

MBX SQUARE TRAINING

NEW MBX Square Help Contact Information:

Square Help Email: squarehelp@mbxfoundation.org

Square Help Phone Number: 424/296-7605

MBX Square Reference Documents include:

1. Square Items Set-Up Instructions
2. Square Reports & Refunds Instructions
3. Square Mobile Payment Instructions

All MBX documents and forms can always be found on our website at mbxfoundation.org located in the footer section under Forms & Resources

SQUARE TRAINING TOPICS

Archive all OLD square items immediately

Square Item Set-Up

- Login credentials
- Avoiding the 2-step verification
- How to set-up items for online sales
 - Once Booster sets up in Square, contact Square Help and provide item names.
 - MBX will review for accurate naming, no taxes applied, and accuracy of category, and location.
 - Once reviewed and approved by MBX, MBX will make your item live for online sales.
- Test purchase your item/s prior to your online or in-person sales

Reports and Refunds

- Understanding the reports Boosters will use to manage their sales
- Issuing refunds is at the Booster level - square fees are not returned to Boosters

QR Codes

- How to use with Square items once items are available for online sales (item url created in Canva or Google QR generator)
- How to use with Venmo / Zelle

Square Reader Onboarding

- Getting familiar with the Square Readers for in-person purchases
- Boosters are to create a step-by-step document for your rotating volunteers

Item Promotion - Refer to the MBX

- **HOW TO GET THE WORD OUT TO MBX AND MBUSD**
 - Fill out the [MBX Submit News Form](#)
- **HOW TO GET THE WORD OUT TO HERMOSA**
 - HBCSD: Submit MBX Booster event flyers through the [Community Flyers Google Form](#). Approved flyers are posted on the [Community Flyers page](#) and included in the Sunday [Wave Watch District Newsletter](#) sent to Hermosa school families and staff.
 - HVPTO: Submit a short blurb, linked flyer, and square graphic (club logo is fine) to president@hvpto.com and communications@hvpto.com for the Sunday [HVS Surf Report](#), sent to HVS families, alumni, and community members.