

USING SQUARE

Arlington Historical Society

Updated: March 2023

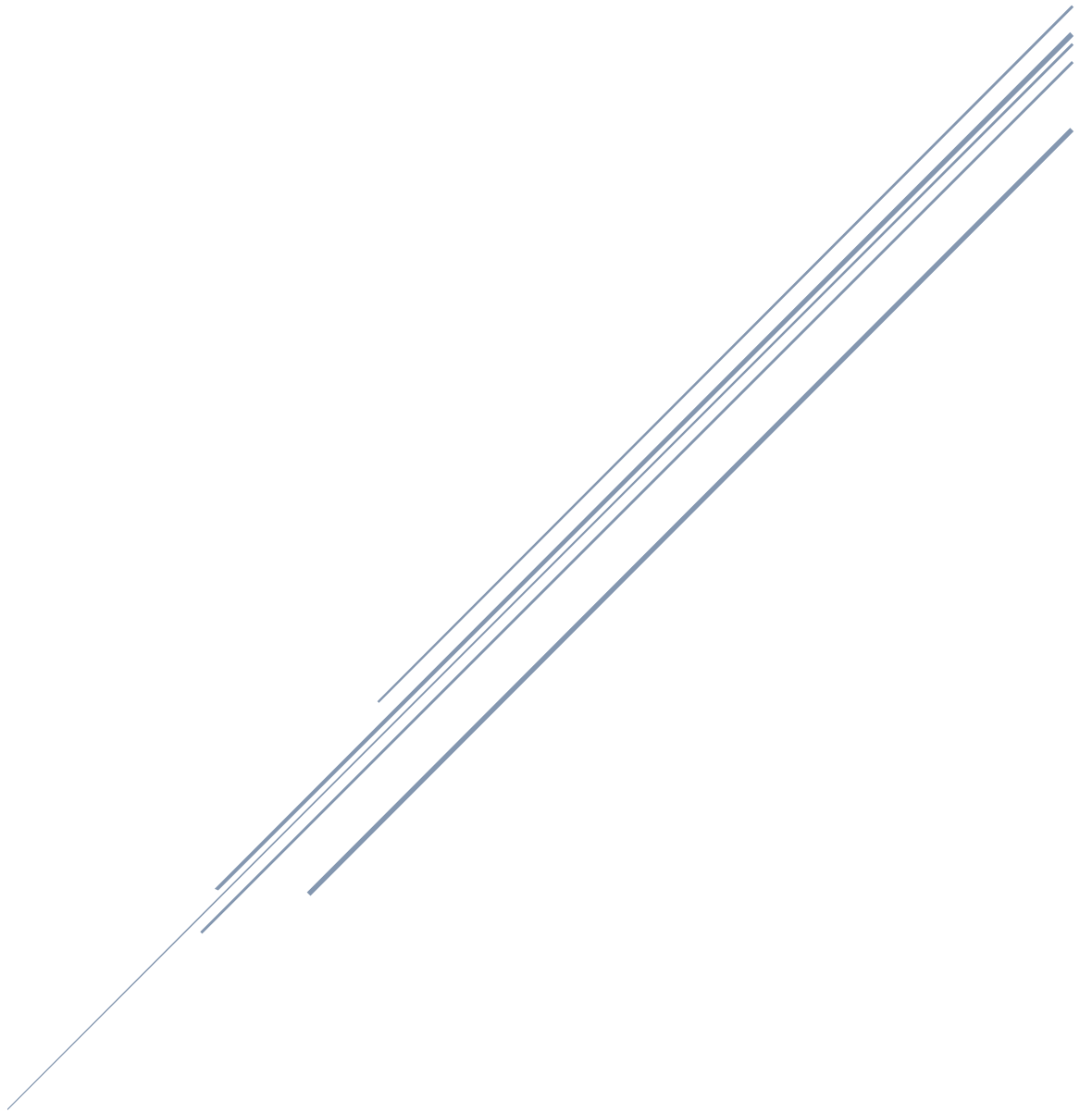


TABLE OF CONTENTS

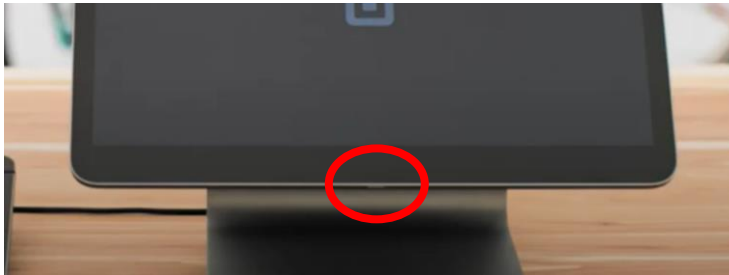
Setting Up.....	2
Using Square.....	3
Tours.....	4
Processing Payments	
Paying by Cash.....	7
Paying by Credit Card.....	10
Processing a \$0.00 payment.....	10
What the customer sees	11
Receipts	12
Other Shop Transactions.....	13
Deleting an item from the sale.....	14
Member Discount.....	15
Selling a Membership to the Arlington Historical Society.....	17
Processing a Donation through Square.....	19
Processing a Refund.....	23
Trouble shooting.....	29
Square is Offline.....	29
Code required.....	30
Logging into Square.....	30

Square POS System

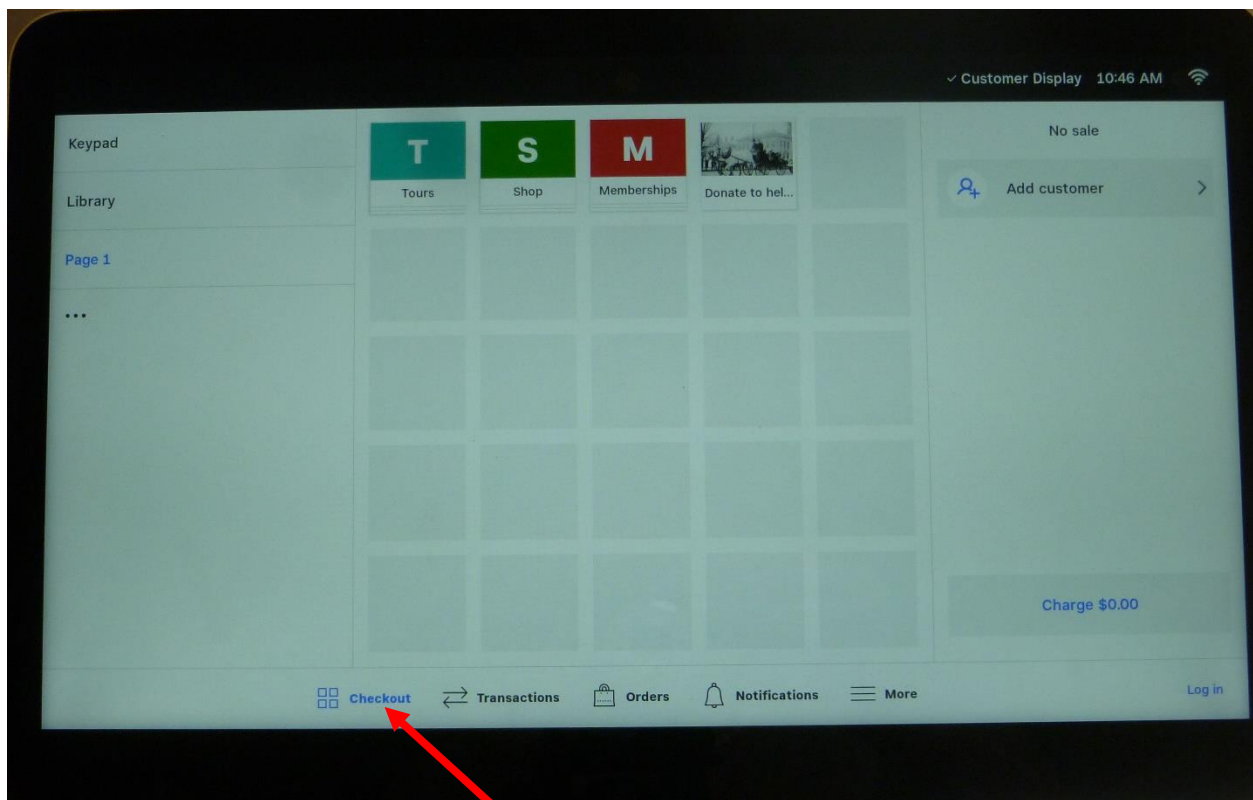
Setting Up:

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”.



- Square is ready for customers

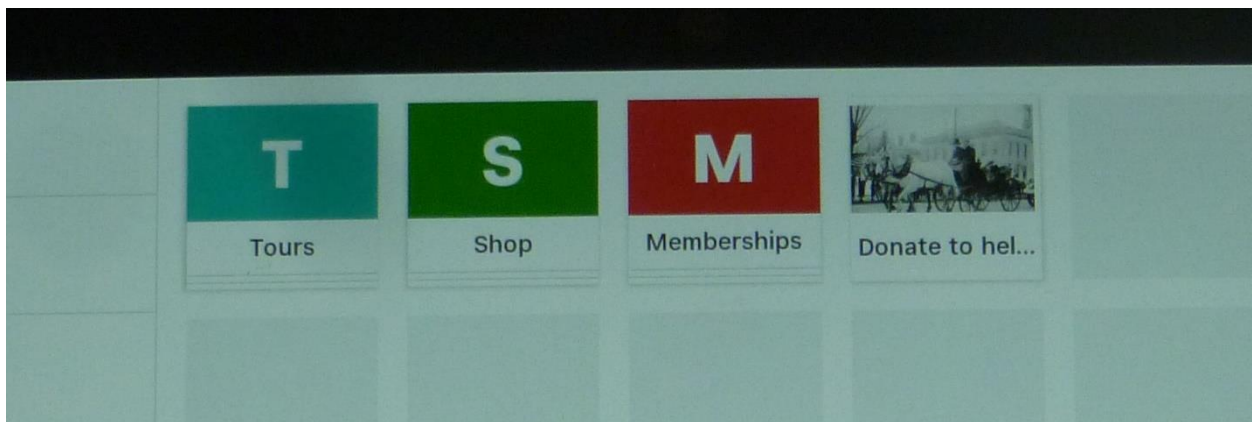


- Note that on the bottom Checkout is in blue. You are on the correct screen.

Using Square:

When a visitor arrives, you will select the tile that is the appropriate option:

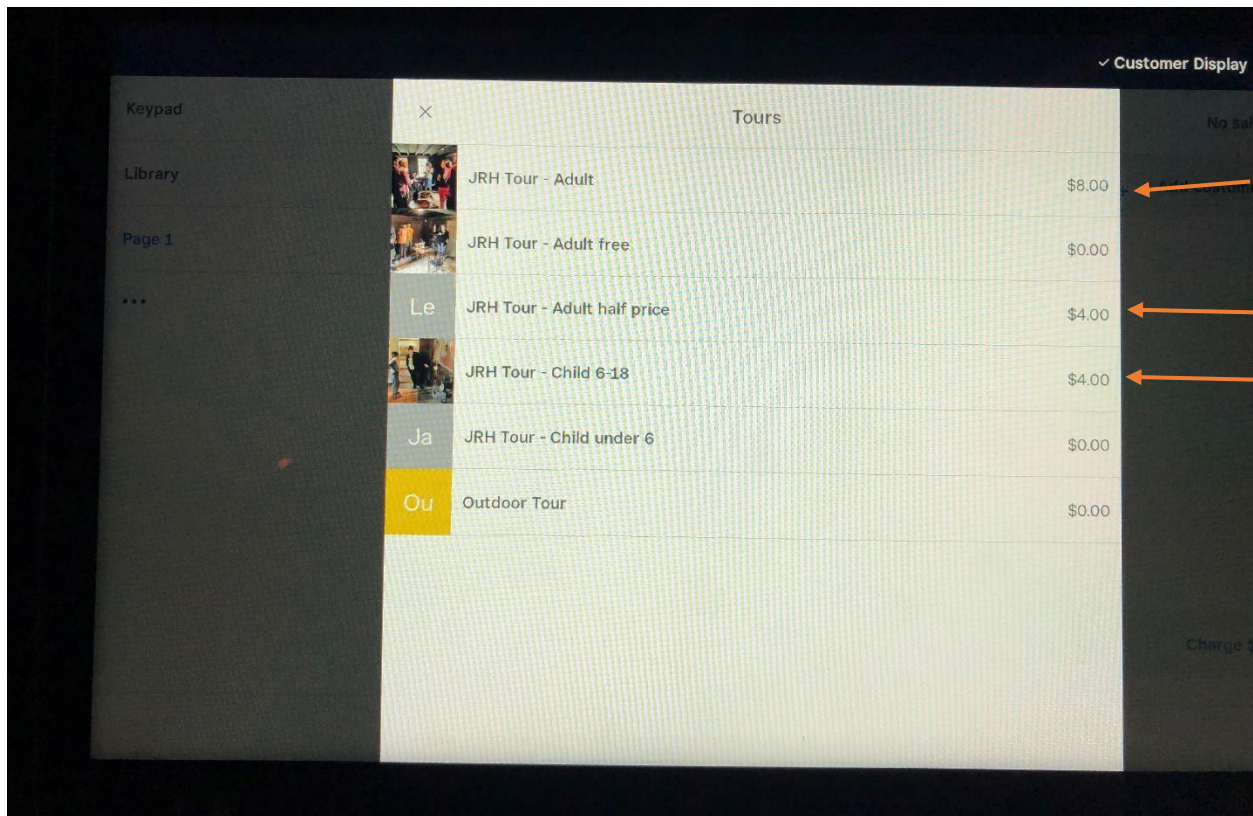
- Tours – This will list all of our tour options available.
- Shop – This will list all the books, postcards and other items we have for sale on the book cart.
- Memberships – You will use this option if a visitor wishes to purchase a membership with the Arlington Historical Society.
- Donations – You will use this tile if someone wishes to make a donation to the Arlington Historical Society.



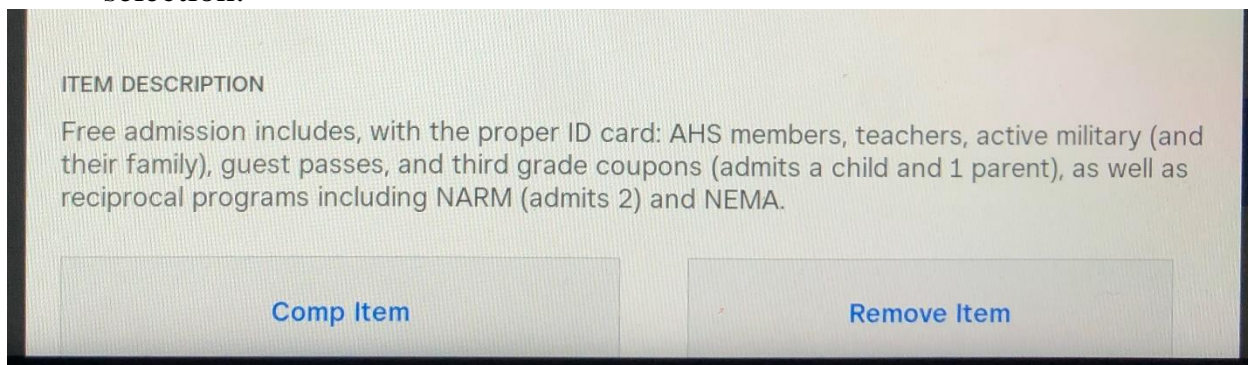
- As you select each option you will be presented with a menu of items you can select from.

Tours:

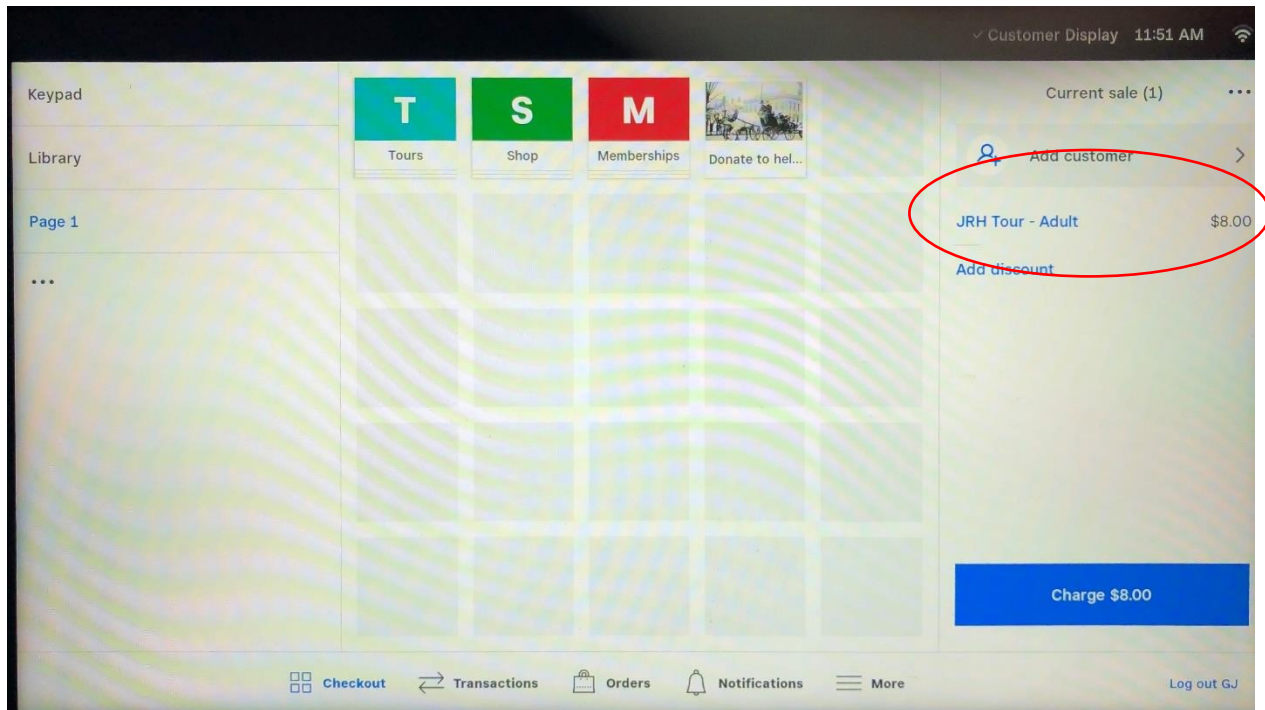
- When a customer comes in requesting a tour, tap the tile “Tours”.



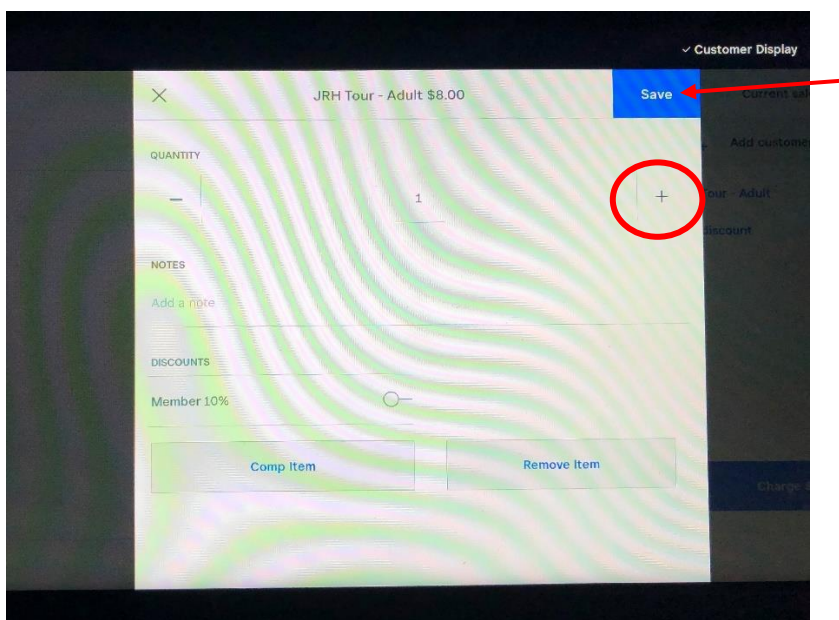
- You will notice that we have streamlined the choices. If they are not a member or have a half price ticket, there is a dollar amount charged.
 - A half price ticket is usually a Three house ticket from Lexington which gives the customer half off a ticket to Jason Russell House.
- If you select the Adult Free, you will see this description at the bottom of the selection:



- Select the Tour option:

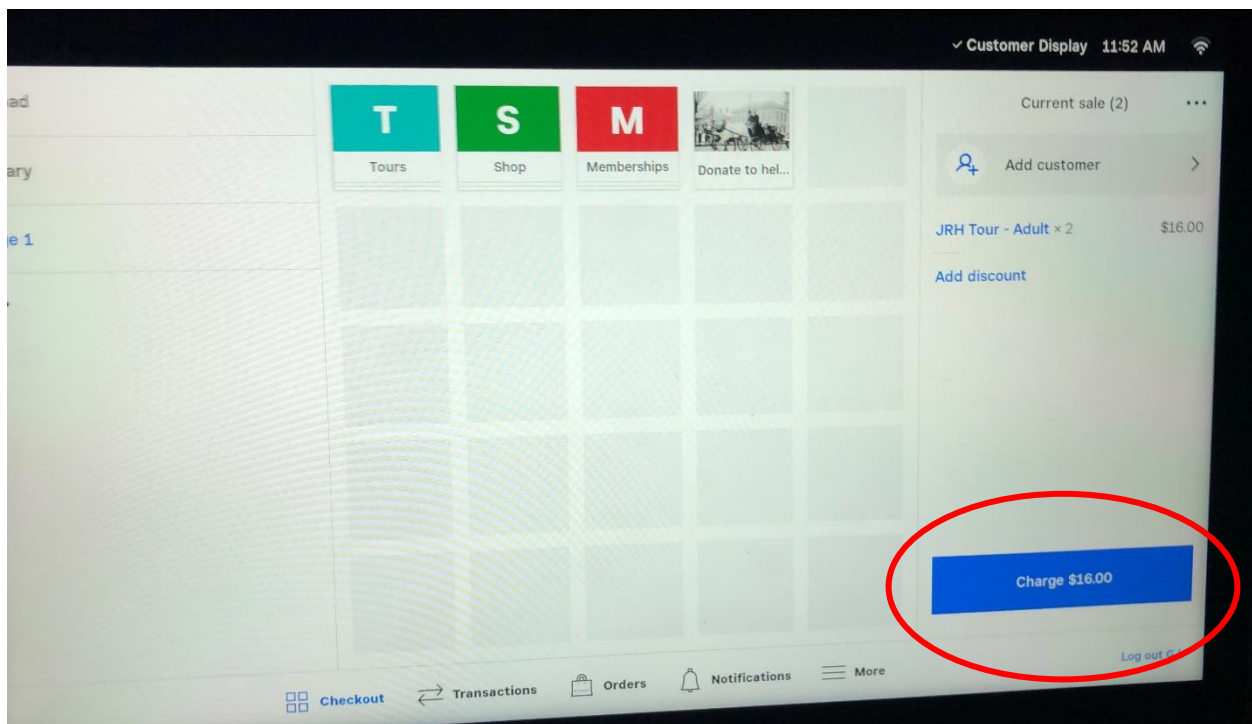


- In this example a non-member adult tour was selected.
- If there is a second adult tap the blue JRH Tour- Adult and you will see:



- Tap the “+” then the blue Save button. Tap the “+” for the total number of adults.

- You will now see on your screen the charge. In this case there are 2 adults.

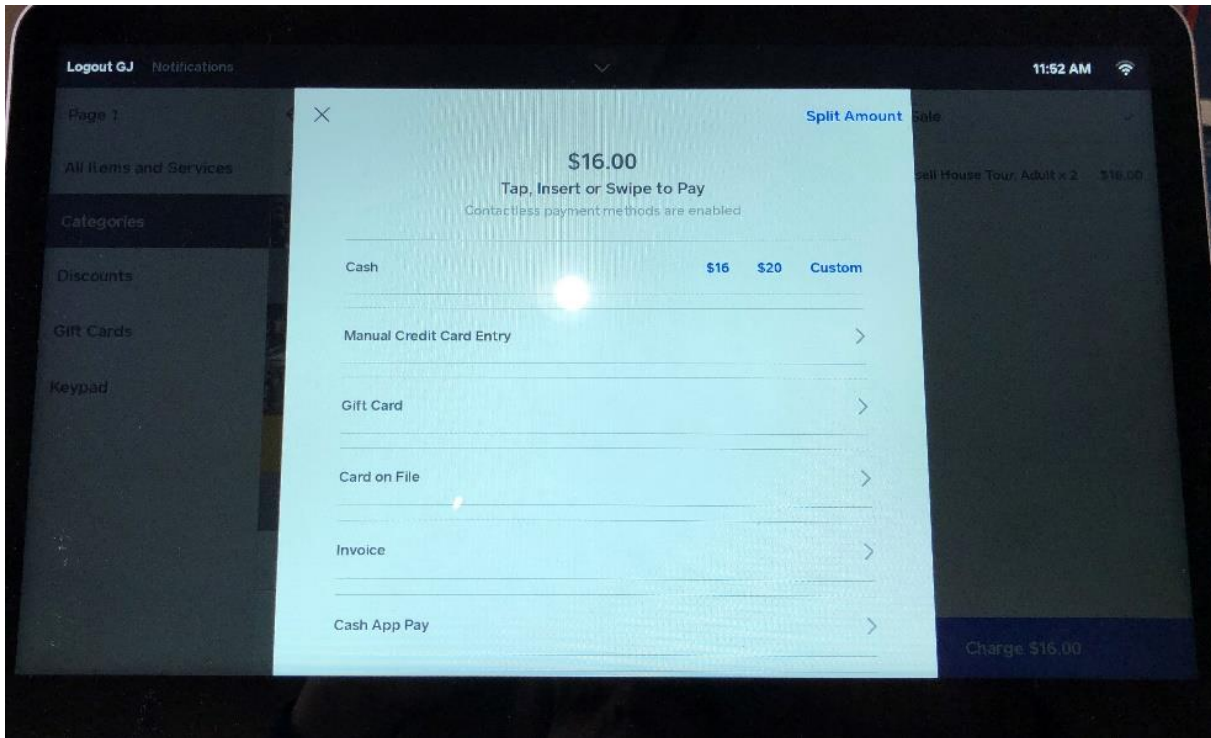


- Once you have entered the tours click on or tap “Charge” on the bottom right of the screen. Click on charge even if the tours are for members and there is no charge. You are to complete the *sale* in Square so we have a record of the number of tours given.

Processing payments

Paid Tours:

- Now that you have tapped 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.

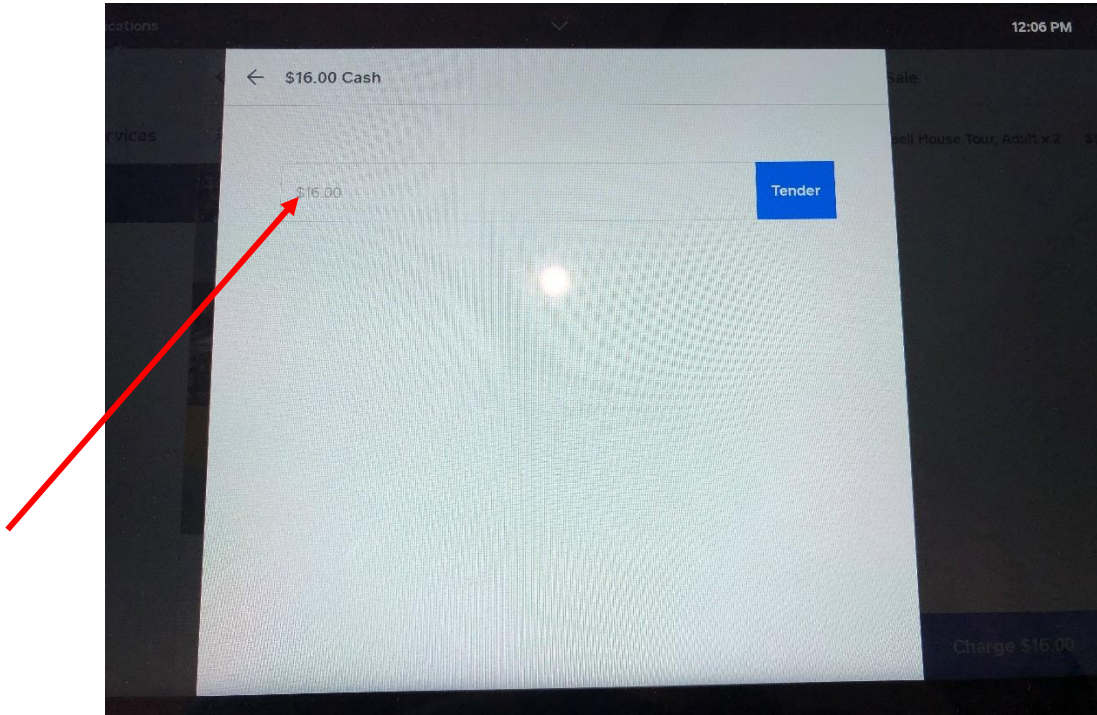
Processing Payments:

Paying by Cash

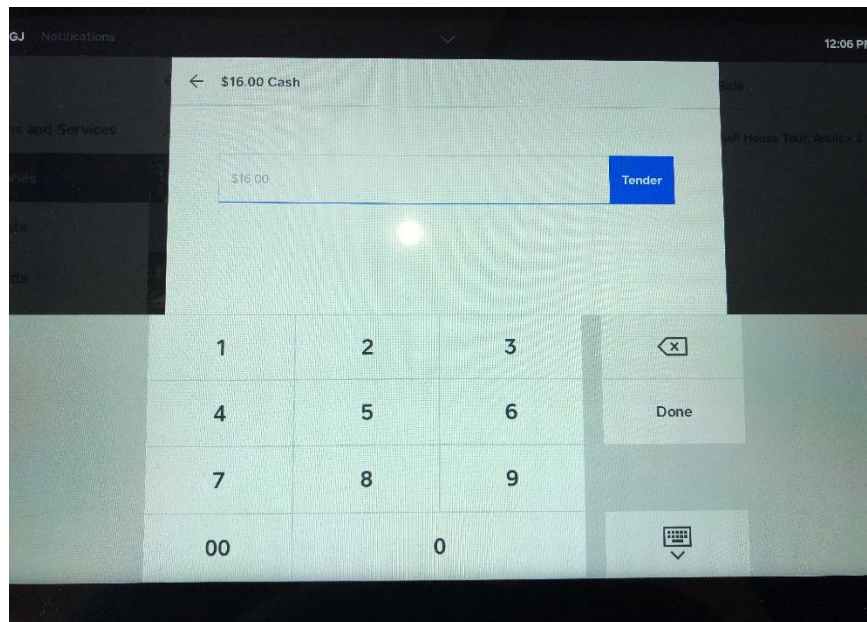
- If the customer wishes to pay by cash, you will notice you have a couple of options. Square gives you the most common cash options. In this example you have the choices of \$16, \$20 or a custom amount.
 - If the customer gives you exact change, tap \$16
 - If the customer gives you \$20, tap the \$20 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

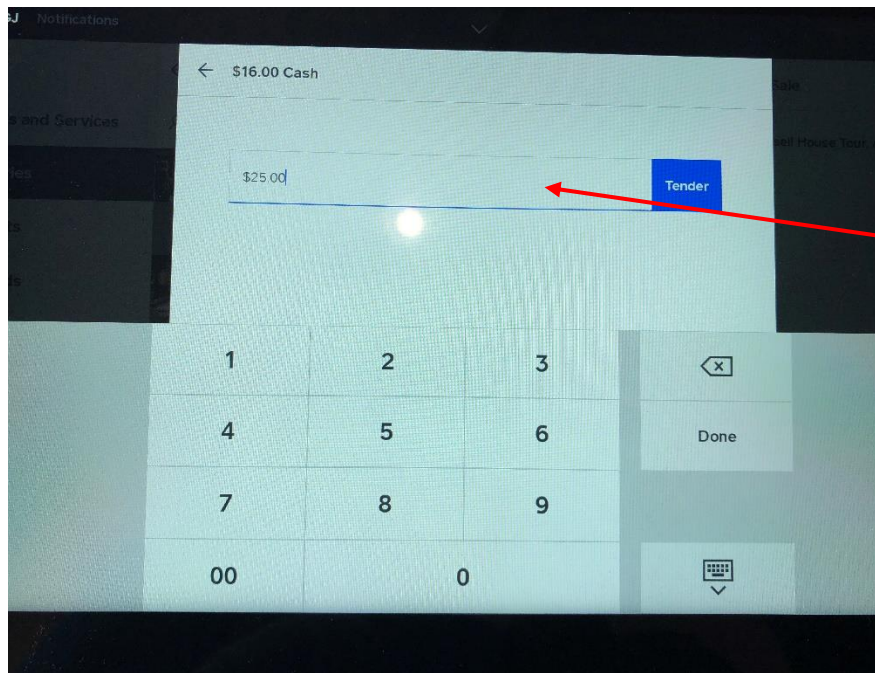
- If you tap Custom, the following screen will appear on Square.



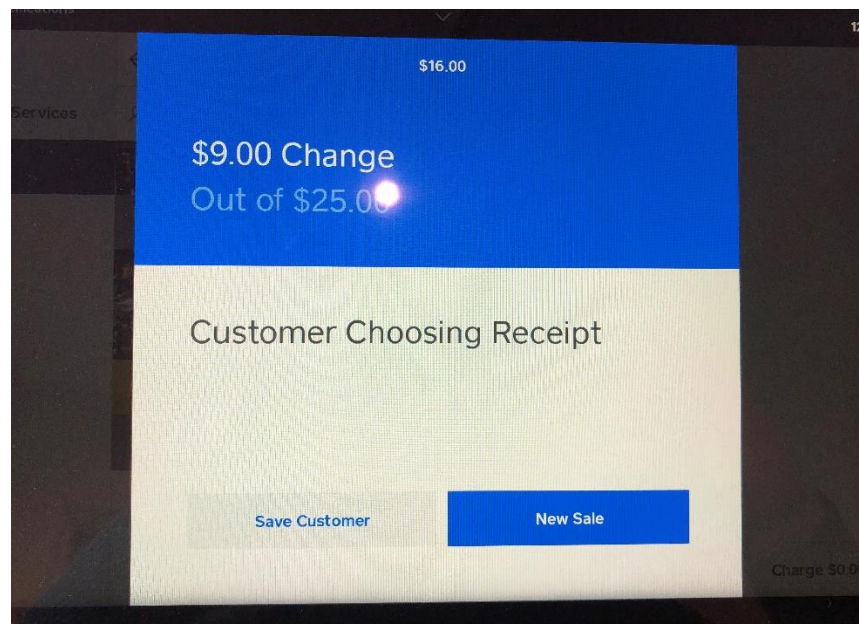
- Tap the box where you see the \$16.00 amount in light grey.



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



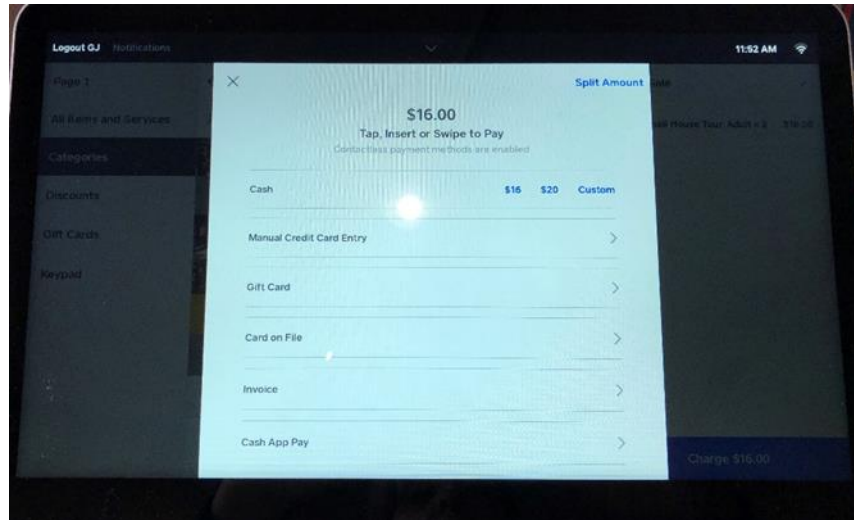
- In this example the customer will hand you \$25.00. Once you enter in the amount, tap the blue “Tender” square.



- 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:

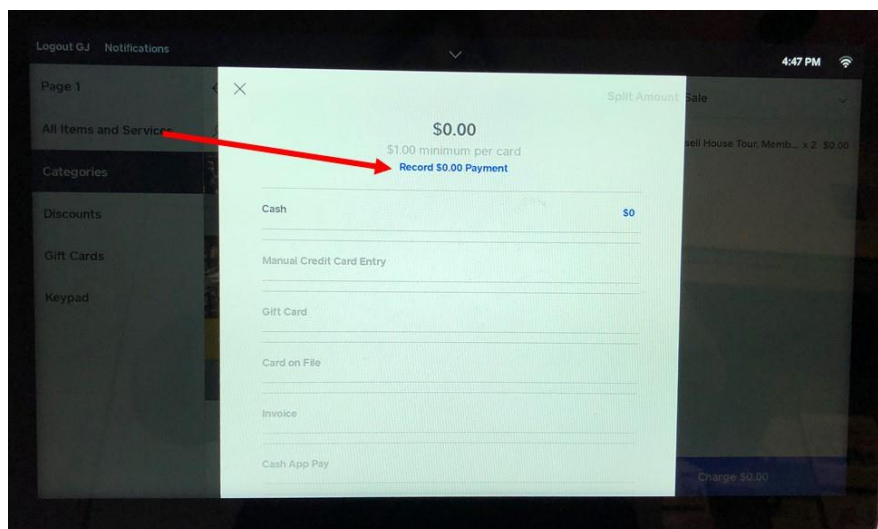
- When a customer is paying by credit card, once you have tapped the blue box with the charge amount you will come to the same screen you saw in the previous description on how to pay by cash:



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

Processing a \$0.00 payment

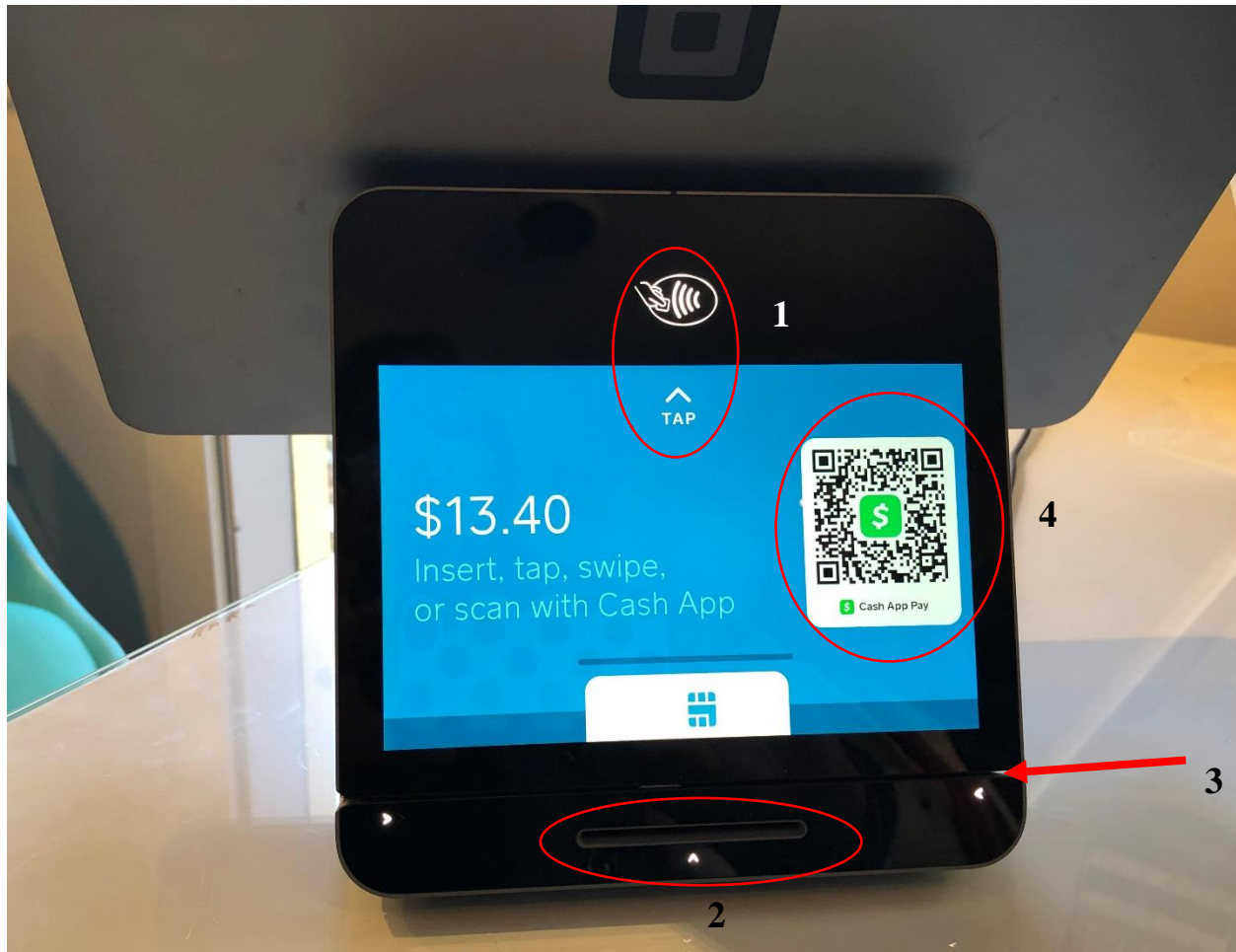
- When you are processing a member tour for \$0.00, you tap the blue charge button at the bottom right of the screen. On the next screen you will “complete the sale”. Tap on the blue words “**Record \$0.00 Payment**”.



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

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.:

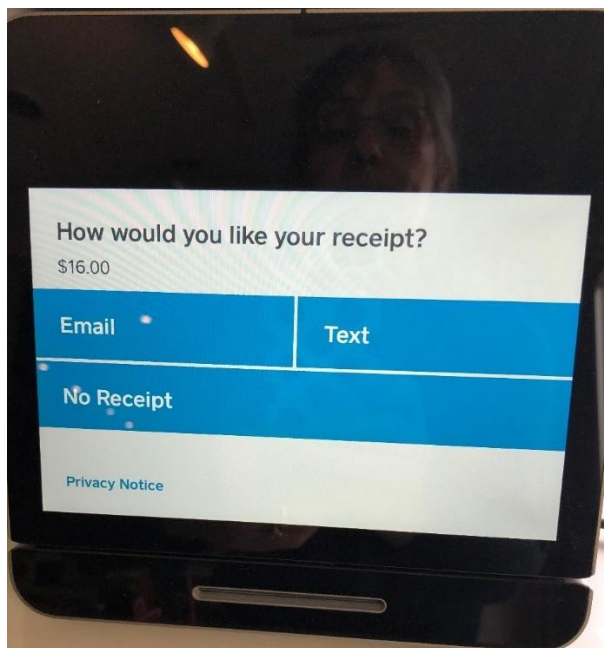


- If they are paying by credit card, which this screen initially looks like, the customer has the following options:
 1. Tap – Customer taps card at top of screen. If the customer has Apple Pay or Google Pay, they would use their smartphone and “tap” in the same place as a credit card.
 2. Insert – Customer 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.

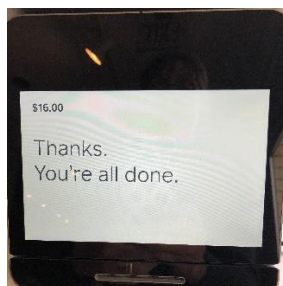
Receipts:

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:



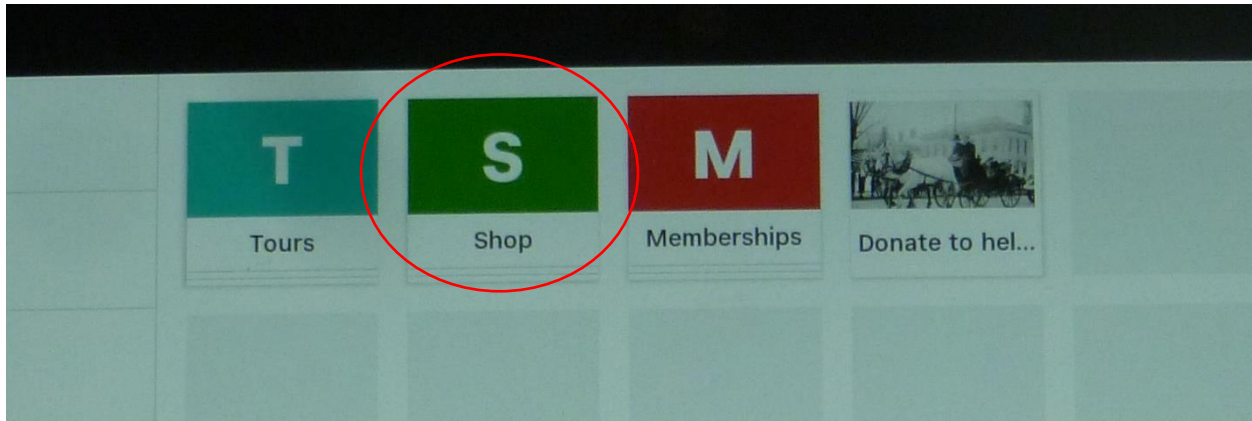
- The customer will tap the receipt option they wish to receive. If they tap email, they will be presented with an alphanumeric keyboard with which to enter their email address. If they wish a receipt via text, they will be presented with a numeric keyboard to enter in their cell phone number. Once done,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



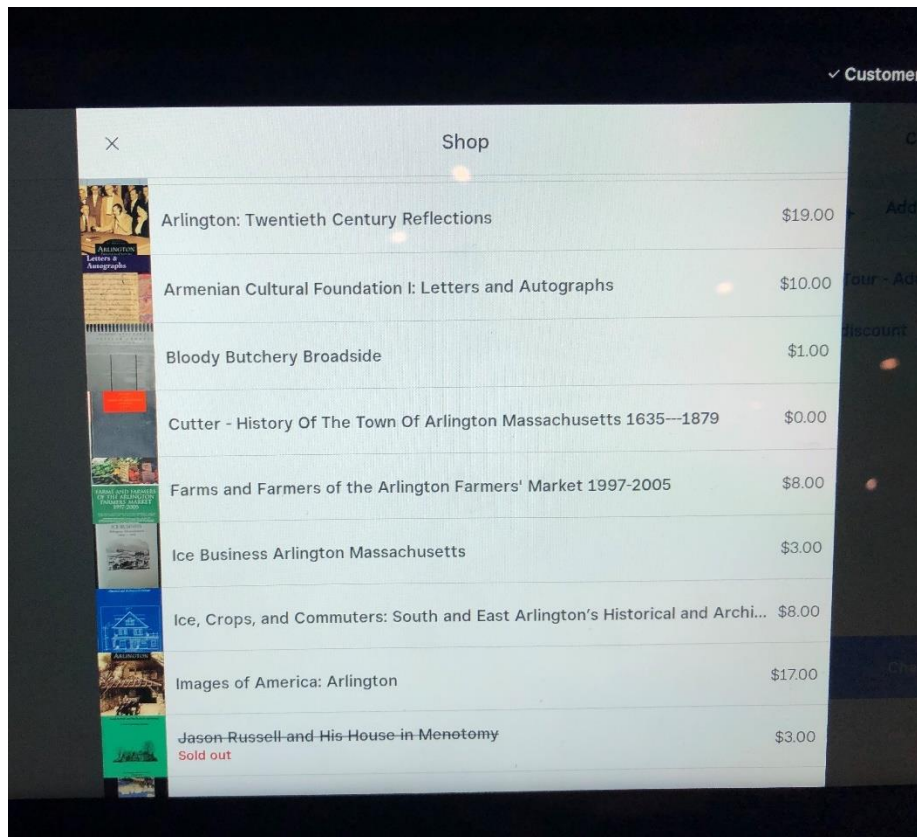
Other Shop Transactions:

Book transaction:

- A customer may purchase a book. At the top of the screen, select the Shop tile:



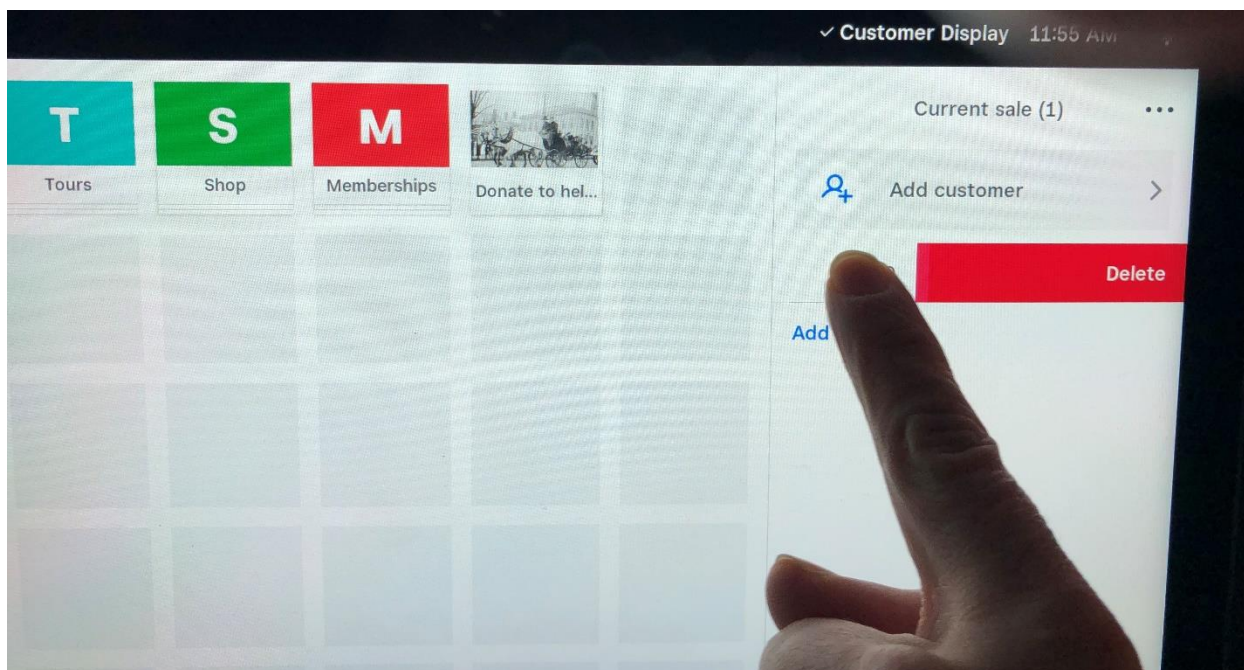
- This will bring up a menu of all of the items we carry are listed in alphabetical order.



- 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.
- The select item will be added to the sale. Complete the sale by tapping on the blue box on the bottom right-hand corner.
- Tour and shop sales can be completed in the same transaction.

Deleting an item from the sale:

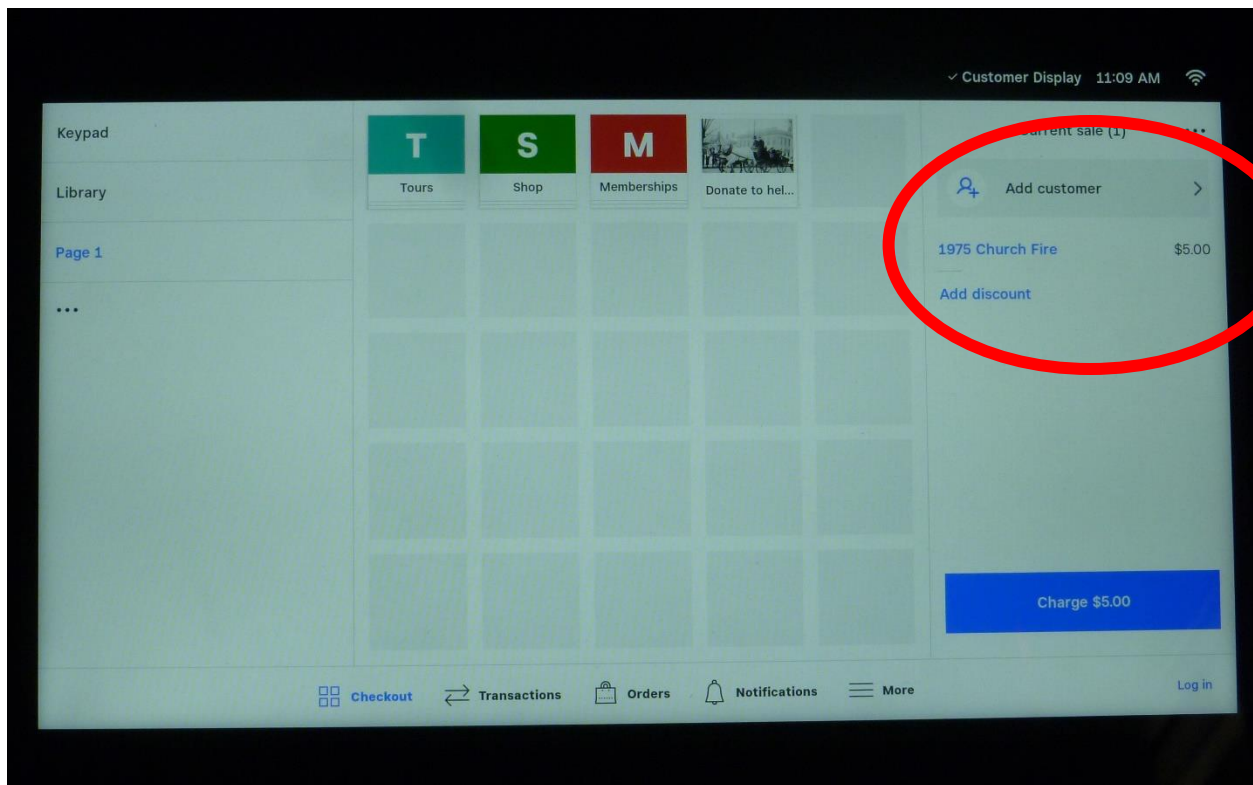
- You may wish to delete an item from the list of purchases. This may be because a wrong item was tapped or the customer changed their mind. If you are still on the sales screen shown above, swipe left on the item.

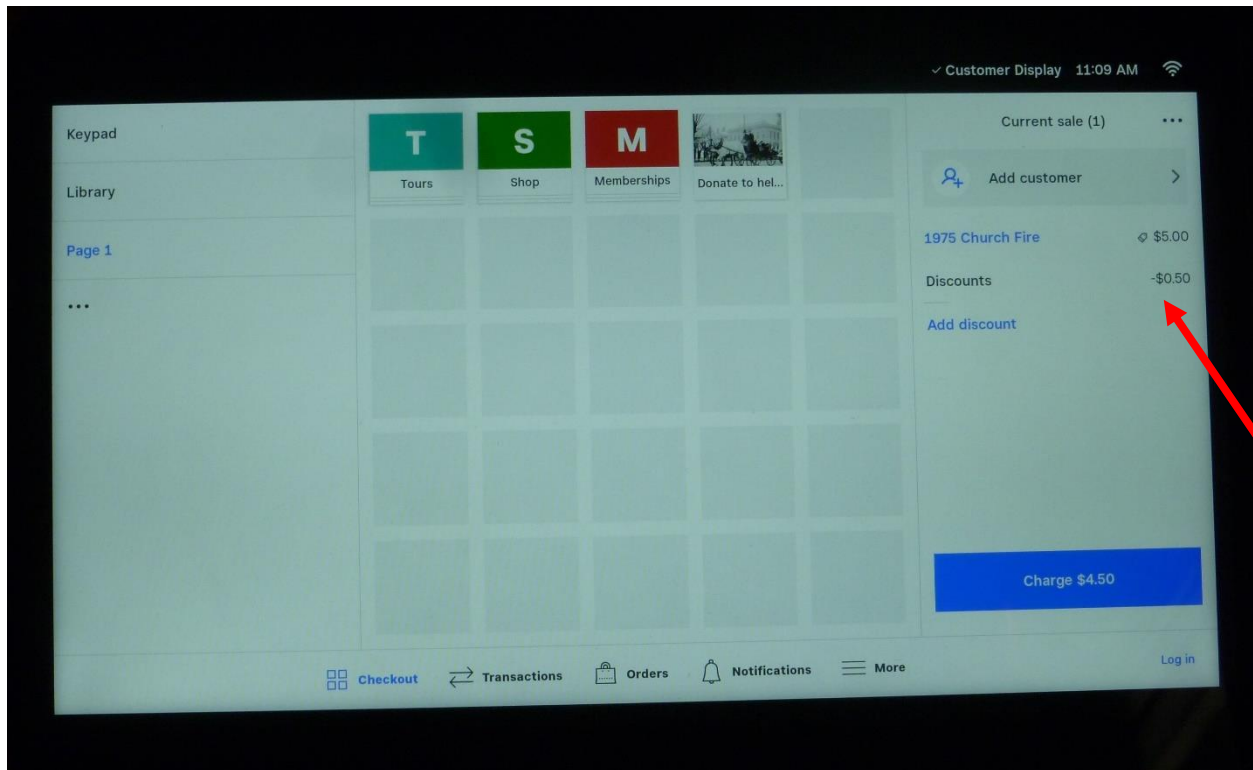


- The item will be removed.

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 right hand side of the screen where the sale is listed are the words “[Add discount](#)”. Tap this.





- The member 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. We have envelopes which once filled out has the information we need. These are found in the cabinet where the binders are kept. The envelopes look like:

Membership benefits:

- Personalized membership card
- Free admission to the Jason Russell House, the Smith Museum, and all Society Lectures
- Invitations to members only programs or discounts for special events
- 10% off purchases from our museum shop
- Free subscription to our quarterly printed newsletter, "Menotomy Minutes"

Sustaining Members receive all the above benefits, plus:

- Two complimentary guest passes to the Jason Russell House or any Society lecture
- Membership in the North American Reciprocal Museum Association (NARM). This gold sticker on your membership card gets you free admission to 842 museums across the country.

YES! I would like to become a member of *The Arlington Historical Society!*

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ - _____ - _____

Email _____

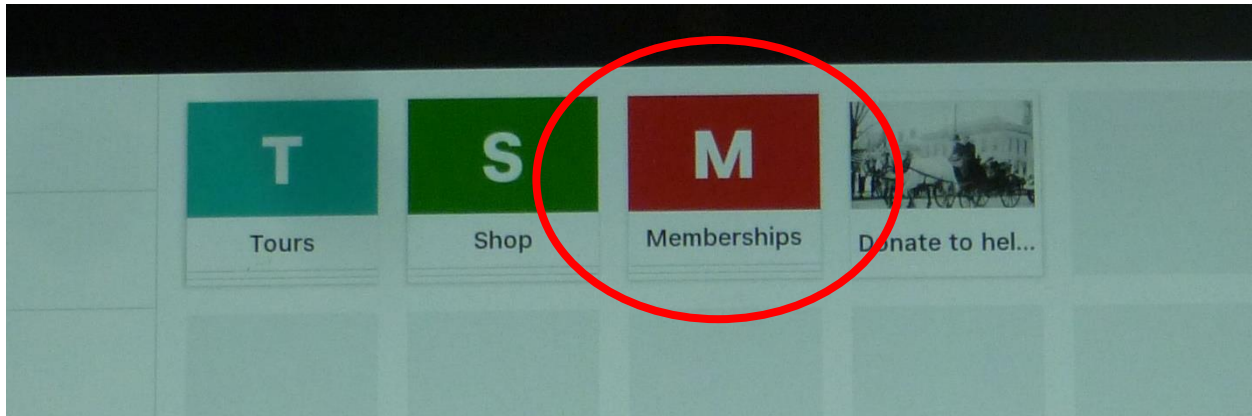
Membership Levels (choose one)

INDIVIDUAL (\$30) SUSTAINING (\$100)

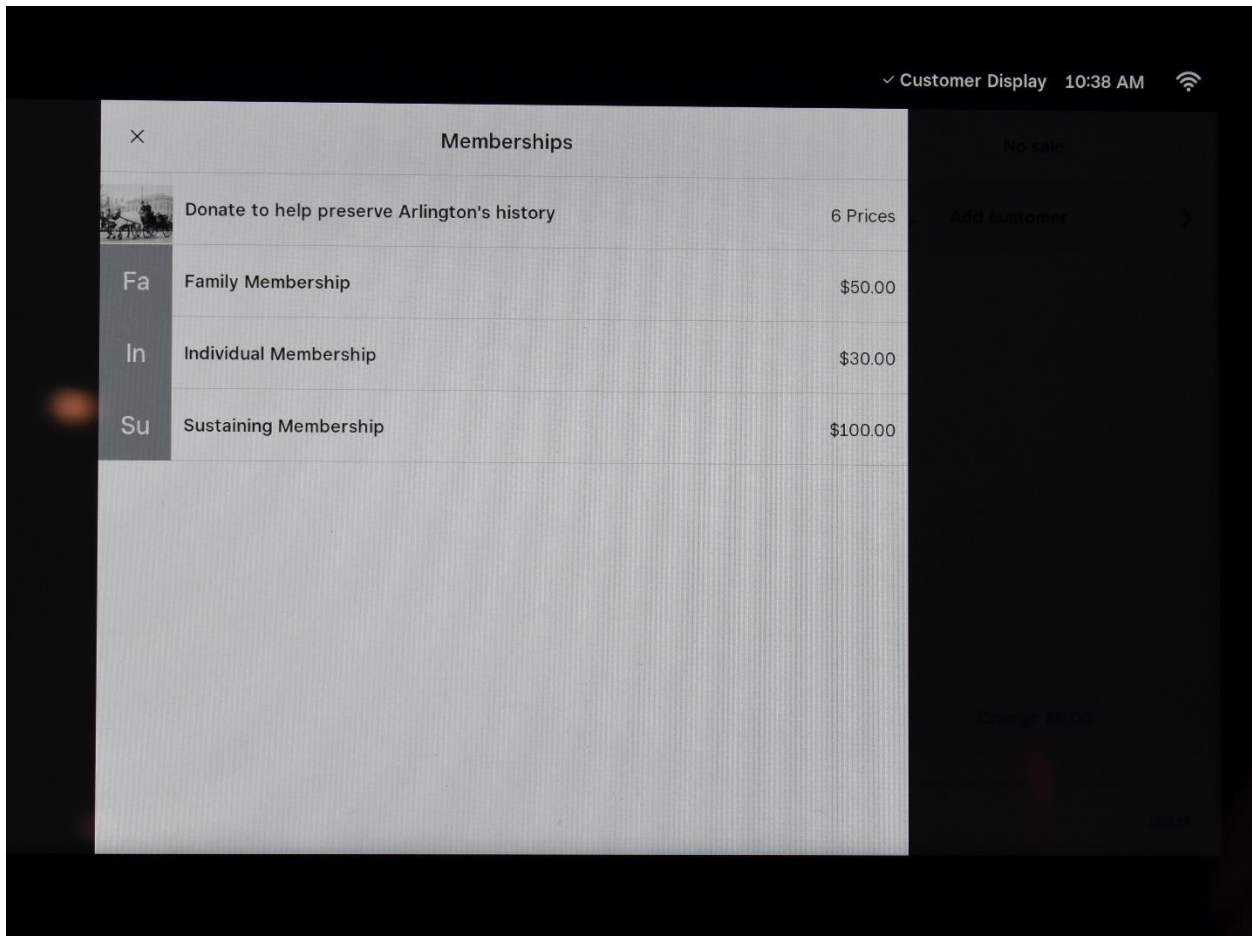
FAMILY (\$50) DONATION \$ _____ TOTAL ENCLOSED \$ _____

- When the customer hands the form back to you make sure the membership level is chosen and **write the date on the bottom of the form**

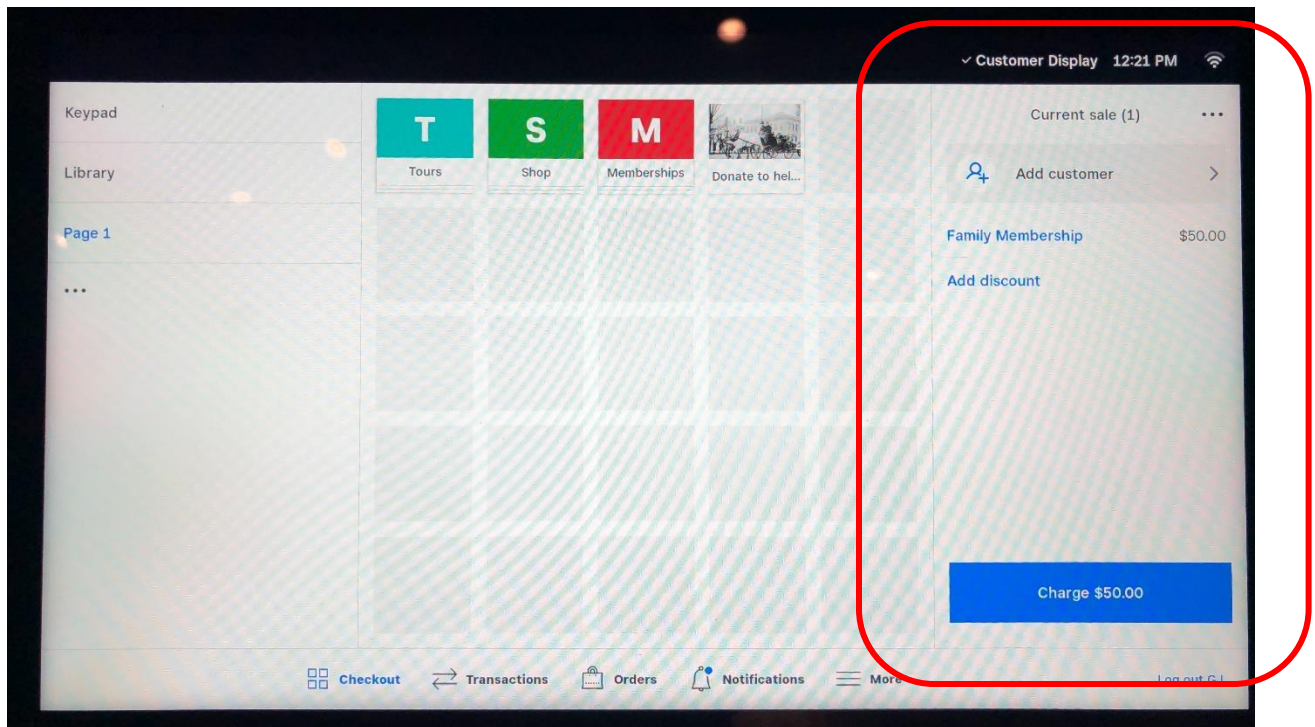
- Next you will tap the “Membership” tile on your screen.



- You will then have the following options to choose from. Select the option the customer filled out on the membership form.

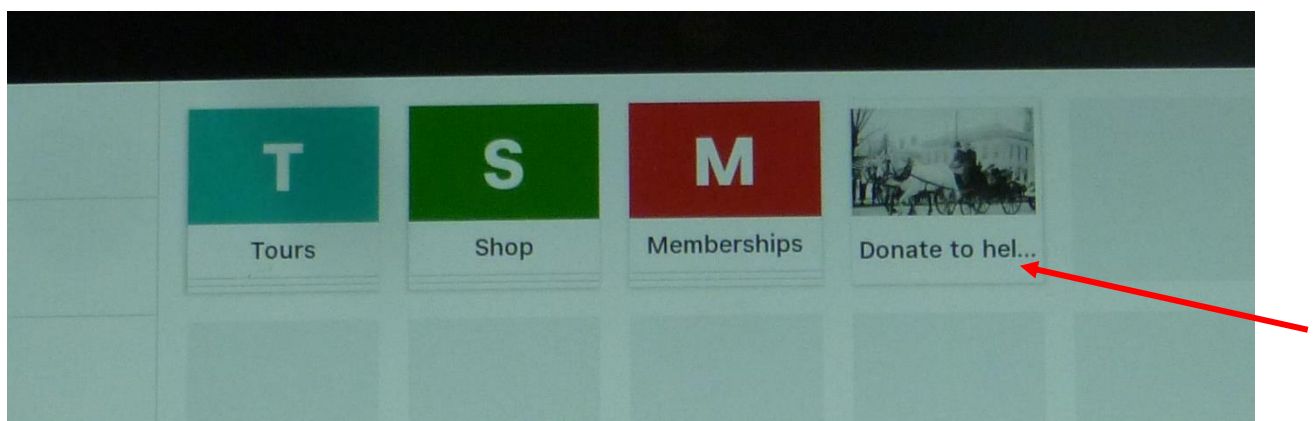


- If the customer wishes a Family Membership, just tap that item, it is added to the sale and process the sales.

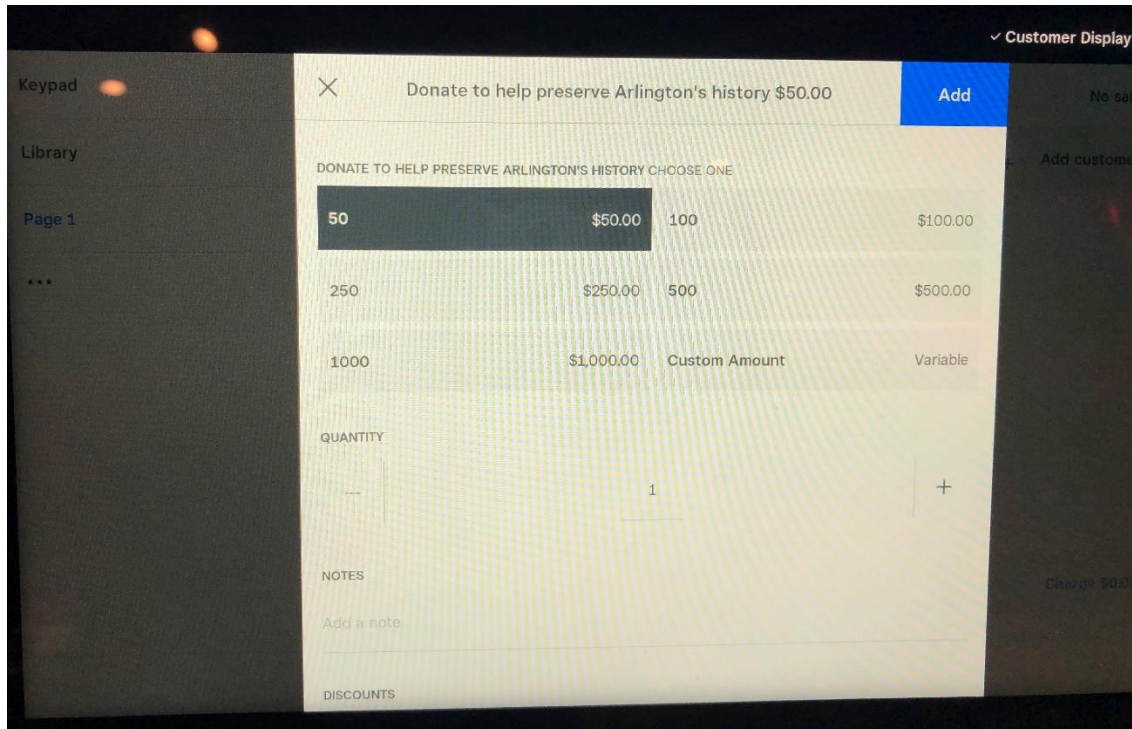


Donations:

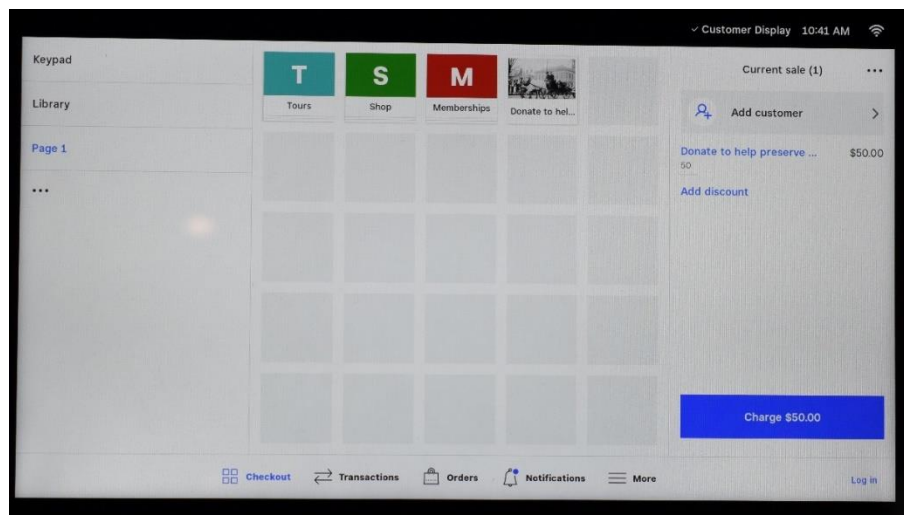
- You may have someone who wishes to make a donation to the Arlington Historical Society and do not wish to use the donation jar or want to charge their credit card.
- To process a donation through Square, select the “Donations” tile from the top of the screen.



- You will be presented with the following screen. Select the amount the visitor wishes to donate.

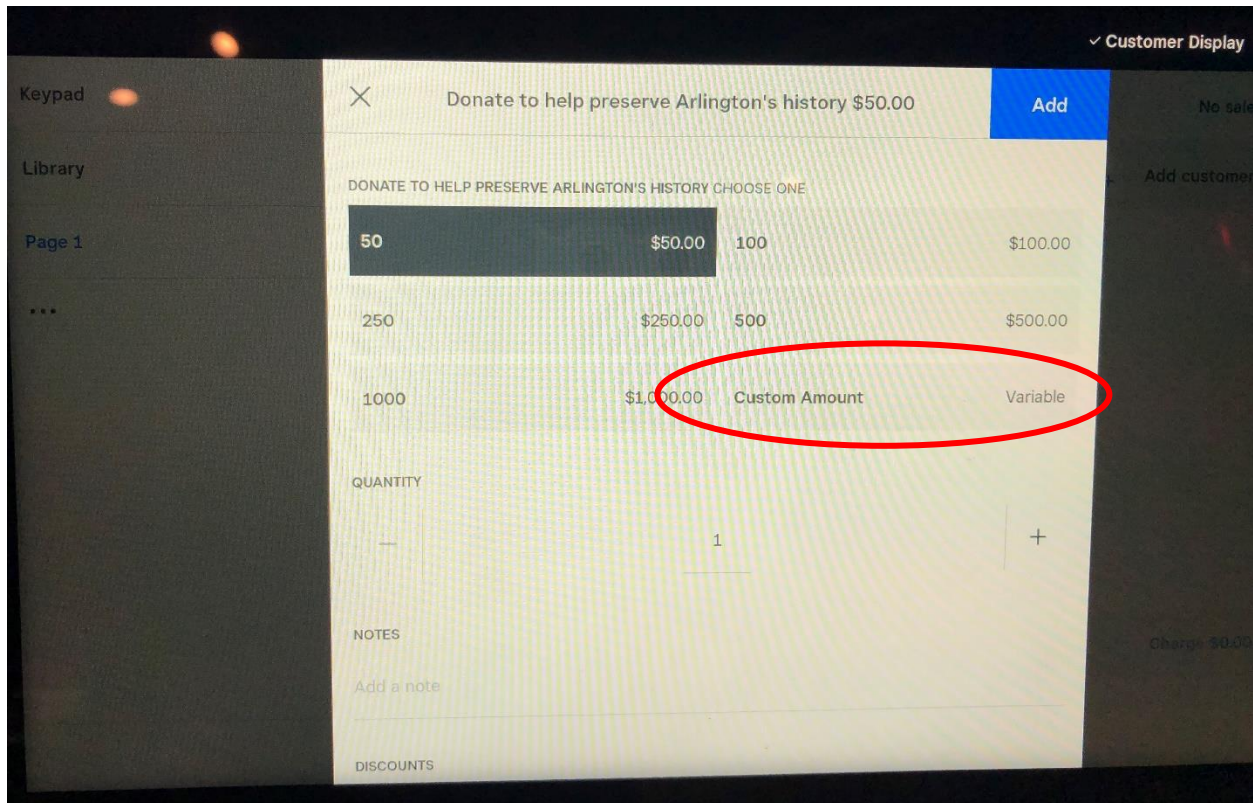


- For instance, if the customer wanted to make a \$50 donation you would tap that option and then tap the word “Add” in the blue box in the top right-hand corner.
- When you tap the blue box “Add”, you will be taken back to the sales screen and you can process the sale.

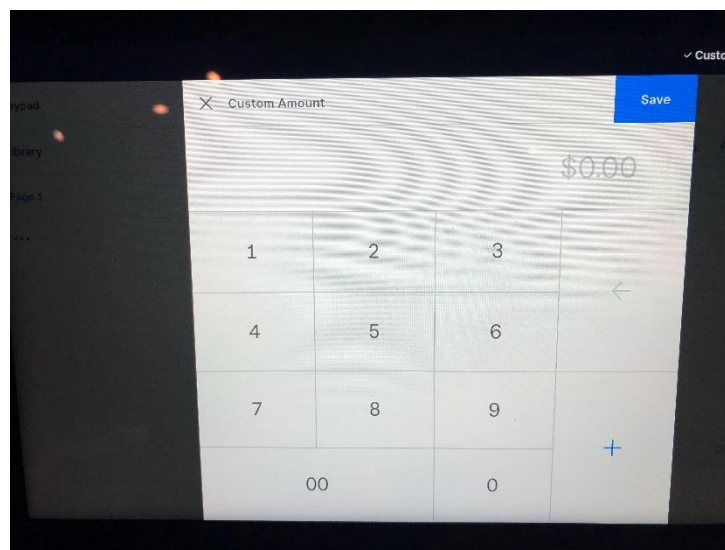


Custom Donation Amount:

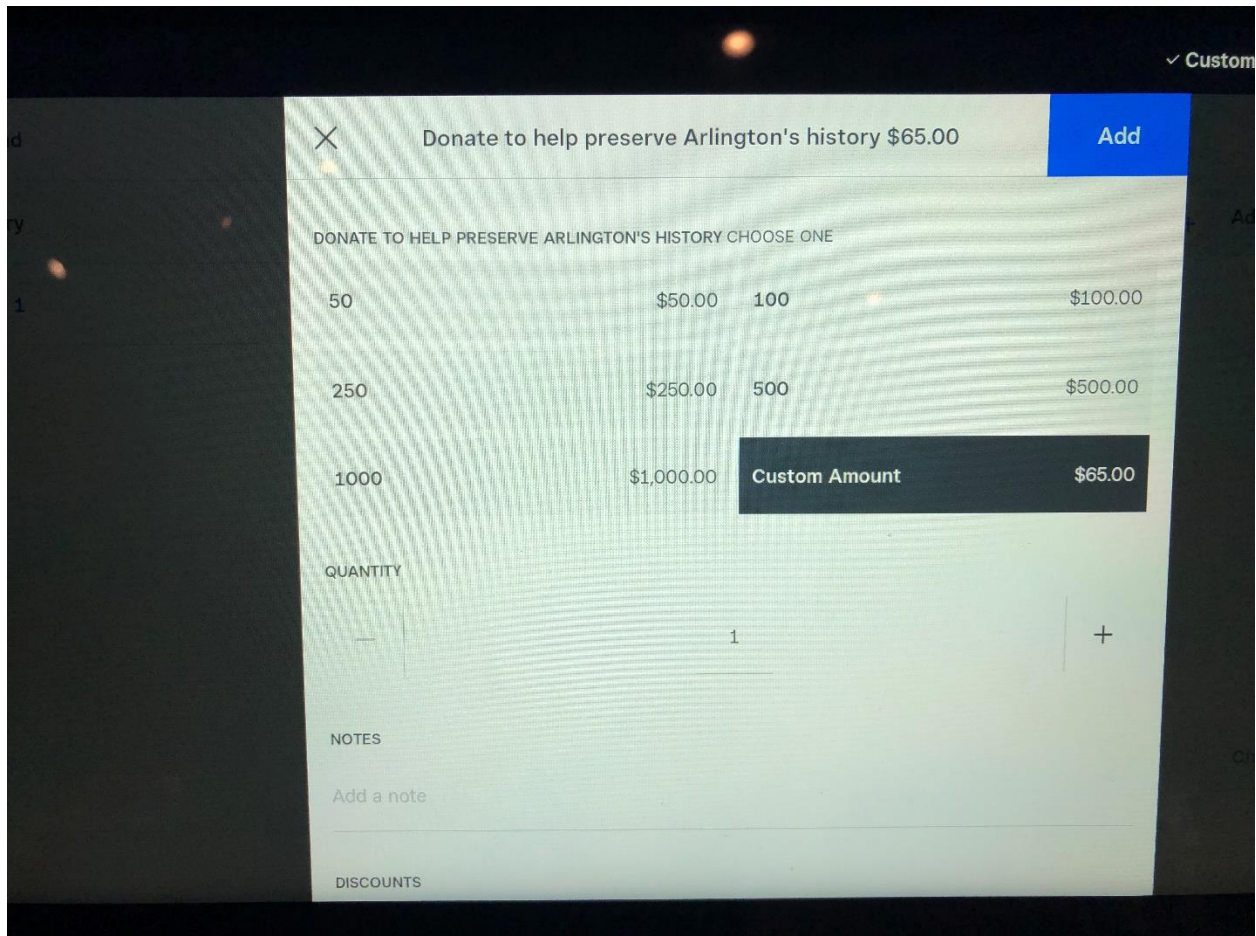
- If you have a customer who wishes to make a donation that is not one of the options on the donation screen (\$50, \$100, \$250, \$500 or \$1,000), you can select the Custom Amount option.



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



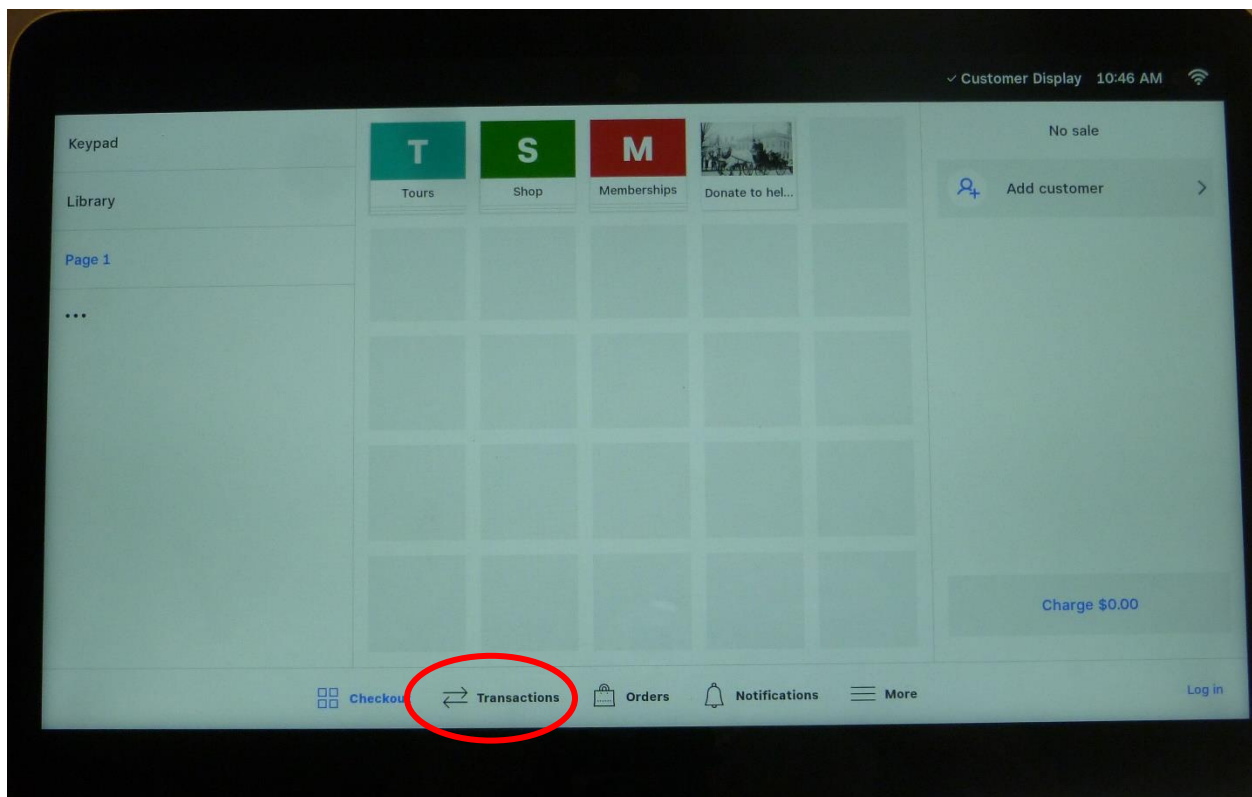
- Enter in the amount the customer wishes to donate and then tap the blue “Save” button on the top right of the screen. For example, if the customer wished to donate \$65, you would tap the 6, then the 5, then followed by two 0s and then tap the “Save” button. When you do this, you will be taken back to the main screen with the donation amounts. You will notice that the custom amount now has a \$65 value.



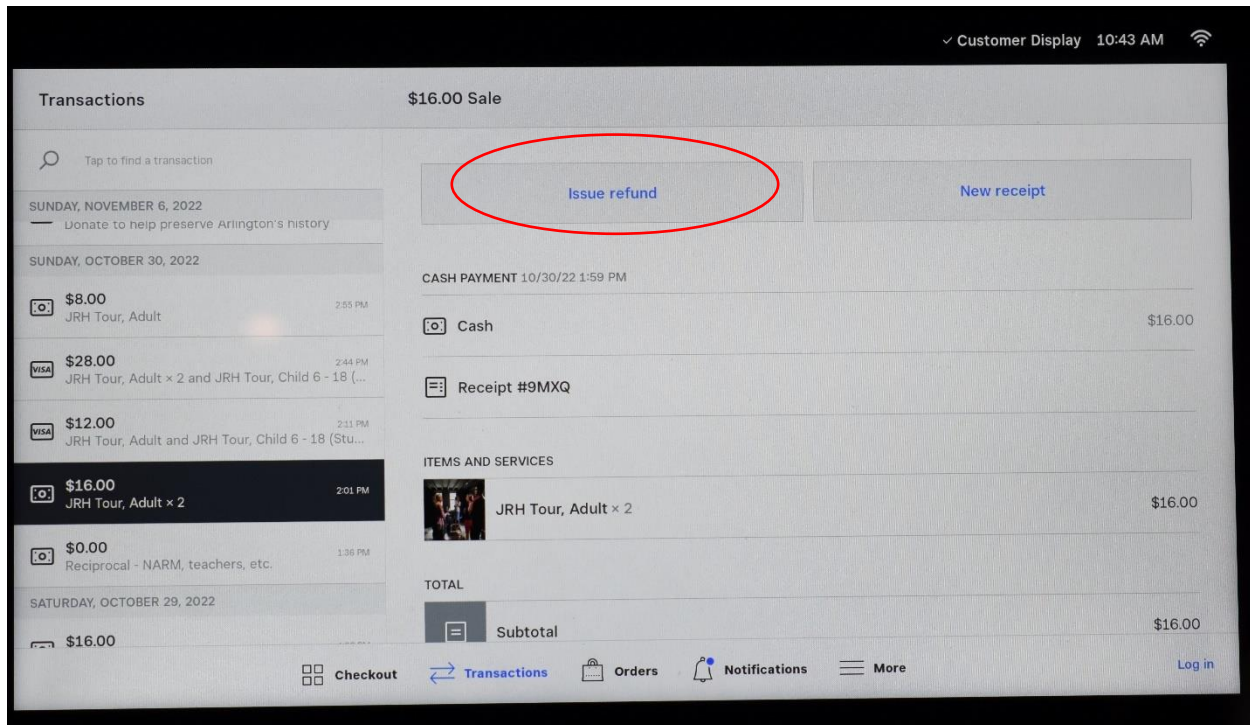
- As in the previous example, you now just tap the blue box “Add” and process the sale.

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, look at the menu at the bottom of the screen and select “Transactions”.

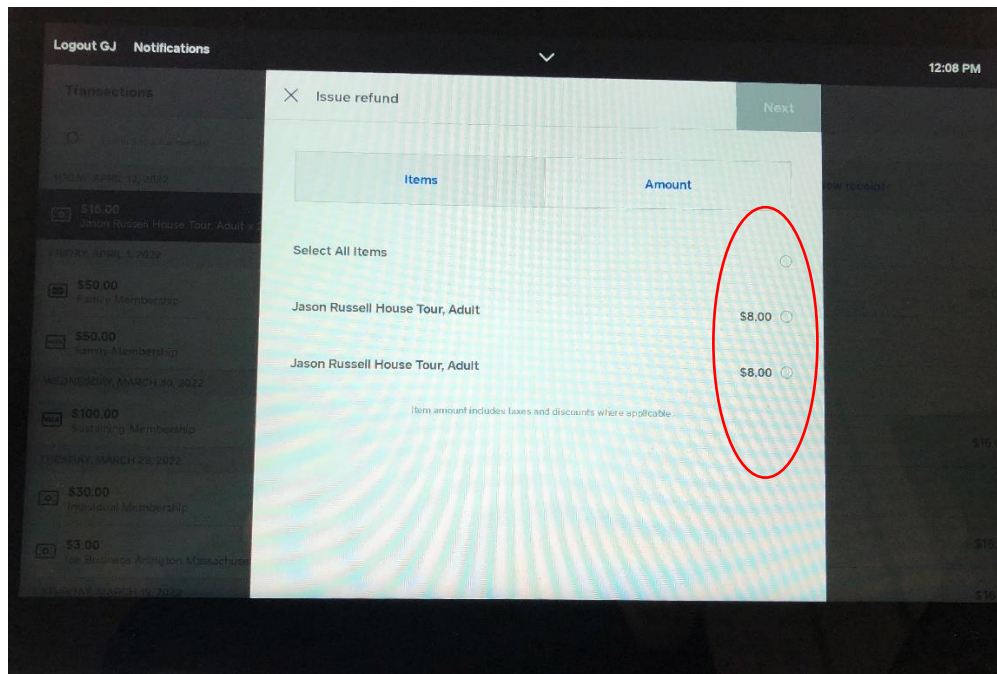


- This will bring up the following screen. On the left-hand side of the screen is a listing of all the most current transactions. You can see the transaction for \$16 for 2 adult tours. Tap that transaction. You will now see in the center of the screen the details of the transaction.

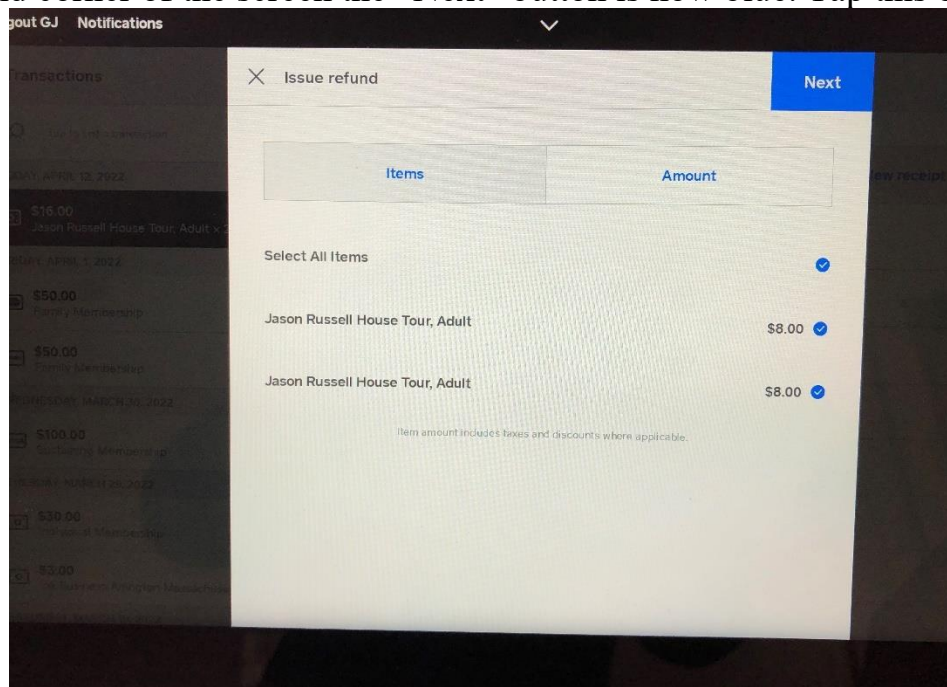


- At the top of the screen, you will notice two buttons, “Issue Refund” and “New Receipt”. Tap “Issue Refund”.

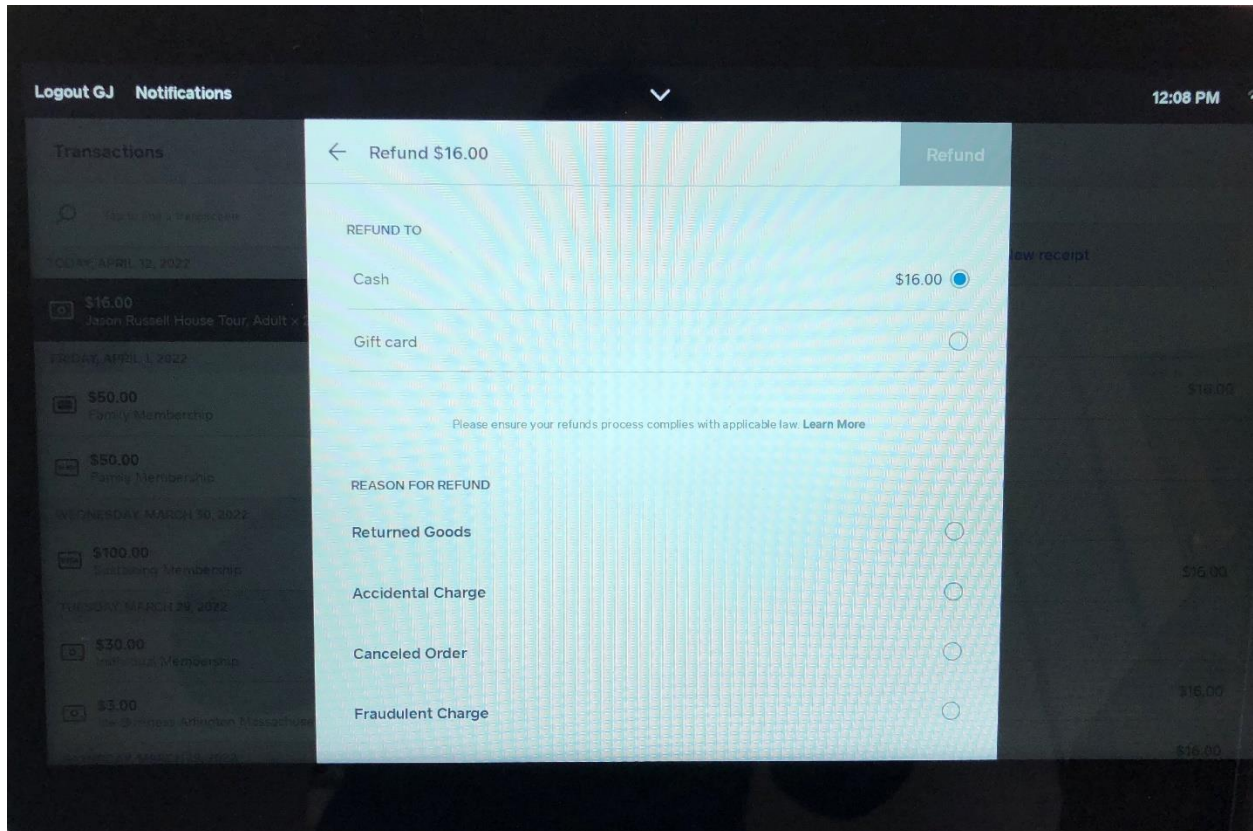
- This will bring you to a screen displaying the items purchase in this transaction:



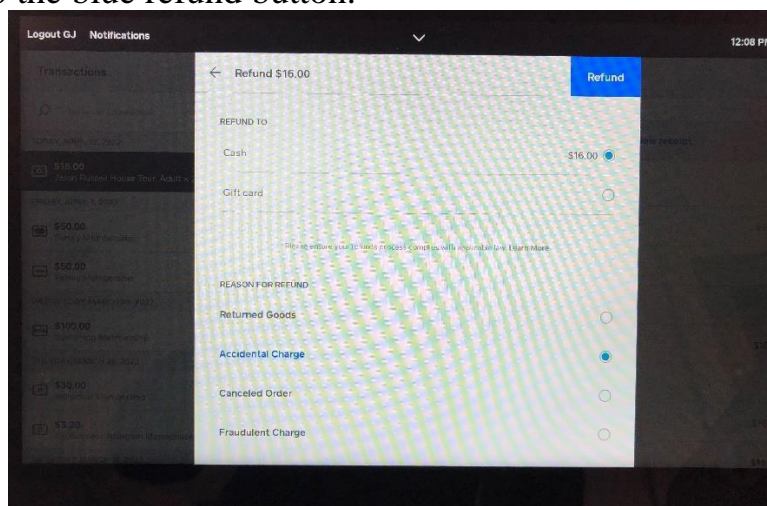
- You will see the two adult tours. You can either tap the little round button next to each dollar amount or tap the “Select All” button.
- Once you select the items to be refunded, you will note that up in the right-hand corner of the screen the “Next” button is now blue. Tap this button.



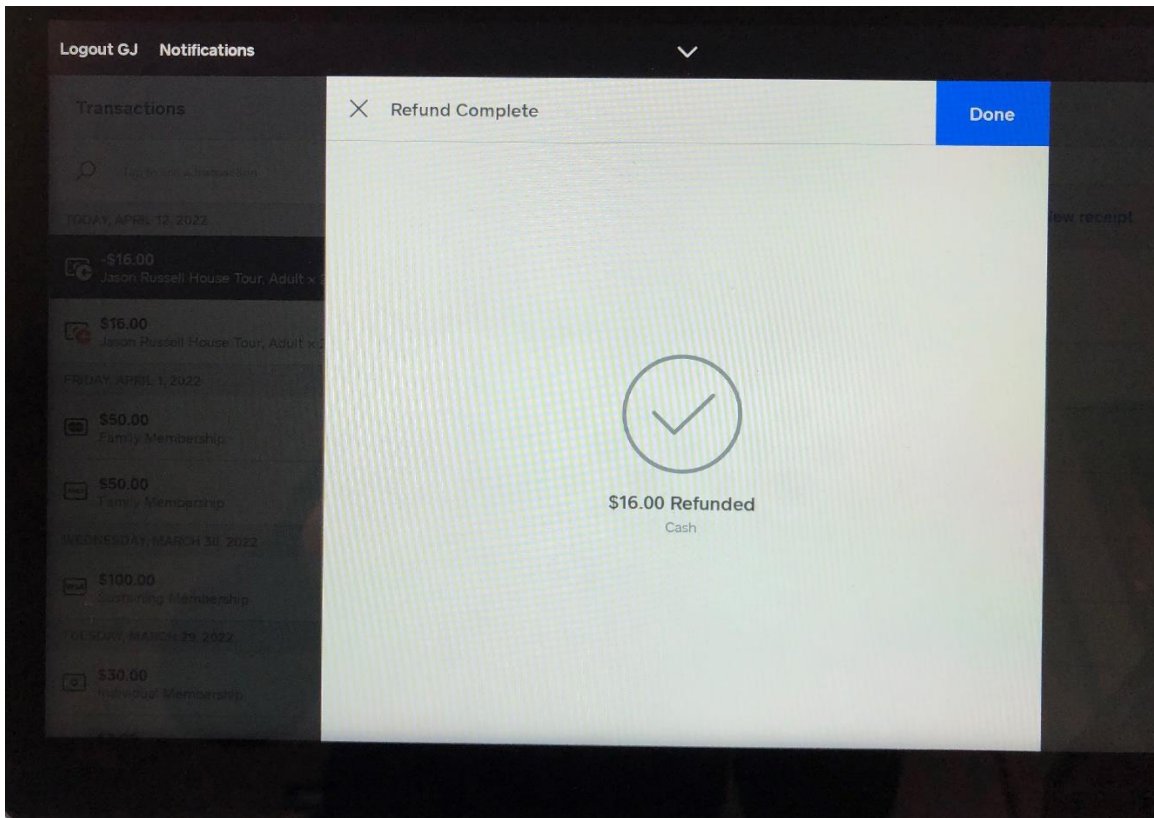
- This will bring to the next screen. Here you must select a reason for the refund. Either it is an “accidental charge”, payment was processed as cash and should have been a credit card. Or, it is a “Canceled Order”, the customer has changed their mind. Note that Square has how the refund will be issued.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



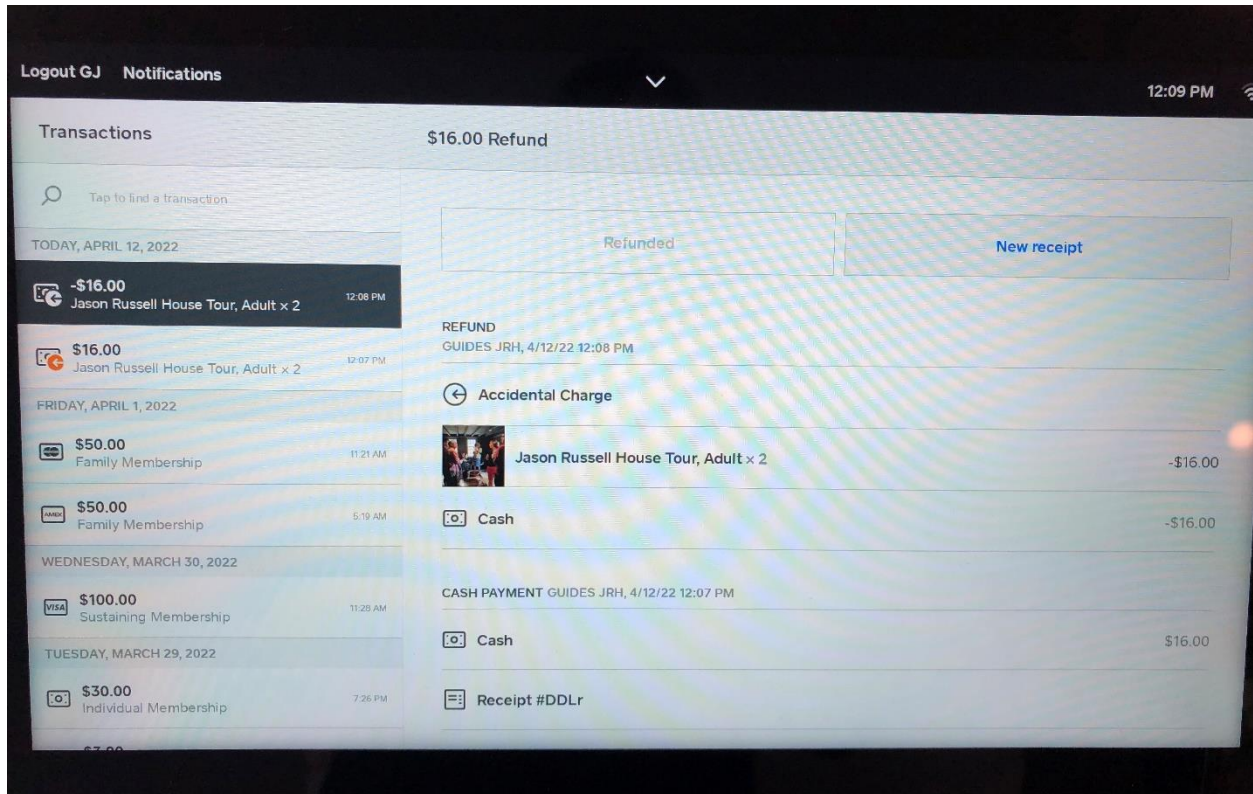
- Select the appropriate reason for the refund and the “Refund” button is now blue. Tap the blue refund button.



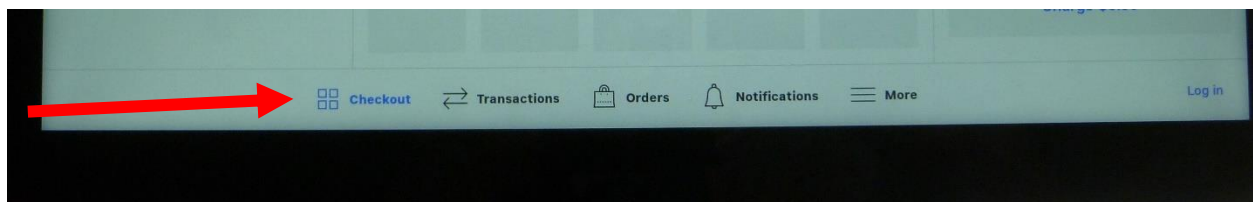
- You will see this screen next. Tap the blue “Done” button.



- 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.



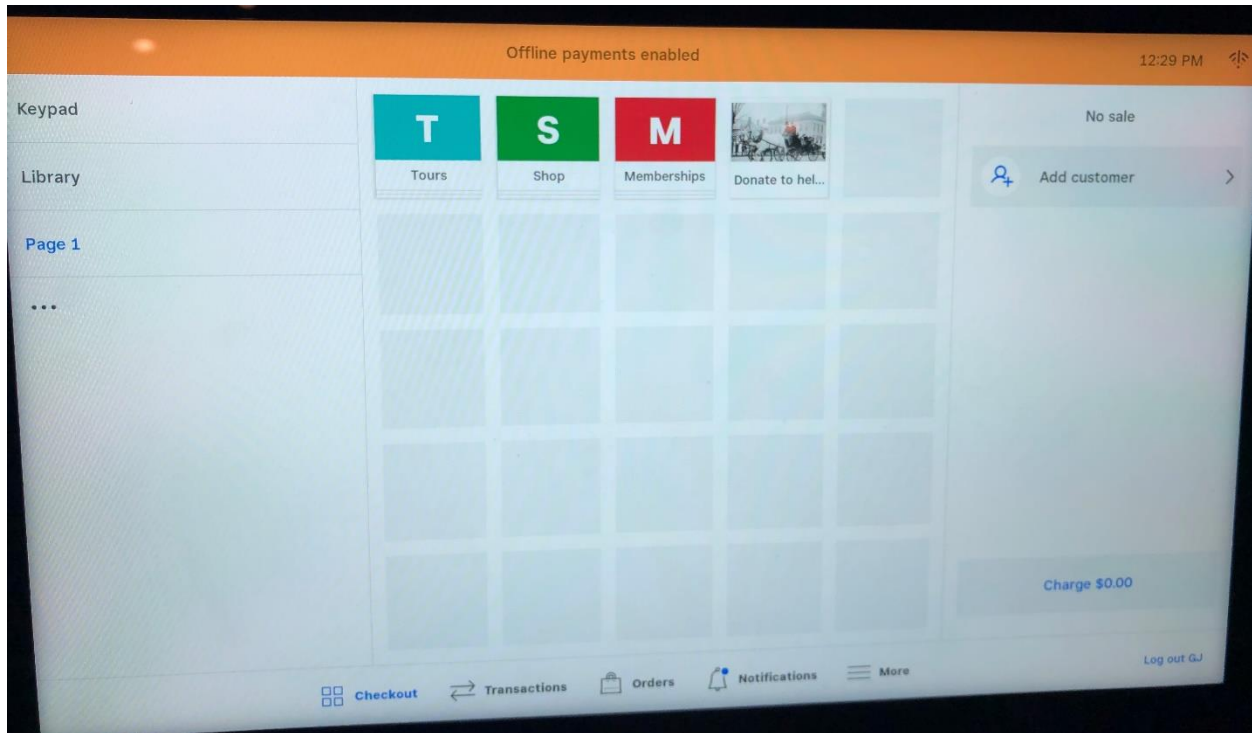
- To go back to your sales screen and be ready for the next customer, on the bottom of the screen, tap “Checkout”. You are ready for the next customer.



Trouble shooting Square

Square is Offline

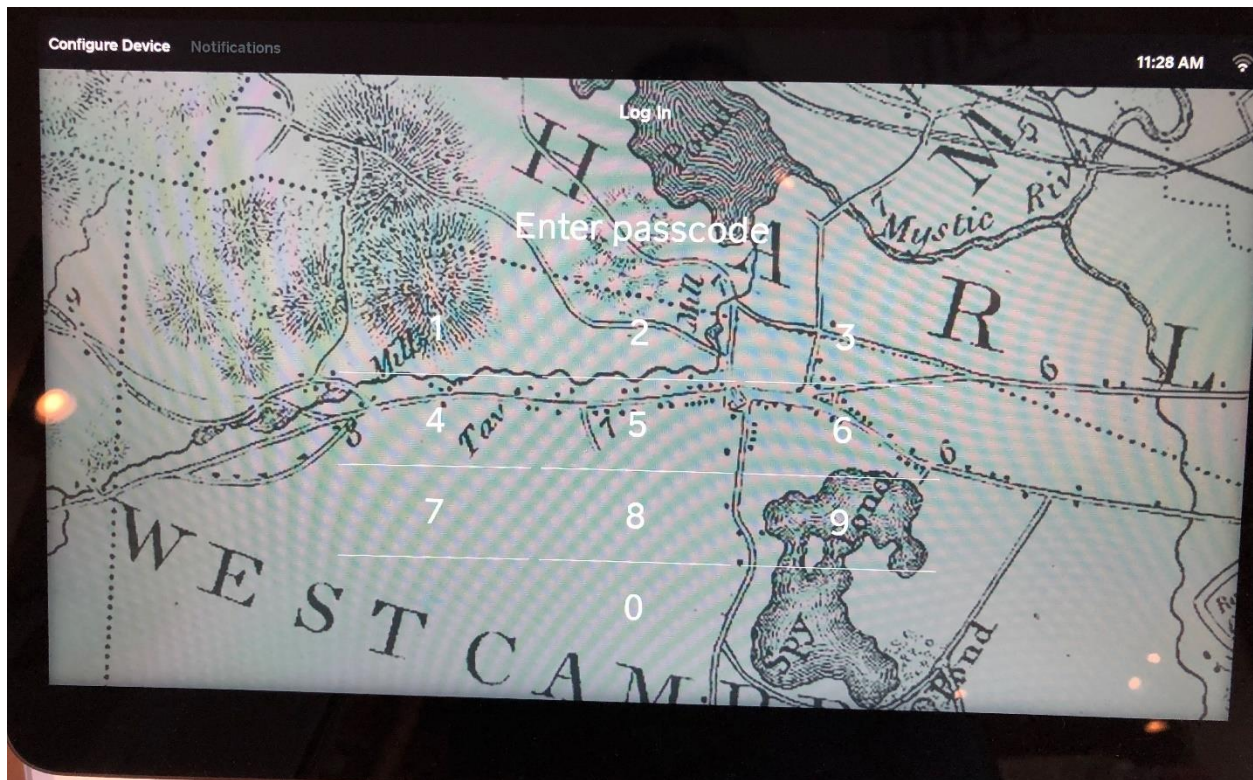
- You may see a screen where Square is telling you it is offline and you are not connect to the internet. The screen will look like:



- You can still process sales. Once the wifi re-connects, all transactions will be processed through Square. If you are very concerned about being offline or Square has been offline for the duration of your shift, contact your month manager.

Passcode required

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

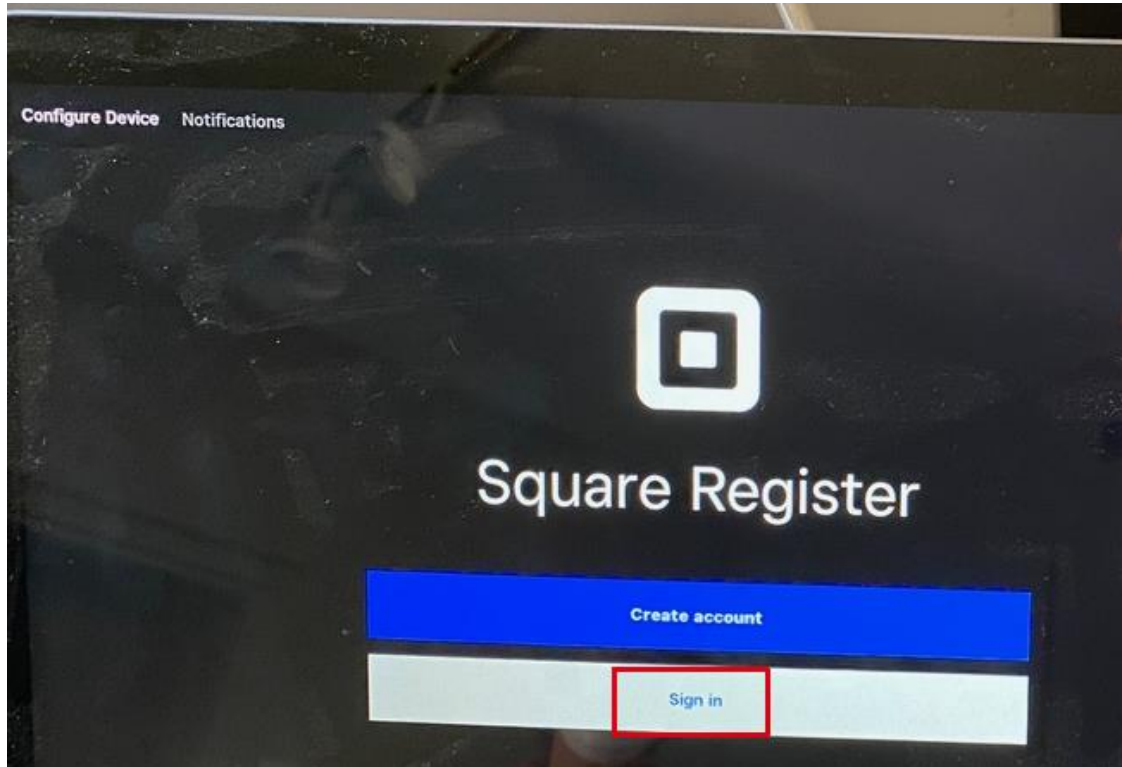


- In this case, for some reason you are logged out of square. To login type 1775
- Square is now ready for you to use.

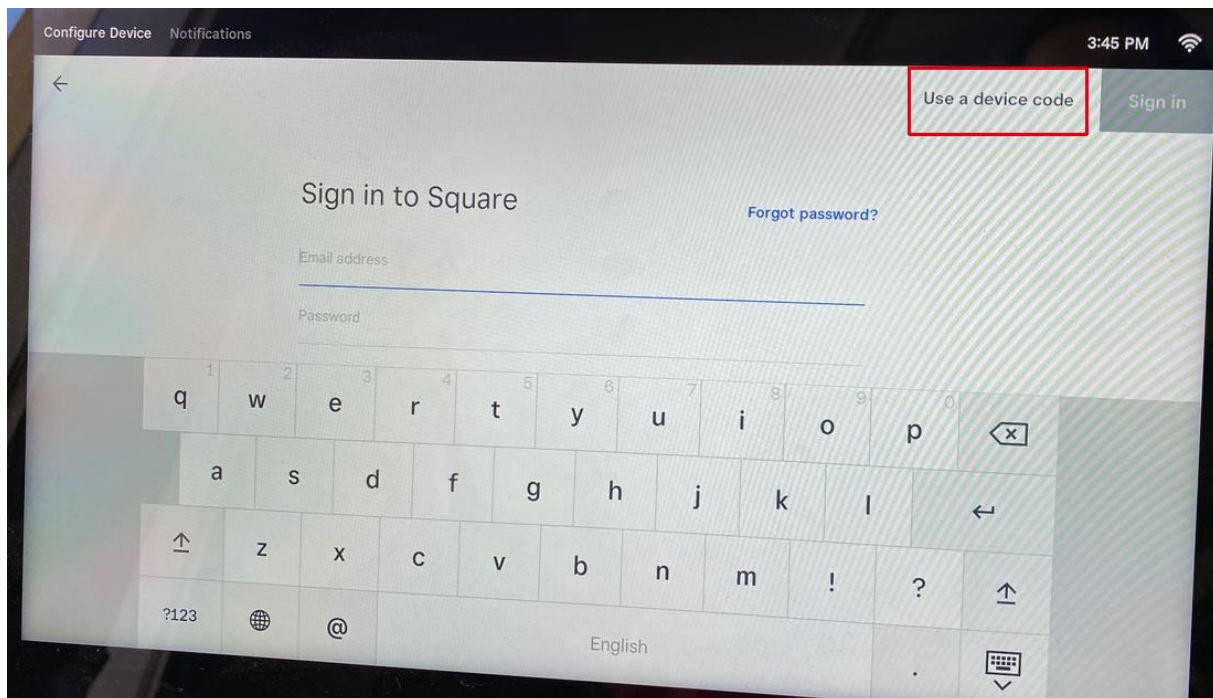
Logging in to Square

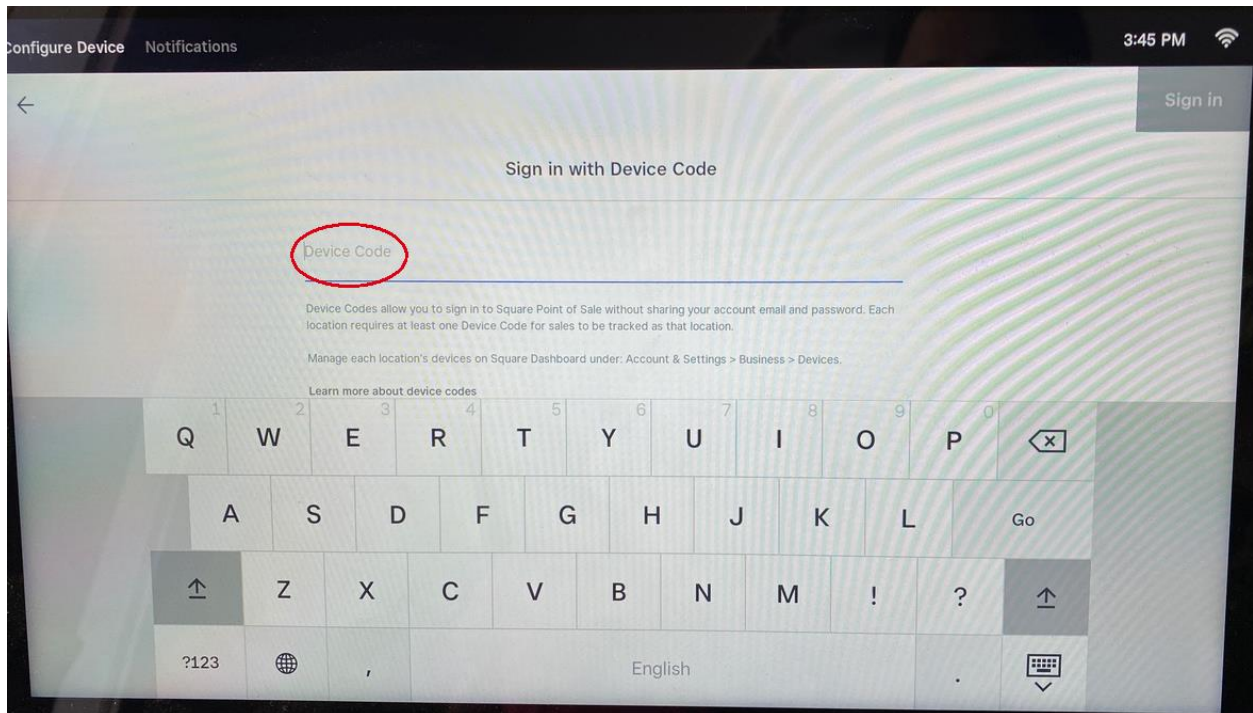
- If necessary, it is possible to log back into the Society's Square account using the device code. This code appears to only be usable on a single device, the register at the front desk, and is safer to hand out to guides than a password.

- Tap **Sign in** when the register first boots up.

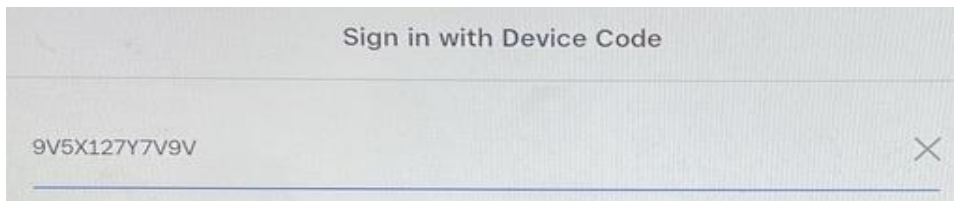


- When asked for the email and password, instead tap on **Use a device code** in the upper right corner.

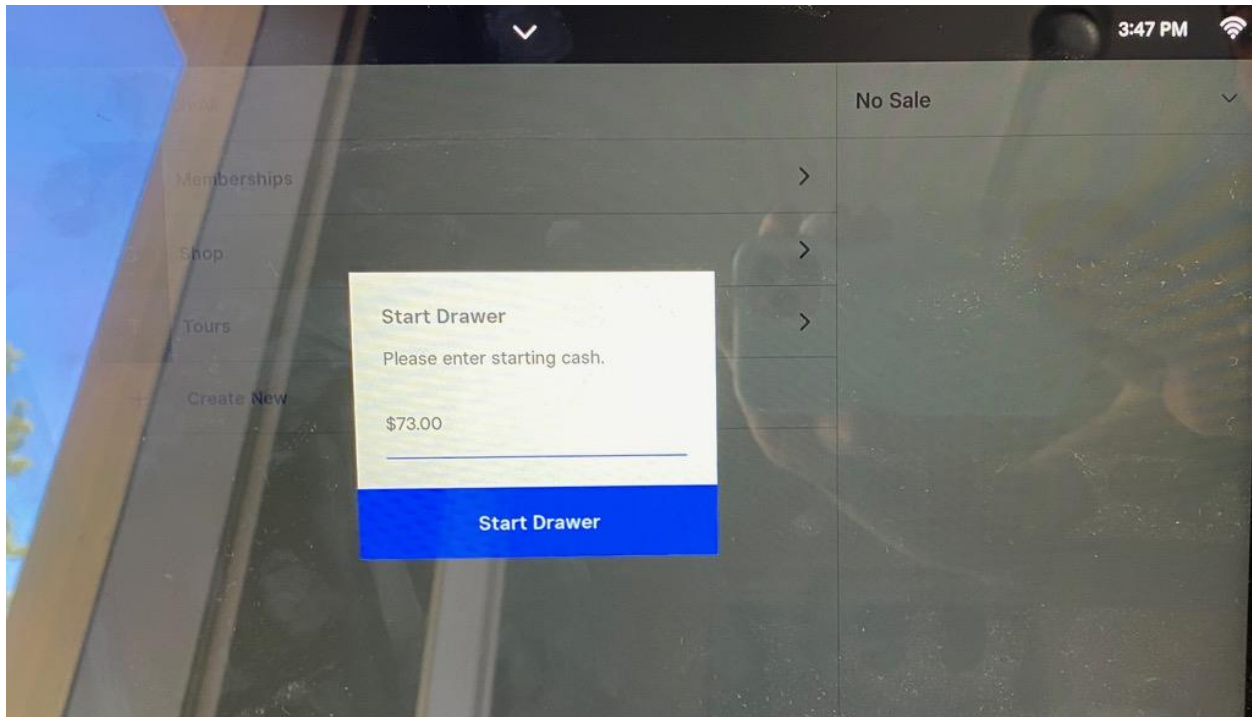




- The device code is **9V5X127Y7V9V**. It is unclear whether the code is case sensitive or not.



- After typing in the code, you will be logged in. The first thing that should pop up is a window asking you to start a cash drawer. Type in the amount in the cash box, which should usually be \$60.



- Note that the amount in the screenshot is \$73 because there was a discrepancy between the amount in the box and the numbers from Square and the tour binders, and the extra was left in the cash box.