IPAD SETUP USING SQUARE RETAIL POINT OF SALE

1. Download "Square: Retail Point of Sale" from the Apple Store to the iPad.
2. Open Square Retail.
3. Select "or sign in with Square".
4. Select "use a device code", and enter the following device code:
   a. iPad1 – CWG3 NAZN 9GHZ
   b. iPad2 – ZTAV XGP0 YZB3
   c. iPad3 – 04FH V5TB ZVXG
   d. iPad4 – 8HZV 4W99 XPCN
   e. iPad5 – VP3K RY7F 5DSJ
   f. iPad6 – HWCZ YXAX KQRK
   g. Square Terminal 1 – PFQA C1FY N34P
   h. iPhoneSue: 2DYD ZA9C 4ZZQ
   i. iPhoneJessie: K8CA G00C AHGR
5. Click sign in.
6. Enable all device settings. Select enable location services: allow while using App.
7. Select "Start Using Square for Retail".
8. Dismiss the guide.
9. Select the "All items" tab; click "Sip and Strut Wine Walk".

To sign in as an administrator on the Square for Retail app on the iPad:
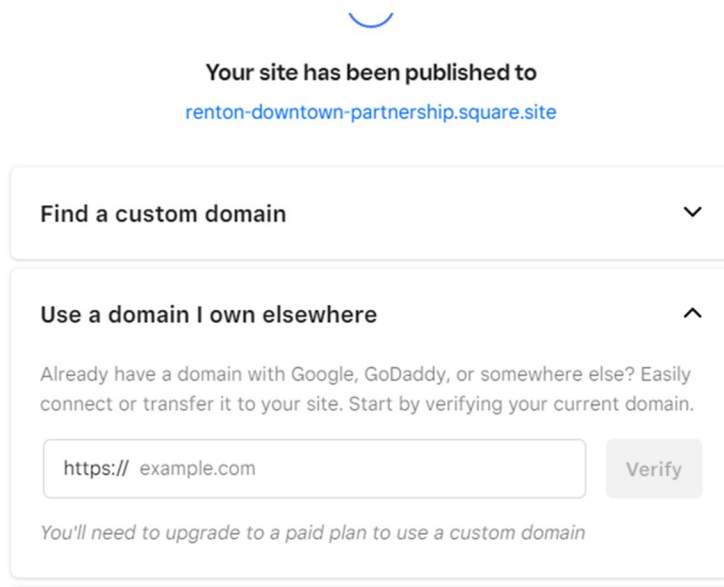
Christian Switzer 1111
Jessie Kotarski 2222
Sue Bollinger 3333

BEFORE EVENT

Use a Single QR Code

If you don't need multiple QR codes mapped to all your ordering stations, Square Online also generates a single QR code for every site. To manage and use a single QR code, go to your [Square Online Overview page](#) and select **Website** > **Site Preferences**. Select Site QR Code. Place this QR code on marketing materials to point directly to your site for customers to order. Learn more about setting up [site preferences](#) for Square Online and accepting [QR code payments](#) with Square.

Note: Site must be published for QR Code to work. Turn on accept online orders otherwise there will be message that your online store is not currently accepting orders.

Site QR Code

Use a QR Code for customers to navigate to your site

Test it out. Open your phone camera, scan the code, and tap the notification

http://renton-downtown-partnership.square.site

Print Ordering card

Select **Website** > **Site Preferences. Select Manage QR Code under Site QR Code.**
Print ordering card.

RENTON DOWNTOWN PARTNERSHIP

**Order from your phone
No app required**

1. Open phone camera
2. Scan QR code
3. Order & pay

To order again, scan QR code

Square

VENDOR MANAGEMENT

Vendor Management is only available with a subscription to Square for Retail. This should be completed with as much information as possible before the event to save time during check-in at the event.

Vendor tab

The list of vendors should include contact name, and email address to send sales report after wine walk. It would be nice to have a contact number to notify the vendor in case of low stock alerts during the wine walk.

To create a new vendor:
1. Go to **Items** > **Inventory Management > Vendors** from your online Square Dashboard.
2. Select **Create Vendor**.
3. Enter details about the vendor, then click **Save**.

To deactivate an existing vendor:
1. Go to **Items** > **Inventory Management > Vendors** from your online Square Dashboard.
2. Click Vendors
3. Click the 3 dots next to the Vendor and select Deactivate.

Items tab

Items will be added through items, not Vendors.

ITEMS LIBRARY

1. Go to **Items** from your online Square Dashboard.
2. Select **Vendor** from the list.
3. Under Details, add Name, Category and Description, if available.
4. Upload the vendors logo.
5. Select All locations.
6. Typically, taxes are not charged to the customer. Under taxes, select No Taxes.
7. Under Variations, enter inventory manually by clicking Add or import from Excel spreadsheet using the Square template.
8. On the details tab, add the variation name, select the Vendor from the dropdown list, and enter unit cost (wholesale price).
9. Under Sales information, add the SKU (see below) and the price (retail price).
10. Add bottle labels for each wine, if available, otherwise add the vendor's logo for each variation.
11. Click Done.

SKUs vs Vendor Codes
Vendor Management also allows you to enter both SKUs and vendor codes.

- **SKUs** helps you search and build your cart from the Square for Retail app, as well as streamline inventory intake.
- **Vendor codes** are often used by vendors for internal reference.

SKU
Assign an SKU to each variation.
- SKU naming convention is the first 3 letters of the winery plus a sequential number. For example, Drum Roll's SKU for the first wine variation would be DRU-1, the second wine DRU-2, and so on.

Box Labels
Print box labels using Avery template.
- One label for each case/box (4 cases = 4 labels).
- ***Bring blank labels in case there are changes or additions.**

Turn on Order Tickets and Order Ticket Stubs

Order tickets will automatically be printed after every sale, even if a customer receipt isn't printed. The Square Stand with iPad 5 is connected to the receipt printer. Only one device can connect to the receipt printer.

Before you turn on Order Tickets, learn how to connect a printer to your:

- [Square Stand](#)

Once your printer is connected, follow the steps below.

1. From the Retail app, tap the three horizontal lines and select **Settings** > **Hardware** > **Printers**.
2. Select the use types under **Use this printer for**.
3. If an order requires immediate preparation or customization for your in-store customer, toggle on **In-store order tickets** to enable automatic printing.
4. If an order requires shipping or pickup and will be fulfilled for a customer at a later time, toggle on **Order tickets with fulfillment** to enable automatic printing.
5. Select the categories of items you prefer to print and enable other options like **Single item per ticket** or **Compact tickets** if applicable.
6. Tap **Save**.

After the feature is turned on, new orders will automatically print from your supported printing device. Any new orders will also be highlighted green in the Orders section of your online Square Dashboard and in your Square for Retail app to differentiate from existing orders.

Reprint Order Tickets

You can reprint an order ticket from the current cart, **Transactions** tab, or open ticket list.

To reprint an order from the current cart:

1. Tap the down arrow in the top right.
2. Tap **Reprint Ticket**.

To reprint from your transactions:

1. From the Square app, tap **Transactions**.
2. Locate the order you'd like to reprint > tap **Reprint Ticket**.

Note: For closed tickets, the option to reprint will only appear if the order is completed in the last 1 hour.
To reprint from your open tickets:

1. Select **Tickets**.
2. Tap **Edit**.
3. Select ticket to reprint > tap **Reprint Ticket**.

Payment Methods

Go to **online > checkout** to select the types of payment methods accepted. Some forms of payment such as PayPal requires a subscription upgrade.

- 2.9% + 30¢ per transaction fee
- Accept Square Gift Cards on your site

Enable Tap to Pay on iPhone

You can enable Tap to Pay on iPhone at any time through the Square POS app.
1. From the navigation bar at the bottom of your screen, tap ≡ **More**.
2. Tap **Settings** > **Account**.
3. Select **Tap toPay** > **Enable Tap to Pay on iPhone**.
4. Verify the correct Apple ID is shown. If not, choose **Use a Different Apple ID**.
5. Select **Agree & Continue** to toggle on **Tap to Pay on iPhone**.

You can disable Tap to Pay any time by toggling off **Tap to Pay on iPhone**.
Note: You will not be able to use Tap to Pay on iPhone if you log in to your Square Point of Sale or Square Appointments app using a Device Code. Tap to Pay on iPhone is available with Square for Retail if you use a Device Code to log in.
Once the Account Owner enables Tap to Pay on iPhone, all Team Members under the same account with an eligible device will automatically be able to use Tap to Pay on iPhone. They will also have access to tutorials on how to use the feature within the app.

Reconnect Printer

If the receipt printer is not connected, connect it through iPad settings. **Only the Square Stand with iPad 5 can be connected to the receipt printer.**

DAY OF EVENT

Turn on Accept online orders.
Go to overview and toggle not accepting orders to accepting orders. You can toggle online ordering on or off. When off, items will still be on your site but not available for purchase. You can also turn online ordering on from **online > checkout**.

Vendor Check-in

Adding/Confirming Inventory and Price
Receive Stock from Square Dashboard (not the Square Retail app)
1. Go to **Items > select winery > manage stock** from your online square Dashboard.
2. **Select stock received** as the reason.
3. **Enter the quantity in the adjustment column** for each variation.
4. Click **Done**
5. Confirm quantity, retail price and unit cost for each variation.
6. Click **Save**.
7. **Attach SKU label to each box corresponding to the inventory received. <u>No mixed boxes</u>!**
8. Line up boxes in SKU order which will be alphabetical by winery name.

Returns and Exchanges

There are a couple of ways to process a return or exchange through Square for Retail.

Processing a Return or Exchange from Transactions
1. From the Square for Retail app, tap **Transactions**.
2. Locate the original transaction by either swiping your customer's card or searching for the receipt number.

3. Tap **Return or Exchange**.
4. Select item(s) to restock or **skip** this step > tap **Next**.
5. You can either issue a refund or search your item library to add additional items to the cart. The cart amount will automatically adjust, calculating the difference between the original and replacement items.

Cart Total: Depending on the price of the replacement item, the cart total will either be positive, negative, or even.

- If the replacement item is less than the returned item, you can issue a refund to your customer's card for the difference.

- If the new item is more, collect payment with any of the standard payment methods.

- If the replacement item is the same price as the returned item, tap **Even Exchange** to close out the transaction.

Note: When you issue a refund for an item sold as a decimal quantity, you will need to refund the entire item.

Wine Shop Closing
Turn off online ordering before running vendor sales reports.
Settings>checkout

Vendor Sales Report
1. Navigate to **Reporting > Reports > Inventory Reports > Vendor Sales** in your online Square Dashboard.
2. Use the date selector at the top-left corner to **choose the date range** you'd like to view or enter custom dates.
3. If you have more than one location, select which location you'd like to see.
4. **Verify** physical inventory is the same as Square inventory.
5. **Export report > send to vendor.**

AFTER EVENT

Removing Inventory
Adjust Stock from Square Dashboard
Do not adjust stock until after the inventory reports are run!
1. Go to **items** from the dashboard.
2. **Select the winery** from the list.
3. Select **manage stock.**
4. Select **inventory recount** as the reason.
5. In the **new stock** column, enter 0 for each variation.

6. Click **Done**.
7. Click **Save**.