

## SQUARE CARD PROCESSING GETTING STARTED GUIDE

### Step 1

To use the Foundation's Square Credit Card processing you must have a business email account set up for your chapter.

What is a business email? An email account created for the chapter that will be maintained by chapter officers year-after-year, regardless of transitions in officer roles. We recommend something like [yourchaptername@gmail.com](mailto:yourchaptername@gmail.com).

### Step 2

Reach out to Amanda Ravsten at [aravsten@dcsdk12.org](mailto:aravsten@dcsdk12.org). The Foundation will check and see if your chapter has a current Square account. If you do not have a Square account, the Foundation will create that account and inform you upon completion. If you have a current Square account the Foundation will give you that information.

Square processors can be purchased from [Amazon](https://www.amazon.com) or local retailers like Target.

\*\*\*\*Any processor that is purchased must be able to read the Chip cards, or you will be assessed more fees for each transaction.

The Foundation has a limited number of Chip Reader Square processors that can be checked out for use for your event. Please reach out to the Foundation when planning your event, to ensure that you will be able to access our Square Processors if needed.

### Step 3

Wait for a confirmation email from Square. Your confirmation email from Square, will prompt you to set a password for your account.

### Step 4

Download the Square Credit Card app to your device, use your business email as the login and the password you set up.

### Step 5

Run a trial transaction, charge yourself \$1. See "How to process a payment" on the following page. Within 48 hours of your event, you'll receive an email sales confirmation from the Foundation detailing your gross and net sales.

# SQUARE CARD PROCESSING

## CHAPTER USER GUIDE

### At least 24 hours prior to event

- Determine who will run credit cards. Anyone running credit cards must be an official member of your chapter.
- Ensure they have a headphone jack on their device, or a headphone jack adaptor.
- Request they download the Square Credit Card app at least 24 hours prior to the event.
- **Get a signed Device Release Form from each individual that will be using their personal device to conduct transactions. This is required.** If your volunteer is unwilling to sign the form, find another volunteer.

### Immediately prior to the event

- Have them open the app, provide your login information (business email and password) to each volunteer.
- Conduct a training, have each volunteer charge their own credit card \$1. This can be refunded if needed. Email the Foundation to process the refund.

### During the event - Processing Payments

How to process a payment:

1. Login
2. Enable all requested settings, including the microphone
3. Plug the card swiper into the device
4. Click the “hamburger icon” (three stacked lines in upper left corner)
5. Tap “Checkout”
6. Enter the dollar amount of the purchase
7. Select the blue “Charge” button
8. Tap “Credit Card”
9. Swipe Card (Note, if you manually enter the credit card number rather than swipe (**or chip reader**) a higher rate of 3.5% will be applied)
10. Have the customer sign with their finger
11. Tap Done Signing and pick the customer’s preferred receipt option

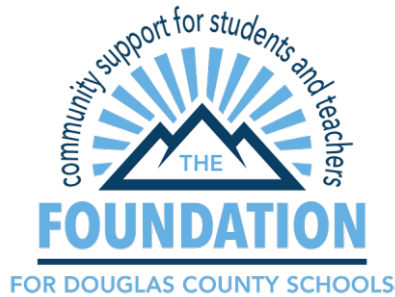
### During the event - Refunds

The system will not allow you to process a refund. Rather, you’ll need to submit a refund request to the Foundation following your event. Be sure to include:

- Your chapter name
- The date and time of the transaction
- Last four digits of the credit card
- Receipt number
- Amount to be refunded

## After the event

- Thank volunteers, unless they are chapter officers ask them to delete the Square app from their device. If needed share that it is Foundation policy that you observe them delete the app.
- Login online or from your own phone to view or sum up your transactions.
- Within two business days you'll receive a report from the Foundation with a sales summary report.
- You may request a detailed report from the Foundation which will provide purchasing details for all transactions purchased on the device.
- **If you had non-officer volunteers using the app it is required that you login and change your Square password within 24 hours of the event. This ensures your account access remains secure.**



## **SQUARE CARD PROCESSING** **FREQUENTLY ASKED QUESTIONS**

### **What are the fees?**

Swiped payments (**and chip payments**) with the Square reader are 2.75%. Keyed in card payments are 3.5% + \$.15 fee.

### **Who is allowed to run credit cards?**

Cards may only be run by adults 18 and over that are official members of your chapter organization. This is the same policy requirement as the Foundation has had for hand-held devices and necessary for security purposes.

### **When will the money appear in my account?**

All Square funds are deposited in the Foundation's master scrips account. The Foundation will transfer your funds monthly, at the close of the month. If you need your funds transferred sooner please submit a request.

### **How will I know how much revenue has been earned?**

You can login to your app or online and sum total the transactions. The Foundation also has access to your square account and can help you run reports. Reach out to [aravsten@dcsdk12.org](mailto:aravsten@dcsdk12.org), for help with your Square reports.

### **Where can I get card readers?**

When you login to set-up your account you may be offered a free reader. Feel free to take advantage of this offer. You can borrow readers from the Foundation or can purchase them at Amazon, Target, Walgreens and other retailers. Please only purchase processors that can read Chip enable cards.

### **How many card readers can I have?**

A chapter may maintain up to four readers.