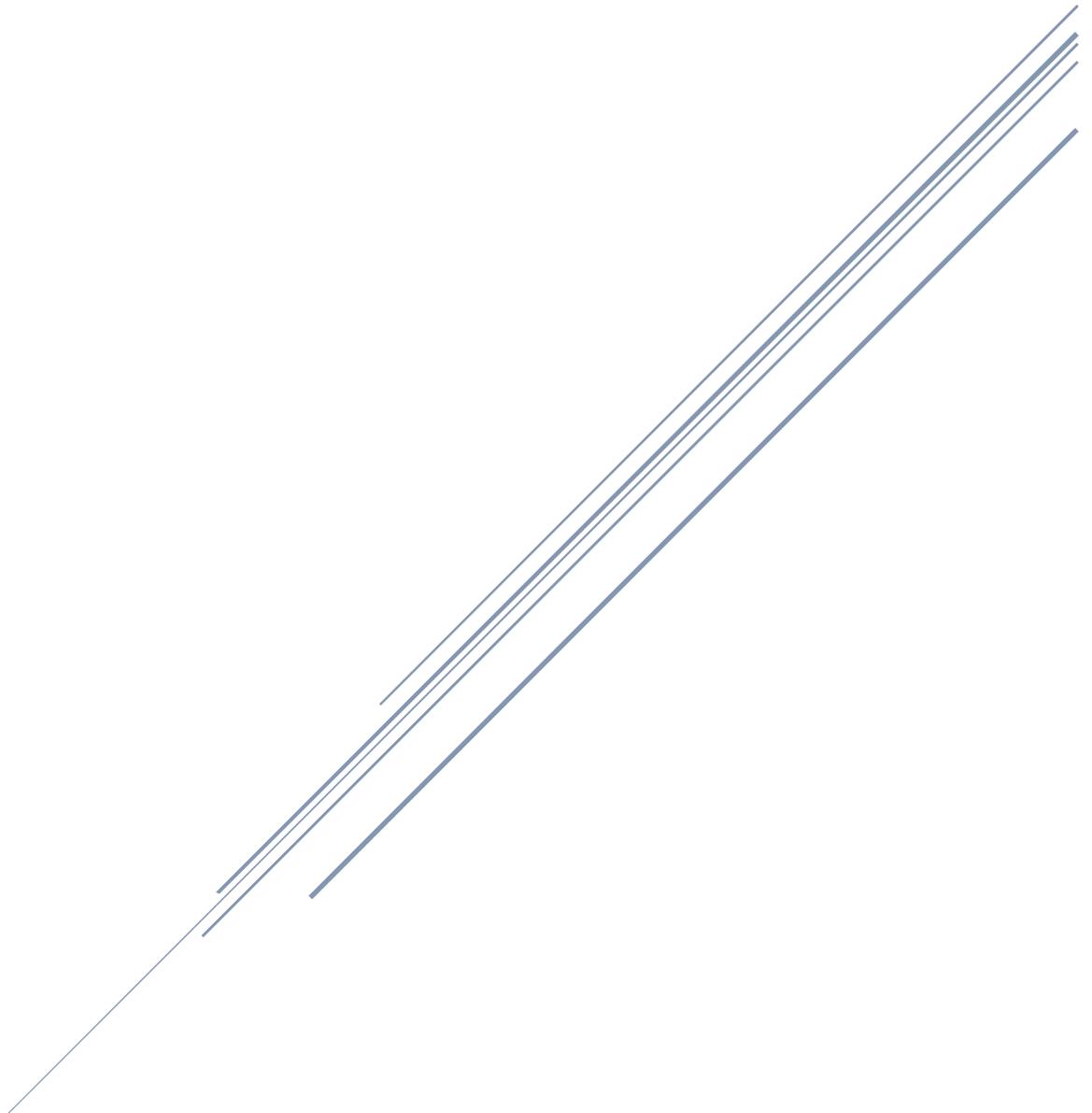


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Square POS System

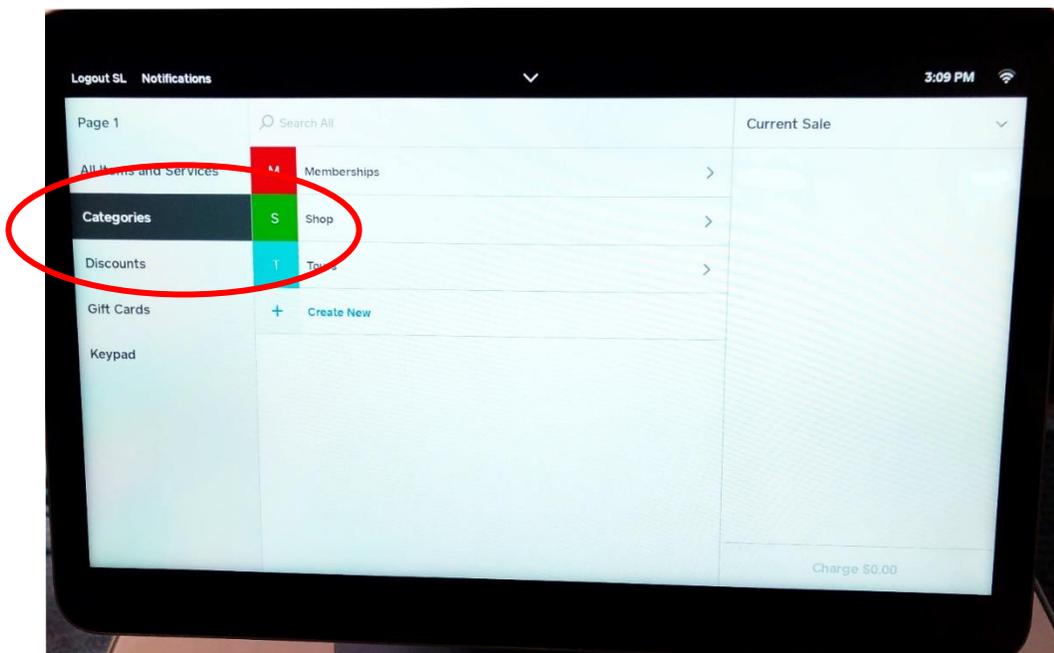
Setting Up:

Start of Shift:

- Retrieve Cash drawer from storage location and place in desk drawer.
- Wake up Square POS System. Along the bottom of the screen in the middle is a button. Press that and Square Register will “wake up”.



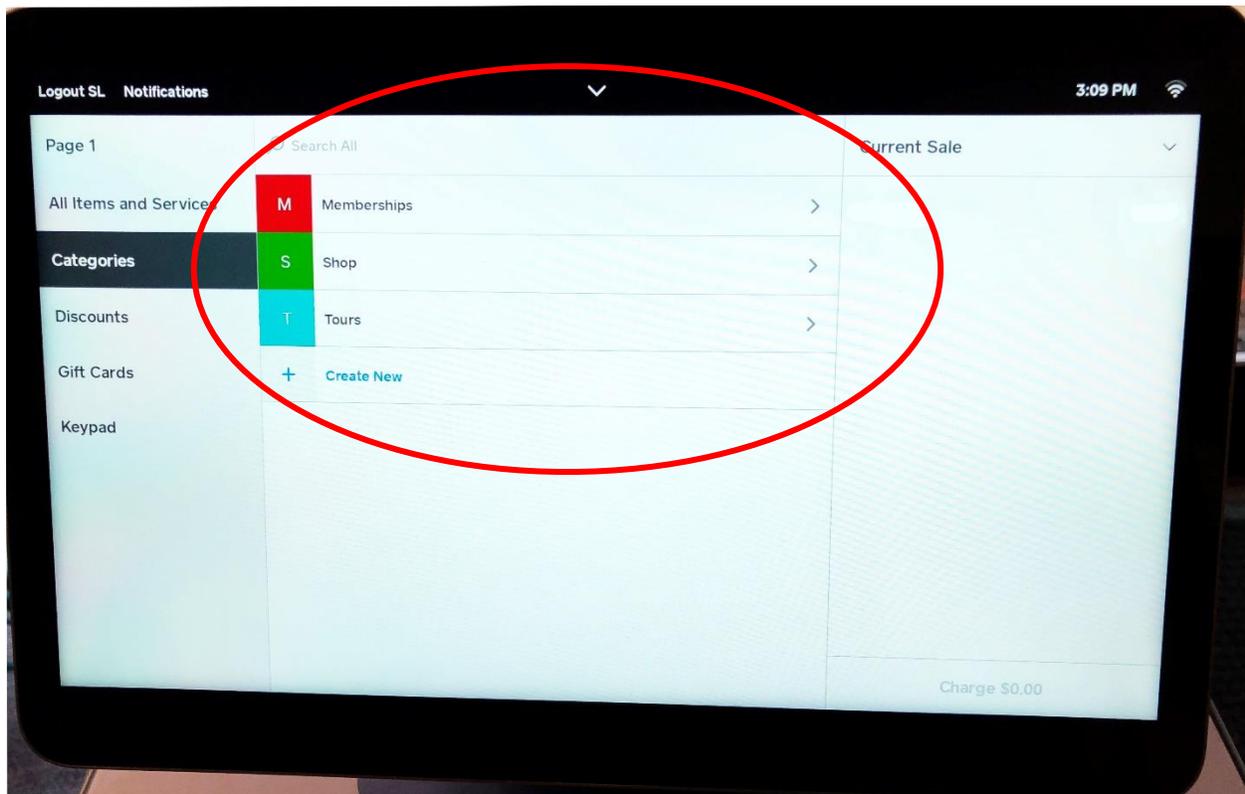
- Along the left-hand side of the screen, you will see a menu of items. Select: “Categories”. Down the center of the screen is now a menu of options you will select from as visitors arrive. Square is ready for customers



Using Square:

When a visitor arrives, you will select from the categories menu the appropriate option. From the center menu you will select from:

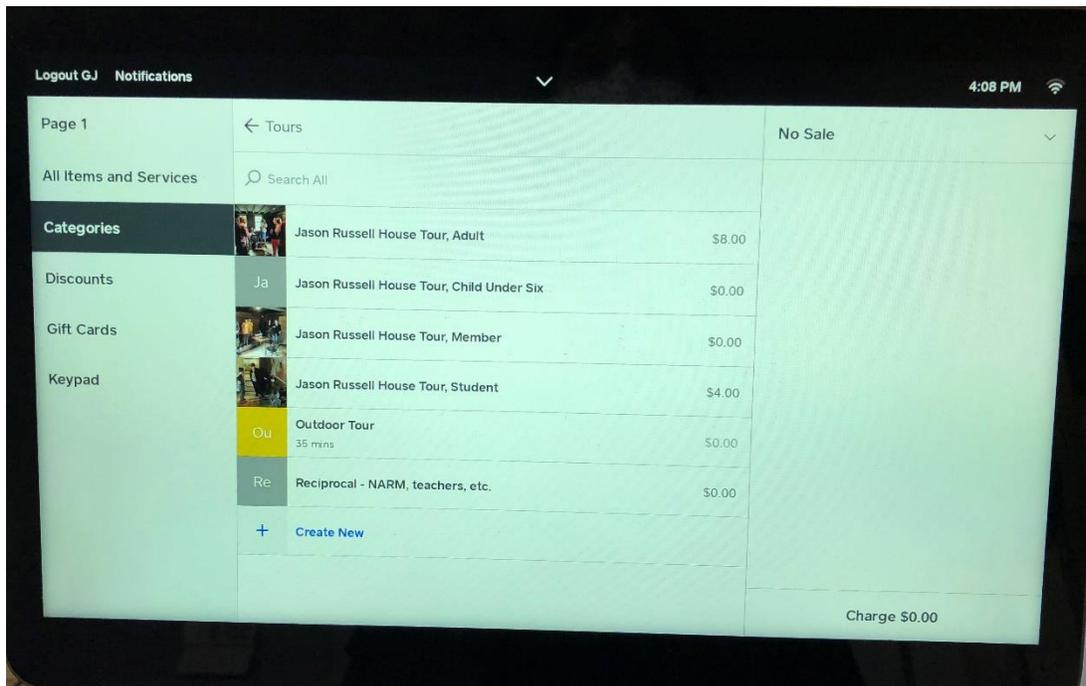
- Memberships – You will only use this option if a visitor wishes to purchase a membership with the Arlington Historical Society or if they wish to make a donation
- Shop – This will list all the books, postcards and other items we have for sale on the book cart
- Tours – This will list all of our tour options available. This also includes all “free” tours i.e., members or NARM members. Enter in all tours, including “free” tours so we can track the number of visitors taking the tour.



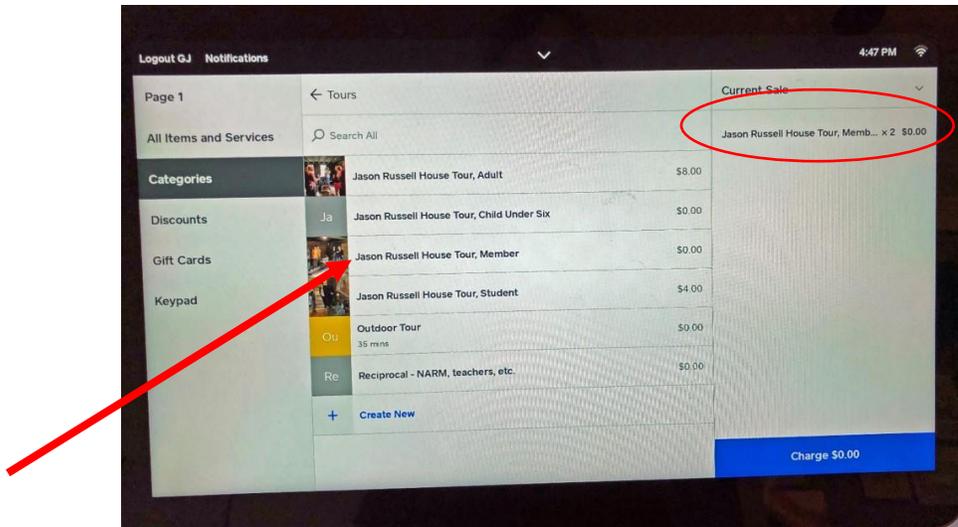
- As you select each option you will be presented with a menu of items you can select from.

Tours:

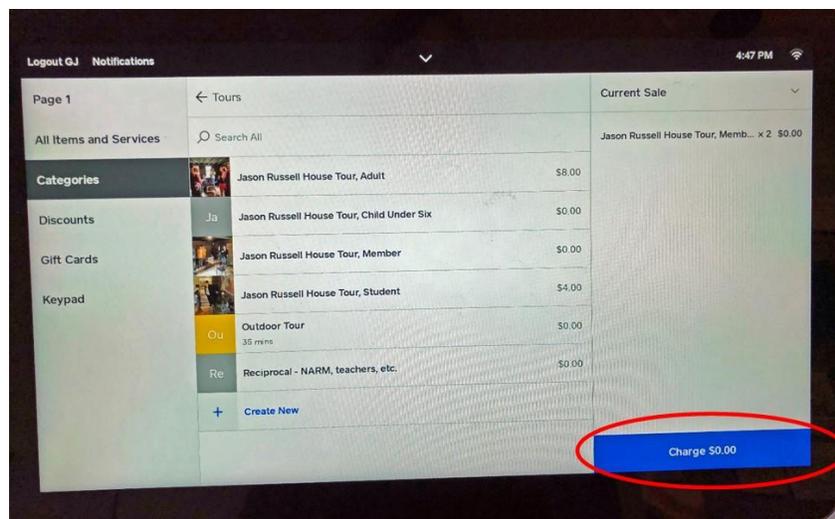
- When a customer comes in requesting a tour, select the category “Tours”.



- Select the number of adults, child, member, NARM member tours required.
 - Reciprocal tours are those who have a NARM membership, are a teacher or are Active Military

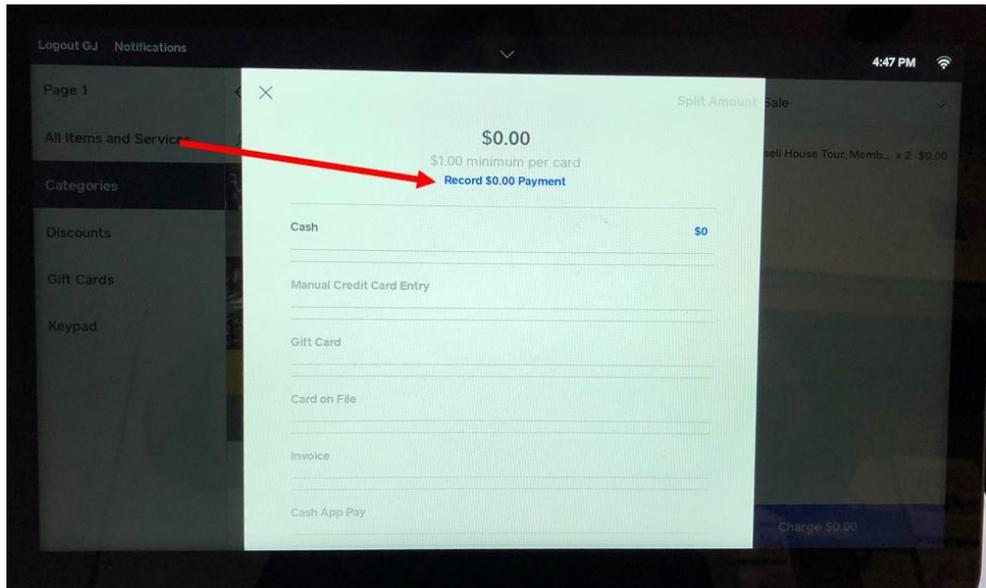


- In this example 2 adult members are taking a tour. You have tapped the “Jason Russell House Tour, Member” item twice.
- Once you have entered the tours click on or tap “Charge” on the bottom right of the screen. Click on charge even if the tours are for members and there is no charge. You are to complete the *sale* in Square so we have a record of the number of tours given.



Processing a \$0.00 payment

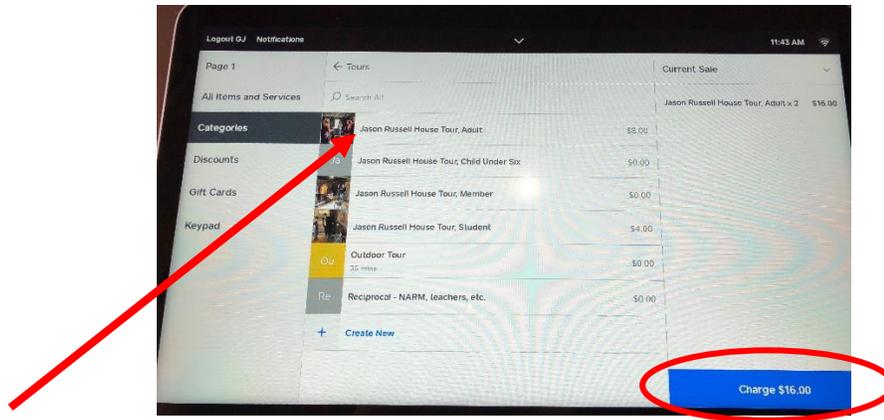
- When you are processing a member tour for \$0.00, you tap the blue charge button at the bottom right of the screen. On the next screen you will “complete the sale”. Tap on the blue words “Record \$0.00 Payment”.



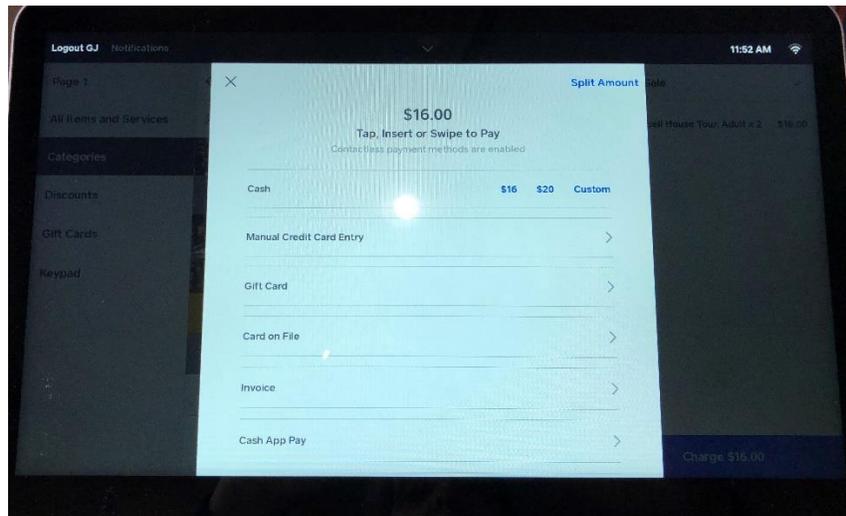
- This will record the number of individuals taking a tour in Square.

Paid Tours:

- If you had two adult paying customers show up to take a tour of the house, you would tap the item “Jason Russell House Tour, Adult” twice.



- Now you will tap the blue box where there is a charge of \$16.00.
- The payment screen now looks like this:



- Depending on how the customer wishes to pay will determine what your next steps are.

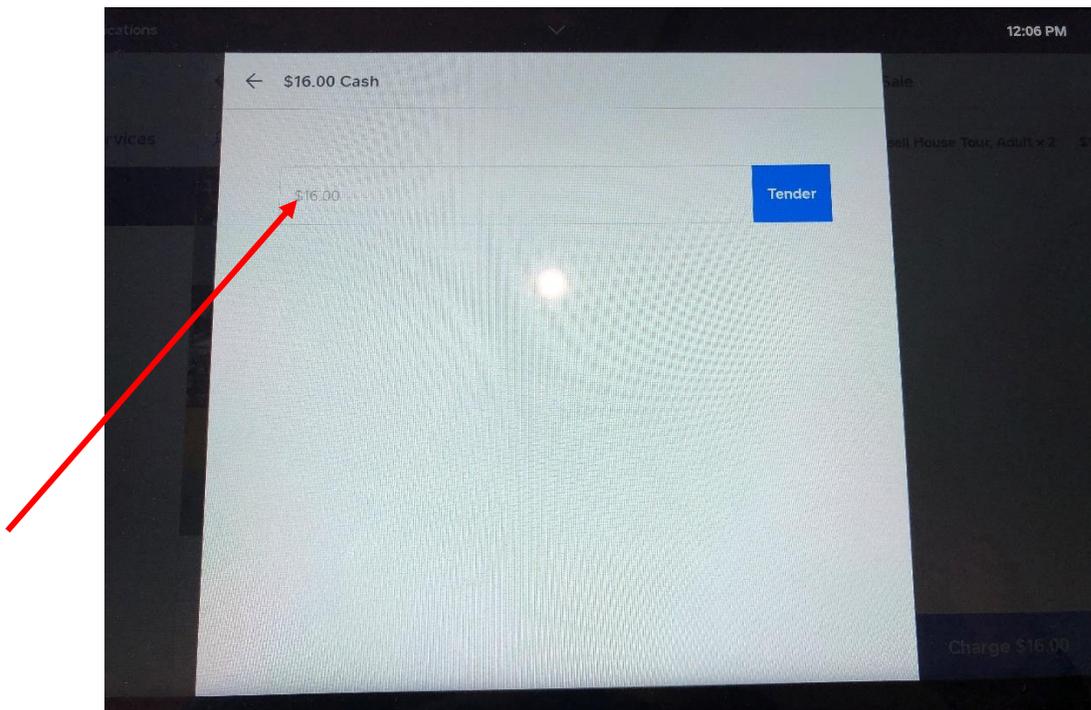
Processing Payments:

Paying by Cash

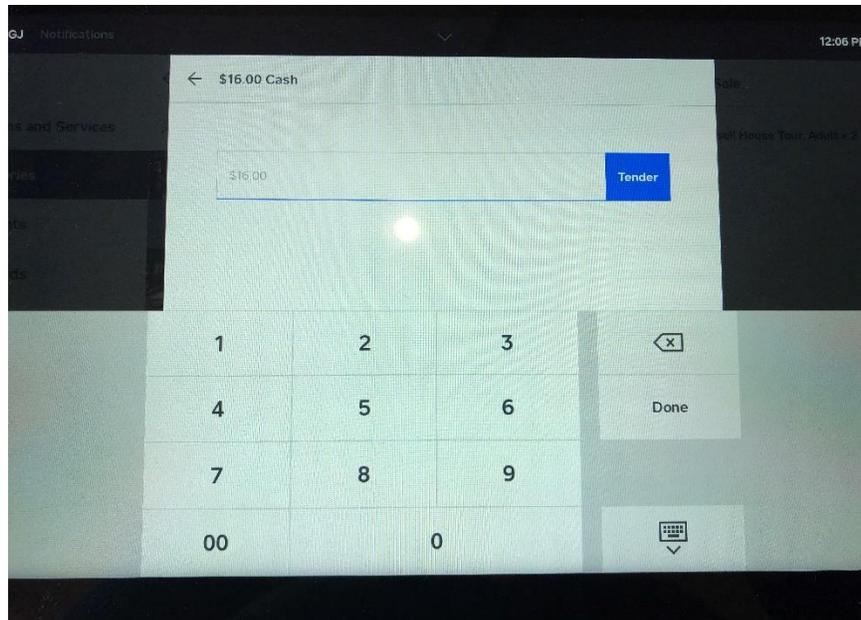
- If the customer wishes to pay by cash, you will notice you have a couple of options. Square gives you the most common cash options. In this example you have the choices of \$16, \$20 or a custom amount.
 - If the customer gives you exact change, tap \$16
 - If the customer gives you \$20, tap the \$20 option. Square will tell you how much change to give.
 - If you tap Custom, you will then enter in the amount of cash the customer has handed to you.

Entering a Custom Cash amount

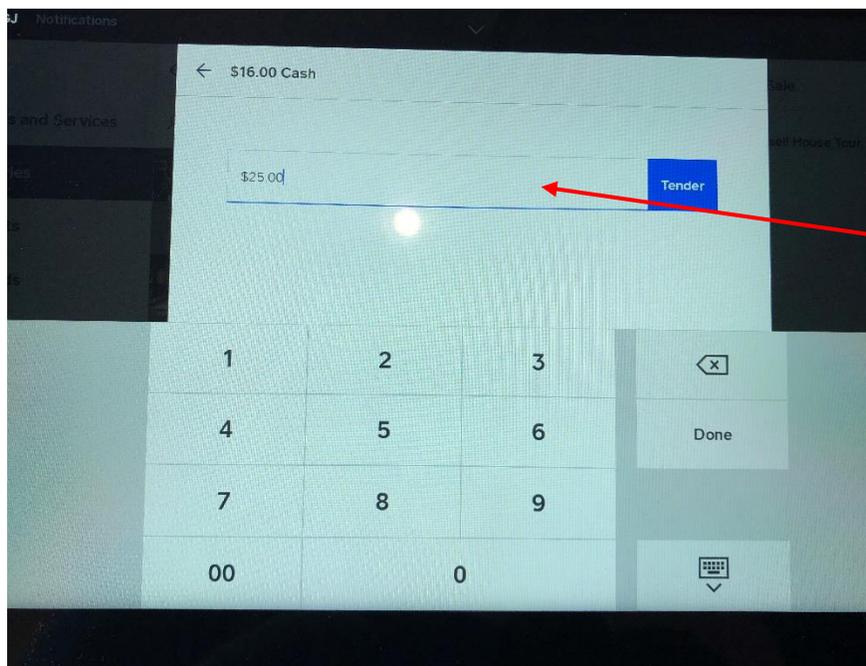
- If you tap Custom, the following screen will appear on Square.



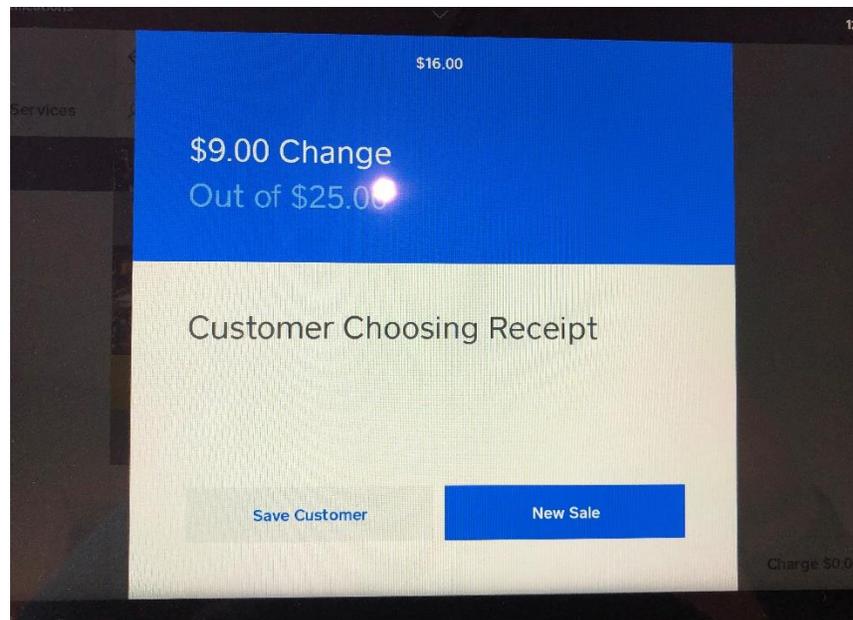
- Tap the box where you see the \$16.00 amount in light grey.



- Using the number pad Square now presents, type in the amount of money the customer has handed to you.



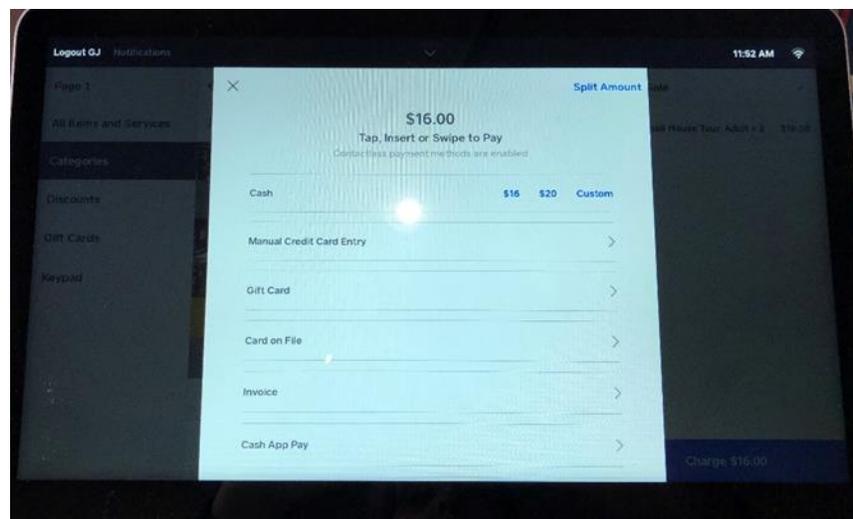
- In this example the customer will hand you \$25.00. Once you enter in the amount, tap the blue “Tender” square.



- Square will tell you how much change to give. On the customer side of the register, they will decide if they want a receipt, and if so, how they want it delivered.

Paying by Credit Card:

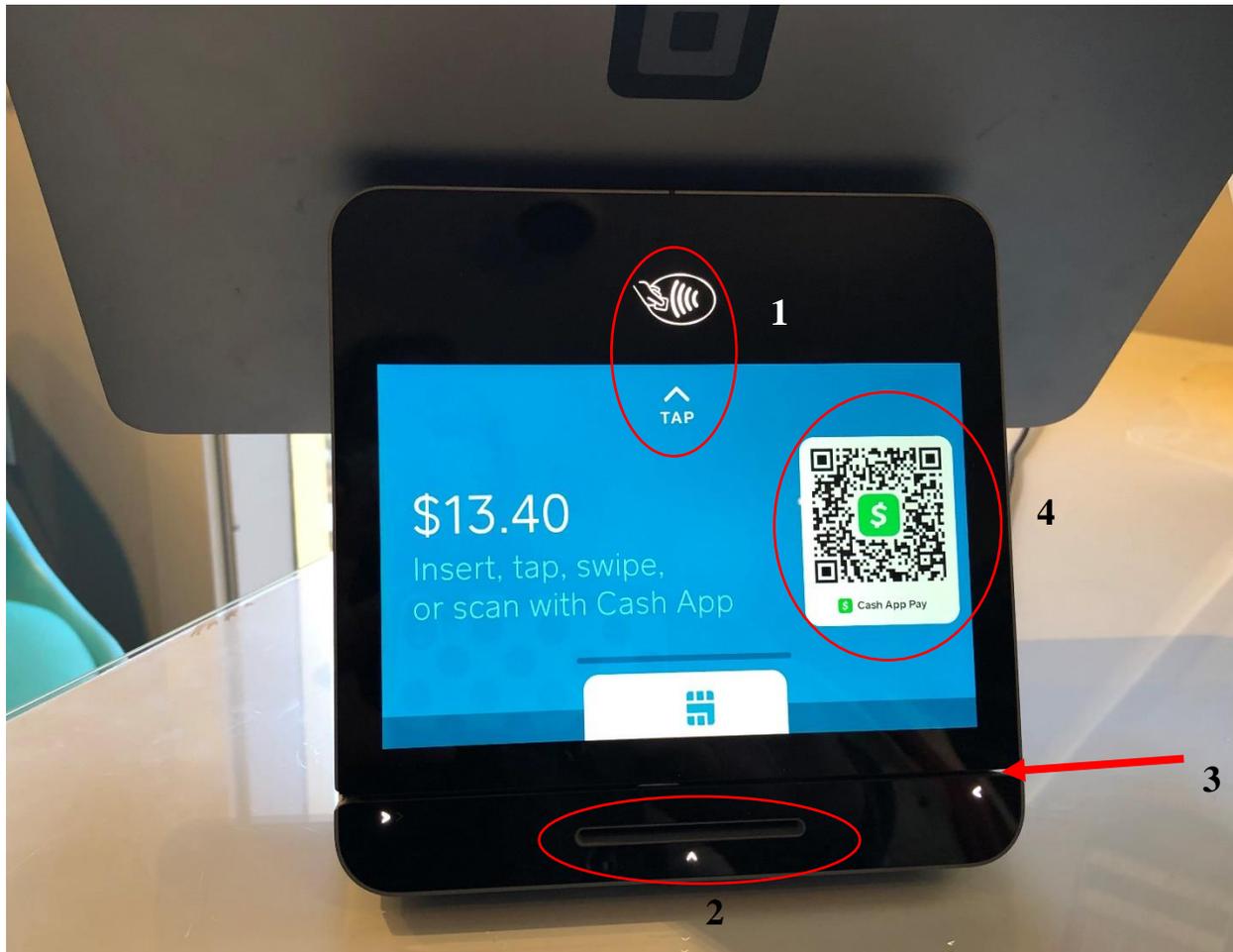
- When a customer is paying by credit card, once you have tapped the blue box with the charge amount you will come to the same screen you saw in the previous description on how to pay by cash:



- When you see this screen, you **DO NOT HAVE TO DO ANYTHING**. You just wait for the customer to use their credit card.

What the customer sees during the payment transaction:

- Whether paying by cash or credit the initial screen that the customer sees on their side of the register is the same. This information is for you in case the visitor is having problems or asks how to pay.:

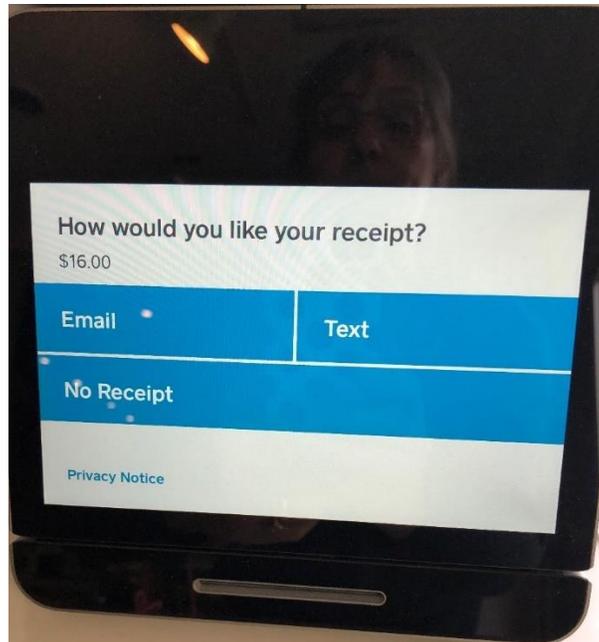


- If they are paying by credit card, which this screen initially looks like, the customer has the following options:
 1. Tap – Customer taps card at top of screen. If the customer has Apple Pay or Google Pay, they would use their smartphone and “tap” in the same place as a credit card.
 2. Insert – Customer inserts the chip side of their credit card in slot at bottom of screen
 3. Swipe – Customer swipes the mag strip of their card along opening above the insert slot. The mag strip can be up or down, they can go left or right.
 4. Cash App – Customer uses the camera on their smartphone focusing on the QR code on the screen.

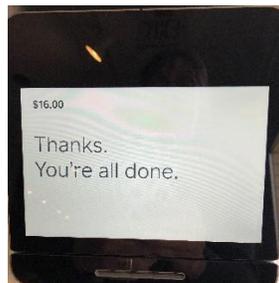
Receipts:

The following is for your information. This is just in case the customer asks you for help, you have an idea of what they are being requested to do by Square.

- We do not have a printer to print out physical receipts. If the customer wishes to receive a receipt, it will have to be digital and they will personally have to enter in the information required. Once payment has been made, they will see the following screen:



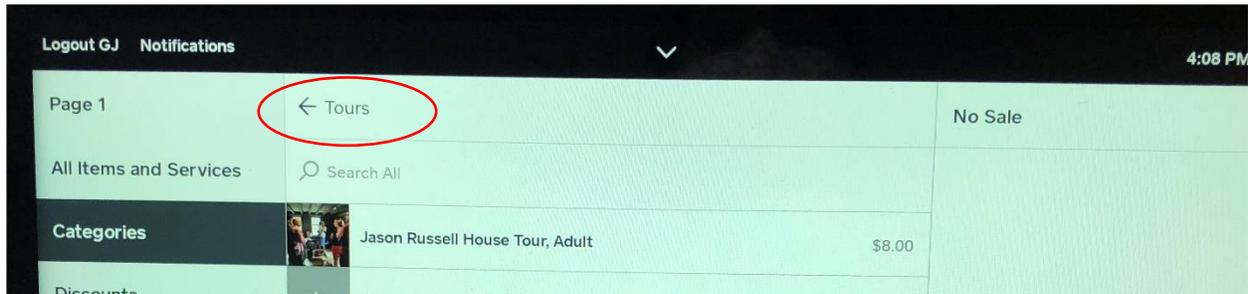
- The customer will tap the receipt option they wish to receive. If they tap email, they will be presented with an alphanumeric keyboard with which to enter their email address. If they wish a receipt via text, they will be presented with a numeric keyboard to enter in their cell phone number. Once done, Square will thank them.



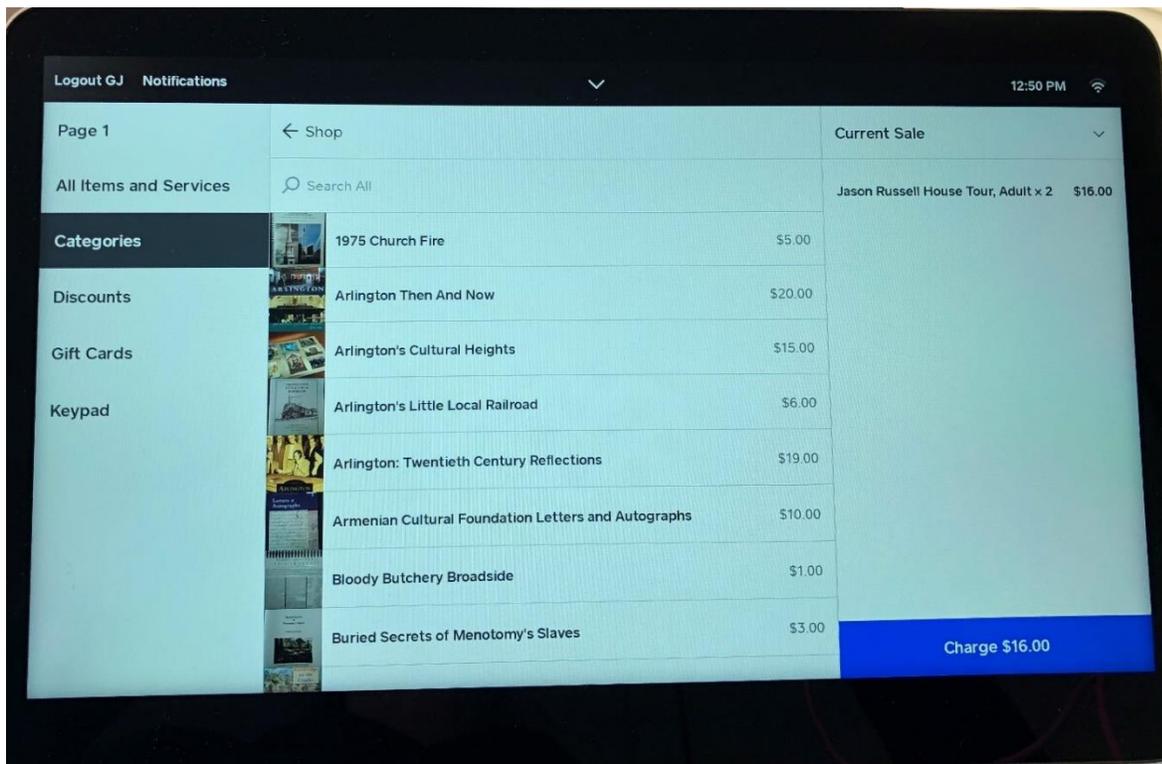
More than one type of item entry in a transaction:

Tour and book transaction:

- A customer may purchase a tour and then also decide that they will purchase a book. This can all be done in the same transaction. At the top of the screen, there is an arrow that points to the left:

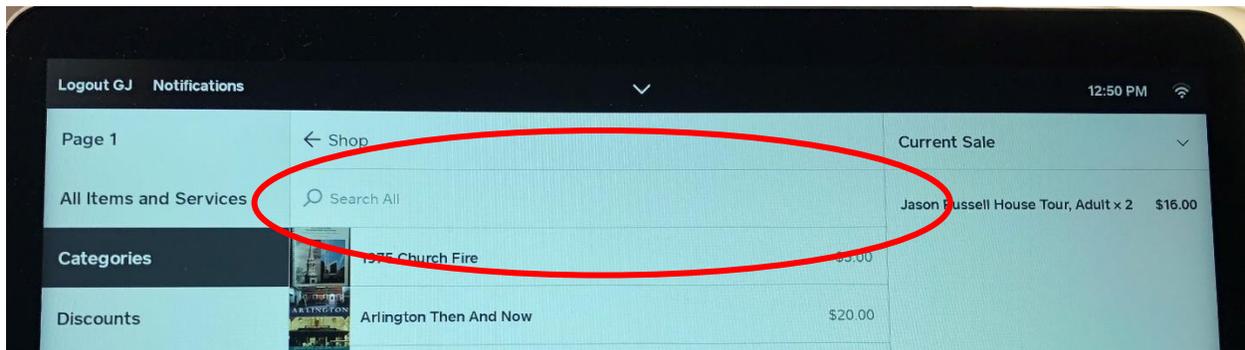


- This will take you back to the screen that lists the categories (See page 3 for a picture of that screen). Select “Shop”. You will see the list of items we sell on the book cart. Scroll through the list and select the books our visitor wishes to purchase. All of the items we carry are listed in alphabetical order.

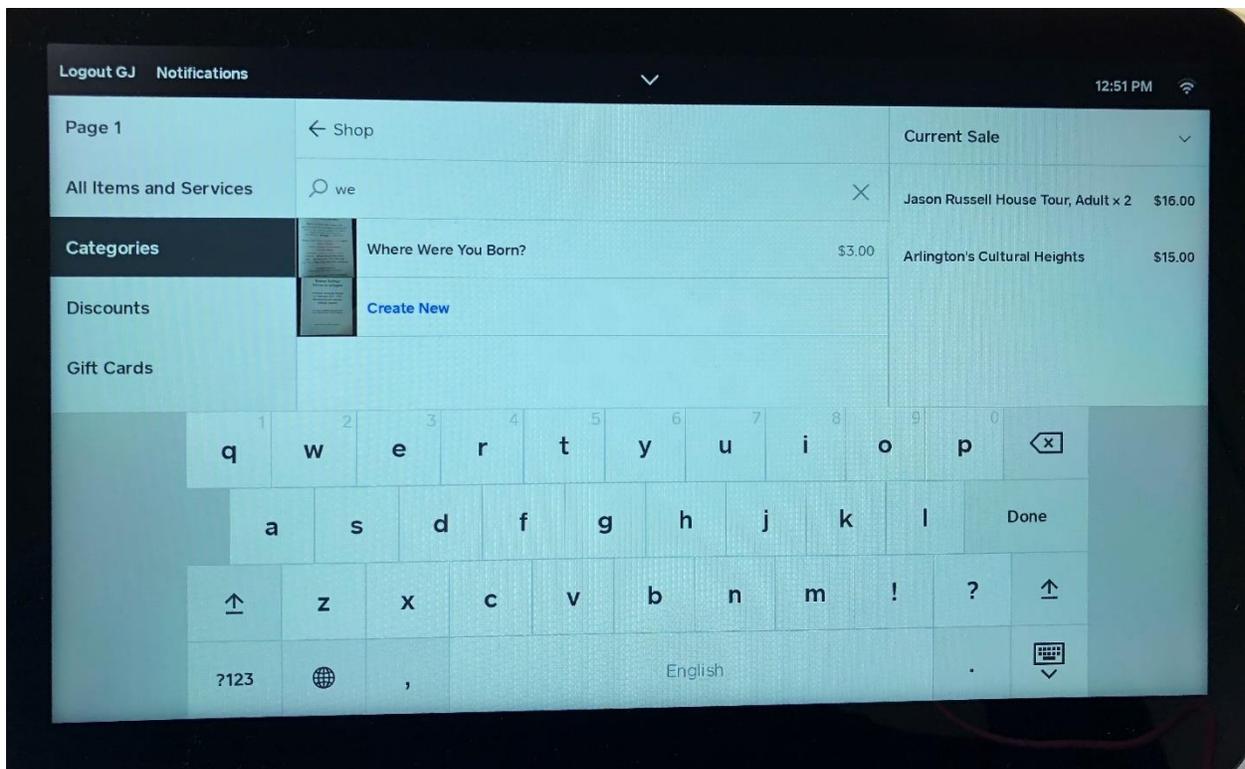


- On this page, tap the book the customer is purchasing. You can scroll down the list of books by “swiping up” with your finger on the screen.

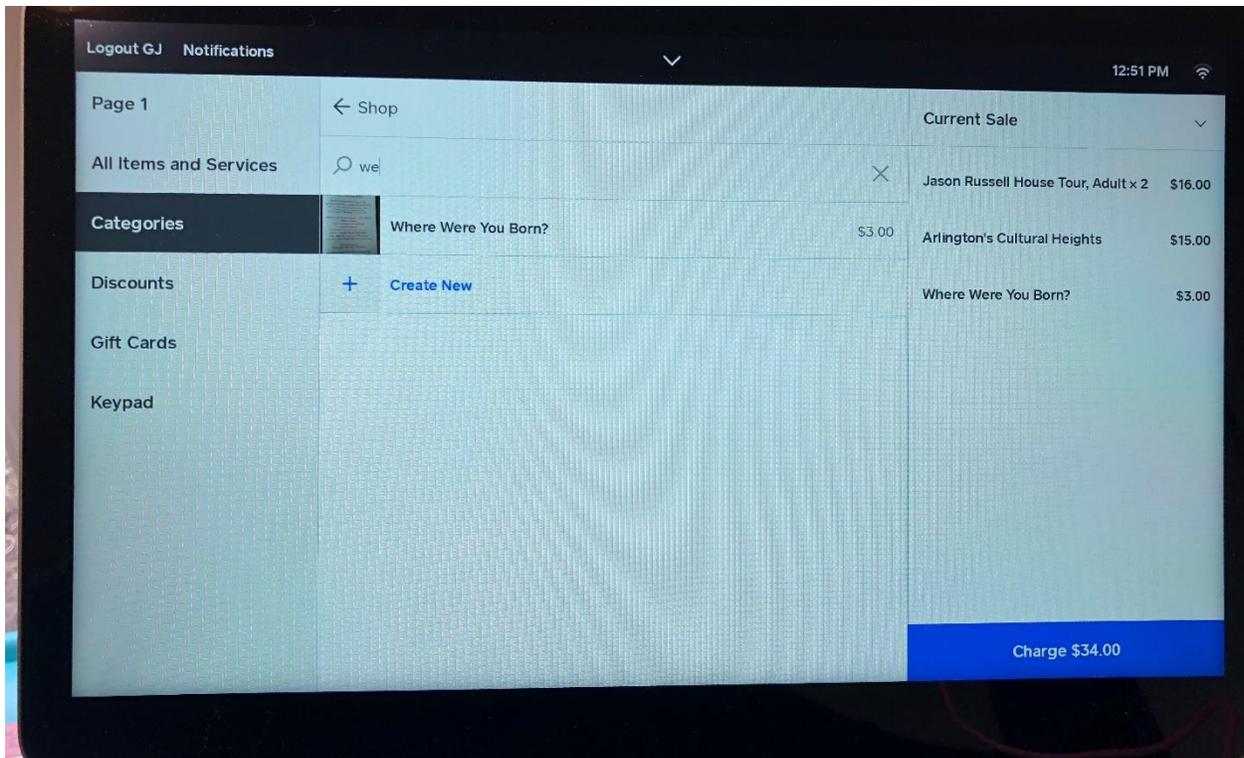
- You also have the option of searching for a book. At the top of the screen, you will find the search bar.



- Tap on this bar and you will be presented with a keyboard. You can start typing the name of the book and option will appear. Select the book/item the customer wishes to purchase.



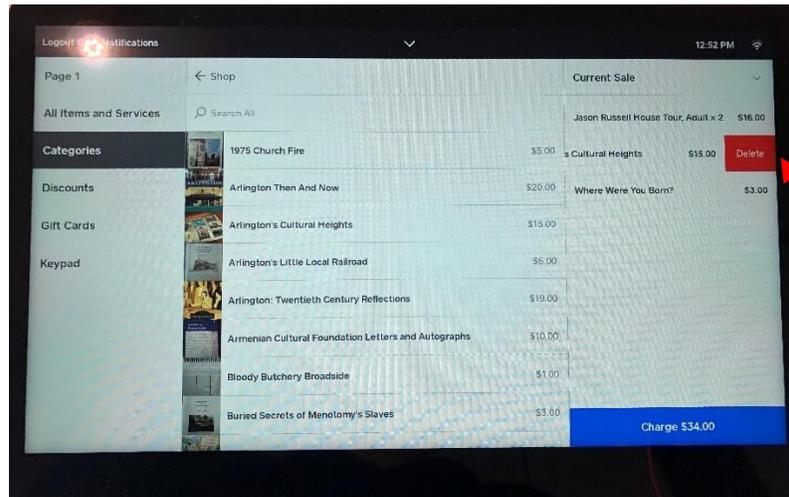
- As you can see in this example, "we" was typed. An item was presented. If this is the item, tap on the item and it will be added to the sale.



- Item has been added to the sale. Complete the sale by tapping on the blue box on the bottom right-hand corner.

Deleting an item from the sale:

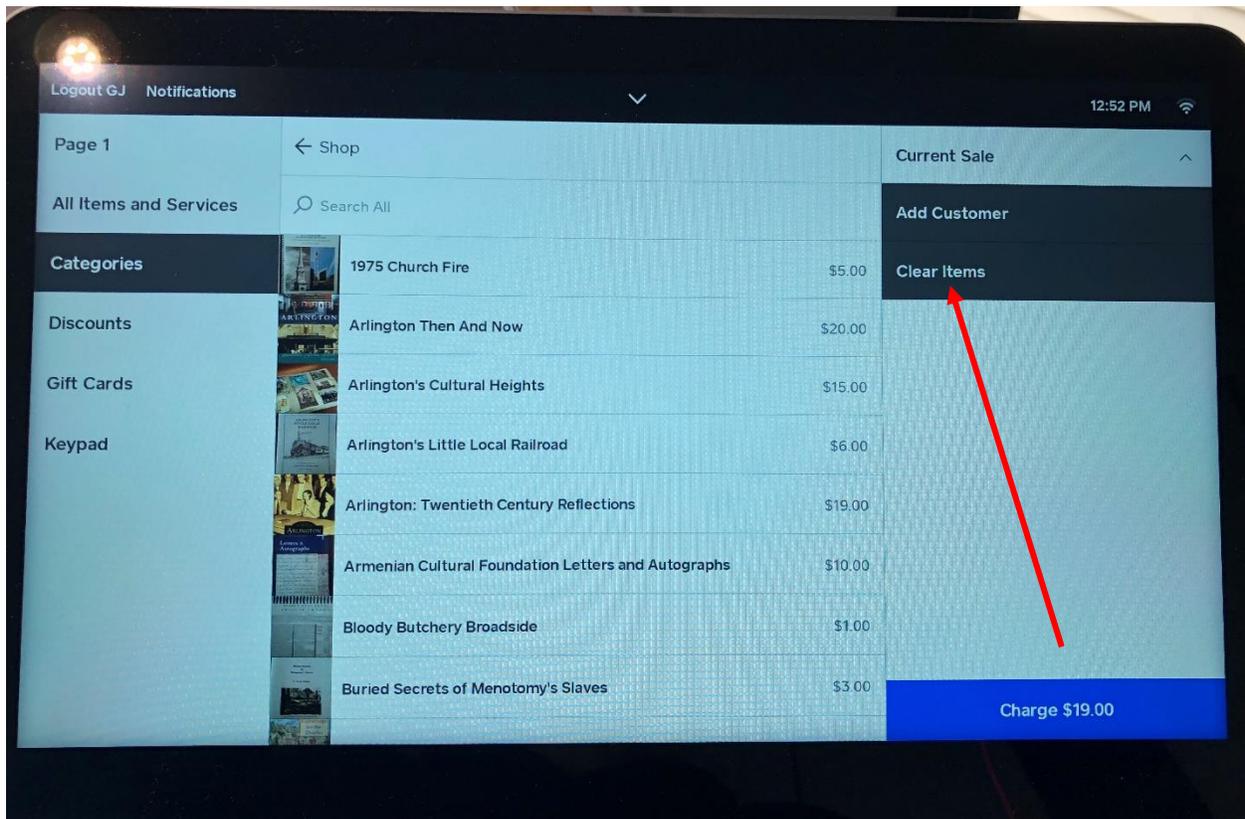
- You may wish to delete an item from the list of purchases. This may be because a wrong item was tapped or the customer changed their mind. If you are still on the sales screen shown above, swipe left on the item.



- Tap the “red” delete box and the item will be removed.
- If the customer decides they have changed their mind before you have taped the blue Charge button at the bottom left of your screen, you can delete the complete sale. In this case you tap the arrow next to “Current Sale” in the top right of the screen.

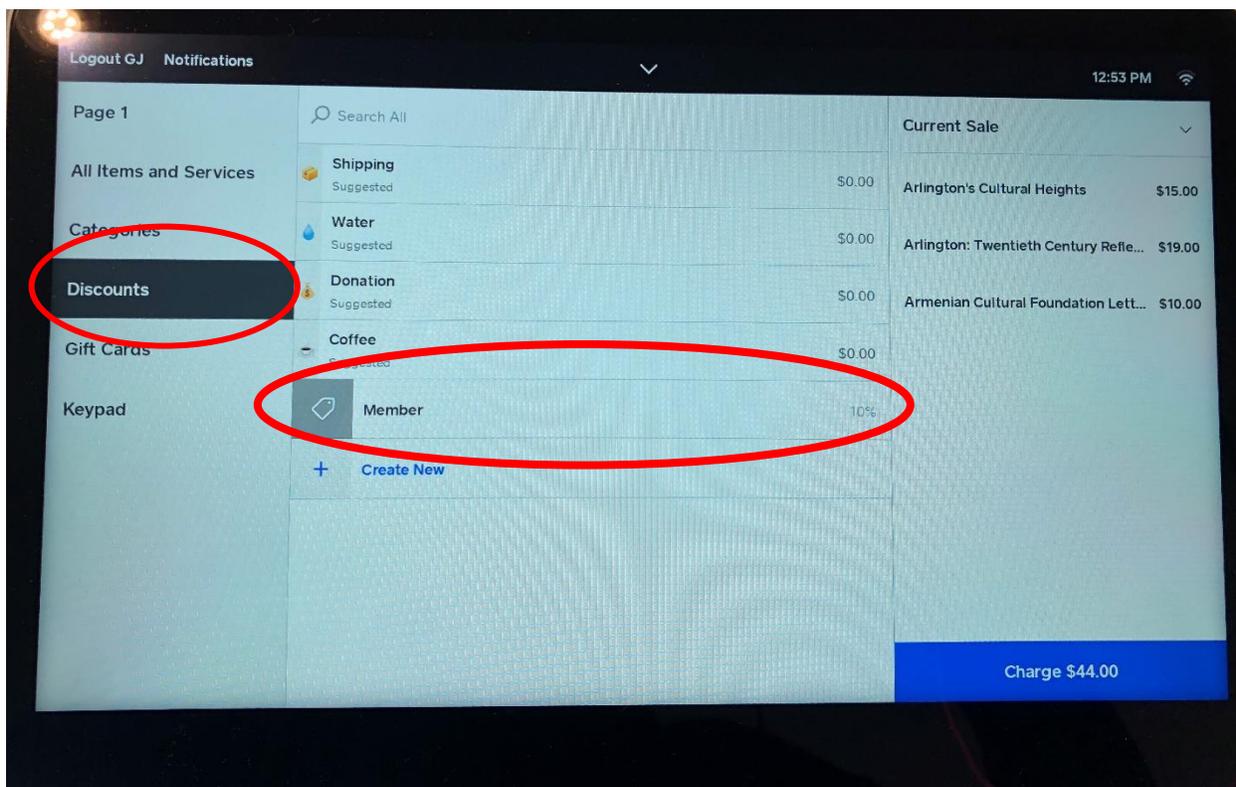


- You will be presented with a short drop-down menu. Tap “Clear Items”. The items will be removed and there will be no sales listed on the screen.

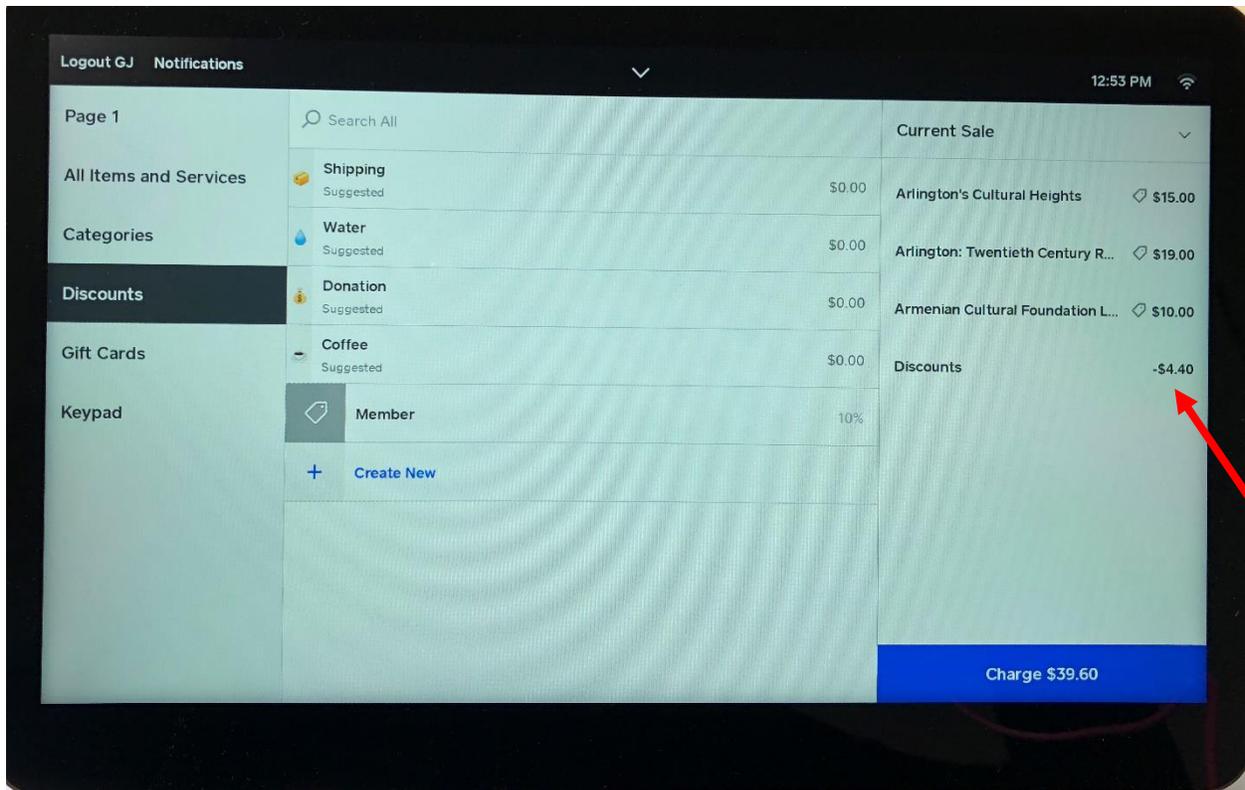


Member Discount:

- You have a customer who wishes to purchase some books and they are a member of the Arlington Historical Society. Once you have entered in all of the items they wish to purchase, on the left hand side of the screen you will select the menu option “Discounts”.



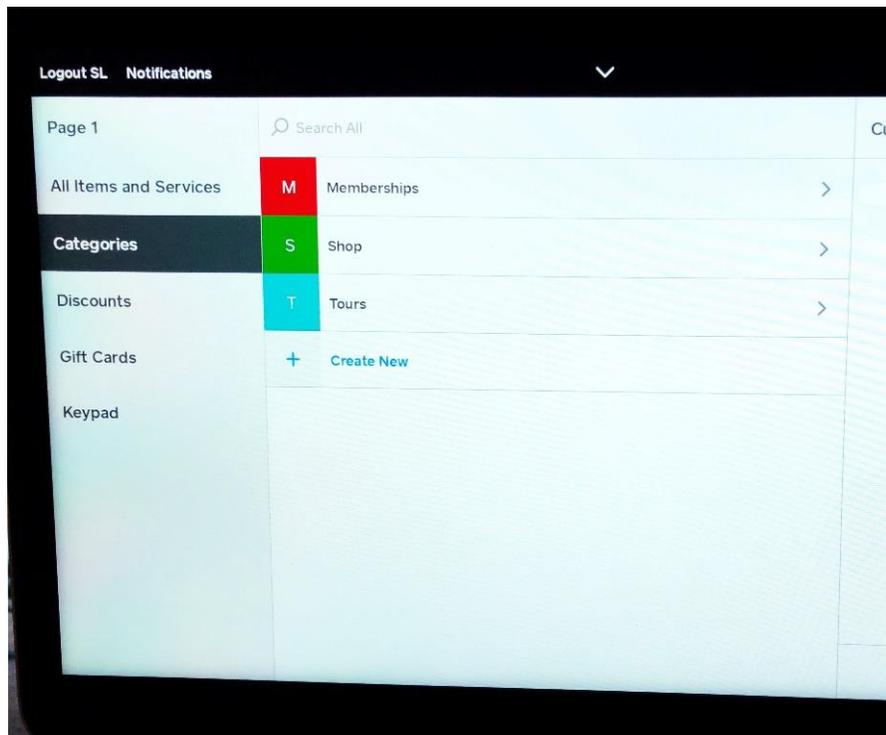
- You will see several options. Most of them Square will not let us remove. Look for the “Member” option. You will tap that bar.



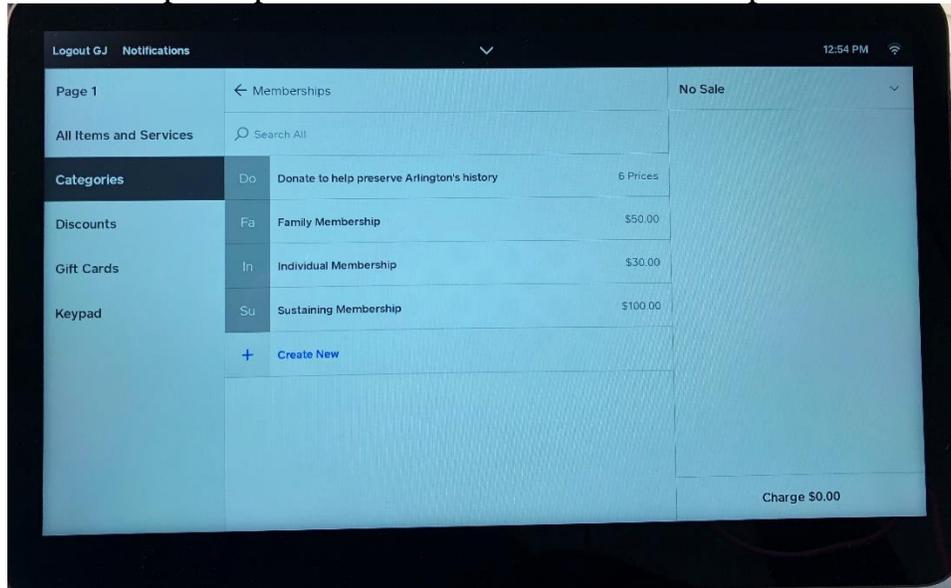
- The discount has been applied. Complete the sale.

Selling a Membership to the Arlington Historical Society:

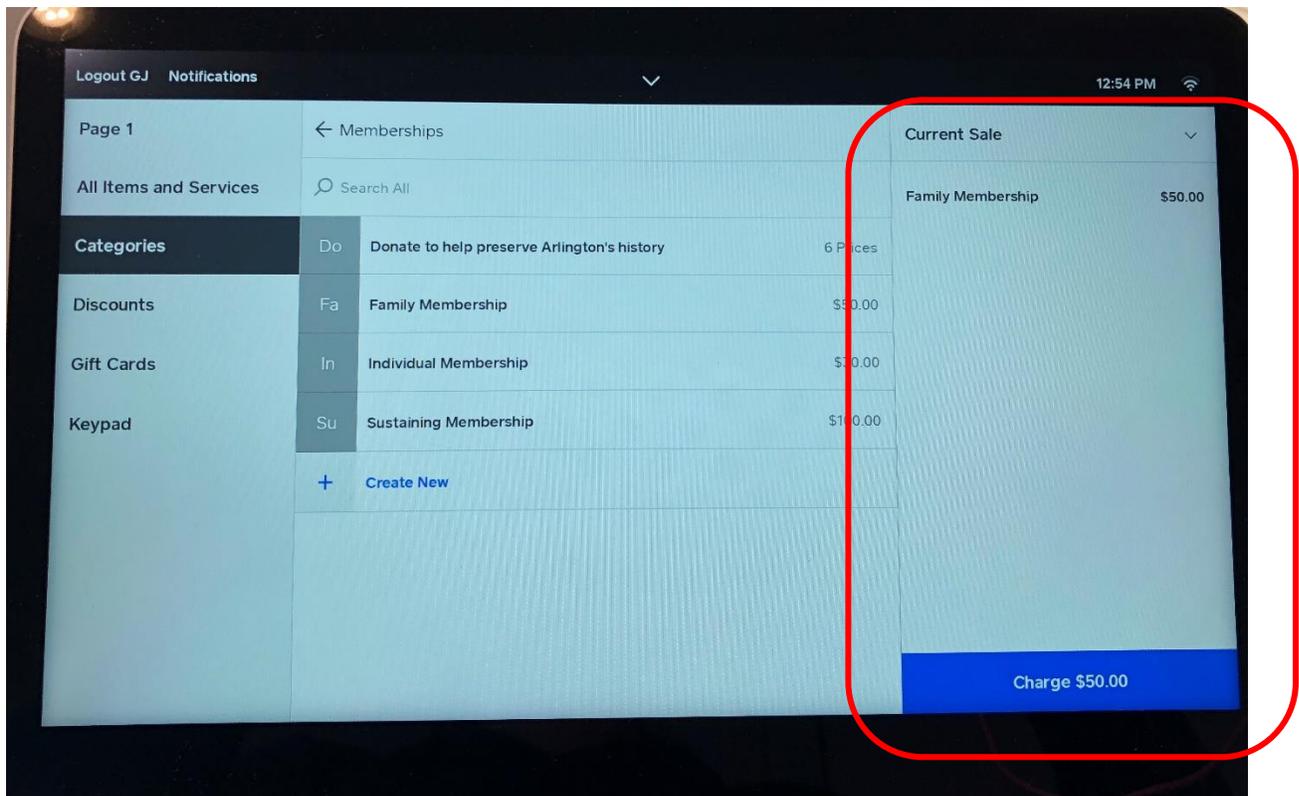
- You may have a customer who wishes to purchase a membership. First have them complete a membership form. The forms are in the membership brochures which are located next to the Square Register. Once they hand you the completed form you will tap on “Categories” from the menu on the left-hand side of your screen to bring you to the main menu shown in the center of your screen.



- Tap on the top menu item “Memberships”. This will bring you to the listing of memberships. Tap the one the customer wishes to purchase.

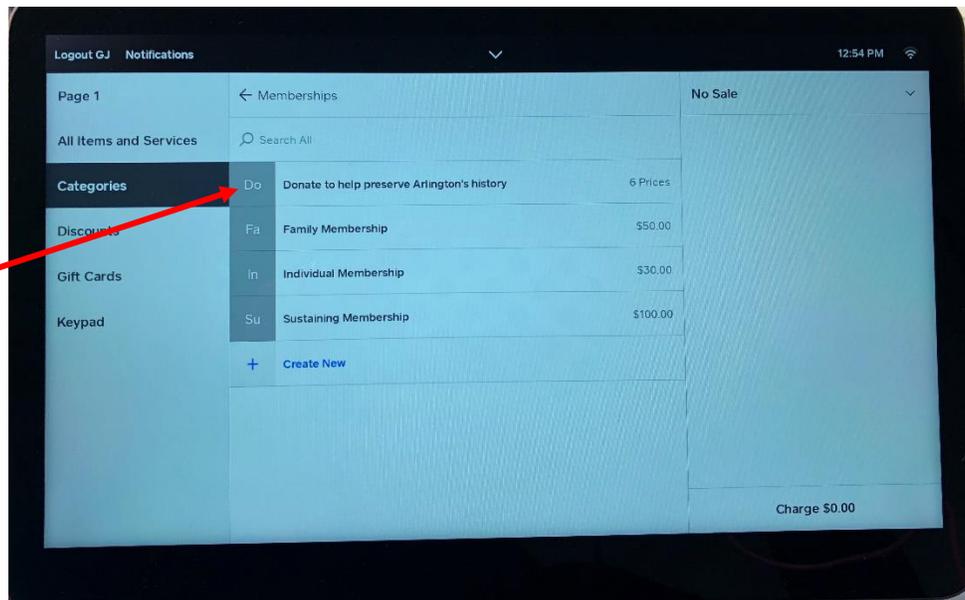


- If the customer wishes a Family Membership, just tap that item, it is added to the sale and process the sales.

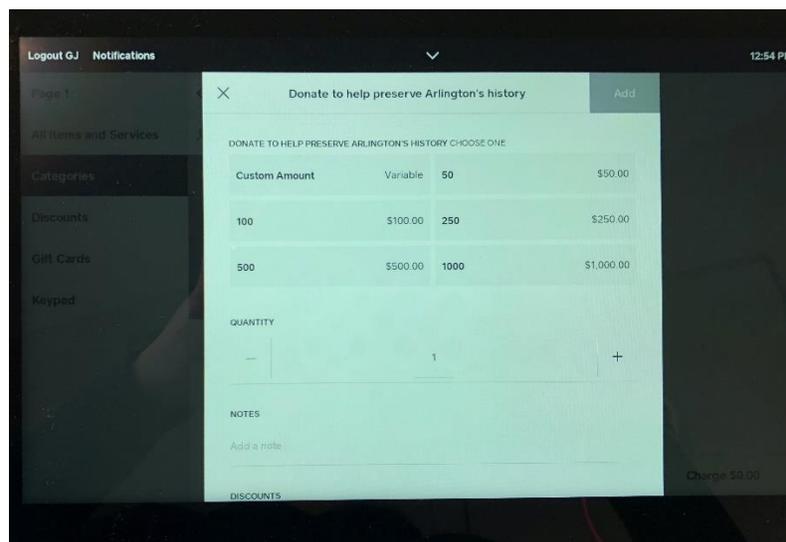


Donations:

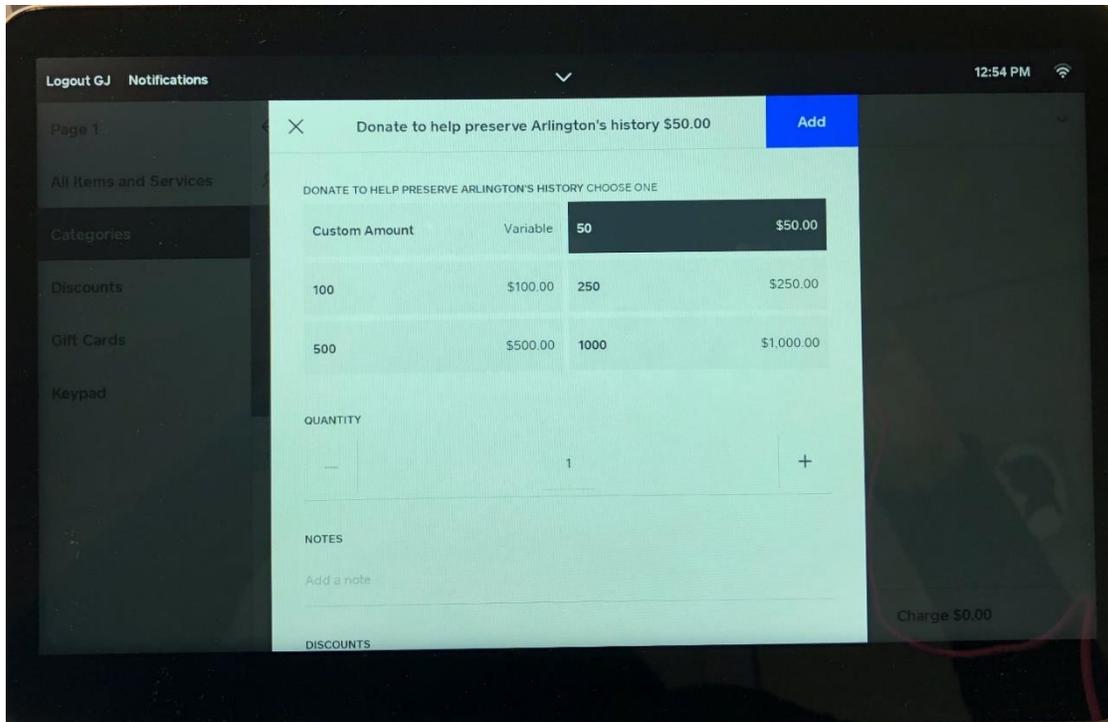
- You may have someone who wishes to make a donation to the Arlington Historical Society and do not wish to use the donation jar or want to charge their credit card.
- To process a donation through Square, from the menu on the left side of the screen, select “Categories”. Then from the main menu in the center of the screen, select “Memberships”.



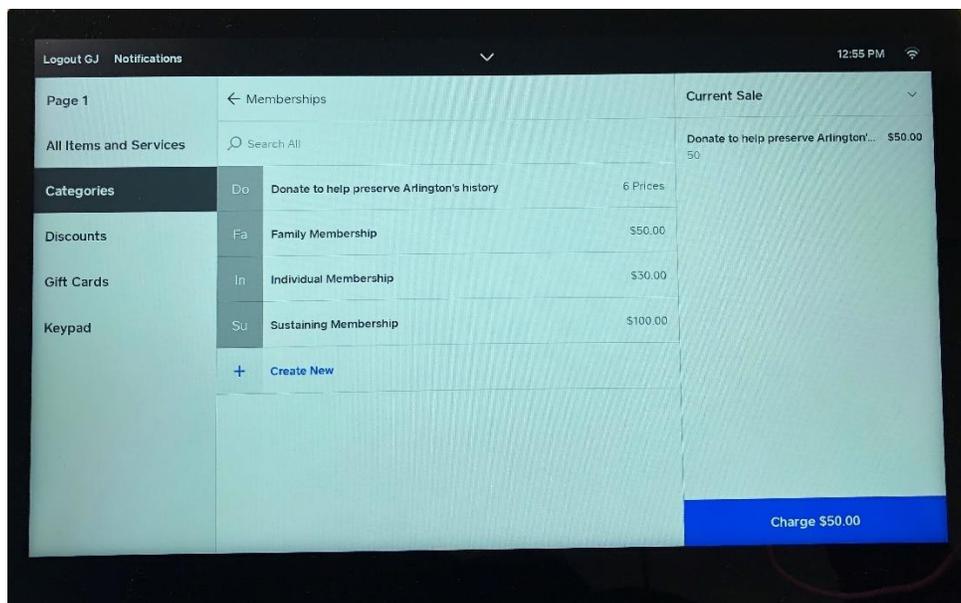
- Notice at the top of the listing of memberships is a donation option. Tap this option you will choose. It will bring you to the next screen, where you can select the donation amount:



- For instance, if the customer wanted to make a \$50 donation you would tap that option. Once tapped you will notice in the top right-hand corner of the screen the word “Add” is now in a blue box.

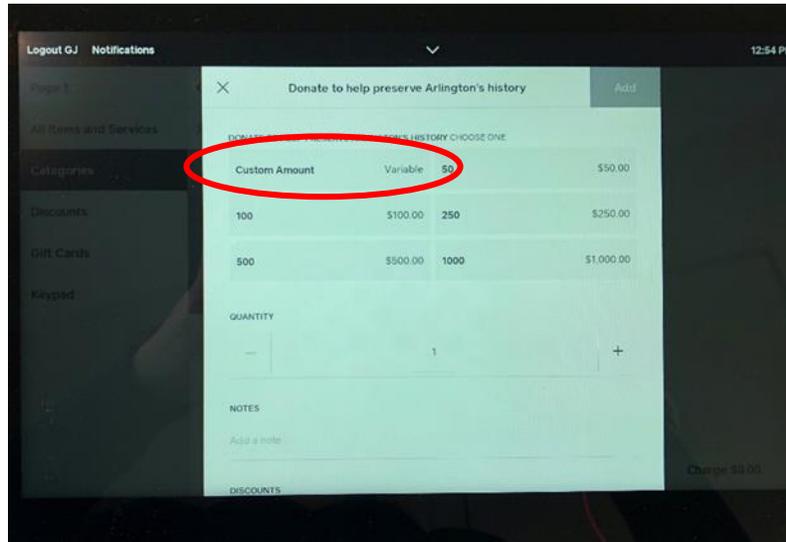


- When you tap the blue box “Add”, you will be taken back to the sales screen and you can process the sale.

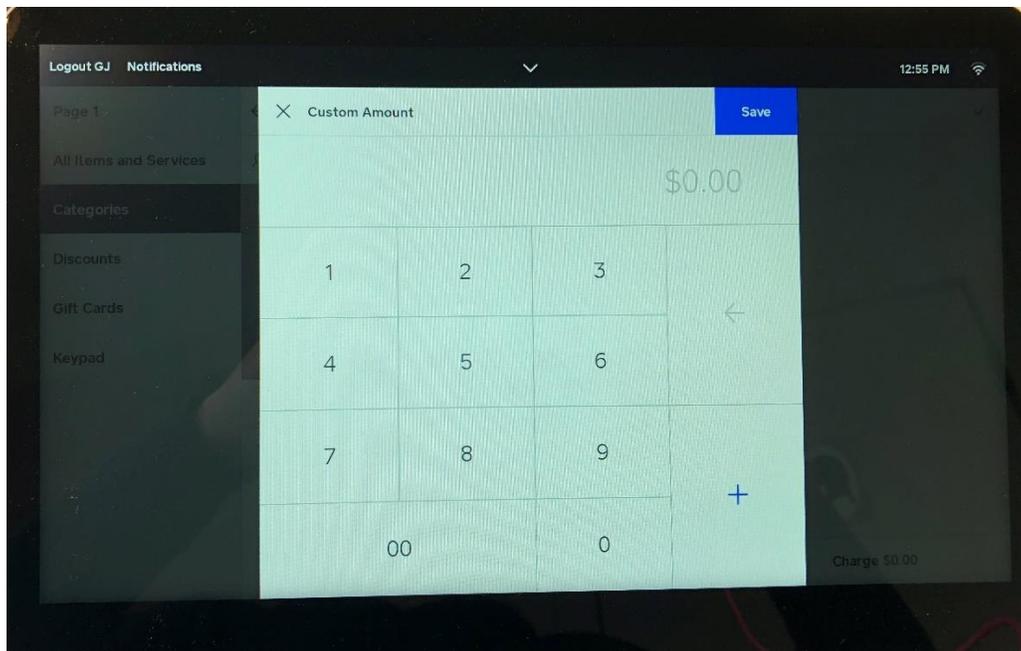


Custom Donation Amount:

- If you have a customer who wishes to make a donation that is not one of the options on the donation screen (\$50, \$100, \$250, \$500 or \$1,000), you can select the Custom Amount option.

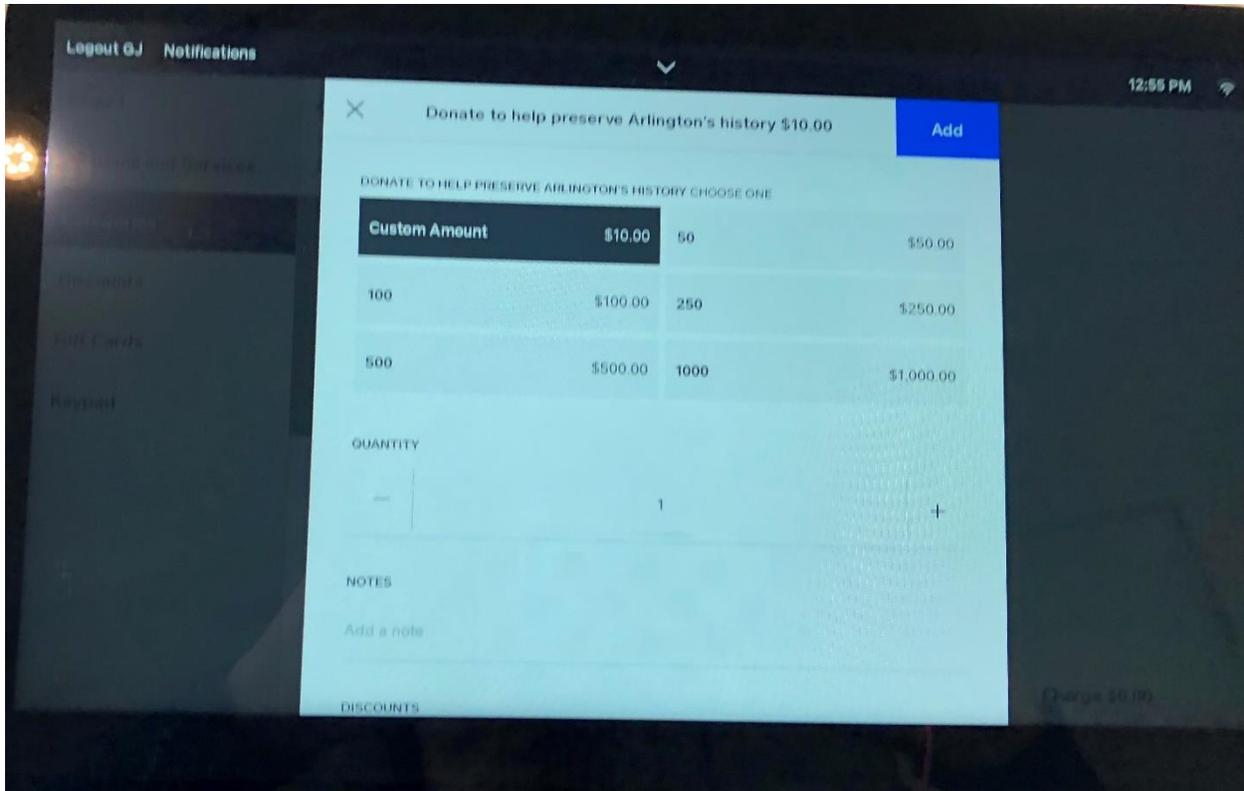


- When you select “Custom Amount” you will be taken to a numeric keypad.

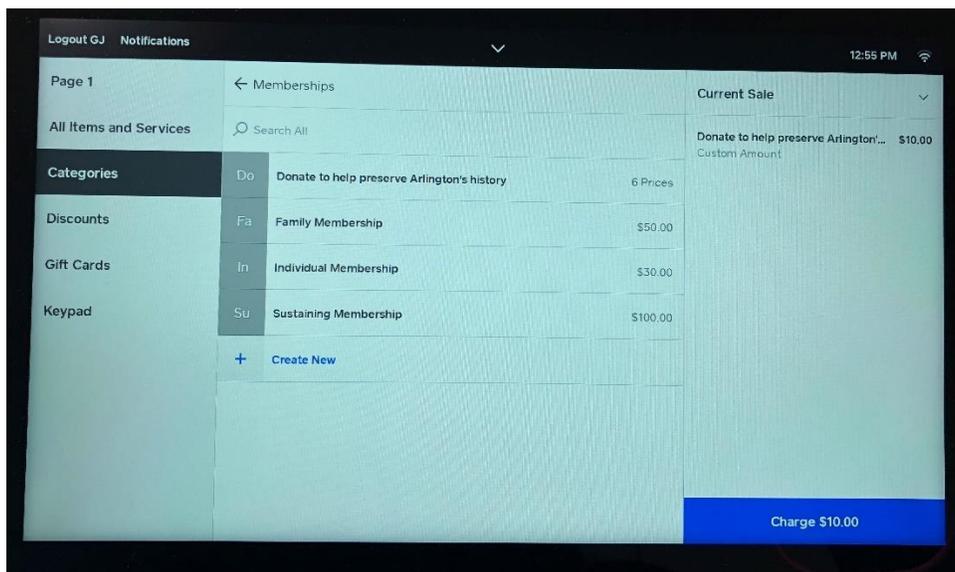


- Enter in the amount the customer wishes to donate and then tap the blue “Save” button on the top right of the screen. For example, if the customer wished to donate \$10, you would tap the 1 followed by three 0s and then tap

the “Save” button. When you do this, you will be taken back to the main screen with the donation amounts. You will notice that the custom amount now has a \$10 value.

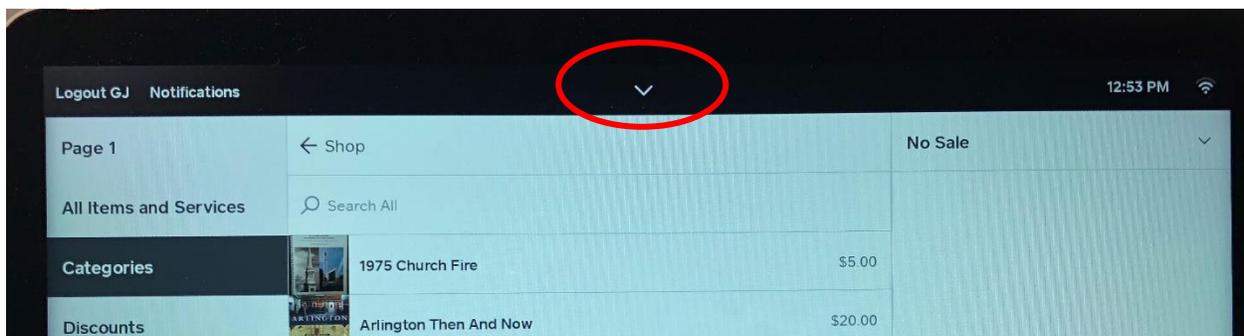


- As in the previous example, you now just tap the blue box “Add” and process the sale.

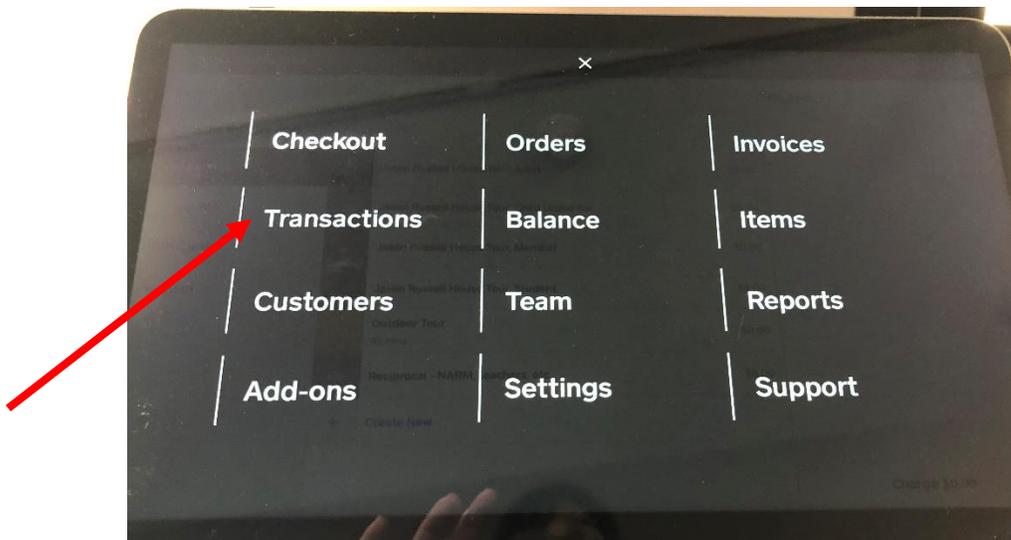


Processing a Refund:

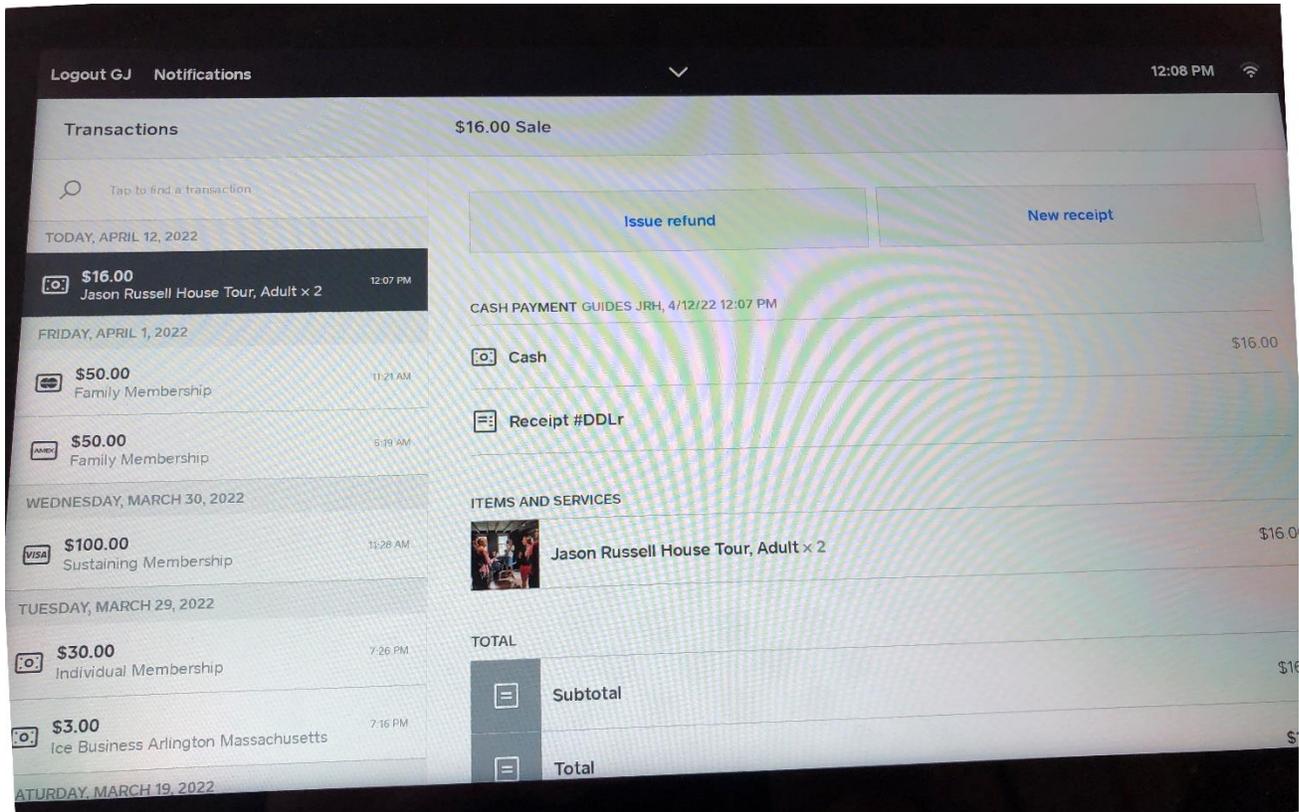
- You may have an occasion where a payment was processed as cash and should have been a credit card. Or if you made a mistake in the charge, such as there are 2 adults and one child and you processed the payment for 2 adults only. These are basically the only times we will process a refund.
- In this example, a couple paid cash for a tour and has then changed their mind. We will then refund them the amount paid. Any time we process a refund it will be via the method paid. If we were paid in cash, we will give cash back. If we were paid via credit card, a refund to their credit card will be processed through Square.
- To process the refund, first look at the top of the screen where you will see a small down arrow. Tap that arrow.



- This will bring up a screen we do not normally see. On here you will see an option "Transactions". Tap this option.

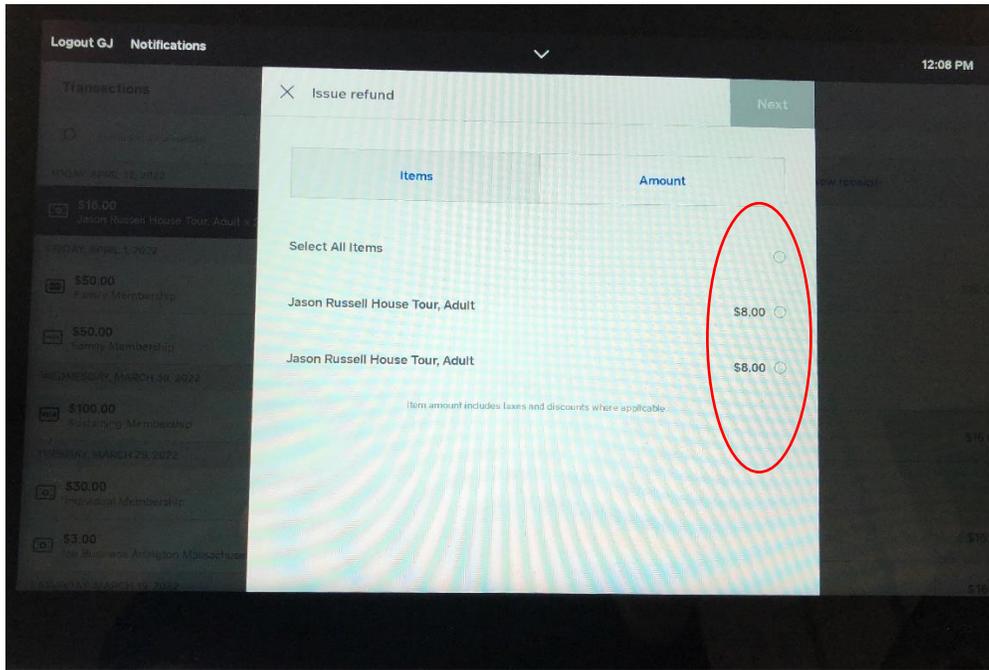


- This will bring up the following screen. On the left-hand side of the screen is a listing of all the most current transactions. You can see the transaction for \$16 for 2 adult tours. Tap that transaction. You will now see in the center of the screen the details of the transaction.

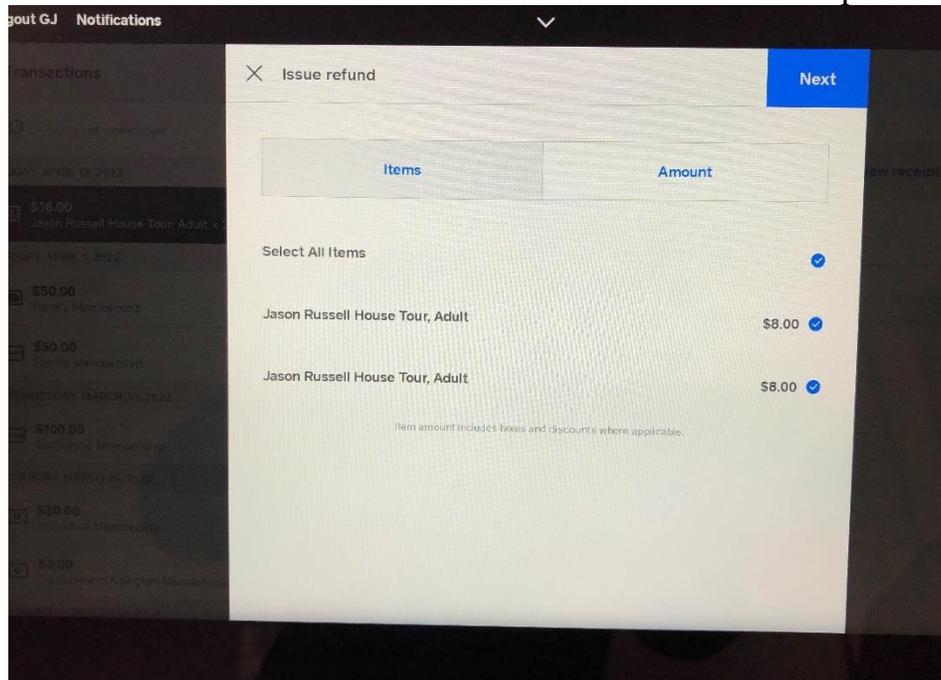


- At the top of the screen, you will notice two buttons, "Issue Refund" and "New Receipt". Tap "Issue Refund".

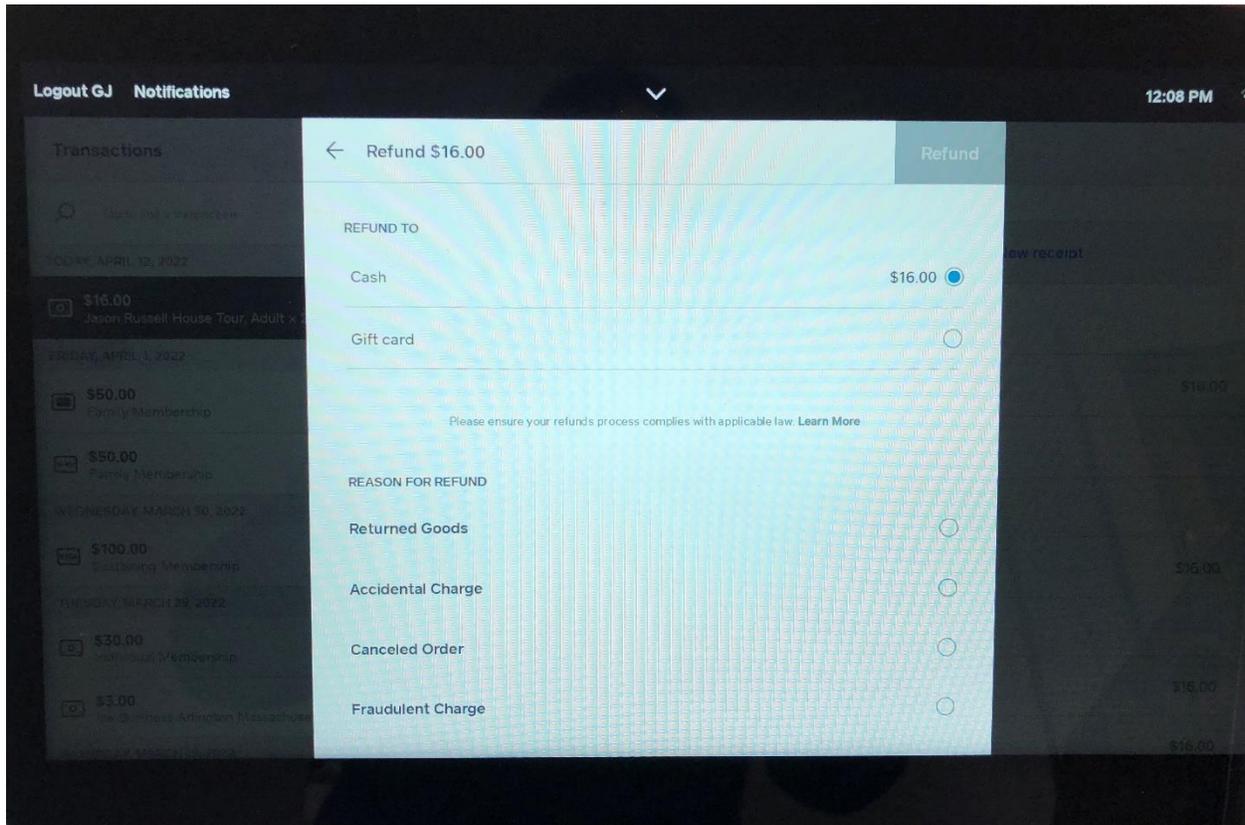
- This will bring you to a screen displaying the items purchase in this transaction:



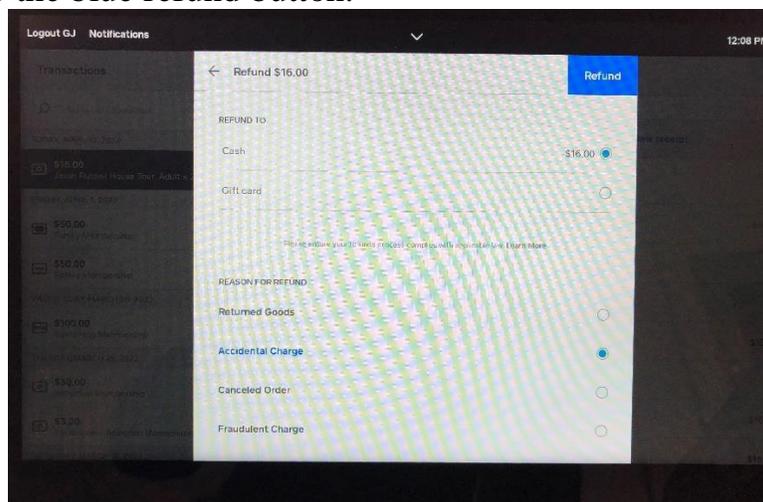
- You will see the two adult tours. You can either tap the little round button next to each dollar amount or tap the “Select All” button.
- Once you select the items to be refunded, you will note that up in the right-hand corner of the screen the “Next” button is now blue. Tap this button.



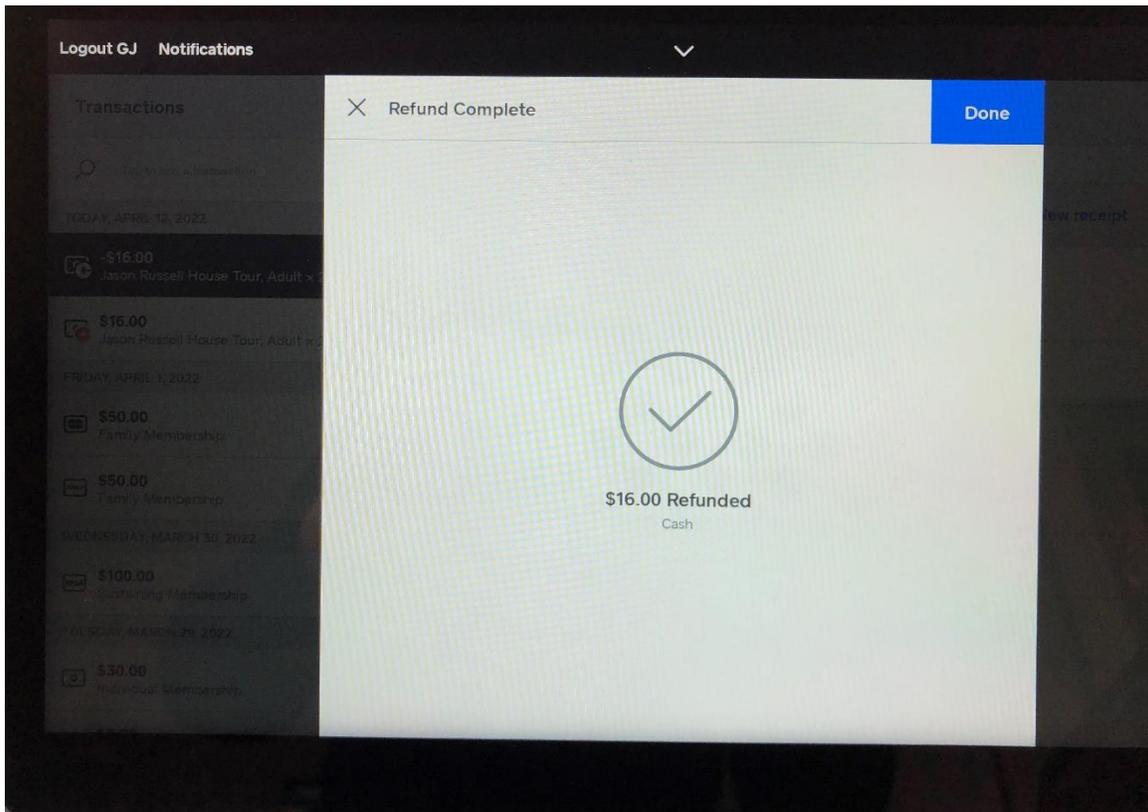
- This will bring to the next screen. Here you must select a reason for the refund. Either it is an “accidental charge”, payment was processed as cash and should have been a credit card. Or, it is a “Canceled Order”, the customer has changed their mind. Note that Square has how the refund will be issued. In this case “Cash” is the button Square selected for you.



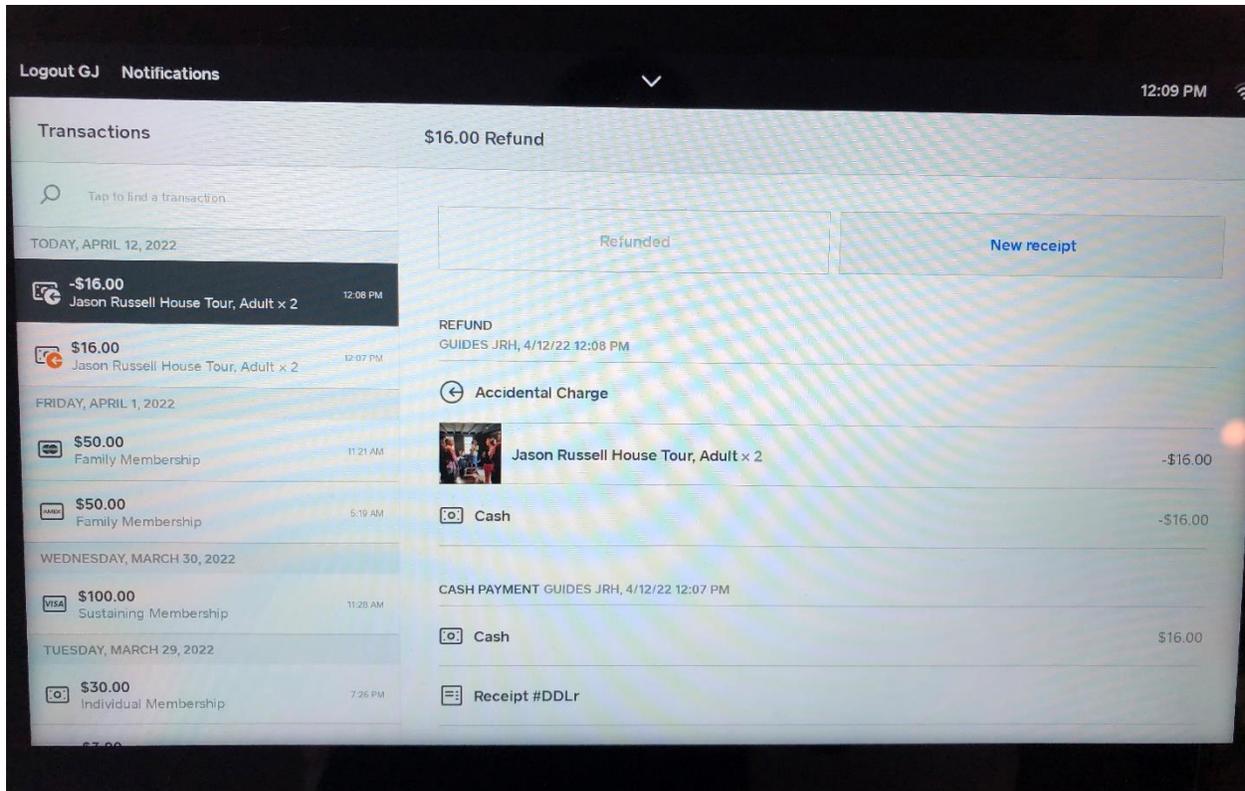
- Select the appropriate reason for the refund and the “Refund” button is now blue. Tap the blue refund button.



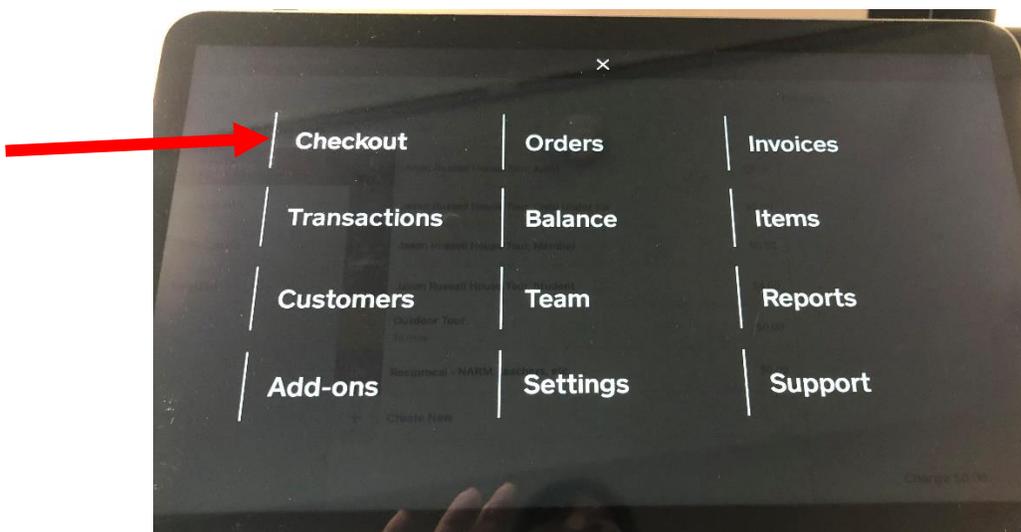
- You will see this screen next. Tap the blue “Done” button.



- Your next screen will show that the refund has been processed. It gives the details of the refund. If it was a credit card refund, you can tap the “Issue receipt” if the customer wishes one.



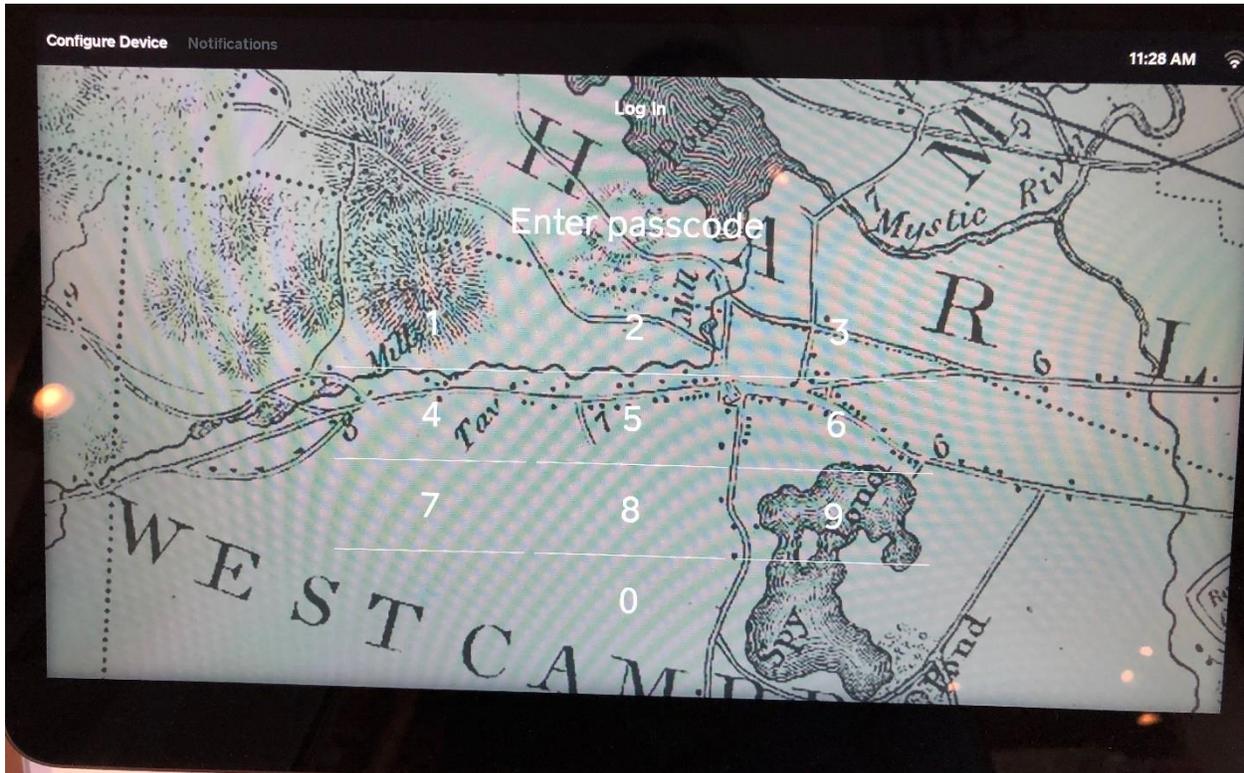
- To go back to your sales screen and be ready for the next customer, tap the little white down arrow in the center of the top of your screen. This will bring back the screen that lists options. Select “Checkout”



Trouble shooting Square

Passcode required

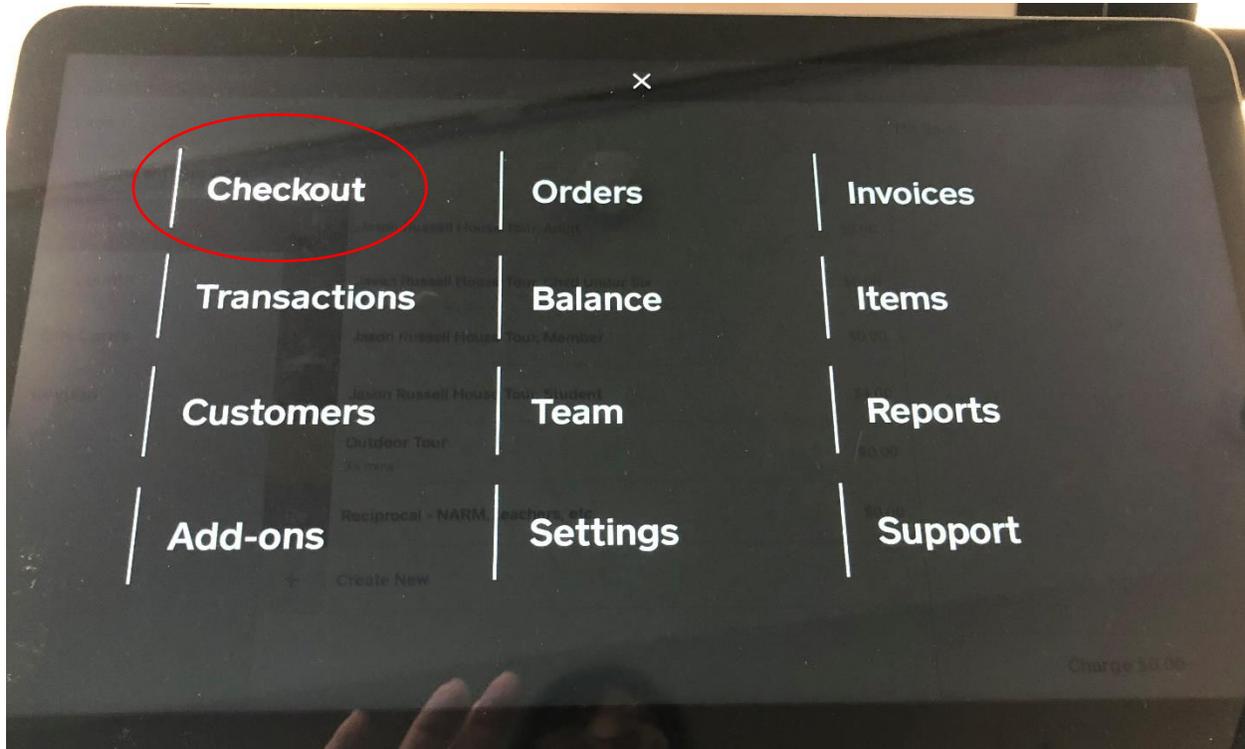
- You may see a screen such as the one below:



- In this case, for some reason you are logged out of square. To login type 1775
- Square is now ready for you to use.

Non-Sales Screen:

- You may see the screen below when you “wake up” Square:



- Checkout will take you back to the main sales screen. Just tap Checkout.