

# Square: Thinking Outside Of The Box

If you're sitting here today, chances are you have at least heard of the Square App, but do you really know what all Square can do? Square is 97.25% free. Where does that number come from? Easy. Square charges 2.75% per swiped credit card. Sounds fair right? They provide a service, and they charge you a fee. But did you know that Square offers a bunch of other features for FREE?! That's why we're here today!

- Have you used Square before?
- Have you used Square for more than just accepting credit card payments?
- Did you know they have a whole "town" that can answer your questions after we leave here today?

So, what is Square?

Square is a pocket register that works by installing an app on your smart phone or tablet, that allows you to swipe or manually enter credit card payments for your business on the go. More than that though Square is a place where you can track your business inventory, sales, and business statistics as well as run analytic reports on your laptop or desktop computer.

What businesses does Square support?

Retail, Food and Beverage, Beauty Professionals, Health and Fitness, Professional Services, Home Repair Service, Leisure and Entertainment, Transportation, and Nonprofit Organizations.

What can square do?

Take Payments, Invoice Clients, Data Management, Gift Cards, Interactive Dashboard, Point of Sale, <sup>own login</sup> Employee Management, Payroll, Marketplace, Schedule Appointments, Get Capital, Customer Engagement and more loan program

\* any denomination minimum \* 100

balance your cash drawer

\$600  
Ipad  
Register/  
Cash drawer  
Scanner

squaremarketplace.com



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# Create and Manage Items Online

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Learn how to create, edit, and import items [<https://squareup.com/help/en-us/article/5153>] from the Square Dashboard. You can also use Square to track your inventory [<https://squareup.com/help/en-us/article/5228>]. Watch this introductory video to learn how to create items from your online Square Dashboard:

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## Create Items Online

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- 1 Visit **Items** [<https://squareup.com/dashboard/items/library>] from your online Square Dashboard and click **Create Item** at the top-right corner.
- 2 Fill in the item information. If your item has a bar code, add the SKU or UPC in the SKU field.
- 3 If you're adding an item image, we recommend the following image specs:
  - \* High resolution
  - \* PNG or JPG file format
  - \* Dimensions that are square
  - \* A size of 720x720 pixels
- 4 Enable inventory management [<https://squareup.com/help/en-us/article/5228>] to view item stock counts and stock alerts.
- 5 To sell an item online, toggle **"Sell this item online"** on and make items available for in-person pickup [<https://squareup.com/help/en-us/article/5227>] or delivery by mail [<https://squareup.com/help/en-us/article/5141>].

# Share Your Items Online

Increase the visibility of your products and services by sharing them over social media and embedding content on your website [https://squareup.com/help/en-us/article/5333]. To share items via social media, click "Sell this item online," then check "Available for pickup" and or "Available for shipping" and select your sharing channel.

You can also manage items directly from the Square Register app on an iPad [https://squareup.com/help/en-us/article/5075], iPhone [https://squareup.com/help/en-us/article/5113], and Android device [https://squareup.com/help/en-us/article/5404].

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X @ @

Recorder function

(Bar tab features)

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Update : <sup>inventory</sup> quantity must be done on the computer

Tag corresponds to SKU # inventory

Email / Save for future alerts

# Manage Tax In-App

With the Square app, you can create multiple tax rates and customize how tax is applied to your items.

## Edit taxes before a sale

- 1 Tap the icon below to visit your in-app Settings:
- 2 Tap **Settings** > **Tax**.
- 3 On an iPhone, tap the + icon in the top-right corner. On an iPad, tap **Add a New Tax**, and on an Android device, tap **Create Tax**.
- 4 Enter the tax information and toggle on **Enabled** to automatically apply this tax at checkout.
- 5 Tap **Applicable Items** to choose which items this tax will automatically apply to. Toggle on **Custom Amounts** to apply this tax to amounts entered at the time of a sale.
- 6 Tap the back arrow > **Item Pricing**. Select if this tax will be included in item prices or added to a price at the time of sale.
- 7 Make sure to save your updates.

## Edit taxes at the time of sale

- 1 From the Square app, tap **Current Sale** and tap an item.
- 2 Under Taxes, toggle applicable tax rates on or off.



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# Apply Discounts

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With the Square app and Square Invoices (<https://squareup.com/help/en-us/article/5137-send-invoices-online-with-square>), you can apply pre-set percentage or dollar amount discounts to your sales. Learn more about creating discounts (<https://squareup.com/help/us/en/article/3955-create-and-manage-discounts>).

**Note:** Percentage discounts can be applied to an entire sale or to individual items. Dollar amount discounts can only be applied to an entire sale at this time. Discounts are applied before taxes.

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## Apply Discounts on a Tablet

Apply discounts from your item library or from your favorites pages on your Android tablet or iPad.

### Apply Discounts to an Entire Sale

- 1 From the Square Register app, tap the list icon for your item library or select your favorites page if you've saved discounts to it.
- 2 Tap the discount you'd like to apply to the current sale.

The applied discount will appear as a line item within the current sale.

### Apply Discounts to Individual Items

- 1 Tap **Current Sale** from the keypad screen and tap the item you'd like to discount.
- 2 Toggle on the discount you'd like to apply.

- ① A discount is added to a sale.
- ② Square calculates the discounted sale total.
- ③ A second discount is added, which is applied to the total discounted sale price.

If you're applying a combination of dollar and percentage discounts, the percentage discount will be applied first followed by the dollar amount discount.

**Note:** You can apply a specific discount to a given sale only once.

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Yes [<https://squareup.com>]

No [<https://squareup.com>]

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If you have multiple locations [<https://squareup.com/help/en-us/article/5580>] , inventory is established, edited, and tracked on a per-location basis. Also, if you're using Employee Management [<https://squareup.com/help/en-us/article/5591-employee-management>] and permission groups, only Administrators and Owners will have the ability to manage inventory.

## Enable Inventory in Bulk

You can also enable inventory from your Inventory CSV:

- 1 Visit **Item Library** [<https://squareup.com/dashboard/items/library>] and click **Import/Export**.
- 2 Click **Import Inventory** and select "**Download our template file.**" This file includes your entire item library.
- 3 Open the file and add your inventory by item in column G, New Quantity. Save the file to your computer.

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- 4 Drag and drop your saved file to the Import Inventory window > click **Upload**.

**Note:** At this time, you can manage inventory from your online dashboard, but not from the Square app.

## Manage Inventory and Alerts for Individual Items

To adjust an item's in-stock quantity and to edit stock alerts, follow the steps below:

- 1 Visit your **Item Library** [<https://squareup.com/dashboard/items/library>] .
- 2 Select **All Categories** or **All Inventory** in the upper-left corner.
- 3 Click "**Manage Item Inventory and Alerts**" to add or decrease the quantity of your items.
- 4 Manage stock alerts for items by checking the **Alert** box and setting the alert threshold. If stock reaches, or drops below the alert threshold, a stock alert will be generated [<https://s>

**Note:** The Import Inventory tool is only for adjusting inventory and alert threshold quantities. You can't create or edit your items here. To bulk edit or create your item library [<https://squareup.com/help/en-us/article/5153-import-items-online>], click **Import/Export** > **Import Items** from the drop-down menu.

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## Track Inventory for In-App and Online Store Sales

### Track Inventory in the Square App

When you complete a sale with Square, inventory stock automatically decreases to reflect the updated item count.

Sold out items will not block a sale for purchases accepted with Square. Your inventory will be updated accurately on your online Square Dashboard [<https://squareup.com/dashboard/items/library>], but you still can complete sales for sold out items.

### Track Inventory for Online Store Sales

When your customer places an order online, your inventory is reduced immediately. To finalize the sale and update item count, navigate to **Orders** [<https://squareup.com/dashboard/orders/pickup>] and complete the order.

Stock count depends on the current status of an order:

- **If an order is canceled or expires**, your stock will automatically adjust to reflect actual item count.
- **If an item is sold out**, customers will see Item Sold Out when they attempt to complete their purchase. Customers will not be able to purchase sold out items on your online store.
- **If an order is refunded**, your stock count will not automatically increase for returned items. You can manually adjust your stock count to reflect the returned item.

**Note:** At this time, online pickup orders [<https://squareup.com/help/us/en/article/5227-accept-pickup-orders-from-your-online-store>] and items sold via Square invoices aren't integrated with inventory management. Stock counts will need to be adjusted manually to reflect these item sales.

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