MBX SQUARE INSTRUCTIONS MOBILE PAYMENTS

MBX
Beyond the Classroom

PRE-EVENT SET-UP & BEST PRACTICES

To ensure a smooth sales experience, complete the following steps prior to your event:

ITEM CREATION	All items must be set up on the Square online platform first. Refer to the MBX Square Item Set-Up Instructions for guidance.
APPROVAL PROCESS	Once created, items will be reviewed by Julie Johnson. After approval, they will automatically appear in your Booster Square location.
TEST RUN	Perform a test transaction a few days early. Use this time to train volunteers and ensure they know how to bypass the 2-step verification process to avoid delays during the event.
QR CODES	For areas with unreliable Wi-Fi (like the Hometown Fair), create a QR code for each item. This allows customers to pay via their own cellular data. Instructions for creating QR codes can be found on Google.

CONNECTIVITY & WI-FI TROUBLESHOOTING

If you experience connection issues on the MCHS campus, try these two options:

1. MCHS Student Wi-Fi: Log in using the password MB!stu44.
2. Personal Hotspot: Use your smartphone to create a Wi-Fi hotspot for the Square reader.

HARDWARE & EMERGENCY SUPPORT

Reader Pick-up & Return	Square Emergencies
Contact Julie Johnson to coordinate the checkout and return of your Square card reader.	If you encounter urgent technical issues during your event, please text Julie Johnson immediately.

CONTACT INFORMATION - MBX SQUARE HELP

squarehelp@mbxfoundation.org

424-296-7605

SQUARE READER SETUP & USAGE GUIDE (Step-by-Step)

1 The Reader should be given to you fully charged. If you need to charge:

- Connect the reader to a power source using the provided cable.
- Allow it to fully charge before first use (indicator lights will show charging status).
- To test charge, press the round button on the bottom of the square reader.
- Battery levels:
  - •••• 4 green lights = 100% charged
  - ••• 3 green lights = 75% charged
  - •• 2 green lights = 50% charged
  - • 1 solid red light = 25% charged
  - * 1 blinking red light = low > charge immediately
- Your reader will go to sleep after a few hours in inactivity to conserve battery. To wake it up, push the round power button on your reader once.
- If you need to charge the reader, you can use the Micro USB cable connected to your personal computer or personal cube but please note that charging takes a bit of time (best overnight!) and charging in your car is almost impossible.

2 Download the Square App

- On your smartphone or tablet, open the App Store (iOS) or Google Play Store (Android).
- Search for "Square Point of Sale" and install the app.

3 Create or Log In to Your Square Account

- Open the Square app.
- Log in with your existing credentials without enabling the 2-step verification.
- Choose "MBX FOUNDATION", and then select your Booster Club name.

4 Enable Bluetooth (if applicable)

- Go to your device settings and turn on Bluetooth.
- Keep your device near the reader for pairing.

5 Pair the Square Reader

- Open the Square app.
- Navigate to Settings > Hardware > Card Readers.
- Select "Connect a Reader" and follow on-screen instructions.
- Press the reader's power button to initiate pairing if required.

6 Confirm Connection

- Once paired, the app will display the reader as connected.
- Test the connection if prompted.

SQUARE READER SETUP & USAGE GUIDE (Step-by-Step) cont'd

7 Process Payment

- Choose the item/s to be purchased.
- In LIBRARY tab, find the store items that have been pre-created and posted to your Square website (this is a 2-step process involving the pre-planned Booster Club creation of the product and MBX activation of the product online. If this process has been completed, click "Library" tab and then "Items". Navigate to your item. Add the item to the sale.
- If you have not completed item set-up, you can add a store item by finding the KEYPAD tab you can:
    - Pre-create your item before your event on the reader itself. Make sure you are applying your item to your square Booster location.
    - If you just need to type in the amount make sure that you identify your booster in the notes of the item sale (always use your Booster Name Abbreviation, MBX Category, and Product Name. eg: VB-IND(G) 310-socks
    - **MBX Naming Convention for Booster items on Square:**
        - All caps prefix
        - Use of (B) or (G) with no space directly after prefix
        - Use no spaces with a dash after the category number (310, 315, 320, 325, 330, or 335). Do not create any new categories. Eg: BB(G) 310-hats XL

      Pay special attention to spaces and "-" as they make a difference for our back-end processing systems that capture sales automatically into Quickbooks.
    - If there are items that are not named correctly they will default into account 335. It will be the booster's responsibility to go into Square and figure out what the sales relate to and how they should be classified.
- Tap "Charge."
- Have the customer tap, insert, or swipe their card on the reader.
- Wait for confirmation on both the reader and app.

8 Complete the Transaction

- Choose how to provide a receipt (email, text, or none).
- Confirm the transaction is complete.

9 Disconnect or Power Off (Optional)

- Turn off the reader when not in use to save battery.
- Disconnect via the app if necessary.

10 Troubleshooting Tips

- If the reader won't connect, restart Bluetooth and the app.
- Ensure the reader is charged.

SQUARE PAYMENT LINK SET UP

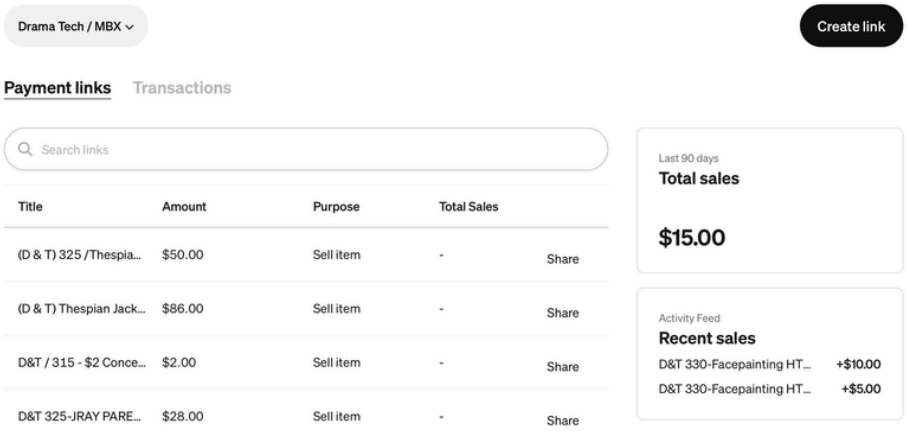
The benefit of using a Square Payment Link is that the purchaser uses their cellular connectivity to complete the payment.

1. **Create your item in Square**
   - Email squarehelp@mbxfoundation.org for review and approval
   - NOTE: If you make any changes to your item, you will need to create a NEW payment link and associated QR code. Make sure to distribute new link/QR code as needed.

2. **Open Square on your desktop computer**

3. **Open Payments & Invoices**

4. **Open Payment Links**
   - Make sure you are in your Booster location located in the top left pulldown menu
   - Click Create Link located at the top right

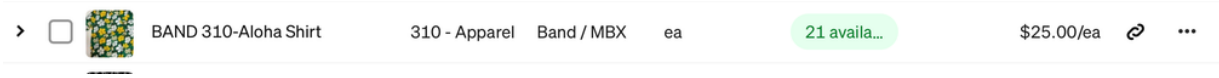


5. **Sell an Item > Continue**

6. **Item > Select an Item (which you have already created)**
   - Type in the name of the item in the search field

7. **SAVE**

8. **Create QR Code**
   - Download QR code to your computer and use to use for promotion
   - You can copy the URL
   - The Payment Link URL can be used to create a QR code in Square itself, in Canva, or with a Google QR Code Generator

9. **DONE**

10. **Return to Item Library where you can see and copy the Payment Link URL**