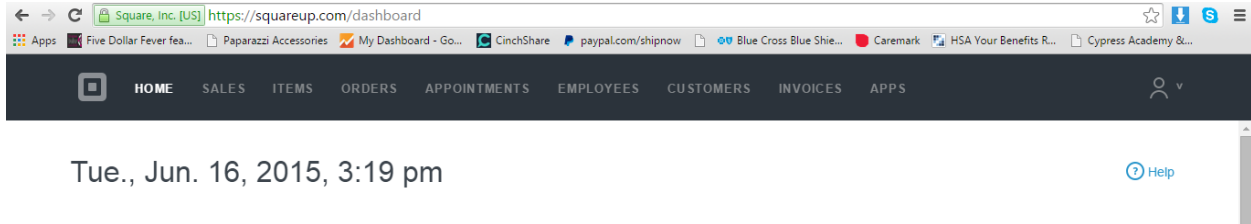




Square Dashboard Training

By Matt Hoisington – Five Dollar Fever – WWW.FIVEDOLLARFEVER.COM

General Overview of Dashboard



Home: Home Screen of the Dashboard that displays pertinent information regarding your account at a quick glance

Sales: Run reports and graphs on your sales numbers, review transactions, review deposits, and cash drawers

Items: Add Items to your inventory, add categories (such as colors or style of piece), and create discounts and taxes

Orders: Settings for pre-paid pick up of items (more for food type establishments), shipping of orders from your Square Market, and online set up for your Square Market

Appointments: Paid feature that allows you to set appointments for customers (meant for businesses that set appointment times with their customers)

Employees: Allows you to set some limits as to what other employees can do within the Square App and to create individual employee accounts

Customers: Gives you graphical insight into the makeup of your customers and keeps a directory of credit card paying customers

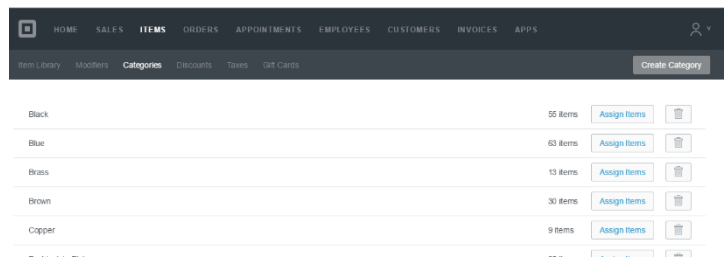
Invoices: Create, send, and track invoices for Facebook Parties

Apps: Additional add on apps that add function to your Square dashboard. Some are free, but many are paid

Tasks to Prepare to Enter Your Inventory

Setting Up Categories

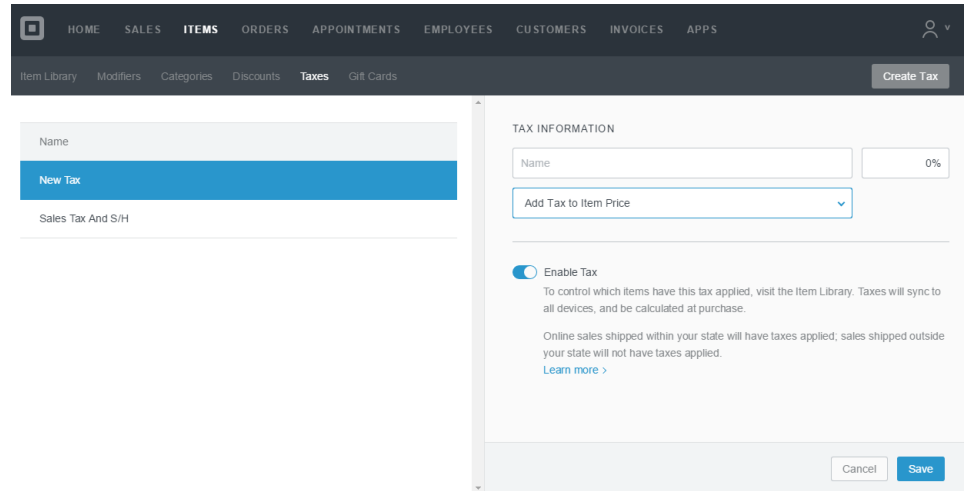
Click on the Items tab followed by the Categories sub-tab. Click the gray “Create a Category” button in the upper right hand corner. A box will appear at the top of the list of categories. Type in the category that you want to create. (HINT: The fewer the categories, the better your Market



site will run. I originally had a category for each color of each of the different types of accessories [i.e. Orange necklaces, orange bracelets, orange rings, etc.]. I found that this was too much and have them organized by colors (color blocked), just like you should on your displays). After your category is entered, click outside of the text box, and your category will be put in alphabetical order with the other categories. I will be including a list of the color categories that I use at the end of this handout (Appendix A – middle chart titled Color). Should you want to delete a category, all you do is click the garbage can icon at the end of the row for that category.

Setting Up Taxes

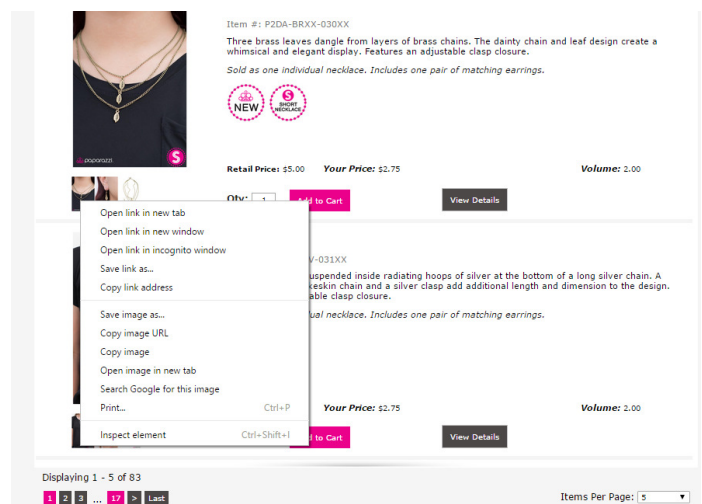
Click on the Items tab, followed by the Taxes tab. Click on the gray “Create Taxes” button in the upper right hand corner. A new tax window will appear. Name the tax (i.e. Sales Tax). You will then need to decide if you want to use a percentage of tax that is added on the price of each item or have the tax added in the item cost (HINT: The Square Market will not allow you to charge tax at a percentage, so if you plan on using



the Square Market feature, then you will need to choose the “Add Tax in Item Price” option. A word about setting your price. First you need to charge tax. You pay it up front and don’t want to lose some of your commission by not recouping it and your customers are expecting to pay it. Many consultants will round the tax to a number that will alleviate the need to make lots of change. My taxed price would be \$5.41. I asked some potential customers and they told me that they would rather pay the extra \$0.09 than have to worry about change. That is a decision that you will have to make for your business. Talk to some potential customers and see if they have a preference. I then state that it is \$5.50 with tax and handling to cover the \$0.09). Choose which two of the options you want by dropping clicking on the drop down triangle, and then type in the percentage amount or item price with tax into the right hand text box. Make sure the Enable Tax switch is switched on and then click the blue save button in the lower right hand corner.

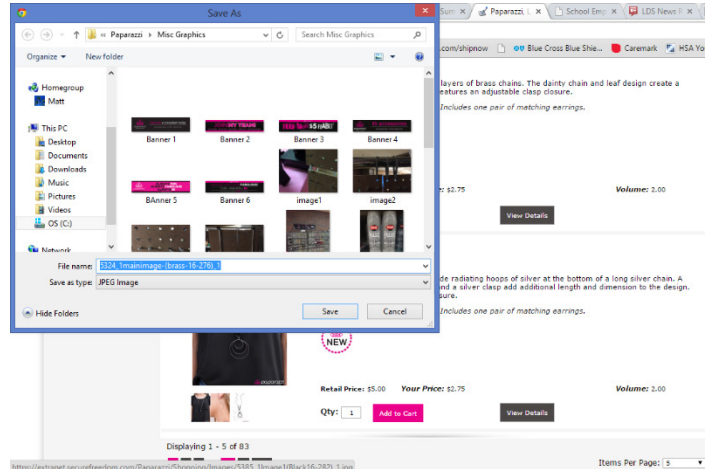
Saving Images and Descriptions

In order to sell your items online, or even if you just plan to use Square as a register (it will put the picture of the item as a reference icon so you can make sure you are selecting the correct item), you will want to save pictures and descriptions of the pieces that you have in your inventory. This can be done by logging into the Back Office and going to the order page. Right click one of the three small pictures underneath the large image (HINT: the large picture cannot be copied, you need to select one of the smaller ones) that you want to copy.





A new window will open into your computer files. Select the file where you want to save the picture, then name the file the name of that piece, and click save (HINT: I save all three pieces in order to give my customers the most views possible of the items in my inventory). To save the description, highlight the text by clicking and dragging across it. Then right click on it and select paste (HINT: You can also use the short cut of holding the Ctrl key down and then push the “c” key). In a word processing document, paste in the description for later use by clicking the cursor where you want your text to be pasted and right click and select paste (HINT: You can also use the short cut of holding the Ctrl key down and then push the “v” key). I have one document that I keep adding to with all of the product descriptions that is currently up to 99 pages. I have gone back to it often and it is very helpful. If you cannot not find a picture or a description and you have an item name, you can Google the full name and Paparazzi Jewelry and you will often find pictures and the description that others have copied and put on their pages.

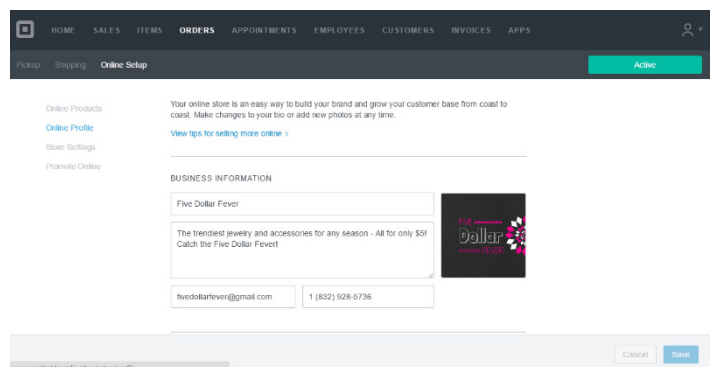


Product Names and Storage System

Paparazzi encourages, as do I, that you try and learn the names of the individual pieces that are in your inventory. Calling them by their name help give the pieces a personality and will also impress the customer as you tell them that “the Ivy League earrings would go great with the color of your eyes”. I try to know as many of the pieces as possible (I know about 80% of the 600 pieces in our inventory), but there are some that I forget. We also take the pieces out of the plastic (where the name stickers are located) and display them on hooks. If I can’t remember a name or I have someone else helping at the register who doesn’t know the names, what do I do? I came up with a simple numbering system that I also enter into Square that allows anyone in our family to check out customers. It consists of 6 numbers. The first two numbers stand for the type of accessory, the second two are for the color, and the third two are an ID number within a color (05 is the 5th piece in any given category). I have included the numbering system chart that I use at the back of this handout (Appendix A). So if I was numbering my first black long necklace, the number would be 100101. The fifth silver short necklace would be 201505. I use a simple spreadsheet that I can share upon request to keep track of the numbers that I have used with this system.

Online Settings

Click on the Orders tab and then Online Set Up sub-tab. Ignore the Online Products option in the side menu (we will be dealing with this option during the set up process) and click on the Online Profile. This is where you fill in your business name, contact info, location, hours, online store image (the image that will be the first thing that you customers see when they go to your online store) and social media links. Fill in all the pertinent information and then click save.



Click on the Store Settings option from the side menu. This tab is where you choose your online store address, set shipping information (I just charge a flat \$4 per order for shipping) and your return policy. Fill in all the pertinent information and then click save.



******Before moving on to the next steps and entering your inventory into Square, make sure that you have set up your taxes, categories, and shipping information (see pgs. 1, 2, & 3).******

Adding Inventory to Square

Click on the Items tab followed by the Item Library sub-tab.

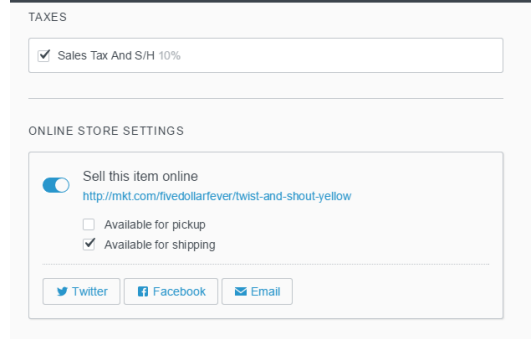
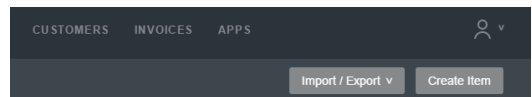
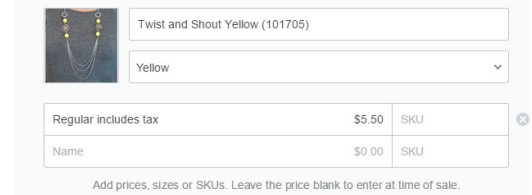
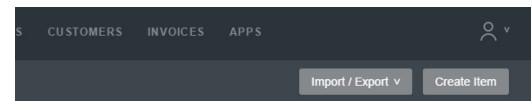
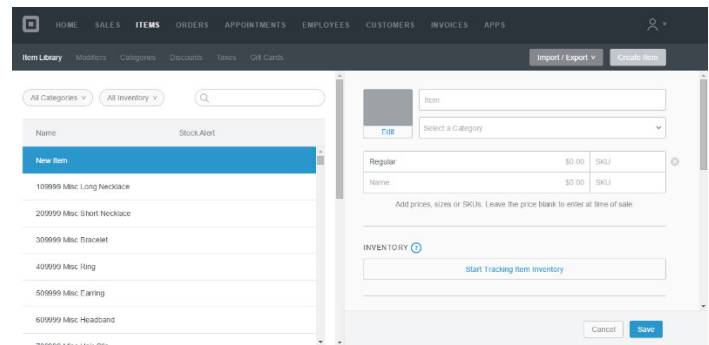
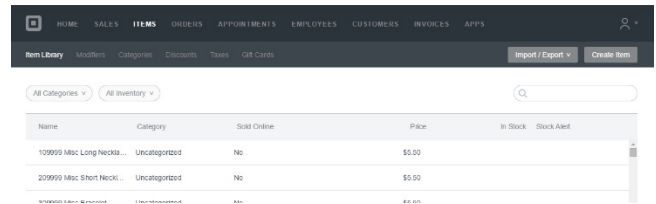
Click the Create Item button.

Enter the item name into the first box, along with any identification numbers you choose to use.

Click on the word Edit at the bottom of the gray rectangle to add a picture of the product. Click Add Image and then navigate through your computer files to find the main picture you want your customer to see for that item (I always use the picture with the model wearing the jewelry). Double click on your desired picture and it will show up in the square above Add Image. Then click done (where the word Edit was previously).

Click on the Select a Category box and start to type in the category under which you want to classify this piece (i.e. yellow). Select the Regular box and type a name for that price (I keep the regular and add "includes tax"). Type in the price where the dollar sign and zeros are. Then skip over the Inventory section temporarily, as it opens a new window and you can lose your work so far.

Tick the box for the appropriate tax rate for this item in the tax box. Then make sure the Sell This Item Online switch is toggled to the on position and tick the box for Available for Shipping.





If for some reason you need to charge extra shipping on top of the normal amount that you set up in the Store Settings, then type that into the box under the Additional Shipping title (I have never had to do this).

If you have additional pictures that you want to show your customer (HINT: the more views that you are able to give your customer, the better. Paparazzi offers two pictures for most items and three for necklaces), click the plus sign in the square and it will open a file window for you to find and select your desired picture. After importing your picture, you can then add a description for the photo (i.e. Matching Earrings, Close Up) by clicking on the text next to the picture and typing your desired description. You should not do anything to the Item Embed section. This is html code for including this item onto a website.

The last section is for you to add a description. Go to your Word document where you have saved all your descriptions. (HINT: To save time looking through all the names for your desired piece, hold down the Ctrl key and click the F key. It will open a search window where you are able to type in the name you are seeking and it will automatically find it for you). Copy the description from the Word document by highlighting the desired description by clicking the cursor at the beginning of the description. Then hold down the mouse button and highlight the whole description. Then hold down the Ctrl key and then click the C key. You have now copied the description. Go to the Square site and click your cursor in the Description box. Then hold down the Ctrl key and click the V key and your description should be pasted in the description box.

Click the Save button to save your work.

Square will run automatic daily reports of items that you have run out of in your inventory. I find this very helpful in the reordering process. In order for Square to do this, you need to enter in quantities for your pieces. Do this by clicking on the Manage Item Inventory and Alerts link. A new window will open upon clicking on it.

Once the new window is open, you will need to tick the box for Track Stock and enter in the number of that item you have in stock in the In Stock box. Then tick the box for Alert and type in a zero in the Alert At box. Click save.

Import / Export v Create Item

ADDITIONAL SHIPPING

\$0.00 + \$4.00 flat rate per order. [Change >](#)

ADDITIONAL IMAGES

Matching Earrings

+ Add images

ITEM EMBED

Copy the code below and paste it to your website. [Preview](#)

```
<a href="https://squareup.com/market/fivedollarfever/twist-and-shout-yellow"
```

Cancel Save

Import / Export v Create Item

DESCRIPTION

A pattern of serrated silver circles, bulky beads and three dimensal silver blossoms are broken up by intervals of simple chain link. Three strands of chain drape elegantly across the bottom of the flirtatious design. Features an adjustable clasp closure.

Cancel Save

INVENTORY ⓘ IN STOCK

Regular includes tax	1
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[Manage Item Inventory and Alerts](#)

Inventory for Twist and Shout Yellow (101705)

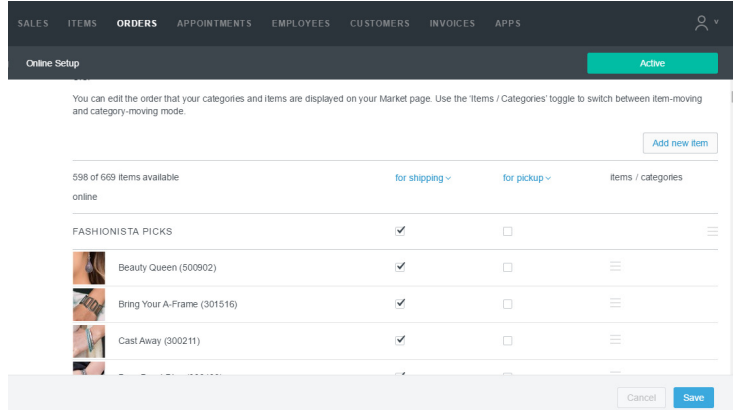
No item variations edited.

Variation	SKU	Track Stock	In Stock	Alert	Alert At
Regular include...		<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	0

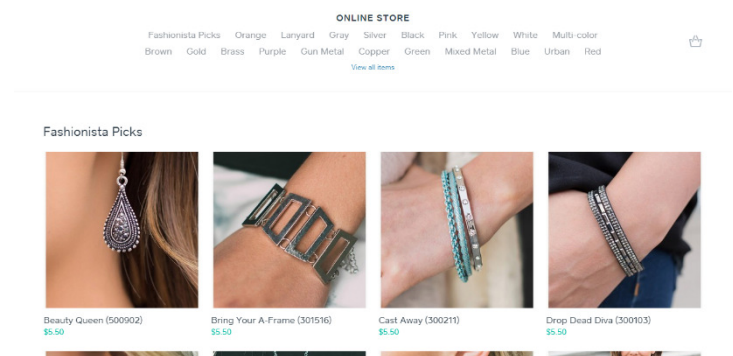
Cancel Save



Once you have entered in all of your inventory, I recommend that you click on the Orders tab and Online Shipping sub-tab to double check that all are available online. Scroll down and make sure that all the items that you want to sell online are ticked For Shipping. After all the changes are made, click the Save button to save your changes.



Once everything is entered in correctly and has been double-checked, you can go to your pre-selected website address at [www.mkt.com/\(your selection\)](http://www.mkt.com/(your selection)) (i.e. www.mkt.com/fivedollarfever). Your site will look like the one to the right after you scroll down to the items.



A Few Additional Hints to Save from Frustrations

- Square will automatically sign you out after a certain period of inactivity. If you are coming back to the website after inactivity, I recommend that you refresh the screen so you don't lose any work that is not saved during a reboot.
- When selling from the Square Register App, it will automatically deduct the sold items from the total number of each item in inventory when a sale is processed.
- Square does not currently have its invoice tool and inventory numbers connected. After an invoice has been paid, you will need to manually deduct the items sold from their inventory numbers.



Appendix A

Product Numbering For Paparazzi Pieces

Example:

The 7th pair of Green Earrings

500807

(50 for earrings, 08 for green, and 07 for the 7th pair)

Style	#
Long Necklaces	10
Lanyards	11
Short Necklaces	20
Bracelets	30
Urban	31
Ring	40
Earrings	50
Clip-on	51
Headband	60
Hippie	61
Elastic	62
Hair Clip	70

Color	#
Black	01
Blue	02
Brass	03
Brown	04
Copper	05
Gold	06
Gray	07
Green	08
Gunmetal	09
Multi-color	10
Orange	11
Pink	12
Purple	13
Red	14
Silver	15
White	16
Yellow	17
Mixed Metals	18

Item #
01-99