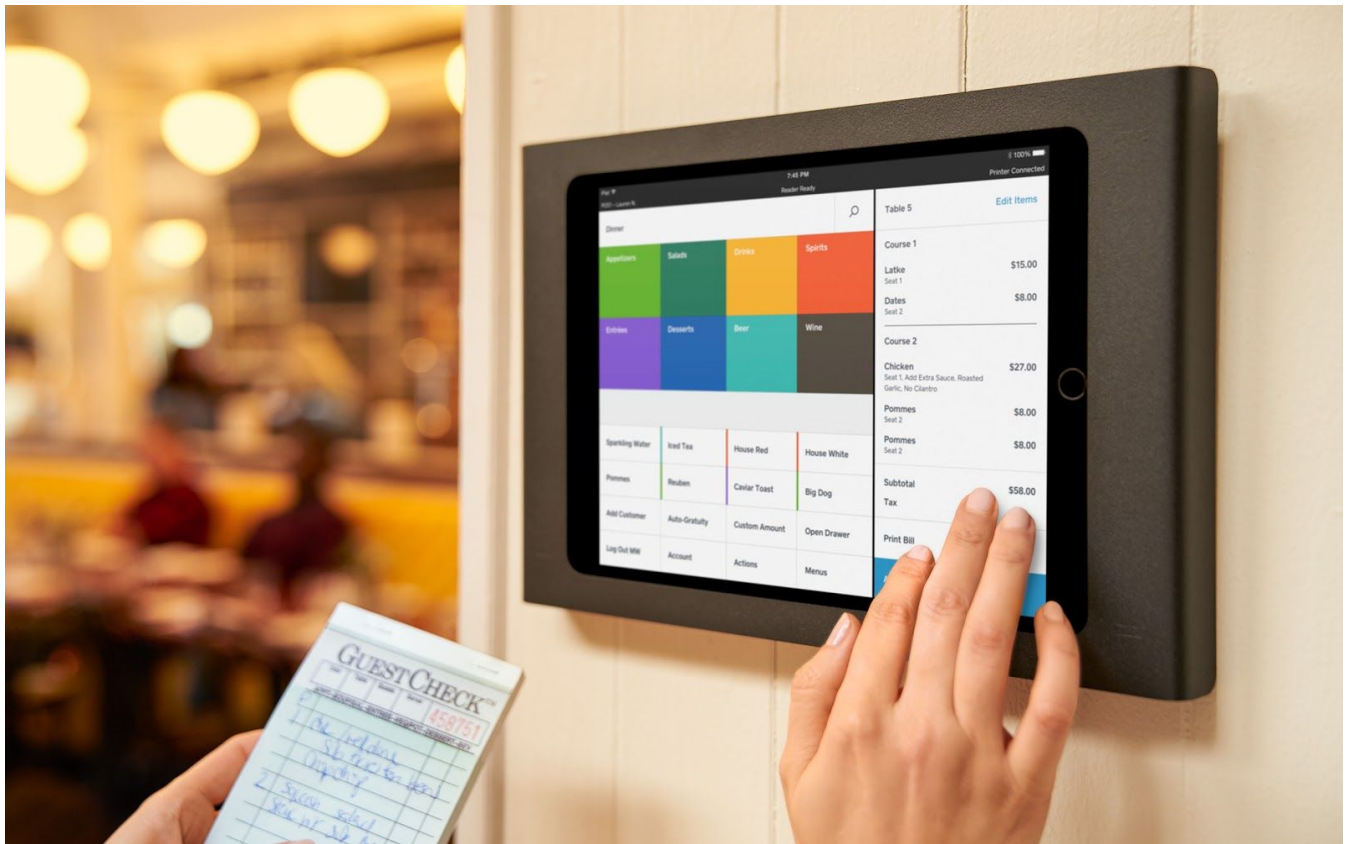


Setup Guide

Square for Restaurants



Last updated August of 2019

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Get Started

Download the App



To download the Square for Restaurants App:

1. Go to the Apple App Store.
2. Search *Square*.
3. Click [Square - Restaurants POS](#) > **Install**.

Create a Device Code

In your Square Dashboard:

1. Click **Points of Sale** > [Devices](#).
2. Click **Add Device**.
3. Select the service style.
4. **Nickname** the device — we recommend coordinating the name of your device on your Square account with the name of the device in your iPad Settings. You can also rename your iPad by going to **Settings** > **General** > **About**.
5. Next, select the device location.
6. Click **Create**.

Shared Settings

Note: If you have multiple devices with the same settings configuration (e.g. multiple mobile points of sale or server stations), you can create a **shared settings** group to apply the same settings across multiple points of sale.

Sign in with a Device Code

If the app logs you out, use your Device Code to log back in. You can access your Device Codes from your Square Dashboard Under **Points of Sale** > [Devices](#).



Note: You can also **Reset** your device code at any time from the device details page.

Hardware Information

Kitchen Printers

Star SP742 ML

- Use 2 ply paper
- The Star SP742 ML is an impact printer (not a thermal printer), so make sure you have compatible printer ribbons. Visit <https://www.starmicronics.com> to learn more.

Receipt Printers

TSP143 USB or LAN

- TSP143 IIU: USB (receipt printers)
- (also used as a bar printer) TSP143 LAN = ethernet (printers that need to get tickets from **multiple** Points of Sale)

Note: You can identify your printer connection by looking at the bottom of the printer or verifying the connection to your Square Stand

Troubleshoot Hardware

Troubleshoot the Contactless and Chip Card Reader

- Verify Bluetooth is turned on from your device settings. If it's on, try turning it off and back on again.
- Make sure the app is open and that you're signed in.
- Make sure your reader is in pairing mode. To do so, press and hold the reader's power button for 3-10 seconds and immediately release your finger when you see the orange blinking lights. If you see red lights, you've held the button for too long.
- If the reader you're connecting has been connected to another device, forget the reader on the previous device before pairing it with a new one.
- If the reader and device are more than 3 meters apart, the reader will have trouble maintaining a consistent connection. Move your reader and device closer when in use.

- Force quit the app and reopen it.
- Delete and reinstall the app. **Note:** Log out of the app before deleting it.
- Turn your iPad off and back on.

Troubleshoot a USB Receipt Printer

- Make sure the printer is plugged into a power source.
- Make sure the printer is turned on (check the switch on the left-hand side of the printer).
- Make sure the printer has paper and that the hood is closed all the way.
- Check the USB connection, try switching the USB ports on the USB hub.
- If none of these work, turn the printer off unplug the cables, plug them back in and turn the printer on again.

Troubleshoot an Ethernet Receipt Printer

- Make sure the printer is plugged into a power source.
- Make sure the printer is plugged into an ethernet port.
- Verify the printer is turned on (check the switch on the left-hand side of the printer).
- Make sure the printer has paper.
- Make sure the iPad is connected to the correct wifi network (under **Settings** > **WiFi**).

Run an IP Test

If you are having trouble connecting your ethernet printer to Square, you can run an IP test to diagnose if the IP is the problem.

1. Turn the printer off.
2. Hold down on the *feed* button.
3. Turn the printer back on.
4. You should see a light flash twice and/or hear two beeps > release the *feed* button.
5. The very last slip of paper will give you the IP address:
 - If this is all 0.0.0.0 the Printer is not obtaining an IP address, you will need to reach out to a tech person who can help you reprogram.
 - If there is an IP address, ensure it matches the IP of the iPad's WiFi and that both devices are on the same network.

Create a Printer Station

1. On your iPad, go to **Account** > **Setup Hardware**.
2. Tap **Create Printer Station**.
3. Name the printer (i.e. Receipts, Bar, Cold Kitchen, Hot Kitchen, Expo).
4. Tap **No printer selected** and you will see a list of printers that are connected to the Square app.

Note: We recommend you run a print test for any ethernet printers that are connected. What appears as WiFi Printer 1 on one station, may not be WiFi Printer 1 on another. To run a print test, select the printer, tap **Print Test**.

5. Toggle on the items to print from this station:
 - **Receipts, Bills, and Reports**
 - **Order Tickets:** Order tickets are kitchen tickets, once you turn this on, scroll down to turn on/off the categories of items you'd like to send to the kitchen
 - If you are using an online ordering partner, you can set tickets to automatically print when an order comes in. Items will still be routed to printers based on their category.
 - **Order Ticket Stubs:** Order ticket stubs do not have order ticket information on them, they are used to give a customer a ticket number to match with their order
 - **Void Tickets:** If a single item or entire ticket is voided, the void ticket can be sent to the kitchen/bar to let the chef/bartenders know not to make the item. If you would prefer to verbal this, make sure to turn voids off.

Note: If you need two tickets to print from a single printer (and are not using two-ply paper), you can create *multiple printer stations* for a single printer.

Restaurants POS App

Edit a Single Item

Before Sending to the Kitchen

Click the item that you've added to the ticket:

- **Edit:** Edit modifiers, change the seat, and add additional notes.
- You are also able to add a discount to an individual item by clicking on **Notes and Options**, scrolling and toggling on applicable discounts.
- **Move to:** Move a single item to a different course, a new check, or combine with an existing check.
- **Transfer:** Move a check to a different server and transfer ownership of the check.
- **Repeat:** Duplicate the same item, including any modifiers and seat number.
- **Remove:** Delete an item from a check (note you can also do this by swiping left on the item and clicking **Remove**).

After Sending to the Kitchen

- After you send a ticket or item to the kitchen, you will no longer be able to *remove* this item, you will need to *void* the item from the sale.
- You will not be able to edit items once they have been sent to the kitchen. If you need to make a change to an item (it was entered incorrectly, modifiers were wrong), you will need to void the item and enter it in again.
- You can still repeat, comp, or move an item (or multiple items) — great for the bar if they need to repeat a round of drinks!
- The items that you repeat can be edited, because they have not yet been sent to the kitchen.

Edit Multiple Items

Note: You don't need to edit items individually, you can edit multiple items at once on a ticket. We recommend using "Edit Items" to repeat rounds of drinks, especially for bartenders.

Before Sending to the Kitchen

- Click **Edit Items** in the upper right-hand corner of the sale.
- To move items around, click and drag the three grey lines on the right-hand side of the items to reorder items or move them to a different course.
- To edit **multiple items** at a time:
 1. Tap the circle next to the item — you're able to select multiple items at a time.
 2. Tap **Edit # of items** at the bottom of the check.
 3. The functionality of edit, move to, repeat, remove will be the same as above.

Edit an Entire Check

Before Sending to the Kitchen

1. If you need to edit a check that has not been sent to the kitchen, click **Actions**:
 - **Clear Items:** Remove all items from your sale on the right-hand side.
 - **Seats:** Edit the cover count on the check.
 - **Item Availability:** 86 items that are no longer available for sale and enter a count to track remaining items. Once all items have been sold, the item will become unavailable for sale.

Note: You can also add an item count or make an item unavailable by long pressing on the item from the menu grid.

After Sending to the Kitchen:

- **Move:** Move the check to an empty table or combine multiple checks.
- **Assign:** Transfer ownership of the ticket to a different server.
- **Comp:** Comp the entire check.
- **Void:** Void the entire check.
- **Split:** Split off items into separate checks:
 - You can move items that one person had on to a separate check if they'd like to pay separately.

Split Check vs. Split Payment

In Square, you can either split a check or split a payment.

Note: When splitting a payment, you must complete the entire payment at the time of sale.

Split Items

Splitting items allows you to move some items from a check to a new or existing check:

1. Tap **Actions** > **Split**.
2. Separate items from one check on to separate checks.

Split Payment

Splitting payments allows you to use multiple payment methods on a single check:

1. Tap **Pay** > **Split** in the upper right-hand corner.
2. Use multiple payment methods.

Note: You are not currently able to split a single item between two checks. You will need to tap **Pay** and split the amount between multiple payments if needed.

Use Order Partners

If you are using a delivery partner (Caviar, DoorDash, Postmates, or Chowly), you'll be able to see and accept pickup and delivery orders through your Square for Restaurants POS app.

1. Instead of *Adjust Tips* along the bottom bar, you'll see *Orders*.
2. When a new order comes in, the tab will turn orange.
3. Tap **Orders** to view, accept, and mark orders complete.

Settle Tips vs. Save Tips

1. To bulk enter/bulk settle tips at the end of the night tap **Adjust Tips**.
2. Enter in Tip Amounts
 - For checks that have a \$0.00 tip or where the customer left cash, you will need to enter \$0.00 to settle the bill.
3. If you are not ready to settle tips, tap **Save**.
 - Saving tips will leave the tip amount entered, but will **not** settle the check.
4. If you're ready to settle tips (all tip amounts have been entered and you're ready to close out) tap **Settle** — you cannot edit a tip amount after you settle the payment.

Reopen Closed Checks

Note: This refunds the sale and does NOT save the card information. If the customer has already left, there is not a way to get their card information again. **Only use this if you still have the customer's card to charge again.**

If you need to reopen a check because you entered the wrong amount or used the wrong payment method:

1. Tap **Order History**.
2. Select the specific transaction.

3. Click **Reopen Check**.

Note: If you haven't already closed out the check and entered the tip, you'll need to do this before reopening.

4. The check will **Refund** and repopulate the check.
5. Re-process your customer's payment once you've updated the check.

Print Additional Receipt/Auth Slip

1. Tap **Transactions**.
2. Search the receipt number or card number to locate the original payment.
3. Select **New Receipt**.
4. Tap **Print Receipt**.
5. If you need an additional authorization slip, tap **Print Auth Slip**.

End of Day: Steps and Reports

Run a Shift Report

When a server is ready to run their report at the end of the night:

1. Tap **Account**.
2. Select **Run Shift Report**.
3. To run their shift report, the server will have had to complete all actions previously set up in the Dashboard service settings.
 - a. If a server has open checks, they will be able to select **Open Checks** and close out any payments.
 - b. If a server has not adjusted their tips, they will be prompted to return and adjust tips.
4. Once all of the required steps are done, they'll be able to select **Run Shift Report**.
5. Lastly, they'll need to **Clock Out**.

Note: If you are not paying out tips the night of service, the cash owed to you/cash owed to house line items will not be necessary for your end of night procedures. In this case, you will want to ensure that your servers simply hand you whatever cash sales they received.

Close Out Cash Drawers

1. Tap **Account** > **Cash Management**.
2. Select **Pay Out** if you need to record a payout.
 - Enter in a description and amount
3. **End Drawer** > enter the **Actual Amount** in the drawer.

Note: In Square, Cash Drawers are attached to a device. They are not server-specific. The Cash Management report will account for any cash sales, refunds, or pay in/outs on that specific device.

Run Close of Day

1. Tap **Account**.
2. Select **Close of Day**.
3. Ensure all actions have been completed:
 - Checks must be closed
 - Tips must be adjusted
 - Cash drawers must be closed
 - Employees must be clocked out

If an employee is not clocked out, select **Employees** > **Clock Out**. Your Close of Day will settle all tips and ensure that you are ready for the next day of service.

Close of Day Scenarios + Best Practices

Pay out Employees Tips in Cash the Night of Service

1. Select **Run Shift Report**.
2. Go to **Account** > **Cash Management** > **Record a Payout**.
 - Make sure to label the payout *Employee Name - Tips* so you'll have a record of payouts, outside of cash sales.

Note: Payouts will *not* change the number of cash sales/refunds on the Sales Summary report. Your Sales Summary report will only reflect sales recorded as cash.

3. Once all shift reports are done, end the cash drawer.
4. Go to **Account** > **Cash Management** > **End Drawer**.



- The expected amount in the drawer is the starting cash amount, cash sales, plus any cash refunds or payouts. **Note:** The expected amount in the drawer is not necessarily the same as the cash drop for the bank.
5. Next, go to **Account > Run Close of Day.**
 - If you have pre-selected all employees must be clocked out before running the close of day, you will need to clock out employees.
 6. Once you've taken all of the necessary steps, **Run Close of Day.**
 - The end of day report will include sales, tips, and a breakout of category sales.

Pay Out Employee Tips Through Payroll

1. Tap **Run Shift Report.**
 - If team members are being paid tips through payroll, disregard the *Cash Owed to House* and *Cash Owed to Server* line items — servers are only responsible for giving you their cash sales.
2. If you're using cash management on a device, go to **Account > Cash Management > End Drawer.**
 - a. The expected in the drawer is the starting cash amount, cash sales, less any cash refunds or payouts
 - b. **Note:** The expected amount in the drawer is not necessarily the same as the cash drop for the bank
3. Go to **Account > Run Close of Day.**

Note: Run Close of Day will settle all tips for the day, this is the best way to ensure that checks are closed, tips are settled, and you're ready to begin the next day of sales.

Dashboard

Create a New Item

<p>Item Name</p>	<p>Identifies the item for kitchen tickets, customer receipts, and item sales reporting.</p> <ul style="list-style-type: none"> • Variable Prices: don't enter in a specific price point, this way you'll be able to enter it at the time of sale (for example: open food/open drink items) • Set Prices: enter in a specific price point when you create the item
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Item Variations	Allows you to have multiple price points for a single item <ul style="list-style-type: none"> ● Example: for a small coffee and a large coffee, the variations are <i>Small</i> and <i>Large</i>
Item Modifiers	Modifiers edit, modify, or specify to the kitchen a change to a pre-existing item; they can either have a dollar upcharge, or \$0. <ul style="list-style-type: none"> ● Conversational modifiers will attach <i>add, extra, side, sub, no, allergy</i> to an existing modifier set.
Categories	Categories route items to printers and control reporting
Display Groups	Organize items on the front end for servers

Create a New Menu

To create a new menu:

1. In your Square Dashboard, navigate to [Menus](#).
2. Click **Create New Menu**.
3. Name the menu.
4. Specify the location.

To create a new Display Group:

1. Click **Add Display Groups**. If you have existing display groups you'd like to add to your new menu, select it from the drop-down.
2. If you are creating a new Display Group, you'll see *(Create New)* next to the Display Group name.
3. You can select the color of this display group and where it appears on your menu (either within another display group, or on the **homepage** — i.e. your main page).

To add items:

1. If you begin typing in the *Add Item* line, you'll see a drop down menu of your entire item library.
2. If the item does not exist yet, you'll see *(Create New)* next to the item name.
3. Create Item: Add the Item name, category, and price
 - Categories route items to printers and control reporting (**Keep in mind:** Categories are not the same as display groups).

NOTE: If you add items from the Menus tab and these items need *specific tax applied*, make sure to head to your Item Library. All taxes enabled at the location will apply to new items.

1. Search the new item in the Item Library.
2. Click the item to edit.
3. Click **Sales Tax** to specify which tax rate to apply.

To add modifiers:

1. In Menu click **Add Modifiers**.
2. If the modifier set already exists, you'll see it appear in the drop down menu.
3. If the modifier set does not exist yet, you'll see (Create New) next to the modifier set name.
4. You'll be able to create a modifier set from the menus page:
 - The modifier set name is a general name used to identify the set.
 - The options are the specific modifiers that can be applied to items.
 - If you enable **customer can only select one option**, modifiers will be required, and only one option allowed (e.g. meat temp).
 - Conversational modifiers will attach *add, extra, side, sub, no, allergy* to an existing modifier set.
5. From the Menus tab, you're able to apply a modifier set to an entire display group or individual items.

Modifier Auto-Progression Rules

1. Choose a seat (if seating is enabled).
2. Choose variation (e.g. *small, medium, large*).
3. Modifiers (see modifier rules).
4. Notes and Options.
5. Add to Check.
 - If **Automatically add item to check** is enabled, the item will add to the check once any required modifiers are selected.

If multiple modifier sets have the same requirements, they'll progress in alphabetical order.

- 1 Required modifier, 1 maximum modifier option: this can be specified by enabling **Customer can only select one option**. E.g. *meat temperature*: only one meat temperature can be selected, after *temperature* is selected you'll be auto-progressed to the next set.
- 1 Required modifier, no maximum modifier limit.
- 1 Required modifier, maximum is greater than 1 modifier.
- More than 1 required modifier, 1 maximum modifier option.
- More than 1 required modifier, no maximum modifier limit.



- More than 1 required modifier, maximum is greater than 1 modifier option.
- No modifier options required, maximum number of modifiers is greater than 0.
- No modifier options required, no maximum modifier limit (for example: optional add ons or additional up charges for extras).

Edit an Existing Item

You can edit a pre-existing item from your Menus tab or your Item Library.

- Edit an item from the [Item Library](#) if you need to **edit modifiers, add tax, or add variations**.
- Edit an item from the **Menus tab** if you need to update **price, item name, or category**.

Create a Discount

Create a discount for items or categories, and set a schedule to define when the discount is applied (by day of the week, time, or date range).

1. Visit **Items** > [Discounts](#) in your online Square Dashboard.
2. Click **Create New Discount**. **Note:** If you'd like to create a variable discount so you can enter the amount at checkout, leave the amount field blank.
3. Enter the discount details > **Save**.

Automatic Discounts

Create automatic discounts for specific items and categories, daily specials like happy hours, or limited time offers.

Automatic Item or Category Discounts

1. Visit **Items** > [Discounts](#) in your online Square Dashboard.
2. Click **Create New Discount**.
3. Enter the discount details.
4. Enable **Auto Apply to Items and Categories**.
5. Click **Select Items** to apply discounts to certain items or categories automatically.
6. Choose up to 1000 individual items or categories and click **Done**. To select all items, select the checkbox next to the Items heading.
7. Click **Save**.

Create a Recurring Discount



1. Visit **Items** > [Discounts](#) in your online Square Dashboard.
2. Click **Create Discount** to add a new discount.
3. Enter the discount details.
4. Enable **Auto Apply to Items and Categories**.
5. Click **Select Items** to apply discounts to certain items or categories automatically.
6. Choose up to 1000 individual items or categories and click **Done**. To select all items, select the checkbox next to the Items heading.
7. Toggle on **Set Schedule**.
8. Set the days of the week and times of day this discount is available.
9. Click **Save**.

Create a Limited Time Discount

1. Visit **Items** > [Discounts](#) in your online Square Dashboard.
2. Click **Create New Discount**.
3. Enter the discount details.
4. Enable **Auto Apply to Items and Categories**.
5. Click **Select Items** to apply discounts to certain items or categories automatically.
6. Choose up to 1000 individual items or categories and click **Done**. To select all items, select the checkbox next to the Items heading.
7. Enable **Set Date Range** and select dates to create a limited-time discount.
8. Click **Save**.

Edit Service Settings

On your Square Dashboard navigate to **Points of Sale** > **Service Settings**. Service Settings include Closing Procedure requirements, Menu Behavior settings, Automatic Gratuity taxation, as well as tip adjustment settings. Service settings are a per location setting.

[Closing Procedures](#)

Close of Day

- Customize actions required before running the Close of Day of day. All actions will be required to be completed before you're able to fully close out and run an end of day report.
- We recommend unchecking **Individual Item Sales** for end of night reports, these will make printed reports very long.

Shift Report Settings

- Customize actions required before employees can run their shift report. All actions will be required before an employee can run their end of shift report and be prompted to clock out.
- Again, we recommend unchecking **Individual Item Sales** for end of shift reports.

Menu Behavior

- Menu behavior controls whether the menu navigates back the main menu page after adding an item to a sale, or will remain on the display group.

Note: Quick service restaurants tend to prefer **Return to Home Screen**, whereas full-service restaurants have found it easier to use **Stay in Place**.

Printed Receipt

- For printed receipts, condense item and modifier information. If you would prefer to group the same item and remove unpriced modifiers (e.g. *meat temperature*), select **Minimize Receipt Length**.

Automatic Gratuity

- Customize the gratuity amount and the minimum party size to automatically trigger.
- Turn taxes on/off for automatic gratuity. If you have specific questions about auto-grat, please consult a tax professional.

Note: Automatic gratuity will appear as *Service Charges* on sales summary, close of day, and employee shift reports.

Tip Adjustment

- Customize who is responsible for adjusting tips at the end of the night — the employee who *opens the check*, or the employee who *closes* the check.

Straight Fire

- If using coursing, check the boxes for categories you won't need to course — most often drink categories.

Add a New Employee

To create a new employee:

1. Click [Create Team Member](#).
2. Enter the **Employee Name, Pay Type, Pay Rate**.
3. Toggle on **Enable Sales Tracking, Timecards, and Employee Permissions**
4. Select a role.
5. Enter a custom passcode, or choose to generate a code for the employee.

To Set Work Period, Overtime, and Breaks

1. Go to [Timecards](#).
2. Click **Settings**.
 - Work Period
 - Overtime & Breaks

Employee Training Guide

New Employee Checklist

Getting Started

1. Enter your employee passcode to log in.
2. Clock in and continue to Square for Restaurants.

From the Floorplan

3. Select a table.
4. Select the number of covers.

From the Menu

5. Add a single item to the check:
 - Swipe left to remove.
 - Swipe right to repeat.
 - Click the item, **Edit**, add notes, discounts, or modifiers.
6. Input a mock order, make sure to enter multiple courses and include drinks, apps, and mains.
7. Repeat a round of drinks:
 - Click **Edit Items**.
 - Select multiple items > **Edit # of items**.
 - **Repeat, Move**.
8. Review the **Actions** tab:
 - **Move**: Move a check to a new or merge with an existing check.
 - **Assign**: Transfer to another server.

- **Check Name & Notes.**
- **Item Availability:** Add an item count and make an item temporarily unavailable for sale.

Closing Procedures

9. Run a Shift report:
 - a. Make sure checks are closed.
 - b. Adjust any open tips.
 - c. Clock out after your shift report is finished.
10. Close out the cash drawer (if needed).
 - If paying out tips from the cash drawer, record any cash payouts.
11. Run the **Close of Day** report.