



Square Extension for Magento 2

User Guide

Version 2.1.8

Contents

0 - Introduction to the Square Extension	4
1 - Must-read	5
2 - Installation	6
Step 1 – Purchase the extension on Magento Marketplace	6
Step 2 – Get your public and private keys on Magento Marketplace	6
Step 3 – Add your Magento Marketplace credentials to your Magento instance	7
Step 4 – Download the extension using Composer	7
Step 5 – Complete the installation	8
3 - Important Configuration Information	9
4 - Square Configuration in Magento Admin	10
5 - If You Only Need the Square Payment Method	13
5.1 Square Payment Method Set Up	13
5.1.1 <i>Authorize and Capture amount when Order is placed</i>	13
5.1.2 <i>Authorize (without capture) amount when Order is placed</i>	17
5.1.3 <i>Capture amount when the Invoice is being created</i>	20
5.1.4 <i>Void Transaction when an Order is Canceled</i>	22
5.1.5 <i>Store Credit Card</i>	24
5.1.6 <i>Multi-store Configuration for Square Payment Transactions</i>	25
5.2 Gift Cards	28
5.2.1 <i>Magento Settings</i>	28
5.2.2 <i>Checkout Using Gift Cards</i>	29
5.2.3 <i>Refund Orders Paid for Using Gift Cards</i>	31
5.2.4 <i>View Gift Card Transactions in Square Dashboard</i>	33
5.3 Apple Pay	34
5.3.1 <i>Prerequisites</i>	34
5.3.2 <i>Set Up</i>	34
5.4 Invoice Pay	38
5.4.1 <i>Prerequisites</i>	38
5.4.2 <i>Journey</i>	38
5.5 PSD2 SCA	41
5.5.1 <i>Admin Settings</i>	41
5.5.1 <i>Front Customer Journey with SCA</i>	41
6 - If You Need the Full Omni Capabilities of the Extension	44
6.1 General Configuration	44
6.1.1 <i>Customer Synchronization</i>	44
6.1.2 <i>Catalog and Inventory Synchronization</i>	45
6.1.3 <i>Order and Transactions Synchronization</i>	46
6.1.4 <i>Webhooks Configuration</i>	47
6.2 Square Payment Processing Configuration	52
6.2.1 <i>Authorize and Capture amount when Order is placed</i>	52
6.2.2 <i>Authorize (without capture) amount when Order is placed</i>	55
6.2.3 <i>Capture amount when the Invoice is being created</i>	58
6.2.4 <i>Void Transaction when an Order is Canceled</i>	60
6.2.5 <i>Store Credit Card</i>	62
6.2.6 <i>Invoice Pay</i>	64
6.2.7 <i>PSD2 SCA</i>	66
6.2.8 <i>Multi-store Configuration for Square Payment Transactions</i>	69
6.3 Gift Cards	71

6.3.1	Magento Settings	71
6.3.2	Checkout Using Gift Cards	72
6.3.3	Refund Orders Paid for Using Gift Cards	75
6.3.4	View Gift Card Transactions in Square Dashboard	77
6.4	Apple Pay	78
6.4.1	Prerequisites	78
6.4.2	Set Up	78
6.5	Customers Synchronization	82
6.5.1	Admin Settings Needed	82
6.5.2	Magento Customer Creation	83
6.5.3	Square Customer Creation	86
6.5.4	Edit a Customer in Square	87
6.5.5	Delete a Customer in Magento	88
6.5.6	Delete a Customer in Square	89
6.6	Catalog Management Synchronization	91
6.6.1	Sources of Records	91
6.6.2	Configurable Products Notes	92
6.6.3	Admin Settings	94
6.7	Locations and Inventory Synchronization	95
6.7.1	Set Location from Magento Admin	95
6.7.2	Set Location During the Get OAuth Token Process	97
6.7.3	Inventory Synchronization: Square is SOR	98
6.7.4	Inventory Synchronization: Magento is SOR	99
6.7.5	View and Edit Inventory per Location in Magento	100
6.8	Order and Transaction Synchronization	105
6.8.1	Magento Settings	105
6.8.2	View Square Transactions	106
6.8.3	View Square Refunds	109
6.9	In-Store Pickup Functionality	112
6.9.1	Prerequisites for enabling In-Store Pickup	112
6.9.2	Configuring the In-Store Pickup functionality	114
6.9.3	Order journey	115
6.9.4	In-store Pickup functionality notes	121
6.10	Subscriptions Functionality	122
6.10.1	What Does the Square Subscriptions Functionality Do?	122
6.10.2	Prerequisites for Enabling Subscriptions	122
6.10.3	See the List of Active Subscription Plans	123
6.10.4	Add a New Subscription Plan	125
6.10.5	Subscriptions Extension Settings	127
6.10.6	Attach Subscription Plans to Products	129
6.10.7	Frontend Journey	130
Appendix-1 Entities mapping between Magento and Square		136
A-1.1	Square Locations	136
A-1.2	Square Customers	137
A-1.3	Square Catalog	138
A-1.4	Square Inventory	138
A-1.5	Square Payment Transaction	139
A-1.6	Square Transactions/Refunds	140
A-1.7	Square Orders	141
Appendix-2 Crons schedule		142

o - Introduction to the Square Extension

The Square extension for Magento simplifies all the different aspects of running your business - with out-of-the-box fraud detection, PCI compliance, simplified catalog and inventory management, and a holistic view of your customers - so that you can focus on growing your business. The Square extension for Magento allows merchants to power online payments on their Magento online store, as well as push transactions made on the Square POS into Magento. Transactions, refunds, customer data, product catalog info, and inventory quantities sync between Square and Magento systems.

A Square account is required to use this extension. Get started and create a Square account:

- [US](#)
 - [Canada](#)
 - [UK](#)
 - [Australia](#)
 - [Japan](#)
-

1 - Must-read

The following information is a quick collection of answers to the most frequently-asked-questions we encountered. If you feel you have issues with the extension, please consult this list first. This information is also presented in detail throughout the rest of this user guide:

1. **Installation.** Please make sure you installed the extension using one of the methods described [here](#). If you chose the second method, please make sure you run the following Command:
 - a. **If you are installing fresh, version 1.0.0 or later:**
 - the extension uses the official Square SDK: square/connect, as well as square/square
 - b. **If upgrading from an earlier version:**
 - please first remove the previous SDK by running: `composer remove adriansavuosf/squarepaymentssdk`
 2. **Configuration.** When configuring the extension or after changing the configuration at a later time, please refresh the cache.
 3. **Locale options.** Please don't forget that the time settings under 'Locale Options' must match the store's time zone
 4. **Payment options.** If the Square Payment method is set to "Authorize" only, without capture, then the transaction will not be pushed to Square at the time the order is placed. It is instead pushed at the moment the order is invoiced.
 5. **Payment options.** The option to store credit card can only be offered to logged in customers that are synchronized with Square. Therefore, if you set the Square payment method to work ONLY with stored credit cards (in the Payment Methods settings), then checking out as guest will not be possible.
 6. **Order placing.** The option to create the corresponding order in Square every time an order is placed in Magento is designed to work with synchronized products. Catalog and Inventory synchronization should be enabled.
 7. **Catalog and Inventory synchronization.** Please note that the inventory displayed in Magento products grid and in the product's inventory tab has the value matching ONLY the selected default location. Switching the default location here will also make all the inventories displayed in the grid take the values matching the quantities on the selected location. If the products have 0 inventory on the newly selected location, then the inventory displayed will be 0. Note that by switching the location from one with inventory to another without inventory, the quantities are not lost. All quantities on all locations are visible in the Locations tab of the product details. Also, switching back from a location without inventory to one with inventory will display the quantities again.
-

2 - Installation

Important: Please install and use the extension first on a development or staging environment. We advise adding the extension to your production environment only after you are satisfied with how the extension works on the development/staging environment. When the functional mode is changed (from sandbox to production or vice versa) as well when the location is switched, products, customers, transactions, and inventory counts are reset to 0.

Step 1 – Purchase the extension on Magento Marketplace

The first step is to purchase, for free, the official Square extension on Magento Marketplace.

<https://marketplace.magento.com/square-module-squareup-omni.html>

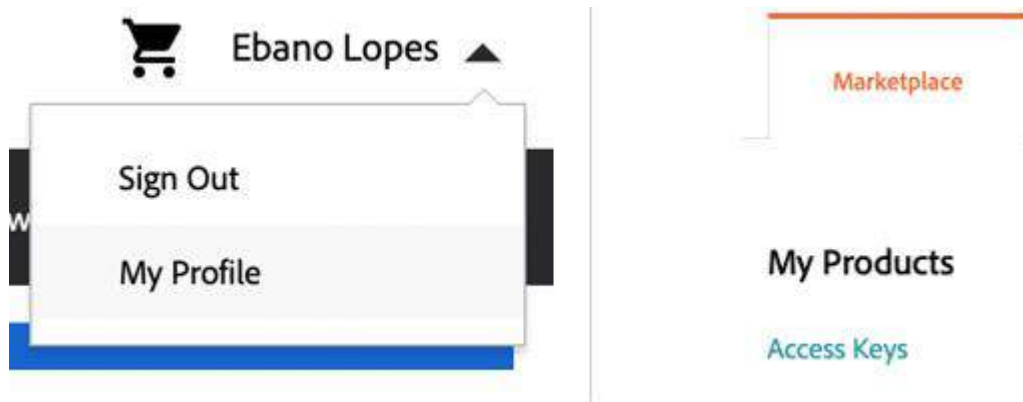
Important: make sure that the account used on Magento Marketplace it's the same one which you'll use for extension installation. If you already installed other extensions from the Magento Marketplace using Composer on your Magento instance, it's needed to use the same account.

Step 2 – Get your public and private keys on Magento Marketplace

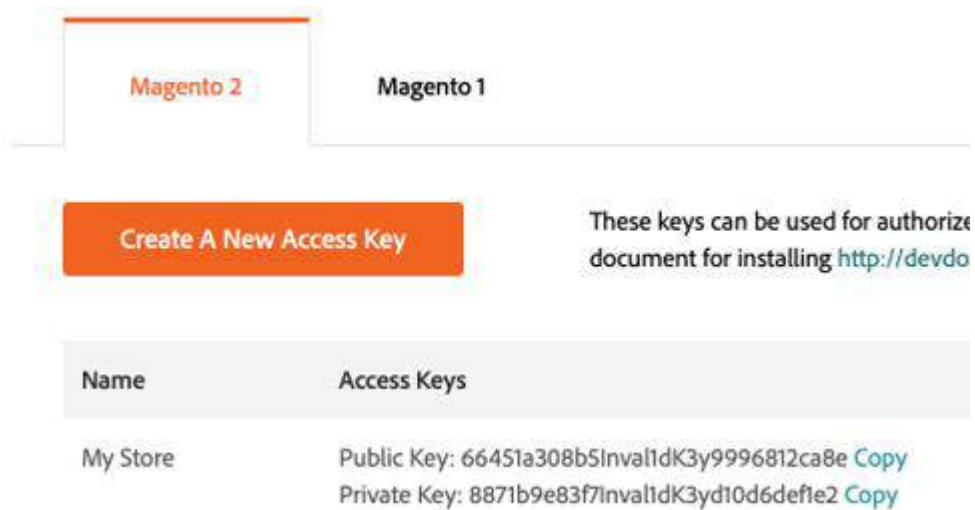
It's needed to have your Marketplace keys properly setup on your application.

Note: If you've already installed other extensions from your Magento Marketplace account using Composer, you can skip this step.

Look for your Access Keys on your Magento Marketplace account, navigate to My Profile and under the "Marketplace" tab click on "Access Keys"



At this moment you should be on URL <https://marketplace.magento.com/customer/accessKeys/> and you should see a screen similar as the below one.



If you don't see public and private keys on the list, click on "Create A New Access Key". Otherwise, if the keys are already created, then you're good to go.

Step 3 – Add your Magento Marketplace credentials to your Magento instance

Check your [MAGENTO_ROOT] folder and look for auth.json file. If it does not, create one with the below content, exchanging <public-key> and <private-key> for the keys from Magento Marketplace.

```
{
  "http-basic": {
    "repo.magento.com": {
      "username": "<public-key>",
      "password": "<private-key>"
    }
  }
}
```

If the auth.json file already exists, make sure that you see a similar structure as the above and the keys under "repo.magento.com" are the ones you've seen from Magento Marketplace.

Step 4 – Download the extension using Composer

Run the below command line to download the extension using composer:

```
composer require square/module-squareup-omni
```

You should see an output similar to the below one:

```
Warning from https://repo.packagist.org: Support for Composer 1 is deprecated and some packages will not be available. You should upgrade to Composer 2. See https://blog.packagist.com/deprecating-composer-1-support/
Using version ^1.11 for square/module-squareup-omni
./composer.json has been updated
Loading composer repositories with package information
Warning from https://repo.packagist.org: Support for Composer 1 is deprecated and some packages will not be available. You should upgrade to Composer 2. See https://blog.packagist.com/deprecating-composer-1-support/
Updating dependencies (including require-dev)
Package operations: 5 installs, 0 updates, 0 removals
 - Installing apimatic/jsonmapper (v2.0.3): Loading from cache
 - Installing apimatic/unirest-php (2.0.0): Loading from cache
 - Installing square/square (11.0.0.20210513): Loading from cache
 - Installing square/connect (3.20200528.1): Loading from cache
 - Installing square/module-squareup-omni (1.11.0): Loading from cache
Package square/connect is abandoned, you should avoid using it. No replacement was suggested.
Writing lock file
Generating autoload files
120 packages you are using are looking for funding.
Use the `composer fund` command to find out more!
```

Step 5 – Complete the installation

Find out which application mode you're using on your Magento installation, by running below command:

```
bin/magento deploy:mode:show
```

Important: If you see as an output the "production" mode, then below command lines will temporarily make your application unavailable. But usually, it's a quick process.

If you're on production environment, it's recommended to put the application on maintenance mode, this will make the application unavailable:

```
bin/magento maintenance:enable
```

Then run the below command which will actually install the extension on Magento:

```
bin/magento setup:upgrade
```

If you're running on production mode, then run below command line. For other modes, you should not run this.

```
bin/magento deploy:mode:set production
```

If you put the application on maintenance mode before, run the below command line to disable maintenance mode:

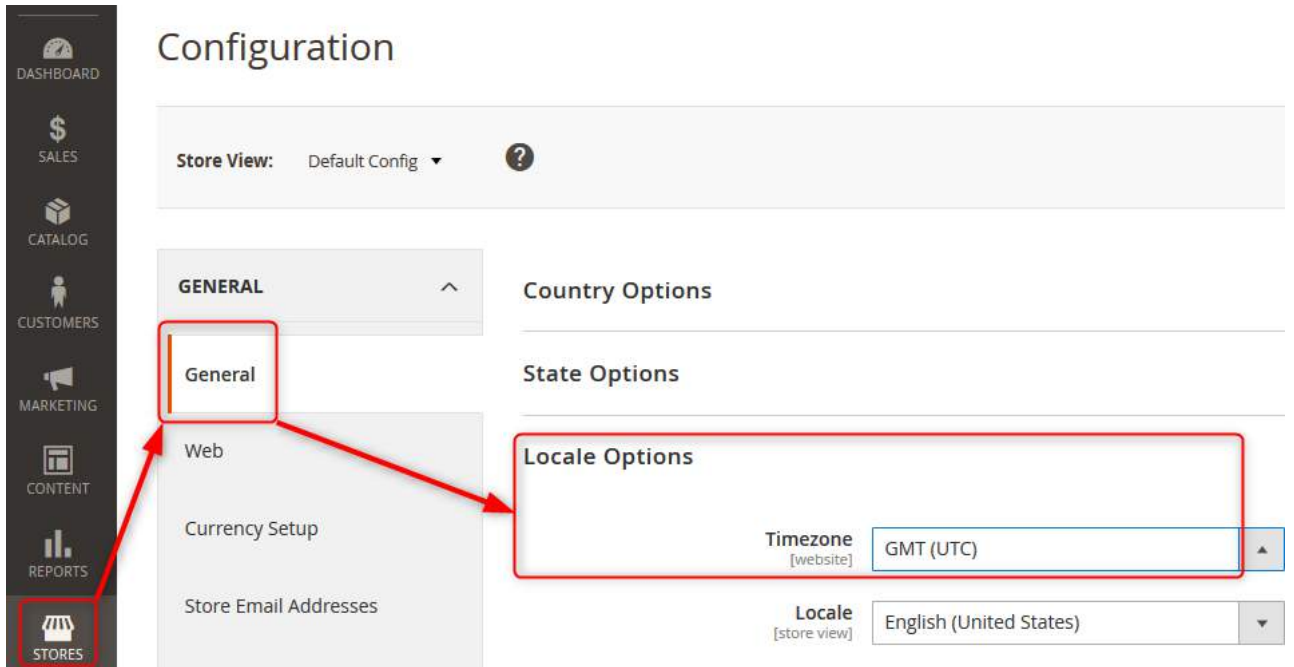
```
bin/magento maintenance:disable
```

All set! Now you should be able to see the extension on Magento admin, under Stores > Configuration, then look for SQUARE on the left menu.

3 - Important Configuration Information

Please consider the following information when setting up the extension:

1. The Magento cache must be cleaned after each time the configuration is changed
2. The time settings under 'Locale Options' must match the store's time zone:



3. Orders placed on Magento using a payment method different than Square will not be pushed to Square.
4. If Magento is the system of record (SOR), do not add/edit/remove products in Square too as the changes done on Square will not be reflected in Magento.
5. When the functional mode is changed (from sandbox to production or vice versa), as well when the location is switched, products, customers, transactions, and inventory counts are reset to 0.
6. If multiple Square production accounts are used for the same callback URL, then Square does not differentiate between the catalogs of each account: all products from all Square accounts are grouped together in the Items dashboard.
7. If during the initial setup a valid Square account is used, but then during the get OAuth process a different production account is used for logging in, the result will be that the locations of both accounts will be brought into Magento.
8. **It is HIGHLY advisable to be consistent with the choice you make for your system of records (SOR): whatever you choose, be it Magento or Square – be sure to only make changes inside your SOR. If you chose Magento as the system of records, then only make changes in Magento and let Square synchronize. In the same way, if you chose Square as the system of records, then only make changes within Square and let Magento synchronize. This is especially true for catalog and inventory synchronization.**

4 - Square Configuration in Magento Admin

The Application Mode drop down switches the way Magento interacts with Square between a production and non-production environment. Use the sandbox mode to test endpoints, common failure cases, retrieve sample data etc. Transactions in the sandbox are not sent to card networks, and credit cards are never charged. Square sandbox does not have a visual interface, so you will not be able to see transaction, customers, products, inventory, orders in square UI. Sandbox URL documentation:

<https://docs.connect.squareup.com/articles/using-sandbox>

The image displays two screenshots of the Magento Admin interface for configuring the Square extension. Both screenshots show the 'General Configuration' and 'Credentials' sections.

Top Screenshot (Production Mode):

- Application Mode:** Set to 'Production'.
- Production Application ID:** A red box highlights this field, with a red arrow pointing to the 'Production Application ID' field in the 'Credentials' section.
- Production Application Secret:** A field with masked characters.
- Production Location:** Set to 'Location 1'.
- Credentials Section:** Shows 'Application Name' as 'Magento Test App', 'Production Application ID' (highlighted with a red box), and 'Production Access Token'.

Bottom Screenshot (Sandbox Mode):

- Application Mode:** Set to 'Sandbox'.
- Sandbox Application ID:** A red box highlights this field, with a red arrow pointing to the 'Sandbox Application ID' field in the 'Credentials' section.
- Sandbox Access Token:** A field with masked characters.
- Sandbox Location:** Set to 'Please select location'.
- Credentials Section:** Shows 'Application Name' as 'Magento Test App', a warning message: 'Sandbox endpoints are only available on Connect v2.', and 'Sandbox Application ID' (highlighted with a red box).

Please consider that every time the application mode is switched and the Magento Admin configuration saved, the fields below reset:

- Application ID
- Application secret
- Location ID

Set up a Square merchant account

- You will need a merchant account with Square in order to set up an application which will integrate with the extension. Sign up for a merchant account at <https://squareup.com/signup/>.

Create a Square app that will be connected to the Square-Magento extension

- Go to <https://squareup.com/developers> and click on 'Developer Dashboard'. Sign in using the same credentials as your Square merchant account.
- Click on 'New Application'. Fill out 'Application Name' and click 'Create Application'.
- Keep your Square application page open as you'll be going back and forth between this window and your Magento admin panel.

Link your Square account to the Square extension in your Magento admin panel

- **For Magento 1:** In the Magento admin, navigate to System > Configuration > Square Configuration
- **For Magento 2:** In the Magento admin, navigate to Stores > Configuration > Square > Square Configuration
- In the Square Developer Dashboard under 'Credentials', copy the 'Application ID' and paste it into the Magento admin field 'Square Application ID'.
- In the Square Developer Dashboard under 'OAuth', show the 'Application Secret' and paste it in the Magento admin field 'Square Application Secret'. In the Magento admin area click 'Save Config'.
- In the Magento admin area locate 'Redirect URL' and copy the URL. In the Square Developer Dashboard under 'OAuth' paste the URL in 'Redirect URL' and click 'Save'.
- In the Magento admin area click 'Get OAuth Token'. In the popup window, sign in to your Square account, accept the permission scope, and select the Square location that you want to connect to Magento. When prompted, close the popup window. In the Magento admin page click 'Save Config'.
- In the Magento admin area, under 'Square Location for Online Payments' select the Square location that you want to connect to Magento. Click 'Save Config'.

Set up Webhooks

- In the Magento admin area locate 'Webhook URL' and copy it. In the Square Developer Dashboard under Webhooks paste it in 'Notification URL' and click 'Save'.
- Show the 'Signature Key' and copy it. In the Magento admin area paste it under 'Square Signature'.

Refer to either Section 5 or 6 of the User Guide to configure other pieces of the extension (depending on whether you only need to use the Square payment method, or the full omni capabilities of the extension)

- Including 'Customer Synchronization', 'Catalog and Inventory Synchronization', and 'Order and Transactions Synchronization'.

Final steps in enabling the Square extension

- In the Magento Configuration page navigate to Sales > Payment Methods.
- Under 'Square Payment Solution':
 - Make sure 'Enabled' = Yes
 - Change the 'Title' to a credit card label that you want customers to see. We recommend 'Credit Card'.
 - Select the 'Payment Action' setting you prefer.
 - Select the 'Card on File' setting you prefer.

- Click 'Save Config'.
-

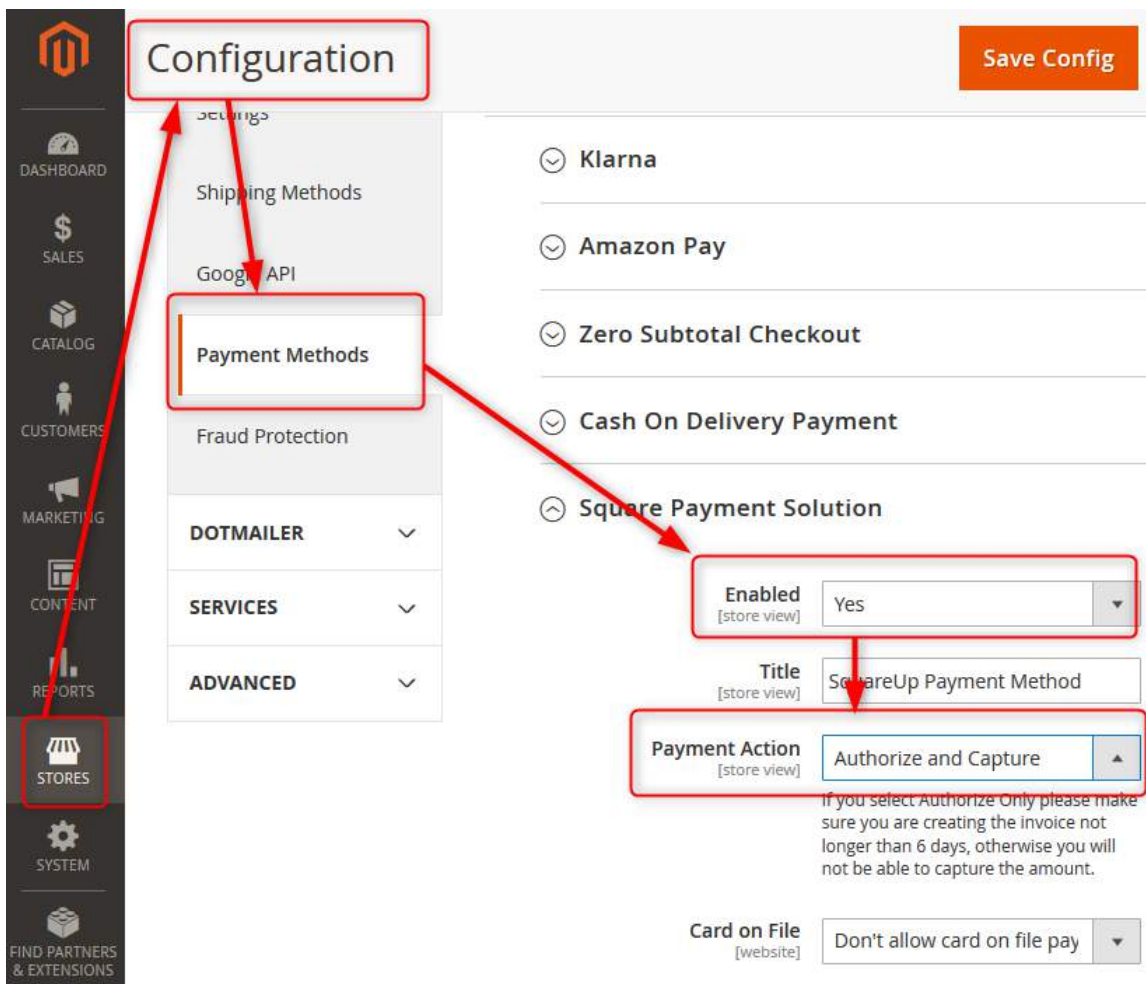
5 - If You Only Need the Square Payment Method

5.1 Square Payment Method Set Up

5.1.1 Authorize and Capture amount when Order is placed

In order to enable the Square payment solution, please make sure it is Enabled in both Magento 2 and Square admin. There are two options to use the Square payment solution: either authorize only on order being placed (and capture the amount later when the invoice is generated), or authorize and capture the amount the instant the order is placed.

Navigate to Stores > Configuration > Sales > Payment Methods > Square payment Solution section. Make sure the solution is enabled and choose "Authorize and Capture" from the Payment Action drop down menu.



Save the current configuration, refresh the cache and try placing an order on the frontend.

Note that the field "Sort Order" allows setting the display order of the enabled payment methods on the frontend:

Configuration

YOTPO

DOTDIGITAL

GIGYA IDENTITY MANAGEMENT

SERVICES

ADVANCED

Square Payment Solution

Enabled [website] Yes

Important Message [store view] In order to use this payment solution you need to go to the [Square configuration screen](#) and configure your account in order to be able to process transactions using Square.

Title [store view] Squareup Payment

Payment Action [website] Authorize Only
If you select Authorize Only please make sure you are creating the invoice not longer than 6 days, otherwise you will not be able to capture the amount.

Enable digital wallet [website] Yes

Card on File [website] Allow credit card payments an

Enable Gift Card [store view] Yes

Sort Order [store view] 0

Proceed with the checkout steps using valid data. Choose “Credit Card Square” when you get to the Payment Information screen. Consider that a front-end validation is done on the credit card number – which needs to be valid in order for the pay with card button to be active:



Payment Method:

Credit Card

My billing and shipping address are the same

a1 a2
2 Broadway
New York, New York 10004
United States
7052533254

Pay with a Credit Card

Card Number:

CVV:

Expiration Date:

Postal Code:

Save this credit card for future payments

I agree with the terms and conditions

Finalize the placing of the order. Navigating back to Magento Admin, in Sales > Orders grid and selecting to view the details of the order that has just been placed, shows the order status as Processing and the order's amount being captured:

The screenshot displays the Magento Admin interface for an order with ID #000000002. The left sidebar contains navigation menus for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Third Parties & Extensions. The main content area shows the order details, including a navigation bar with options like 'Back to register or connect an account', 'Send Email', 'Credit Memo', 'Hold', 'Ship', and 'Reorder'. The 'Order Total' section is visible, along with a 'Notes for this Order' section where the status is set to 'Processing'. A 'Comment' section contains a text area and checkboxes for 'Notify Customer by Email' and 'Visible on Storefront'. A 'Submit Comment' button is also present. The 'Order Totals' section shows a subtotal of \$10.00, shipping and handling of \$5.00, and a grand total of \$15.00. The 'Total Paid' is \$15.00, 'Total Refunded' is \$0.00, and 'Total Due' is \$0.00. The order date is Jun 14, 2018, at 1:46:48 PM, with a status of 'Processing' and a customer. A 'Not Notified' message indicates that a captured amount of \$15.00 was recorded online, with a transaction ID: "qVOFrif0TsaeNCKrleytX6IEZfYOp65rUUvIOI1ymrj7aMty25BMhO".

#000000002

← Back to register or connect an account Send Email Credit Memo Hold Ship Reorder

Order Total

Notes for this Order

Status: Processing

Comment

Notify Customer by Email

Visible on Storefront

Submit Comment

Jun 14, 2018 1:46:48 PM | Processing | Customer

Not Notified
Captured amount of \$15.00 online, Transaction ID: "qVOFrif0TsaeNCKrleytX6IEZfYOp65rUUvIOI1ymrj7aMty25BMhO"

Order Totals	
Subtotal	\$10.00
Shipping & Handling	\$5.00
Grand Total	\$15.00
Total Paid	\$15.00
Total Refunded	\$0.00
Total Due	\$0.00

5.1.2 Authorize (without capture) amount when Order is placed

Navigate to System > Configuration > Sales > Payment Methods > Square payment Solution Tab. Make sure the solution is enabled and choose "Authorize Only" from the Payment Action drop down menu.

The screenshot shows the Magento 2 Configuration interface. The left sidebar contains navigation options: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area is titled "Configuration" and has a "Save Config" button. A list of configuration sections is shown, with "Payment Methods" selected. The "Payment Methods" section is expanded to show a list of payment methods: Klarna, Amazon Pay, Zero Subtotal Checkout, Cash On Delivery Payment, and Square Payment Solution. The "Square Payment Solution" method is selected, and its configuration is displayed. The "Enabled" field is set to "Yes". The "Title" field is set to "SquareUp Payment Method". The "Payment Action" field is set to "Authorize Only". A note below the "Payment Action" field states: "If you select Authorize Only please make sure you are creating the invoice not longer than 6 days, otherwise you will not be able to capture the amount." The "Card on File" field is set to "Don't allow card on file pay".

Save the current configuration, refresh the cache and try placing an order on the frontend.

Proceed with the checkout steps using valid data. Choose "Credit Card Square" when you get to the Payment Information screen. Consider that a front-end validation is done on the credit card number – which needs to be valid in order for the pay with card button to be active:



Payment Method:

Credit Card

My billing and shipping address are the same

a1 a2
2 Broadway
New York, New York 10004
United States
7052533254

Pay with a Credit Card

Card Number:

CVV:

Expiration Date:

Postal Code:

Save this credit card for
future payments

GIFT CARD NUMBER

Apply Gift Card

I agree with the terms and conditions

Finalize the placing of the order. Navigating back to Magento Admin, in Sales > Orders grid and selecting to view the details of the order that has just been placed, shows the order status as Processing and the order's amount being authorized:

#000000001

← Back to register or connect an account Cancel Send Email Hold Invoice Ship Reorder Edit

Order Total

Notes for this Order

Status: Processing

Comment

Notify Customer by Email

Visible on Storefront

Submit Comment

Order Totals

Subtotal	\$10.00
Shipping & Handling	\$5.00
Grand Total	\$15.00
Total Paid	\$0.00
Total Refunded	\$0.00
Total Due	\$15.00

Jun 14, 2018 1:32:20 PM | Processing |
Customer **Not Notified**
Authorized amount of \$15.00. Transaction ID:
"4UwuSEICKtcStdAU60mG4UWtf15PKHwkyMtCv56Y9ntr0qzqfwEh4HhD"

5.1.3 Capture amount when the Invoice is being created

If you chose the first option described previously (to only authorize the amount on order being placed), then the amount will be captured when the order is invoiced. The transaction will not become visible in Square until the order is invoiced.

Navigate to Magento Admin, in Sales > Orders grid and select to view the details of the order that placed using the "Authorize Only" option. Click on Invoices and choose to emit the invoice for the order:

The screenshot shows the 'New Invoice' page in the Magento Admin interface. The page title 'New Invoice' is highlighted with a red box. A red arrow points from this box to the 'Submit Invoice' button at the bottom right. The page content includes:

- Items to Invoice:** A table with columns: Product, Price, Qty, Qty to Invoice, Subtotal, Tax Amount, Discount Amount, Row Total.
- Order Total:** A section for the order total.
- Invoice History:** A section for the invoice history.
- Invoice Comments:** A text area for adding comments.
- Invoice Totals:** A table showing Subtotal (\$10.00), Shipping & Handling (\$5.00), and Grand Total (\$15.00).
- Amount:** A dropdown menu set to 'Capture Online'.
- Options:** Checkboxes for 'Append Comments' and 'Email Copy of Invoice'.
- Submit Invoice:** A prominent orange button at the bottom right.

Going back to the orders details shows the order processing and the notification that the order amount has been captured online:

#000000001

← Back to register or connect an account Send Email Credit Memo Hold Ship Reorder

Order Total

Notes for this Order

Status: Processing

Comment

Notify Customer by Email
 Visible on Storefront

Submit Comment

Order Totals

Subtotal	\$10.00
Shipping & Handling	\$5.00
Grand Total	\$15.00
Total Paid	\$15.00
Total Refunded	\$0.00
Total Due	\$0.00

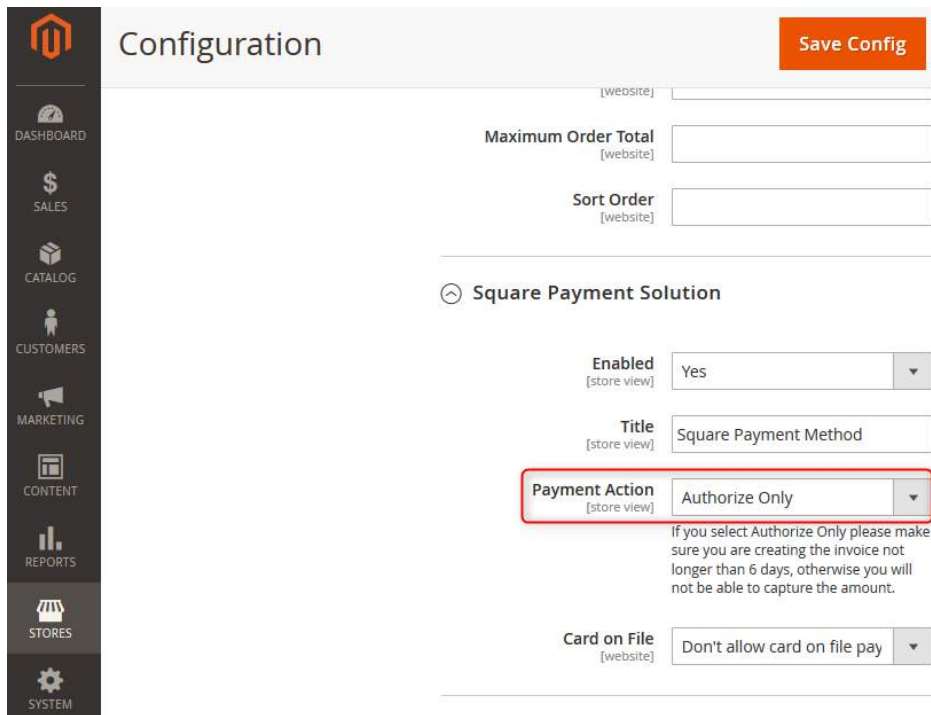
Jun 14, 2018 1:52:20 PM | Processing | Customer **Not Notified**
Captured amount of \$15.00 online. Transaction ID: "uV191MYKPOdb3HuLYG1Nvxh514Gujwm2Lq2Zd3ZsRSmZPQXFYUDFEIhO"

Jun 14, 2018 1:32:20 PM | Processing | Customer **Not Notified**
Authorized amount of \$15.00. Transaction ID: "4UwuSEICKtcStdAU60mG4UWtf15PKHwkyntCv56Y9ntr0qzqfwEh4HHO"

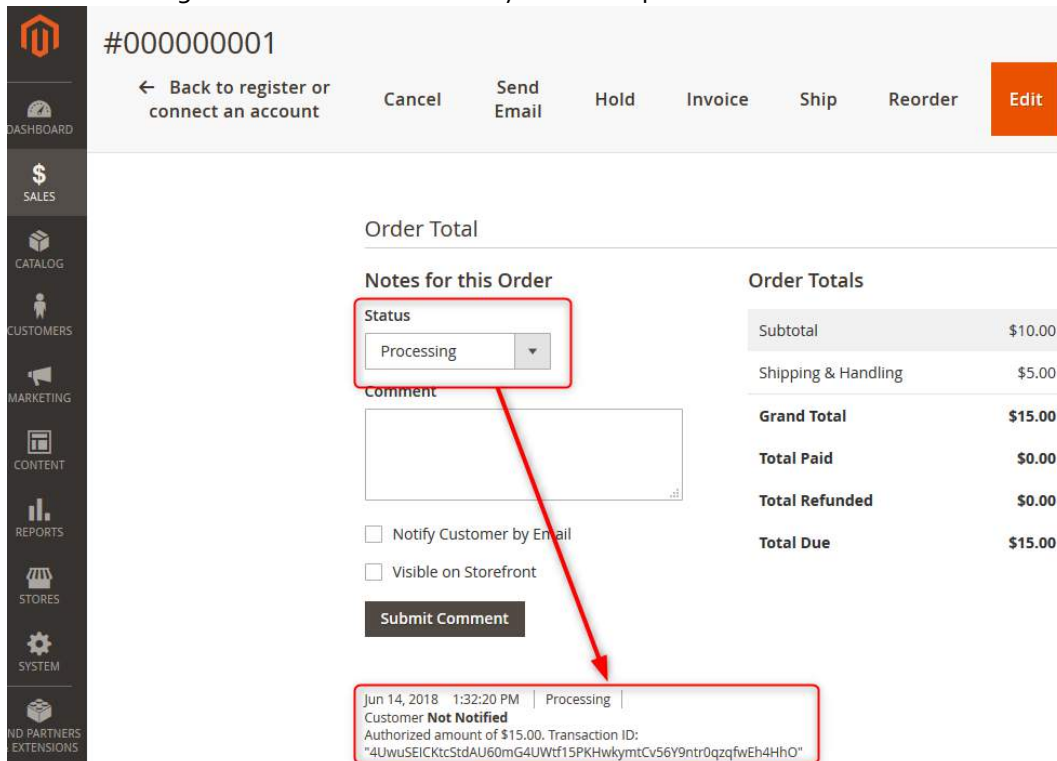
5.1.4 Void Transaction when an Order is Canceled

The following preconditions need to be fulfilled to void a transaction:

- The Square Payment Solution's payment action is set to Authorize Only:



- An order has been placed and its corresponding invoice has not yet been emitted – the order therefore has the status "Processing" and the amount has not yet been captured:



From the Order's details page, Cancel the order and confirm the action:

System Messages: 2

#000000003

← Back to register or connect an account Reorder

✓ You canceled the order.

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions

Order & Account Information

Order # 000000003 (The order confirmation email was sent)

Order Date	Jun 14, 2018, 2:00:08 PM
Order Status	Canceled
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	5.2.190.85

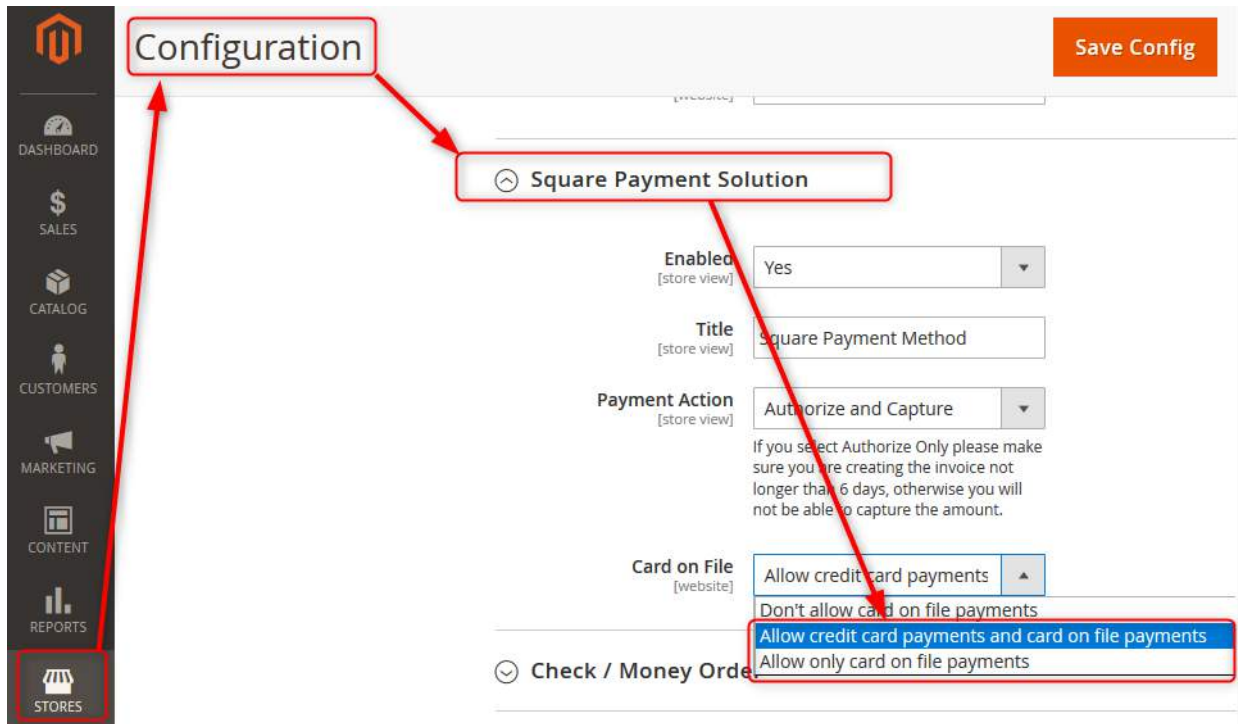
Account Information [Edit Customer](#)

Customer Name	Adi test 5
Email	adrian.becherete5@ro.osf-global.com
Customer Group	General

The new order's status is canceled and with it, the amount authorization.

5.1.5 Store Credit Card

In order for customers to be able to store and reuse their credit cards, one of the “Allow card on file payments” options must be enabled in the Square Payment Solution:



If the option is enabled, then the customer has the chance to save their credit card information during checkout:

Pay with a Credit Card

Card Number:

CVV:

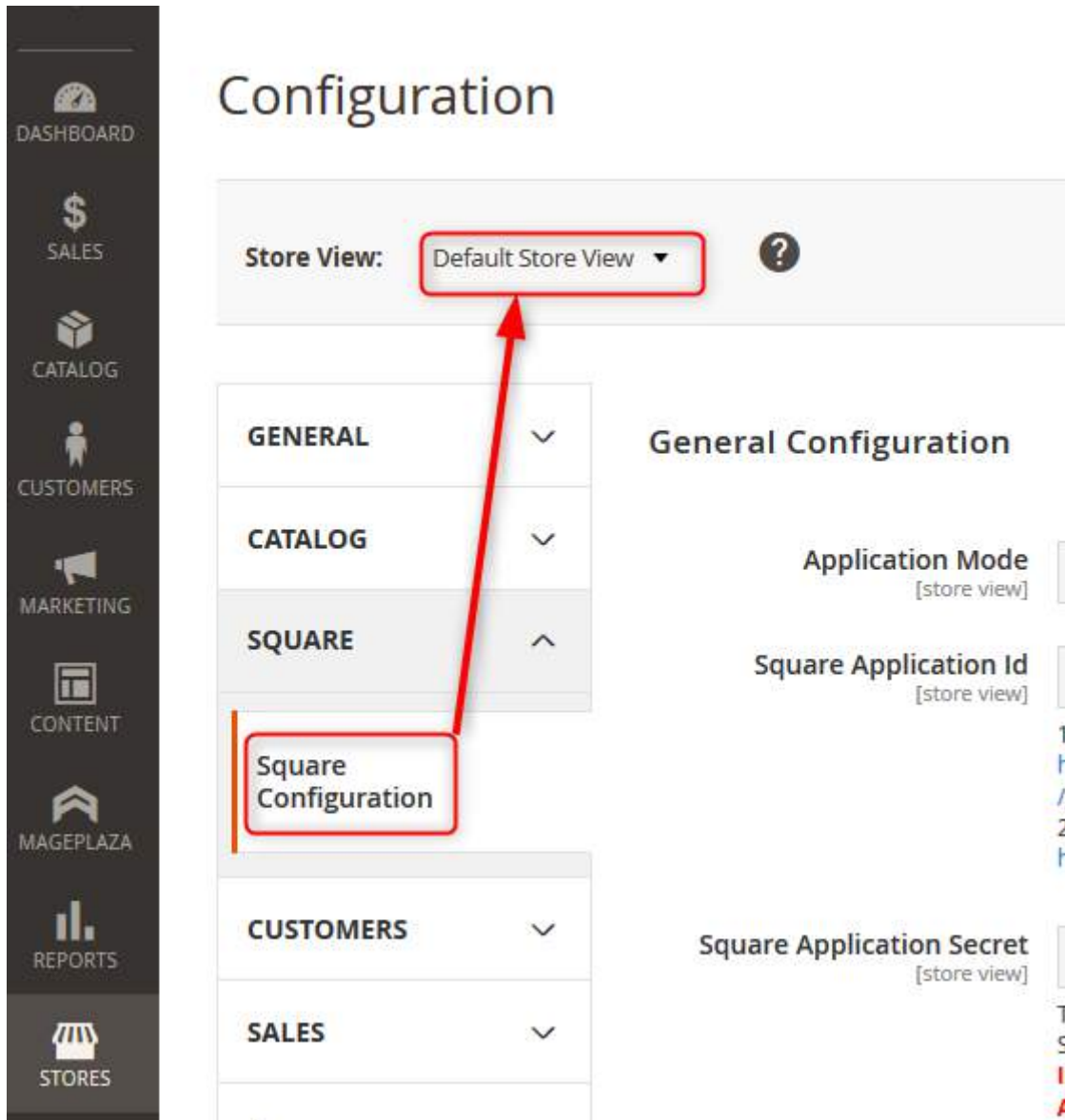
Expiration Date:

Postal Code:

Save this credit card for future payments

The solution consists in associating each Magento store to a different Square Location for Online Payments, by having individually saved square configurations for each store.

a. In Admin > Stores > Configuration > Square > Square Configuration, switch the "Current Configuration Scope" from "Default" to the "Store View" of your first store:



b. Uncheck the "Use Website" checkmark next to the Square Locations for Online Payment drop down. Select the Square location you want to associate to the store currently in scope from the drop down. Save the configuration:

Configuration

Search 28 square

Scope: Default Store View ?

Save Config

GENERAL

CATALOG

SECURITY

SQUARE

Subscription

Square Configuration

General Configuration

Application Mode [store view] Production Use Default

Production Location [store view] Please select location Use Default

Square Developer Portal > Applications > App > Locations

Repeat steps a. and b. for your other stores (by selecting the scope for each store, selecting the Square location associated for each store and saving)

Remember to clear the cache after each time the configuration is changed.

5.2 Gift Cards

5.2.1 Magento Settings

Please note that using the Gift Card functionality is limited to accounts that have this option enabled on their Square account. Please contact a Square representative and request the Gift Card functionality to be enabled for your account before enabling this option.

If you made sure the gift card functionality is enabled on your Square account, then you can activate it in Magento by navigating to Stores > Configuration > Sales > Payment Methods > Square Payments Solution > Enable Gift Card:

The screenshot displays the Magento 2.4 Configuration interface. On the left is a vertical sidebar with navigation icons and labels: DASHBOARD, SALES, CATALOG, CUSTOMER, MARKETING, CONTENT, IMAGEPLAZA, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The 'STORES' icon is highlighted with a red box. The main content area is titled 'Configuration' and shows a tree view of settings. The 'SALES' category is expanded, and the 'Payment Methods' option is selected and highlighted with a red box. The 'Square Payment Solution' configuration page is visible, featuring several settings: 'Enabled' (Yes), 'Important Message' (In order to use this payment solution you need to go to the Square configuration screen and configure your account in order to be able to process transactions using Square.), 'Title' (Credit Card), 'Payment Action' (Authorize Only), 'Enable digital wallet' (No), 'Card on File' (Allow credit card payments and car), 'Enable Gift Card' (Yes), and 'Sort Order' (10). The 'Enable Gift Card' dropdown is highlighted with a red box. A red arrow points from the 'STORES' icon in the sidebar to the 'Configuration' header, and another red arrow points from the 'Payment Methods' option in the tree view to the 'Enable Gift Card' dropdown.

Enabling the gift card inserts a new section inside the Square payment form on the front, where the customer can check the value of a gift card, apply gift cards to their checkout, or remove a gift card from the ones they previously applied.

5.2.2 Checkout Using Gift Cards

The customers can use gift cards during the payment method step of the checkout. After typing/pasting the gift card number in the marked field, they have the option to check the balance or apply the gift card to the current order:

Credit Card

My billing and shipping address are the same

a1 a2

2 Broadway

New York, New York 10004

United States

7052533254

Pay with a Credit Card

Card Number:

CVV:

Expiration Date:

Postal Code:

Save this credit card for future payments

Insert the gift card number

Apply the gift card

I agree with the terms and conditions

Place Order

If the total balance of all applied gift cards is greater than the order value, no credit card information is required. At this point, the customer may also decide to remove an applied gift card:

square2.osf-demo.com says
Cart total amount it is covered by gift cards

OK

Pay with a Credit Card

Card Number:

CVV:

Expiration Date:

Postal Code:

Save this credit card for future payments

Individually remove gift cards

7783 3200 2303 8375

Apply Gift Card

**** * 8375

\$1.08

Remove gift card

I agree with the terms and conditions

Place Order

If the balance of a gift card is greater than the order value, the remaining amount will still be available for use during a future order.

5.2.3 Refund Orders Paid for Using Gift Cards

Refunding an order paid for using gift cards follows the normal procedure of refunding an order online: navigate to the orders grid, click to view the invoice of a specific order, create credit memo, then click Refund. This action will distribute the refunded amounts to the gift cards and credit card, with the same amounts they were charged, respectively.

Refund Totals

Subtotal	\$1.00
Refund Shipping	<input type="text" value="0"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Tax	\$0.08
Square Gift Card Refund **** * 3458	Max: 1.0000 <input type="text"/>
Grand Total	\$1.08

- Append Comments
- Email Copy of Credit Memo

To refund gift cards used in an order using custom amounts, navigate to the orders grid, click to view the invoice of a specific order, create credit memo (the same process as when refunding an order online), type the amount you want to refund on a specific gift card, click “Update Totals”, and then click “Refund”.

Refund Totals

Subtotal	\$1.00
Refund Shipping	<input type="text" value="0"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Tax	\$0.08
Square Gift Card Refund **** * 3458	Max: 1.0000 <input type="text" value="0.5"/>
Grand Total	\$1.08

Append Comments
 Email Copy of Credit Memo

5.2.4 View Gift Card Transactions in Square Dashboard

Transactions involving gift cards (be they payments or refunds) are visible in the Square dashboard for each order:

- Payment using a gift card in Square dashboard:

TOTAL	\$3.15
MasterCard 4771	\$1.15
May 8, 2019 4:04 pm	
Receipt #dvHs	
Gift Card 5484	\$2.00
May 8, 2019 4:04 pm	
Receipt #np0T	

- Refund of a gift card in Square dashboard:

\$1.00 Refund

May 8, 2019 4:04 pm

Issued at: Lavu Test MK1

Source: eCommerce Integrations

Refund order #000000573 from location (\$1.00)
#A97WD87MZRJ77

TOTAL	(\$1.00)
Gift Card 5484	(\$1.00)
May 8, 2019 4:04 pm	
Receipt #np0T	

5.3 Apple Pay

5.3.1 Prerequisites

In order to be able to set up Apple Pay, the following must be true:

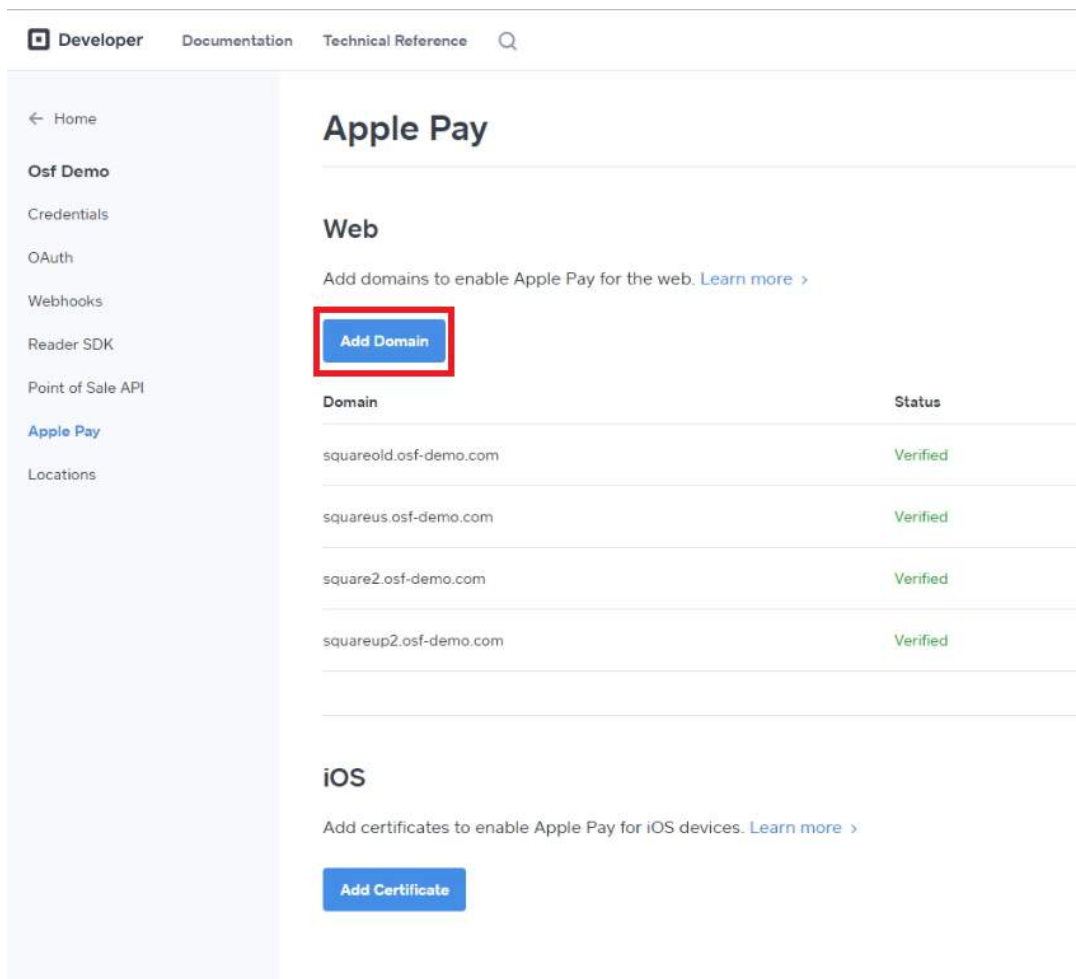
- you have https set up on your Magento store
- you have a Square production account connected In the Magento Admin
- your Square account Is based In the United States

5.3.2 Set Up

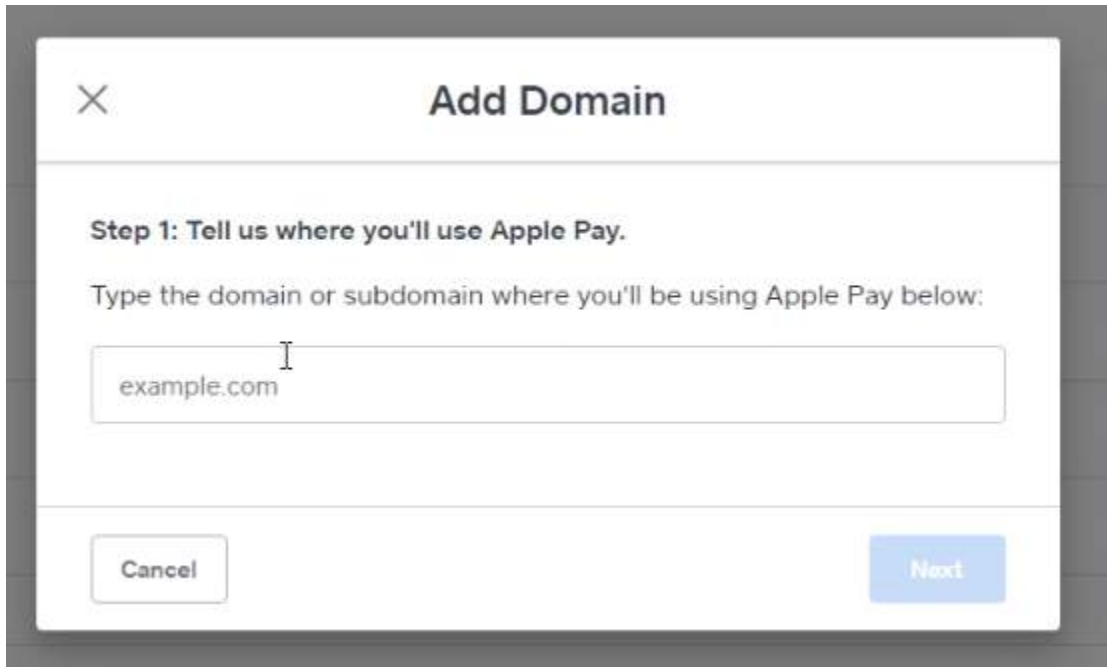
No configuration or setting up is needed in your Magento Admin.

In your Square dashboard, the following actions must be performed:

- Open the Application Dashboard, select the application associated with your SqPaymentForm implementation,
- Click on the Apple Pay tab for the selected application, then click on the "Add a new domain" link:

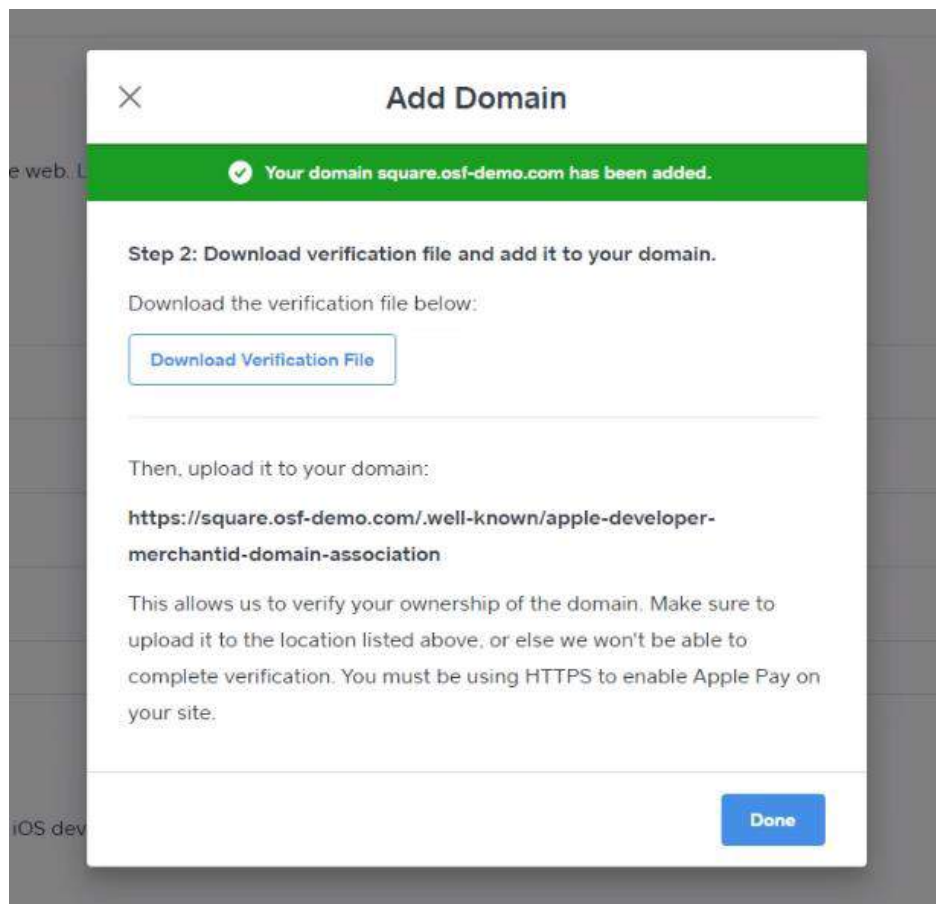


1. Type the domain name to your store:



The screenshot shows a dialog box titled "Add Domain" with a close button (X) in the top left. Below the title, it says "Step 1: Tell us where you'll use Apple Pay." followed by the instruction "Type the domain or subdomain where you'll be using Apple Pay below:". A text input field contains "example.com" with a cursor at the end. At the bottom, there are two buttons: "Cancel" on the left and "Next" on the right.

2. A success message will be displayed:



The screenshot shows the same "Add Domain" dialog box, now at "Step 2: Download verification file and add it to your domain." A green success banner at the top reads "Your domain square.osf-demo.com has been added." Below this, it says "Download the verification file below:" and provides a "Download Verification File" button. A horizontal line separates this from the next section, which says "Then, upload it to your domain:" followed by the URL <https://square.osf-demo.com/.well-known/apple-developer-merchantid-domain-association>. A final paragraph explains that this allows verification of domain ownership and that HTTPS must be used. A "Done" button is located at the bottom right.

3. Download the verification file, upload it to your domain. After the domain ownership verification is completed, the domain will be added in the validated domains list:

Apple Pay

Web

Add domains to enable Apple Pay for the web. [Learn more >](#)

Add Domain

Domain	Status
squareold.osf-demo.com	Verified
squareus.osf-demo.com	Verified
square2.osf-demo.com	Verified
squareup2.osf-demo.com	Verified
square.osf-demo.com	Verified

4. If everything went well, when a customer accesses the front, the payment form will look like so:

The image shows a mobile payment interface. At the top is a status bar with 'No SIM', signal strength, VPN, time '2:55 PM', and battery '61%'. Below is a browser address bar with 'squareup2.osf-demo.com'. The main heading is 'Pay with a Credit Card'. It contains four input fields: 'Card Number' (with a masked pattern of dots), 'CVV' (with the text 'CVV'), 'Expiration Date' (with the text 'MM/YY'), and 'Postal Code' (with the text '16811'). Below this is a section for 'Pay with a Digital Wallet' featuring a large black button with the Apple Pay logo. At the bottom is a large blue button labeled 'Place Order'.

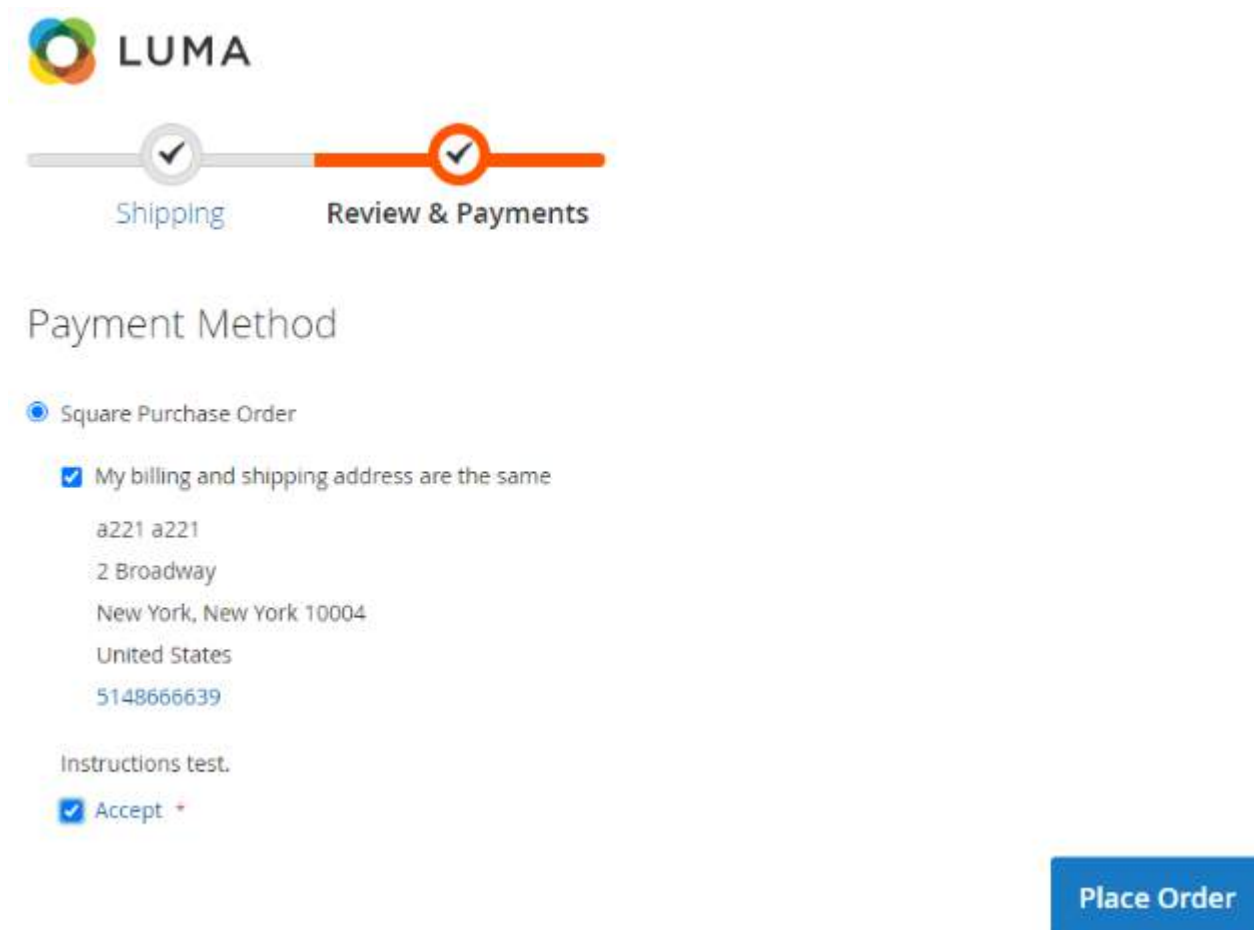
5.4 Invoice Pay

5.4.1 Prerequisites

Invoice Pay is available for customers only and the method is displayed in the front as Square purchase order payment method. Because of Square restrictions, Invoice Payment is not available for guests.

5.4.2 Journey

If the user is logged in, they have the possibility to choose Square purchase order payment method in the Payment step during checkout:



Once the order is placed, the store owner must make sure the order is invoiced in the Admin area. The square invoice is created only if the Magento order has an Invoice associated to the order. Please make sure the order is invoiced:

#000000824

✓ The invoice has been created.

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History

Order & Account Information

Order # 000000824 (The order confirmation email was sent)

Order Date	Jun 25, 2021, 6:48:42 AM
Order Status	Pending invoice payment
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	130.176.33.134 (79.112.125.147)

Once the order is invoiced, the corresponding invoice is also visible in the Square Dashboard > Invoices:

Invoices

Overview

- Invoices**
- Recurring
- Estimates
- Settings ▾

\$60.31
PAID (2) (LAST 30 DAYS) >

Search invoices All invoices ▾ All Time ▾ Florida ▾

Date	Customer	ID
Today	a221 a221	000104 Not viewed

Opening the invoice details also provides it in downloadable PDF format:



Florida 101-149 Post Ave SE Winter Haven, FL 33880
Florida, DC 20500 United States

Invoice #000104

Bill To
a221 a221

Invoice Details
PDF created June 25, 2021
\$21.26

Payment
Due July 6, 2021
\$21.26

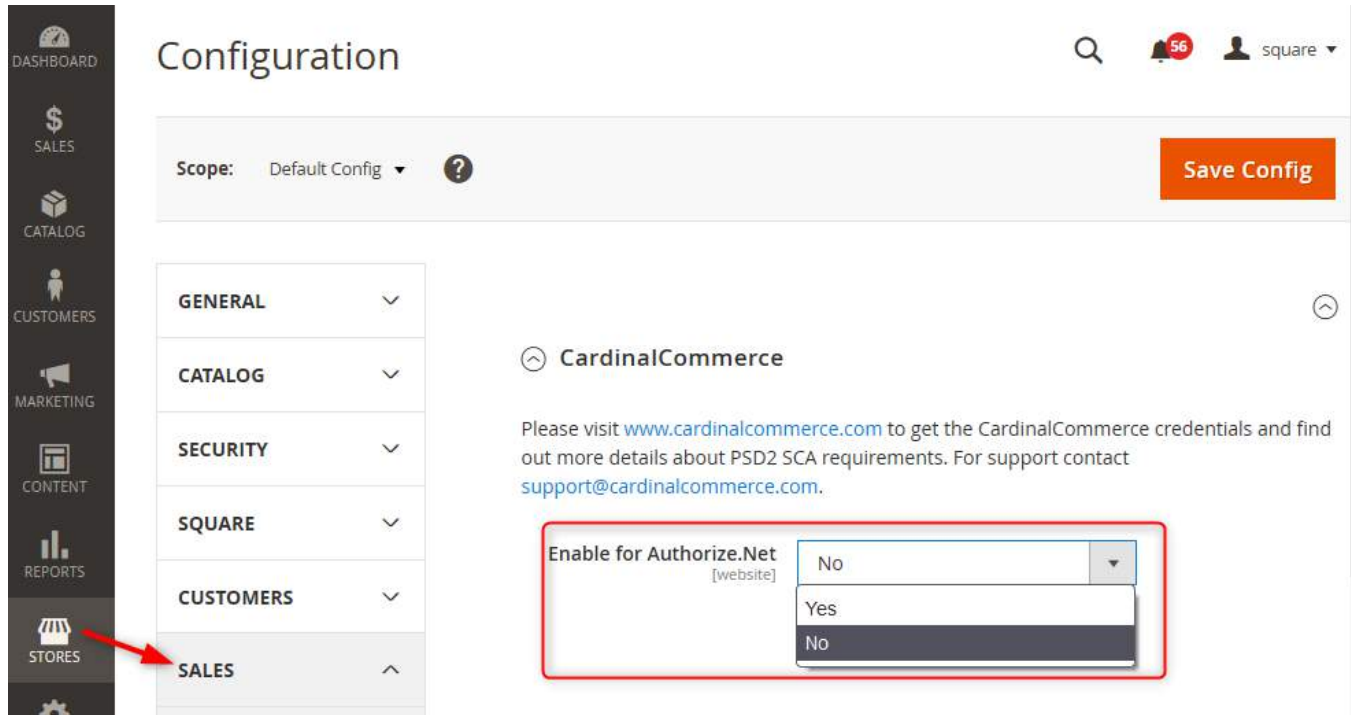
Item	Quantity	Price	Amount
Wonder Woman	1.0000 sq m	\$15.00/sq m	\$15.00
Shipping Amount	1	\$5.00	\$5.00
Subtotal			\$20.00
Total taxes			\$1.26

Total Due **\$21.26**

5.5 PSD2 SCA

5.5.1 Admin Settings

Whenever a customer on the front performs a payment using a credit card, 3D Secure validation can now be enabled. This can be done by navigating in admin to Stores > Configuration > Sales > 3D Secure:

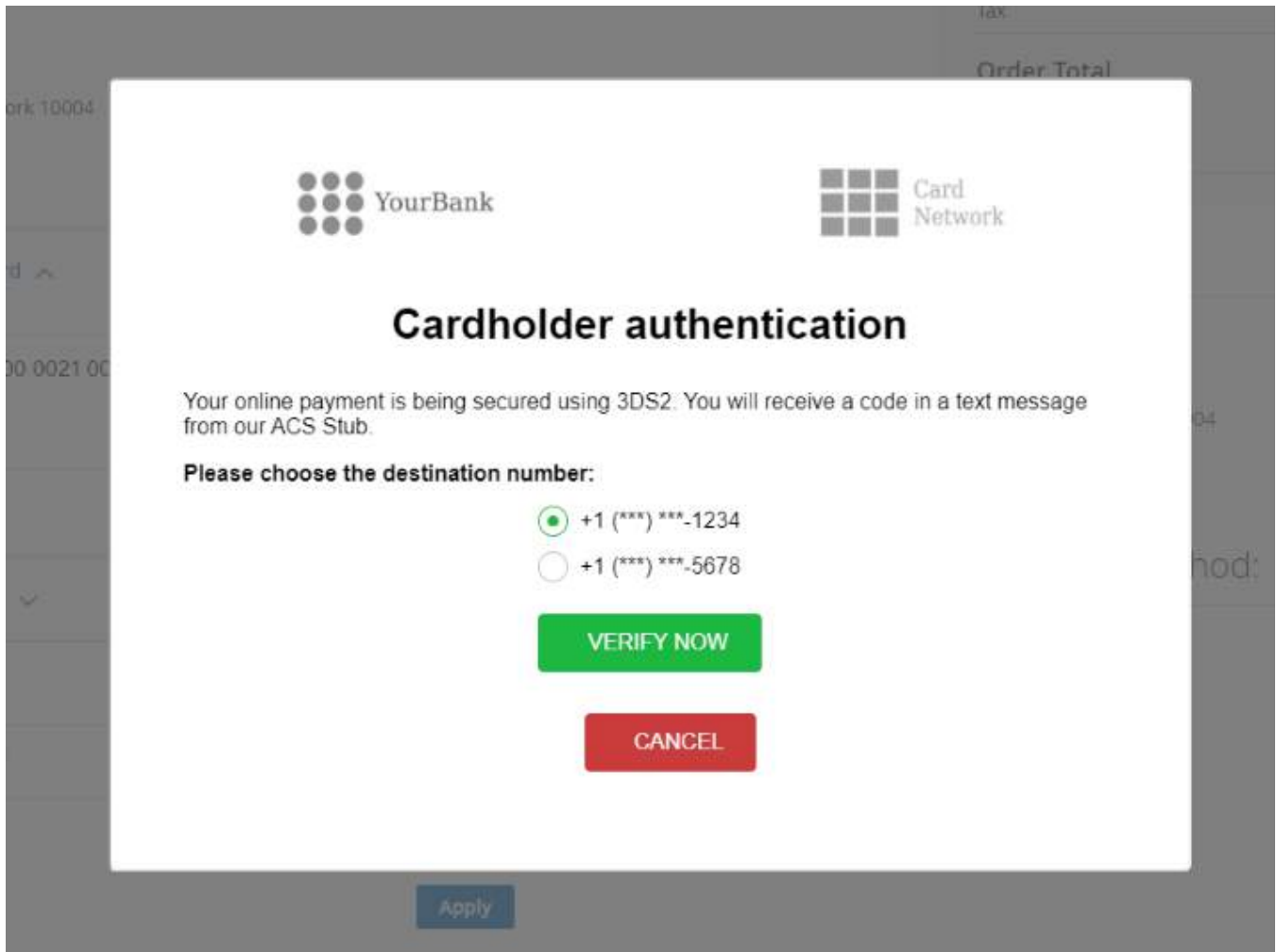


The screenshot shows the Magento 2.x Admin Configuration page for CardinalCommerce. The left sidebar has a red arrow pointing to the 'STORES' menu item. The main content area is titled 'Configuration' and shows the 'Sales' configuration for 'CardinalCommerce'. A dropdown menu for 'Enable for Authorize.Net [website]' is open, showing 'No' selected. A red box highlights this dropdown menu.

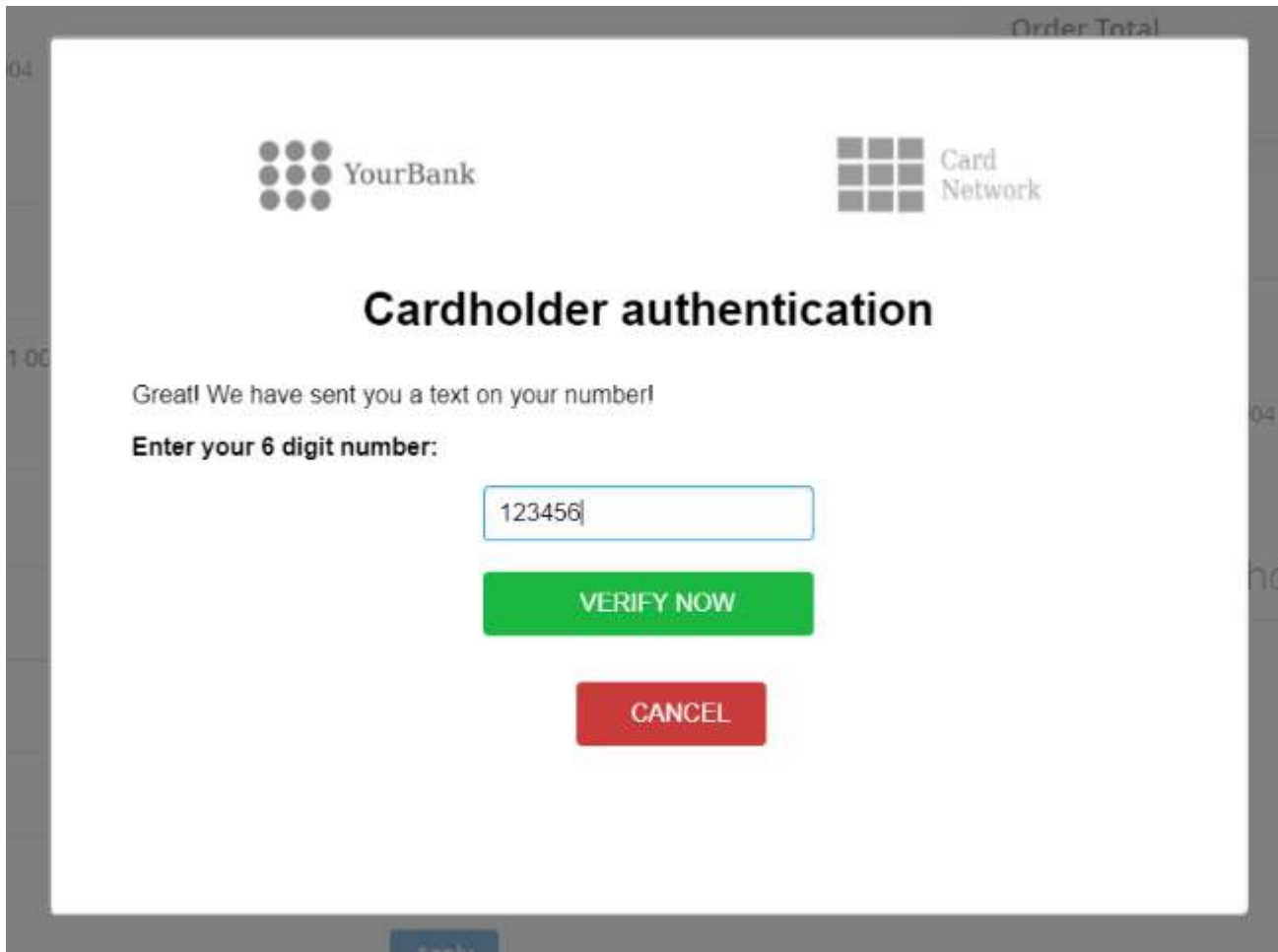
Once enabled, the customer journey on the front end will be changed so that before the order is placed, they must confirm the credit card transaction via a code they receive on their phone number.

5.5.1 Front Customer Journey with SCA

On the front, SCA inserts two extra steps in the ordering process. After the credit card details they insert are validated and they click the order submission button, a screen where they need to provide a phone number (if not previously provided during a prior pass-through) is displayed:



After choosing or entering a phone number and they click on "Verify Now", they receive an SMS with the code. They will next need to enter the code they receive in the following screen:



If the validation passes, the order is submitted immediately and no other interactions occur with the previously described flows.

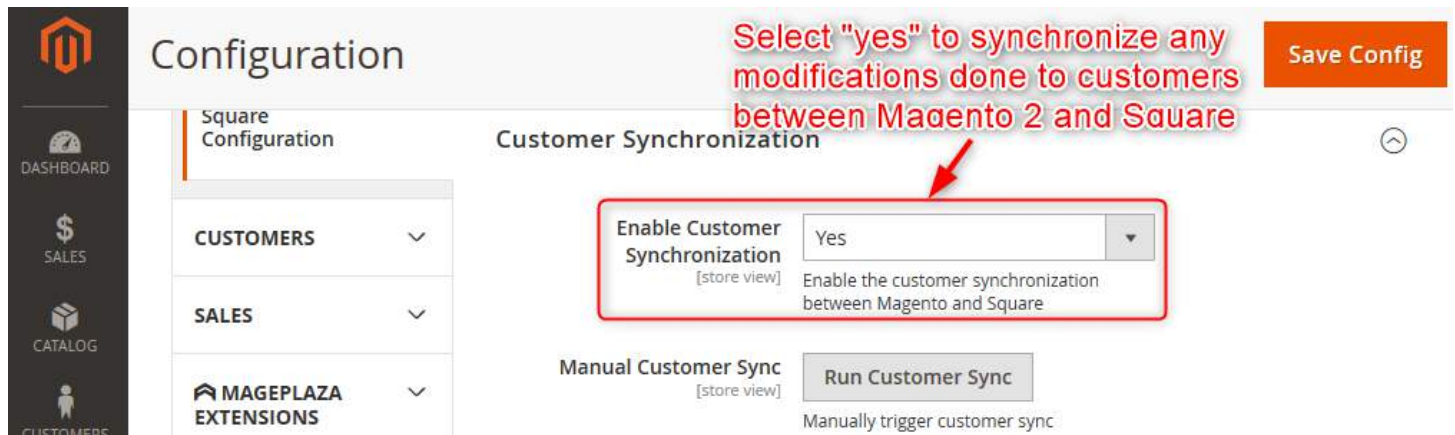
6 - If You Need the Full Omni Capabilities of the Extension

6.1 General Configuration

6.1.1 Customer Synchronization

The synchronization of customers from the Square platform to the Magento one is done automatically, periodically with the aid of a cron (currently set to run twice an hour). This requires no changes in the Magento 2 Admin settings.

In order to pick the changes from Magento and push them into Square, please make sure "Enable Customer Synchronization" is set to "Yes" in the Magento Admin Square configuration. If the option is enabled, the changes are instantly visible in Square. If the option is disabled, all the customers created will be pushed to Square next time the synchronization is enabled.



6.1.2 Catalog and Inventory Synchronization

To enable the synchronization of products between the source of records and the client, please make sure the “Enable Catalog Synchronization” is set to “Yes”. To find this setting, navigate to Admin > System > Square > Square Omni Configuration > Catalog and Inventory Synchronization. In the same tab, select the source of records from the drop down to establish the way the records are synchronized:

The screenshot shows the Magento Admin Configuration interface. On the left is a sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Mageplaza, Reports, Stores, System, and Third Parties. The main content area is titled "Configuration" and "Catalog and Inventory Synchronization". A "Save Config" button is in the top right. The configuration is divided into several sections:

- Enable Catalog Synchronization** (store view): A dropdown menu is set to "Yes". Below it, text reads: "Enable the synchronization of products between system of records and the client. Please enable Catalog Sync in order to enable Inventory Sync."
- System of records** (store view): A dropdown menu is open, showing "Magento" selected, with "Square" and "Magento" as other options.
- Price Attribute** (store view): A dropdown menu is set to "Special Price". Below it, text reads: "If it is needed to send a different price than standard one to Square select desired product attribute on this field"
- Manual Catalog Sync** (store view): A button labeled "Run Catalog Sync" with the text "Manually trigger catalog sync" below it.
- Enable Inventory Synchronization** (store view): A dropdown menu is set to "Yes". Below it, text reads: "Enable the synchronization of inventory between system of records and the client"
- Manual Inventory Sync** (store view): A button labeled "Run Inventory Sync" with the text "Manually trigger inventory sync" below it.

If you decide to switch the source of records after the initial set up of the system, please make sure that the records sync’s destination is empty. In other words, if so far, the system had Square Up as the source of records and you switch it to Magento, make sure you delete all records in Square before committing the switch. If so far, the system had Magento as the source of records and you switch it to Square Up, make sure you delete all records in Magento before committing the switch.

6.1.3 Order and Transactions Synchronization

The user is able to view all transactions associated with a customer inside Magento, including those done in a physical location, if the "Import transaction and refunds" is set to yes. With the settings saved, all transactions done in a physical location registered in Square will also be pushed to Magento. Currently, a cron job runs twice an hour to retrieve the orders from Square and push them to the Magento 2 Admin:

The screenshot shows the Magento 2 Configuration interface for the Square extension. The left sidebar contains navigation options: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, MAGEPLAZA, REPORTS, and STORES. The main configuration area is titled 'Configuration' and includes a 'Save Config' button. The 'Square Configuration' section is expanded, showing the following settings:

- Webhooks Configuration** (dropdown arrow)
- Customer Synchronization** (dropdown arrow)
- Catalog and Inventory Synchronization** (dropdown arrow)
- Transactions and Refunds Synchronization** (dropdown arrow)
 - Import Transaction and Refunds** [store view]: Set to 'Yes'. Description: Import transaction and refunds from physical location. (This setting is highlighted with a red box in the image.)
 - Convert Transactions into Orders** [store view]: Set to 'Yes'. Description: Convert Square transactions into Magento orders.
 - Manual Transactions and Refunds Sync** [store view]: Includes a 'Run Transactions and Refunds Sync' button. Description: Manually trigger transactions and refunds sync.

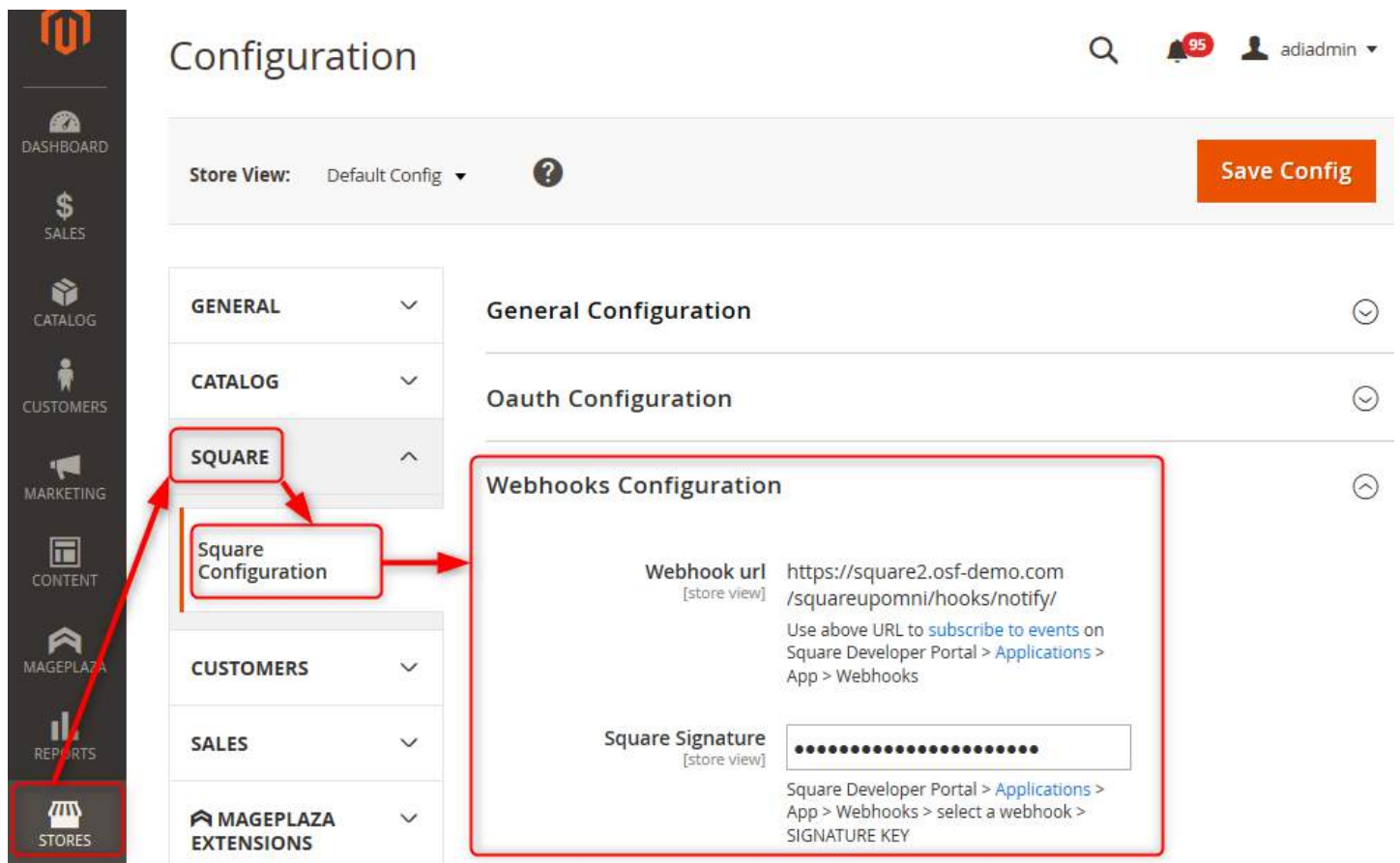
6.1.4 Webhooks Configuration

All modifications to inventory made in Magento are instantly pushed to Square. Modifications done to the inventory in Square need to wait for the cron to run (twice an hour) in order to be reflected in Magento.

If however you need that modifications done to the inventory in Square to be instantly visible in Magento as well, you will have to enable webhooks. They will allow any change in inventory (including orders) to be instantaneously synchronized with Square.

To enable webhooks:

- Navigate to Magento Admin > Stores > Configuration > Square > Square Configuration > Webhooks Configuration:



The screenshot shows the Magento Admin Configuration interface. The left sidebar contains navigation menus for Dashboard, Sales, Catalog, Customers, Marketing, Content, Mageplaza, Reports, and Stores. The main content area is titled 'Configuration' and shows a breadcrumb path: 'Store View: Default Config' > 'Square' > 'Square Configuration' > 'Webhooks Configuration'. The 'Webhooks Configuration' section is highlighted with a red box and contains the following information:

- Webhook url** [store view]: `https://square2.osf-demo.com/squareupomni/hooks/notify/`
Use above URL to [subscribe to events](#) on Square Developer Portal > [Applications](#) > App > Webhooks
- Square Signature** [store view]:
Square Developer Portal > [Applications](#) > App > Webhooks > select a webhook > SIGNATURE KEY

- Copy the Webhook URL:

The screenshot shows the Magento Configuration interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Mageplaza, Reports, and Stores. The main content area is titled 'Configuration' and shows 'Store View: Default Config'. A 'Save Config' button is in the top right. The configuration is organized into sections: General Configuration, Oauth Configuration, and Webhooks Configuration. The Webhooks Configuration section is expanded, showing two fields: 'Webhook url' with the value 'https://square2.osf-demo.com/squarepomni/hooks/notify/' (highlighted with a red box) and 'Square Signature' with a masked value (also highlighted with a red box). Below the URL is a note: 'Use above URL to subscribe to events on Square Developer Portal > Applications > App > Webhooks'. Below the signature is another note: 'Square Developer Portal > Applications > App > Webhooks > select a webhook > SIGNATURE KEY'.

- In your Square account, manage your app: navigate to Webhooks and Enable Webhooks here:

The screenshot shows the 'Webhooks' page in the Square Developer Portal. On the left is a sidebar with a back arrow and a list of options: 'Magento Test App', 'Credentials', 'OAuth', 'Webhooks' (highlighted with a red box), 'Reader SDK', 'Point of Sale API', 'Apple Pay', and 'Locations'. The main content area is titled 'Webhooks' and contains the text: 'Use Connect API webhooks to notify you occur. Notifications are typically sent with...'. Below this is the 'Enable Webhooks' section, which has two radio buttons: 'Disabled' and 'Enabled' (the 'Enabled' option is selected and highlighted with a red box). A red arrow points from the 'Webhooks' link in the sidebar to the 'Enabled' radio button.

- Paste the Webhook URL you copied earlier into the Notification URL field:

Webhooks

Use Connect API webhooks to notify your application when certain payment, inventory, or timecard events occur. Notifications are typically sent within sixty seconds of the associated event.

Enable Webhooks

- Disabled
- Enabled

Paste the Webhook URL you copied from Magento here:

Notification URL

`https://square2.osf-demo.com/squareupomni/hooks/notify/`

For a list of complete events you can subscribe to, please consult the Square documentation at <https://developer.squareup.com/docs/webhooks-api/subscribe-to-events>

- Click Save:

Add Endpoint

Name	URL	Events
square2.osf-demo.com	https://square2.osf-demo.com/squareupom...	2 x

Cancel

Save

- Click Show Signature Key and copy it:

Webhooks

Use [Connect API webhooks](#) to notify your application when certain payment, inventory, or timecard events occur. Notifications are typically sent within sixty seconds of the associated event.

Enable Webhooks

- Disabled
- Enabled

Click to show the signature

Notification URL

https://square2.osf-demo.com/squareupomni/hooks/notify/

Signature Key

...then copy the key

.....

Show

- Go back to Magento in your Square Configuration page and paste the secret you have just copied into the Square Signature field, then save the configuration:

The screenshot shows the Magento configuration interface for Square. At the top right, there is a red-bordered button labeled "Save Config". Below this, there are three expandable sections: "General Configuration", "Oauth Configuration", and "Webhooks Configuration". The "Webhooks Configuration" section is expanded, showing a "Webhook url" field with the value "https://square2.osf-demo.com/squareupomni/hooks/notify/" and a "Square Signature" field containing a series of dots. A red arrow points from the "Square Signature" field to the "Save Config" button. The "Webhook url" field has a "[store view]" link below it. The "Square Signature" field also has a "[store view]" link below it. Below the "Square Signature" field, there is a breadcrumb trail: "Square Developer Portal > Applications > App > Webhooks > select a webhook > SIGNATURE KEY".

- Refresh the Magento cache and you are all set.

6.2 Square Payment Processing Configuration

6.2.1 Authorize and Capture amount when Order is placed

In order to enable the Square payment solution, please make sure it is Enabled in both Magento 2 and Square admin. There are two options to use the Square payment solution: either authorize only on order being placed (and capture the amount later when the invoice is generated), or authorize and capture the amount the instant the order is placed.

Navigate to Stores > Configuration > Sales > Payment Methods > Square payment Solution section. Make sure the solution is enabled and choose "Authorize and Capture" from the Payment Action drop down menu.

The screenshot displays the Magento 2 Configuration interface. The left sidebar contains navigation options: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area is titled "Configuration" and includes a "Save Config" button. A list of configuration sections is shown, with "Payment Methods" highlighted. The "Square Payment Solution" section is expanded, showing the following settings:

- Enabled** [store view]: Yes
- Title** [store view]: SquareUp Payment Method
- Payment Action** [store view]: Authorize and Capture
- Card on File** [website]: Don't allow card on file pay

A note below the Payment Action dropdown states: "if you select Authorize Only please make sure you are creating the invoice not longer than 6 days, otherwise you will not be able to capture the amount."

Save the current configuration, refresh the cache and try placing an order on the frontend.

Note that the field "Sort Order" allows setting the display order of the enabled payment methods on the frontend:

Configuration

YOTPO

DOTDIGITAL

GIGYA IDENTITY MANAGEMENT

SERVICES

ADVANCED

Square Payment Solution

Enabled [website] Yes

Important Message [store view] In order to use this payment solution you need to go to the [Square configuration screen](#) and configure your account in order to be able to process transactions using Square.

Title [store view] Squareup Payment

Payment Action [website] Authorize Only

If you select Authorize Only please make sure you are creating the invoice not longer than 6 days, otherwise you will not be able to capture the amount.

Enable digital wallet [website] Yes

Card on File [website] Allow credit card payments an

Enable Gift Card [store view] Yes

Sort Order [store view] 0

Proceed with the checkout steps using valid data. Choose "Credit Card Square" when you get to the Payment Information screen. Consider that a front-end validation is done on the credit card number – which needs to be valid in order for the pay with card button to be active:



Payment Method:

Square Payment Method

Pay with a Credit Card

Card Number:

CVV:

Expiration Date:

Postal Code:

Pay with a Digital Wallet

Apple Pay for Web not enabled

Finalize the placing of the order. Navigating back to Magento Admin, in Sales > Orders grid and selecting to view the details of the order that has just been placed, shows the order status as Processing and the order's amount being captured:

M

#000000002

← Back to register or connect an account
Send Email
Credit Memo
Hold
Ship
Reorder

Notes for this Order

Status Processing ▼

Comment

Notify Customer by Email

Visible on Storefront

Jun 14, 2018 1:46:48 PM | Processing | Customer

Not Notified

Captured amount of \$15.00 online. Transaction ID: "qVOFrizf0TsaeNCKrleytX6IEZfYOp6SrUUvIO11ymrj7aMty25BMhO"

Order Totals

Subtotal	\$10.00
Shipping & Handling	\$5.00
Grand Total	\$15.00
Total Paid	\$15.00
Total Refunded	\$0.00
Total Due	\$0.00

6.2.2 Authorize (without capture) amount when Order is placed

Navigate to System > Configuration > Sales > Payment Methods > Square payment Solution Tab. Make sure the solution is enabled and choose "Authorize Only" from the Payment Action drop down menu.

The screenshot displays the Magento 2.x Configuration interface. On the left is a vertical sidebar with navigation options: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area is titled "Configuration" and includes a "Save Config" button in the top right. A left-hand menu lists various configuration sections: Shipping Methods, Google API, Payment Methods, Fraud Protection, DOTMAILER, SERVICES, and ADVANCED. The "Payment Methods" section is expanded, showing a list of payment methods: Klarna, Amazon Pay, Zero Subtotal Checkout, Cash On Delivery Payment, and Square Payment Solution. The "Square Payment Solution" method is selected and expanded to show its configuration options: "Enabled" is set to "Yes", "Title" is "SquareUp Payment Method", and "Payment Action" is set to "Authorize Only". A note below the "Payment Action" dropdown states: "If you select Authorize Only please make sure you are creating the invoice not longer than 6 days, otherwise you will not be able to capture the amount." At the bottom, the "Card on File" option is set to "Don't allow card on file pay". Red arrows and boxes highlight the navigation path from the sidebar to the "Payment Methods" section, then to "Square Payment Solution", and finally to the "Enabled" and "Payment Action" settings.

Save the current configuration, refresh the cache and try placing an order on the frontend.

Proceed with the checkout steps using valid data. Choose "Credit Card Square" when you get to the Payment Information screen. Consider that a front-end validation is done on the credit card number – which needs to be valid in order for the pay with card button to be active:



Payment Method:

Credit Card

My billing and shipping address are the same

a1 a2
2 Broadway
New York, New York 10004
United States
7052533254

Pay with a Credit Card

Card Number:

CVV:

Expiration Date:

Postal Code:

Save this credit card for future payments

GIFT CARD NUMBER

Apply Gift Card

I agree with the terms and conditions

Finalize the placing of the order. Navigating back to Magento Admin, in Sales > Orders grid and selecting to view the details of the order that has just been placed, shows the order status as Processing and the order's amount being authorized:

#000000001

← Back to register or connect an account Cancel Send Email Hold Invoice Ship Reorder Edit

Order Total

Notes for this Order

Status: Processing

Comment

Notify Customer by Email

Visible on Storefront

Submit Comment

Order Totals

Subtotal	\$10.00
Shipping & Handling	\$5.00
Grand Total	\$15.00
Total Paid	\$0.00
Total Refunded	\$0.00
Total Due	\$15.00

Jun 14, 2018 1:32:20 PM | Processing |

Customer **Not Notified**

Authorized amount of \$15.00. Transaction ID: "4UwuSEICKtcStdAU60mG4UWtf15PKHwkyMtCv56Y9ntr0qzqfwEh4HhD"

6.2.3 Capture amount when the Invoice is being created

If you chose the first option described previously (to only authorize the amount on order being placed), then the amount will be captured when the order is invoiced. The transaction will not become visible in Square until the order is invoiced.

Navigate to Magento Admin, in Sales > Orders grid and select to view the details of the order that placed using the "Authorize Only" option. Click on Invoices and choose to emit the invoice for the order:

The screenshot shows the 'New Invoice' page in the Magento Admin interface. The page title 'New Invoice' is highlighted with a red box. A red arrow points from this box to the 'Submit Invoice' button at the bottom right. The page content includes:

- Items to Invoice:** A table with columns: Product, Price, Qty, Qty to Invoice, Subtotal, Tax Amount, Discount Amount, Row Total.
- Order Total:** A section for the order total.
- Invoice History:** A section for the invoice history.
- Invoice Comments:** A text area for adding comments.
- Invoice Totals:** A table showing Subtotal (\$10.00), Shipping & Handling (\$5.00), and Grand Total (\$15.00).
- Amount:** A dropdown menu set to 'Capture Online'.
- Options:** Checkboxes for 'Append Comments' and 'Email Copy of Invoice'.
- Submit Invoice:** A prominent orange button at the bottom right.

Going back to the orders details shows the order processing and the notification that the order amount has been captured online:

#000000001

← Back to register or connect an account Send Email Credit Memo Hold Ship Reorder

Order Total

Notes for this Order

Status: Processing

Comment

Notify Customer by Email
 Visible on Storefront

Submit Comment

Jun 14, 2018 1:52:20 PM | Processing | Customer **Not Notified**
Captured amount of \$15.00 online. Transaction ID: "uV191MYKPOdb3HuLYG1Nvxh514Gujwm2Lq2Zd3ZsRSmZPQXFYUDFEIhO"

Jun 14, 2018 1:32:20 PM | Processing | Customer **Not Notified**
Authorized amount of \$15.00. Transaction ID: "4UwuSEICKtcStdAU60mG4UWtf15PKHwkyntCv56Y9ntr0qzqfwEh4HHO"

Order Totals

Subtotal	\$10.00
Shipping & Handling	\$5.00
Grand Total	\$15.00
Total Paid	\$15.00
Total Refunded	\$0.00
Total Due	\$0.00

6.2.4 Void Transaction when an Order is Canceled

The following preconditions need to be fulfilled to void a transaction:

- The Square Payment Solution's payment action is set to Authorize Only:

The screenshot shows the 'Configuration' page for the Square Payment Solution. The left sidebar contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, and System. The main content area is titled 'Configuration' and includes a 'Save Config' button. Below the title, there are fields for 'Maximum Order Total' and 'Sort Order'. The 'Square Payment Solution' section is expanded, showing 'Enabled' set to 'Yes', 'Title' as 'Square Payment Method', 'Payment Action' set to 'Authorize Only' (highlighted with a red box), and 'Card on File' set to 'Don't allow card on file pay'. A note below the 'Payment Action' dropdown states: 'If you select Authorize Only please make sure you are creating the invoice not longer than 6 days, otherwise you will not be able to capture the amount.'

- An order has been placed and its corresponding invoice has not yet been emitted – the order therefore has the status "Processing" and the amount has not yet been captured:

The screenshot shows the 'Order view' page for order #000000001. The top navigation bar includes 'Back to register or connect an account', 'Cancel', 'Send Email', 'Hold', 'Invoice', 'Ship', 'Reorder', and 'Edit'. The 'Order Total' section shows 'Notes for this Order' with a 'Status' dropdown set to 'Processing' (highlighted with a red box). Below this is a 'Comment' field and two checkboxes: 'Notify Customer by Email' and 'Visible on Storefront'. A 'Submit Comment' button is also present. The 'Order Totals' section displays a table with the following data:

Order Totals	
Subtotal	\$10.00
Shipping & Handling	\$5.00
Grand Total	\$15.00
Total Paid	\$0.00
Total Refunded	\$0.00
Total Due	\$15.00

At the bottom, a log entry is highlighted with a red box, showing the order status as 'Processing' and the message: 'Customer **Not Notified** Authorized amount of \$15.00. Transaction ID: *4UwuSEICKtcStdAU60mG4UWtf15PKHwkytCv56Y9ntr0zqzfwEh4HhO*'

From the Order's details page, Cancel the order and confirm the action:

System Messages: 2

#000000003

← Back to register or connect an account Reorder

✓ You canceled the order.

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions

Order & Account Information

Order # 000000003 (The order confirmation email was sent)

Order Date	Jun 14, 2018, 2:00:08 PM
Order Status	Canceled
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	5.2.190.85

Account Information [Edit Customer](#)

Customer Name	Adi test 5
Email	adrian.becherete5@ro.osf-global.com
Customer Group	General

The new order's status is canceled and with it, the amount authorization.

6.2.5 Store Credit Card

In order for customers to be able to store and reuse their credit cards, one of the “Allow card on file payments” options must be enabled in the Square Payment Solution:

The screenshot shows the Magento 2.x admin interface. On the left sidebar, the 'STORES' menu item is highlighted with a red box. The main content area is the 'Configuration' page for the 'Square Payment Solution'. The 'Card on File' dropdown menu is highlighted with a red box, and the selected option, 'Allow credit card payments and card on file payments', is also highlighted with a red box. Other visible options include 'Allow credit card payments', 'Don't allow card on file payments', and 'Allow only card on file payments'. The 'Enabled' dropdown is set to 'Yes', the 'Title' is 'Square Payment Method', and the 'Payment Action' is 'Authorize and Capture'.

If the option is enabled, then the customer has the chance to save their credit card information during checkout:

Pay with a Credit Card

Card Number:

CVV:

Expiration Date:

Postal Code:

Save this credit card for future payments

After the checkout completes and if the user returns to place another order, the stored credit card will be available with hidden details:

Payment Method:

Credit Card

My billing and shipping address are the same

a1 a2

2 Broadway

New York, New York 10004

United States

7052533254

Pay with a saved Credit Card or use another Credit Card



Use other card

GIFT CARD NUMBER

Apply Gift Card

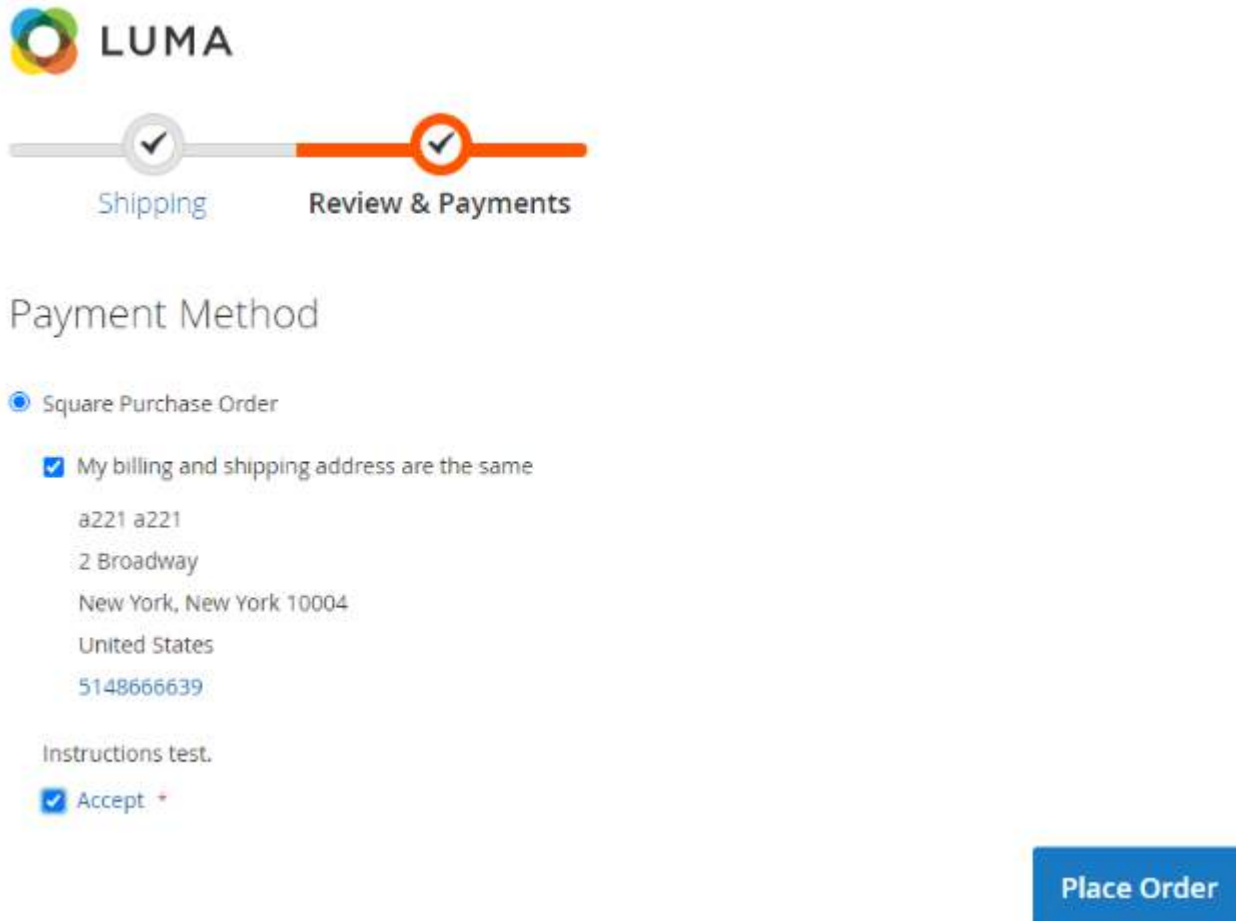
I agree with the terms and conditions

Storing the credit card is not available when placing an order from the Magento Admin.

6.2.6 Invoice Pay

Invoice Pay is available for customers only and the method is displayed in the front as Square purchase order payment method. Because of Square restrictions, Invoice Payment is not available for guests.

If the user is logged in, they have the possibility to choose Square purchase order payment method in the Payment step during checkout:



LUMA

Shipping Review & Payments

Payment Method

- Square Purchase Order
 - My billing and shipping address are the same
 - a221 a221
 - 2 Broadway
 - New York, New York 10004
 - United States
 - 5148666639
 - Instructions test.
 - Accept +

Place Order

Once the order is placed, the store owner must make sure the order is invoiced in the Admin area. The square invoice is created only if the Magento order has an Invoice associated to the order. Please make sure the order is invoiced:

#000000824

✓ The invoice has been created.

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History

Order & Account Information

Order # 000000824 (The order confirmation email was sent)

Order Date	Jun 25, 2021, 6:48:42 AM
Order Status	Pending invoice payment
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	130.176.33.134 (79.112.125.147)

Once the order is invoiced, the corresponding invoice is also visible in the Square Dashboard > Invoices:

Invoices

Overview

\$60.31
PAID (2) (LAST 30 DAYS) >

Invoices

Recurring

Estimates

Settings ▾

Search invoices

All invoices ▾

All Time ▾

Florida ▾

Date	Customer	ID
Today	a221 a221	000104 Not viewed

Opening the invoice details also provides it in downloadable PDF format:



Florida 101-149 Post Ave SE Winter Haven, FL 33880
Florida, DC 20500 United States

Invoice #000104

Bill To
a221 a221

Invoice Details
PDF created June 25, 2021
\$21.26

Payment
Due July 6, 2021
\$21.26

Item	Quantity	Price	Amount
Wonder Woman	1.0000 sq m	\$15.00/sq m	\$15.00
Shipping Amount	1	\$5.00	\$5.00
Subtotal			\$20.00
Total taxes			\$1.26

Total Due **\$21.26**

6.2.7 PSD2 SCA

Whenever a customer on the front performs a payment using a credit card, 3D Secure validation can now be enabled. This can be done by navigating in admin to Stores > Configuration > Sales > 3D Secure:

Configuration

Scope: Default Config ? Save Config

GENERAL

CATALOG

SECURITY

SQUARE

CUSTOMERS

SALES

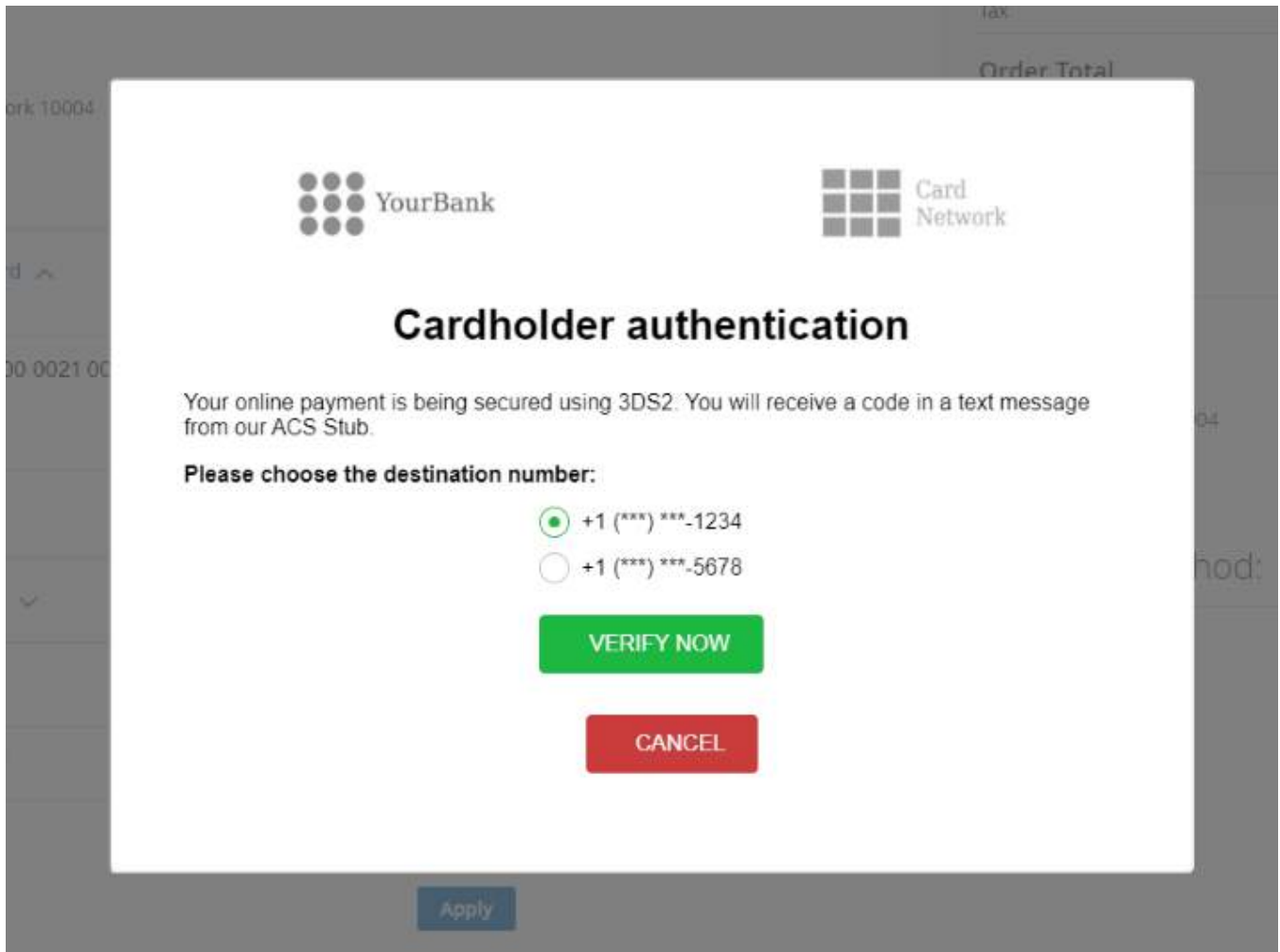
CardinalCommerce

Please visit www.cardinalcommerce.com to get the CardinalCommerce credentials and find out more details about PSD2 SCA requirements. For support contact support@cardinalcommerce.com.

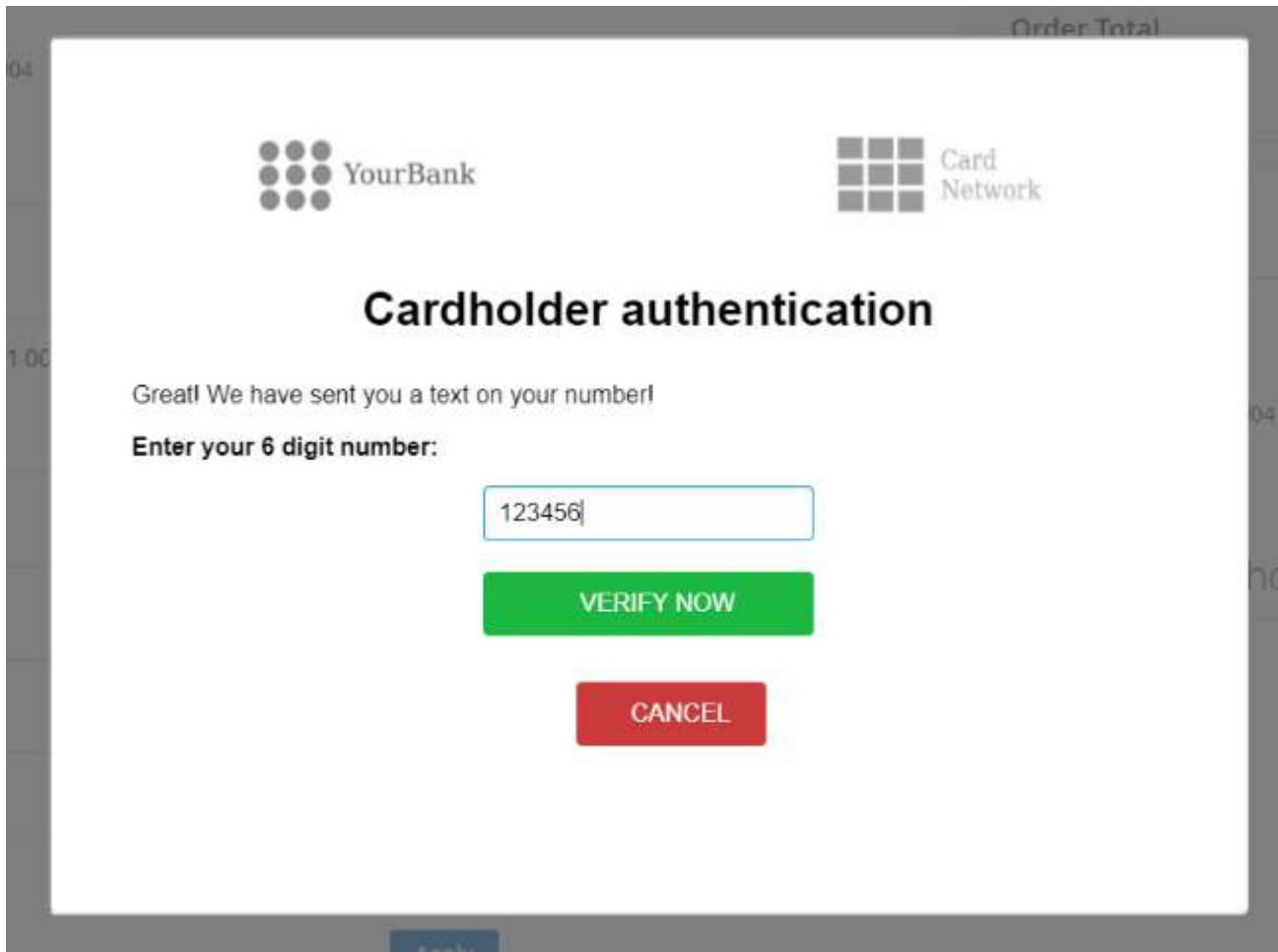
Enable for Authorize.Net [website] No Yes No

Once enabled, the customer journey on the front end will be changed so that before the order is placed, they must confirm the credit card transaction via a code they receive on their phone number.

On the front, SCA inserts two extra steps in the ordering process. After the credit card details they insert are validated and they click the order submission button, a screen where they need to provide a phone number (if not previously provided during a prior pass-through) is displayed:



After choosing or entering a phone number and they click on "Verify Now", they receive an SMS with the code. They will next need to enter the code they receive in the following screen:



If the validation passes, the order is submitted immediately and no other interactions occur with the previously described flows.

6.2.8 Multi-store Configuration for Square Payment Transactions

The Square configuration screen is only displayed on the Default Configuration scope and on the Store View scope.

If you have multiple stores and need to view the transactions differentiated by store in the Square dashboard, then please consider the following information:

- The assumption is that you have a number of locations set in Square at least equal to the number of stores set in Magento.
- The result is that the payment is processed at the selected location for a specific store view

The solution consists in associating each Magento store to a different Square Location for Online Payments, by having individually saved square configurations for each store.

a. In Admin > Stores > Configuration > Square > Square Configuration, switch the "Current Configuration Scope" from "Default" to the "Store View" of your first store:

b. Uncheck the "Use Website" checkmark next to the Square Locations for Online Payment drop down. Select the Square location you want to associate to the store currently in scope from the drop down. Save the configuration:

Scope: Default Store View

Save Config

GENERAL

CATALOG

SECURITY

SQUARE

Subscription

Square Configuration

General Configuration

Application Mode [store view] Production Use Default

Production Location [store view] Please select location Use Default

Square Developer Portal > Applications > App > Locations

Repeat steps a. and b. for your other stores (by selecting the scope for each store, selecting the Square location associated for each store and saving)

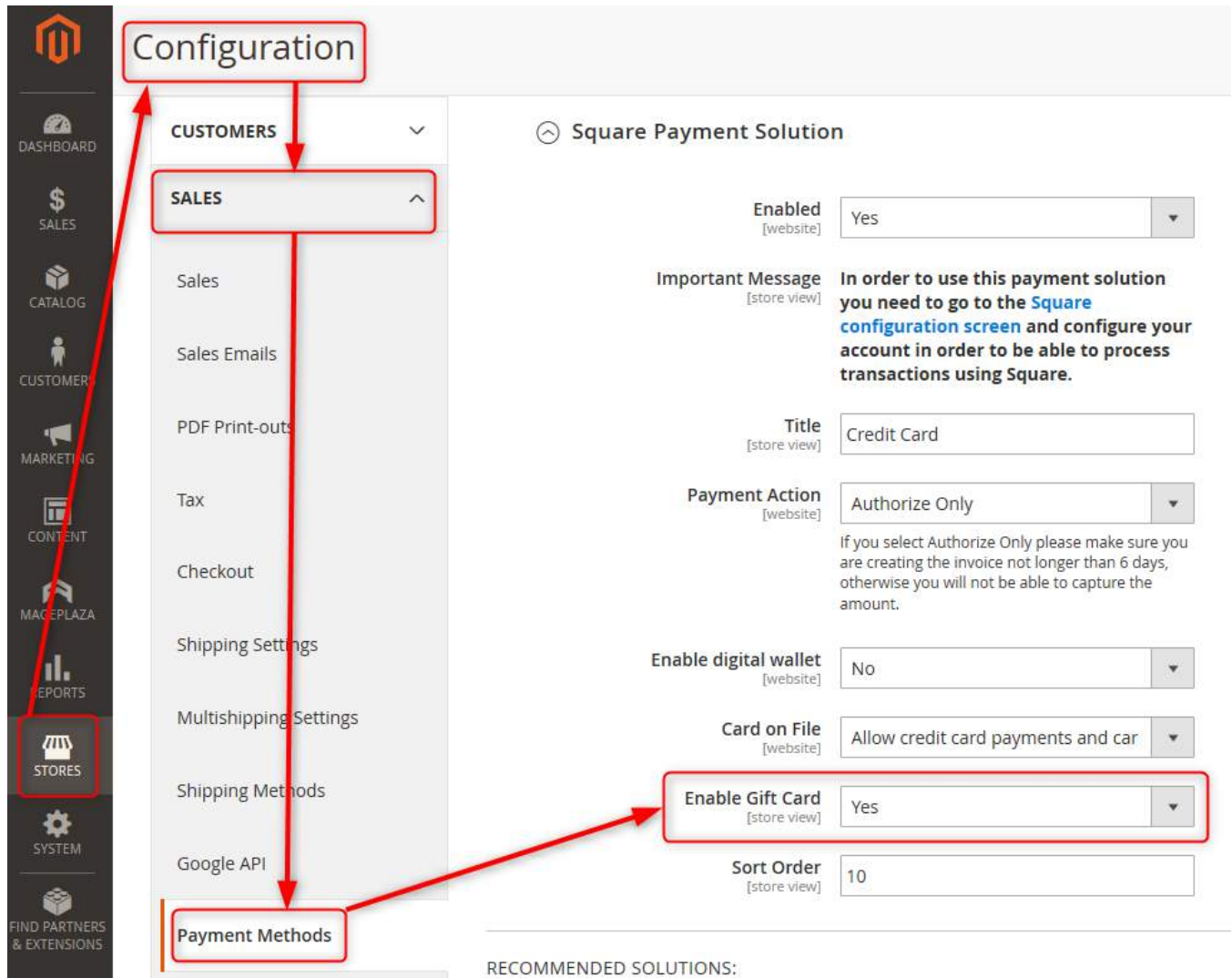
Remember to clear the cache after each time the configuration is changed.

6.3 Gift Cards

6.3.1 Magento Settings

Please note that using the Gift Card functionality is limited to accounts that have this option enabled on their Square account. Please contact a Square representative and request the Gift Card functionality to be enabled for your account before enabling this option.

If you made sure the gift card functionality is enabled on your Square account, then you can activate it in Magento by navigating to Stores > Configuration > Sales > Payment Methods > Square Payments Solution > Enable Gift Card:



Enabling the gift card inserts a new section inside the Square payment form on the front, where the customer can check the value of a gift card, apply gift cards to their checkout, or remove a gift card from the ones they previously applied.

6.3.2 Checkout Using Gift Cards

The customers can use gift cards during the payment method step of the checkout. After typing/pasting the gift card number in the marked field, they have the option to check the balance or apply the gift card to the current order:

Credit Card

My billing and shipping address are the same

a1 a2

2 Broadway

New York, New York 10004

United States

7052533254

Pay with a Credit Card

Card Number:

CVV:

Expiration Date:

Postal Code:

Save this credit card for future payments

Insert the gift card number

Apply the gift card

I agree with the terms and conditions

If the total balance of all applied gift cards is greater than the order value, no credit card information is required. At this point, the customer may also decide to remove an applied gift card:

square2.osf-demo.com says

Cart total amount is covered by gift cards

OK

Pay with a Credit Card

Card Number:

CVV:

Expiration Date:

Postal Code:

Save this credit card for future payments

Individually remove gift cards

Apply Gift Card

**** * 8375

\$1.08

Remove gift card

I agree with the terms and conditions

Place Order

If the balance of a gift card is greater than the order value, the remaining amount will still be available for use during a future order.

6.3.3 Refund Orders Paid for Using Gift Cards

Refunding an order paid for using gift cards follows the normal procedure of refunding an order online: navigate to the orders grid, click to view the invoice of a specific order, create credit memo, then click Refund. This action will distribute the refunded amounts to the gift cards and credit card, with the same amounts they were charged, respectively.

Refund Totals

Subtotal	\$1.00
Refund Shipping	<input type="text" value="0"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Tax	\$0.08
Square Gift Card Refund **** * 3458	Max: 1.0000 <input type="text"/>
Grand Total	\$1.08

- Append Comments
- Email Copy of Credit Memo

To refund gift cards used in an order using custom amounts, navigate to the orders grid, click to view the invoice of a specific order, create credit memo (the same process as when refunding an order online), type the amount you want to refund on a specific gift card, click “Update Totals”, and then click “Refund Gift Cards”.

Refund Totals

Subtotal	\$1.00
Refund Shipping	<input type="text" value="0"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Tax	\$0.08
Square Gift Card Refund **** * 3458	Max: 1.0000 <input type="text" value="0.5"/>

Grand Total

\$1.08

Update Totals

- Append Comments
- Email Copy of Credit Memo

Refund Offline

Refund

6.3.4 View Gift Card Transactions in Square Dashboard

Transactions involving gift cards (be they payments or refunds) are visible in the Square dashboard for each order:

- Payment using a gift card in Square dashboard:

TOTAL	\$3.15
MasterCard 4771	\$1.15
May 8, 2019 4:04 pm	
Receipt #dvHs	
Gift Card 5484	\$2.00
May 8, 2019 4:04 pm	
Receipt #np0T	

- Refund of a gift card in Square dashboard:

\$1.00 Refund

May 8, 2019 4:04 pm

Issued at: Lavu Test MK1

Source: eCommerce Integrations

Refund order #000000573 from location (\$1.00)
#A97WD87MZRJ77

TOTAL	(\$1.00)
Gift Card 5484	(\$1.00)
May 8, 2019 4:04 pm	
Receipt #np0T	

6.4 - Apple Pay

6.4.1 Prerequisites

In order to be able to set up Apple Pay, the following must be true:

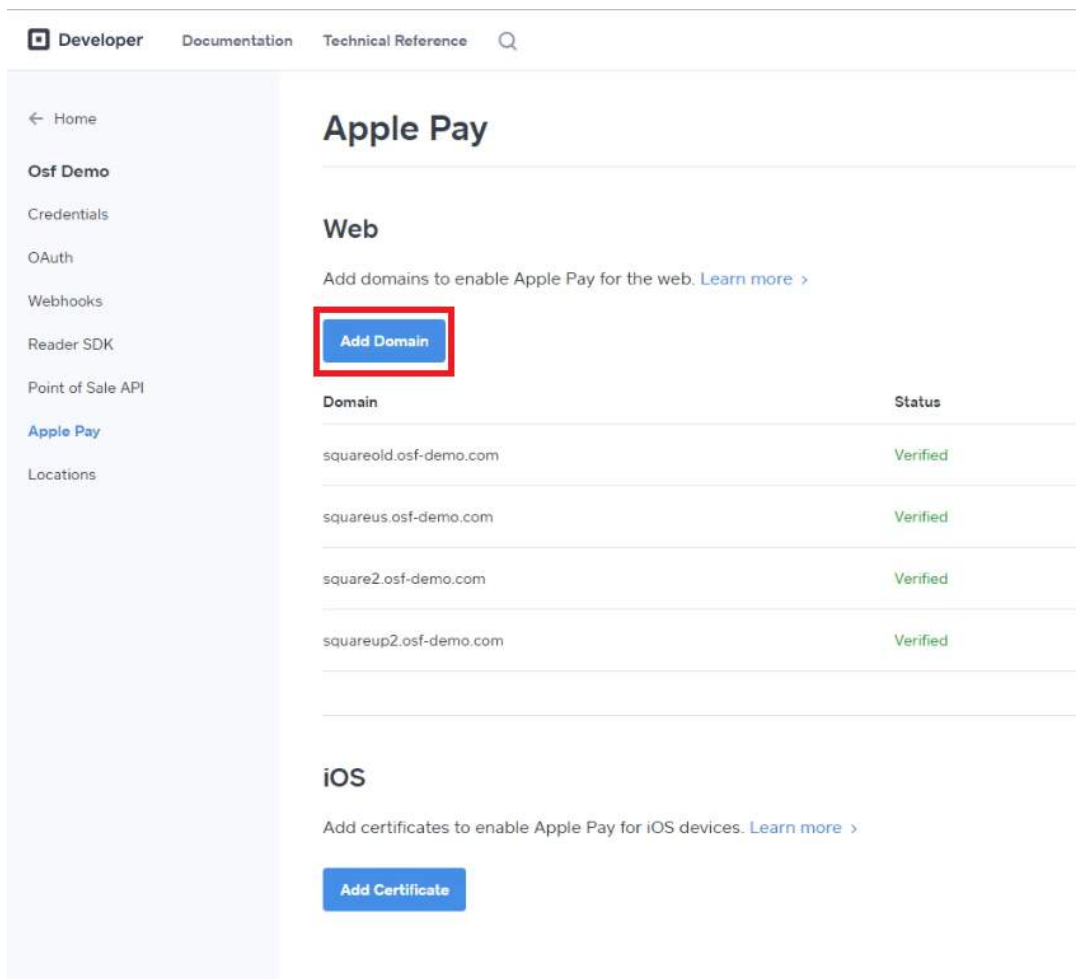
- you have https set up on your Magento store
- you have a Square production account connected In the Magento Admin
- your Square account Is based In the United States

6.4.2 Set Up

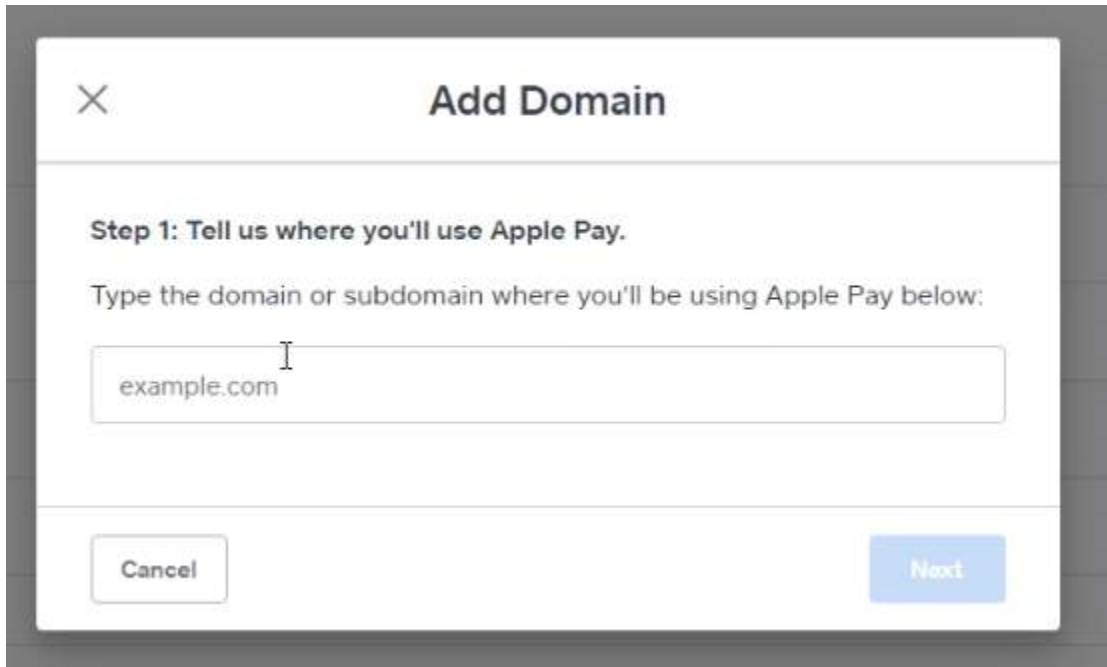
No configuration or setting up is needed in your Magento Admin.

In your Square dashboard, the following actions must be performed:

- Open the Application Dashboard, select the application associated with your SqPaymentForm implementation,
- Click on the Apple Pay tab for the selected application, then click on the "Add a new domain" link:

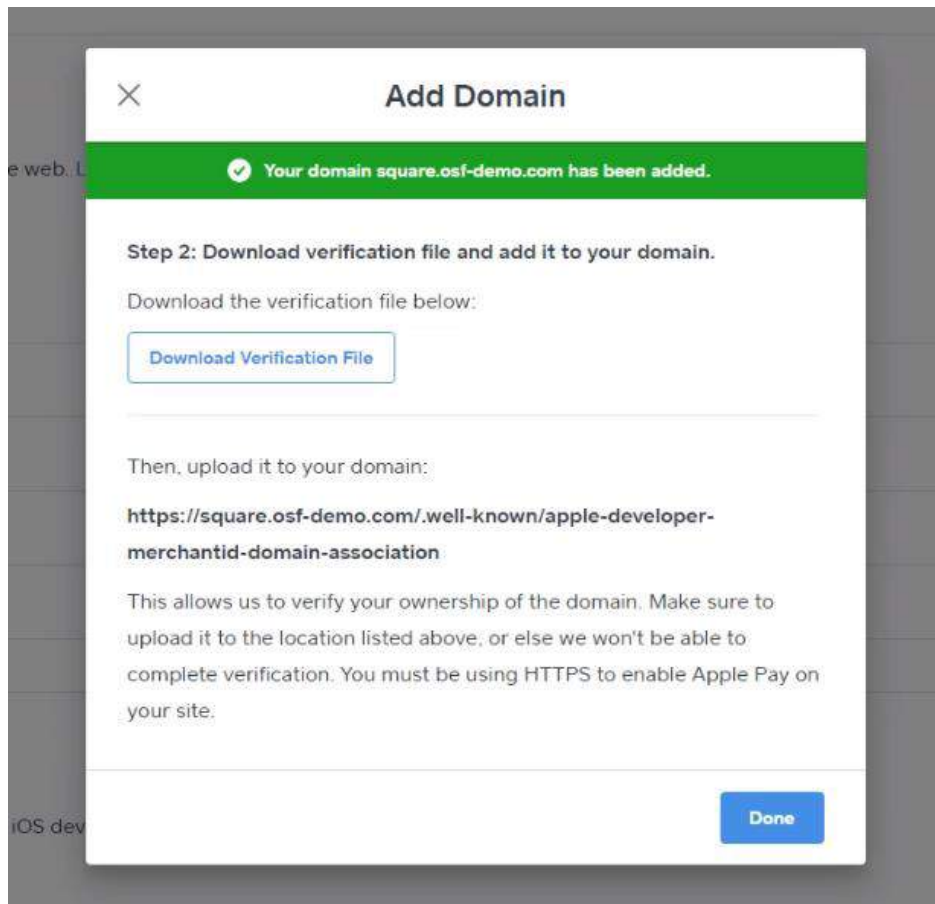


5. Type the domain name to your store:



The screenshot shows a dialog box titled "Add Domain" with a close button (X) in the top left. Below the title, it says "Step 1: Tell us where you'll use Apple Pay." followed by the instruction "Type the domain or subdomain where you'll be using Apple Pay below:". A text input field contains "example.com" with a cursor at the end. At the bottom, there are two buttons: "Cancel" on the left and "Next" on the right.

6. A success message will be displayed:



The screenshot shows the same "Add Domain" dialog box, now at "Step 2: Download verification file and add it to your domain." A green success banner at the top reads "Your domain square.osf-demo.com has been added." Below this, it says "Download the verification file below:" and provides a "Download Verification File" button. A horizontal line separates this from the next instruction: "Then, upload it to your domain:" followed by the URL <https://square.osf-demo.com/.well-known/apple-developer-merchantid-domain-association>. A paragraph explains that this allows verification of domain ownership and that HTTPS must be used. A "Done" button is located at the bottom right.

7. Download the verification file, upload it to your domain. After the domain ownership verification is completed, the domain will be added in the validated domains list:

Apple Pay

Web

Add domains to enable Apple Pay for the web. [Learn more >](#)

Add Domain

Domain	Status
squareold.osf-demo.com	Verified
squareus.osf-demo.com	Verified
square2.osf-demo.com	Verified
squareup2.osf-demo.com	Verified
square.osf-demo.com	Verified

8. If everything went well, when a customer accesses the front, the payment form will look like so:

The screenshot shows a mobile browser interface. At the top, the status bar displays 'No SIM', signal strength, VPN, the time '2:55 PM', and battery level '61%'. Below the status bar, the address bar shows 'squareup2.osf-demo.com'. The main content area is titled 'Pay with a Credit Card' and contains four input fields: 'Card Number' (with a masked input), 'CVV', 'Expiration Date' (with 'MM/YY' placeholder), and 'Postal Code' (with '16811' entered). Below this section is a 'Pay with a Digital Wallet' section featuring a prominent black button with the Apple Pay logo. At the bottom of the form is a large blue button labeled 'Place Order'.

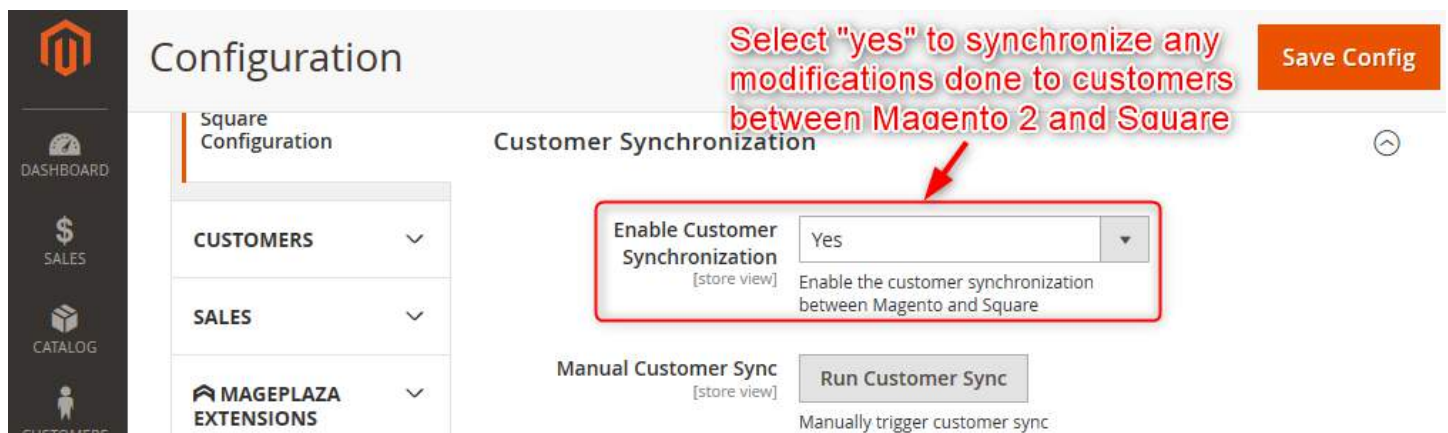
6.5 - Customers Synchronization

6.5.1 Admin Settings Needed

The synchronization of customers from the Square platform to the Magento one is done automatically, periodically with the aid of a cron (currently set to run twice an hour). This requires no changes in the Magento Admin settings.

In order to pick the changes from Magento and push them into Square, please make sure "Enable Customer Synchronization" is set to "Yes" in the Magento Admin Square configuration. If the option is disabled, all the customers created will be pushed to Square next time the synchronization is enabled.

Unlike the flow of information regarding customers coming from the Square platform (which is cron dependent), changes to the customers made in Magento are instantly pushed to Square, as long as the synchronization is enabled:



The screenshot shows the Magento Admin Configuration page for the Square extension. The left sidebar contains navigation links for DASHBOARD, SALES, CATALOG, and CUSTOMERS. The main content area is titled "Configuration" and "Customer Synchronization". A red box highlights the "Enable Customer Synchronization" dropdown menu, which is currently set to "Yes". A red arrow points to this dropdown. A red text box above the dropdown reads: "Select 'yes' to synchronize any modifications done to customers between Magento 2 and Square". Below the dropdown is a "Manual Customer Sync" button labeled "Run Customer Sync". A "Save Config" button is visible in the top right corner.

6.5.2 Magento Customer Creation

There are two ways for a new customer to register in Magento. Registering from the store's front follows the standard registration procedure on any ecommerce site. Fill the form with valid data and click register:

Create New Customer Account

Personal Information

First Name *

Last Name *

Sign Up for Newsletter

Sign-in Information

Email *

Password *

Password Strength: Weak

Confirm Password *

[Create an Account](#)

If the submission is successful, the customer is instantly visible in the Square platform. Their creation source is marked as "third party" and their reference ID matches the Magento customers' grid ID:

The screenshot displays the Square Customers interface. On the left, a sidebar menu includes 'magento testing', 'Home', 'Sales', 'Items', 'Employees', 'Customers', 'Appointments', 'Calendar', 'Inventory', 'Variants', 'Locations', 'Time Zones', 'Marketing', 'Sales', 'Appointments', 'Catalog', 'Orders', 'Marketing', 'Sales', 'System', and 'Grid Partners & Extensions'. The main area shows the 'Customers' directory with a search bar and a table of customers. A customer record for 'adi test1' is highlighted, with the email 'adrian.becherete1@ro.osf-global.com'. A red box highlights the ID '2' in the table. A modal window titled 'adi test1' is open on the right, showing details for the customer. A red box highlights the 'REFERENCE ID' '2' and the 'SOURCE' 'Third-party' in the 'Additional Information' section. Red arrows point from the 'adi test1' record in the table to the modal window.

Registering a customer from the Magento admin area follows the standard admin registration procedure. Fill the form with valid data and save the customer:

The screenshot shows the 'New Customer' registration form in the Square admin interface. The form is titled 'New Customer' and has a 'Save Customer' button. The form is divided into two sections: 'CUSTOMER INFORMATION' and 'Account Information'. The 'CUSTOMER INFORMATION' section includes 'Account Information' and 'Addresses'. The 'Account Information' section includes 'Associate to Website' (Main Website), 'Group' (General), 'Name Prefix', 'First Name' (Adi), 'Middle Name/Initial', 'Last Name' (test2), 'Name Suffix', 'Email' (adrian.becherete2@ro.osf-global.com), 'Date of Birth', and 'Tax/VAT Number'. A red box highlights the 'New Customer' title.

If the submission is successful, the customer is instantly visible in the Square platform. Their creation source is marked as "third party" and their reference ID matches the Magento customers' grid ID:

The image displays two screenshots from the Square platform. The top screenshot shows the 'Customers' directory with a table of customer records. The bottom screenshot shows a detailed customer profile for 'Adi test2'.

Customer Directory Table:

ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Website	Confirmed email	Account Created In	Date of Birth	Tax VAT Number	Gender	Action
3	Adi test2	adrian.becherete2@pro.ost-global.com	General	1 (231) 231-231	10004	United States	New York	Jun 14, 2018 5:37:21 AM	Main Website	Confirmation Not Required	Default Store				View

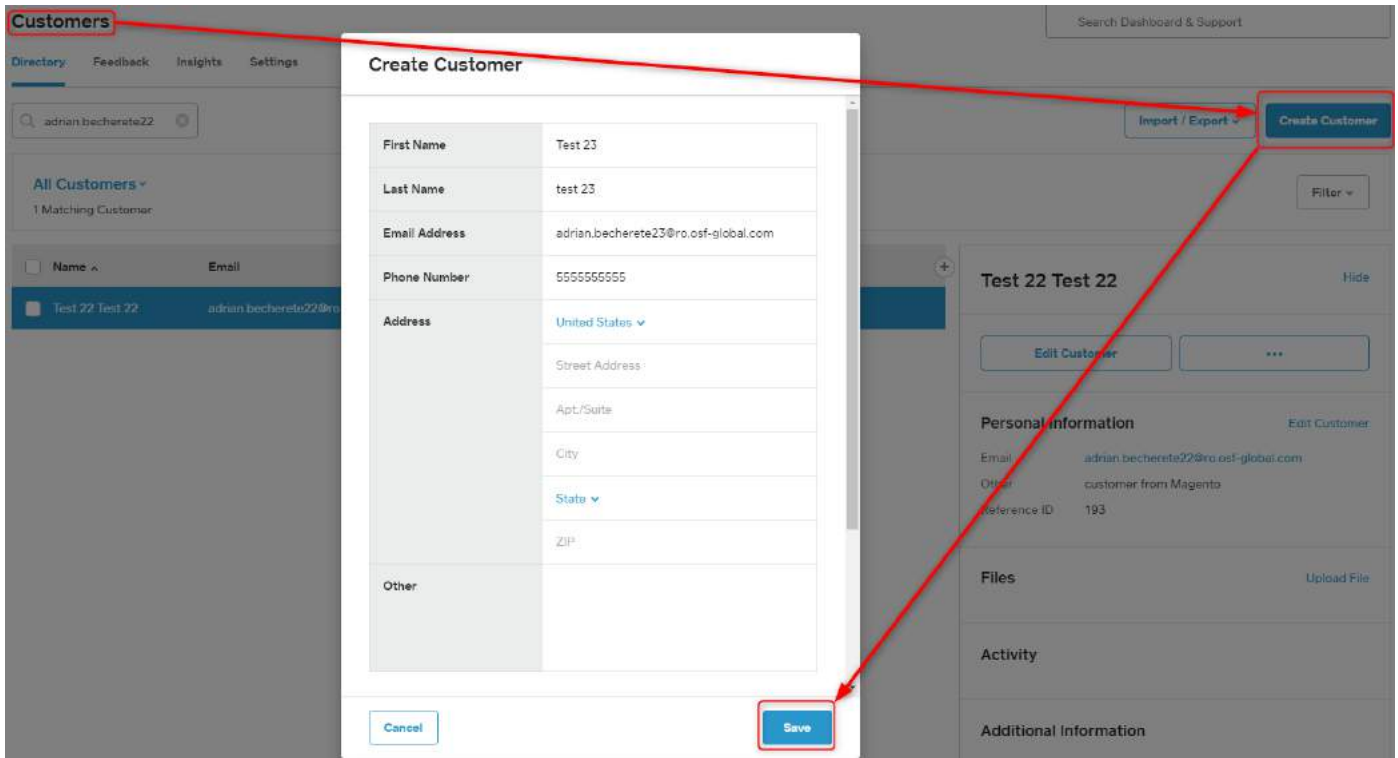
Customer Profile Details:

- Personal Information:** NAME: Adi test2; EMAIL: adrian.becherete2@pro.ost-global.com; PHONE: 1 (231) 231-231; ADDRESS: 2 Broadway, New York, NY 10004.
- OTHER:** customer from Magento
- GROUPS:** Reachable
- REFERENCE ID:** 3

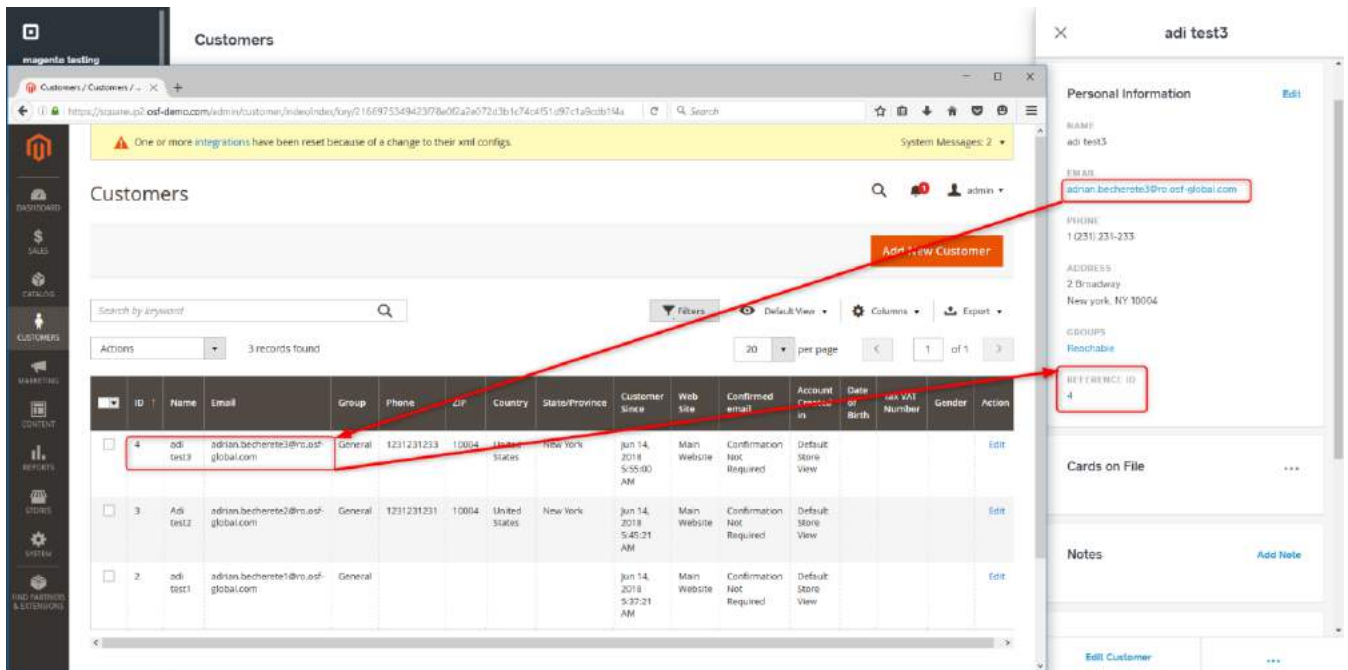
Red arrows in the image indicate the mapping between the 'Adi test2' row in the directory table and the corresponding fields in the customer profile, specifically the 'customer from Magento' source and the 'REFERENCE ID' of 3.

6.5.3 Square Customer Creation

While in Square, navigate to Customers, click Create Customer, fill the form with valid data and Save the newly created customer:



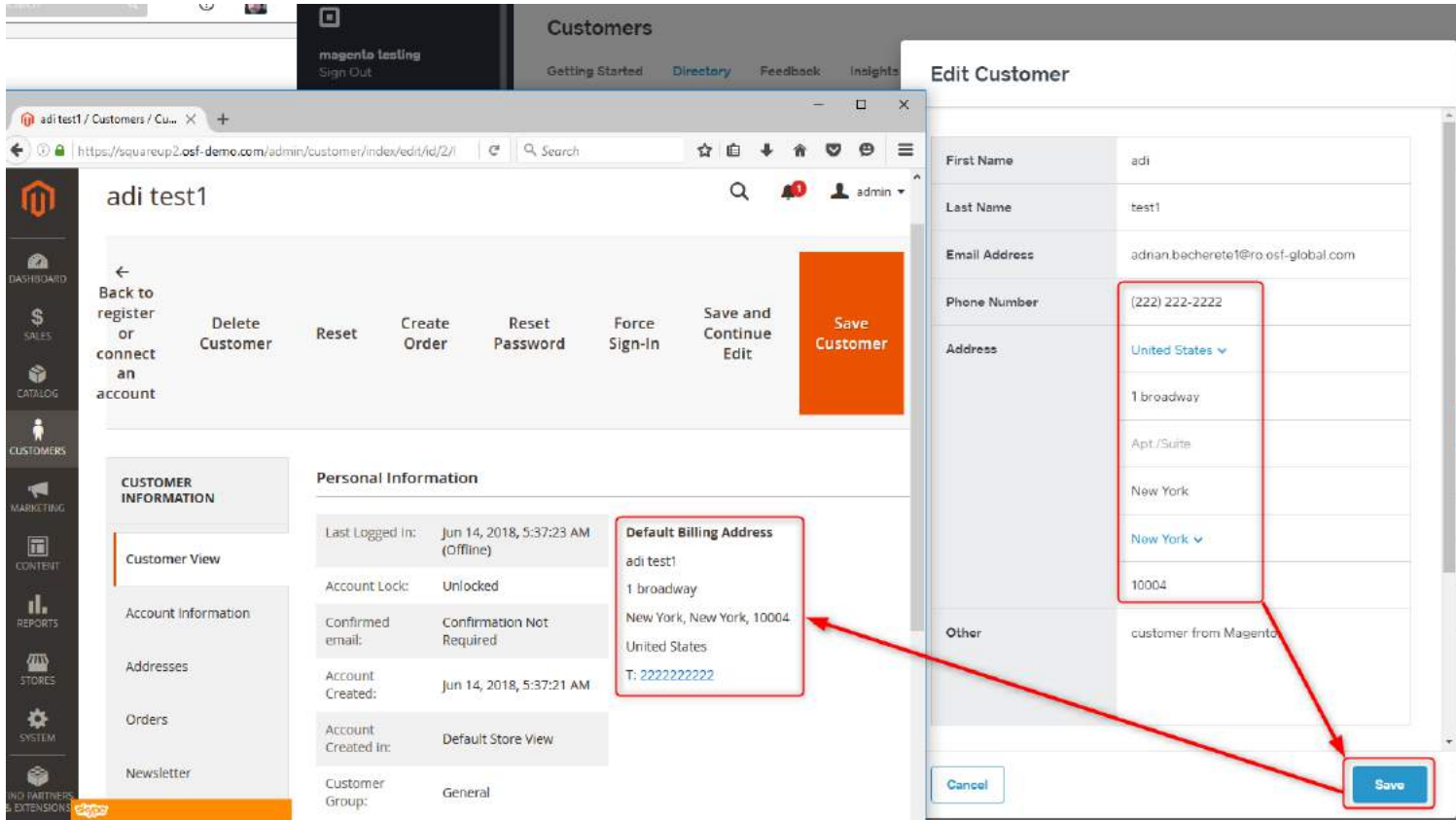
If the submission is successful and once the cron runs, the customer becomes visible in the Magento platform. Their creation source is marked as "Directory". The customer receives a reference ID only after they are pushed to Magento – matching their Magento customers' grid ID:



A customer created in this way will be able to login on the store's front only after a Magento admin edits them and sets a password, or if the customer follows the "forgot password" procedure from the front.

6.5.4 Edit a Customer in Square

Changes done to a customer in the Square platform are pushed to Magento after the cron runs:



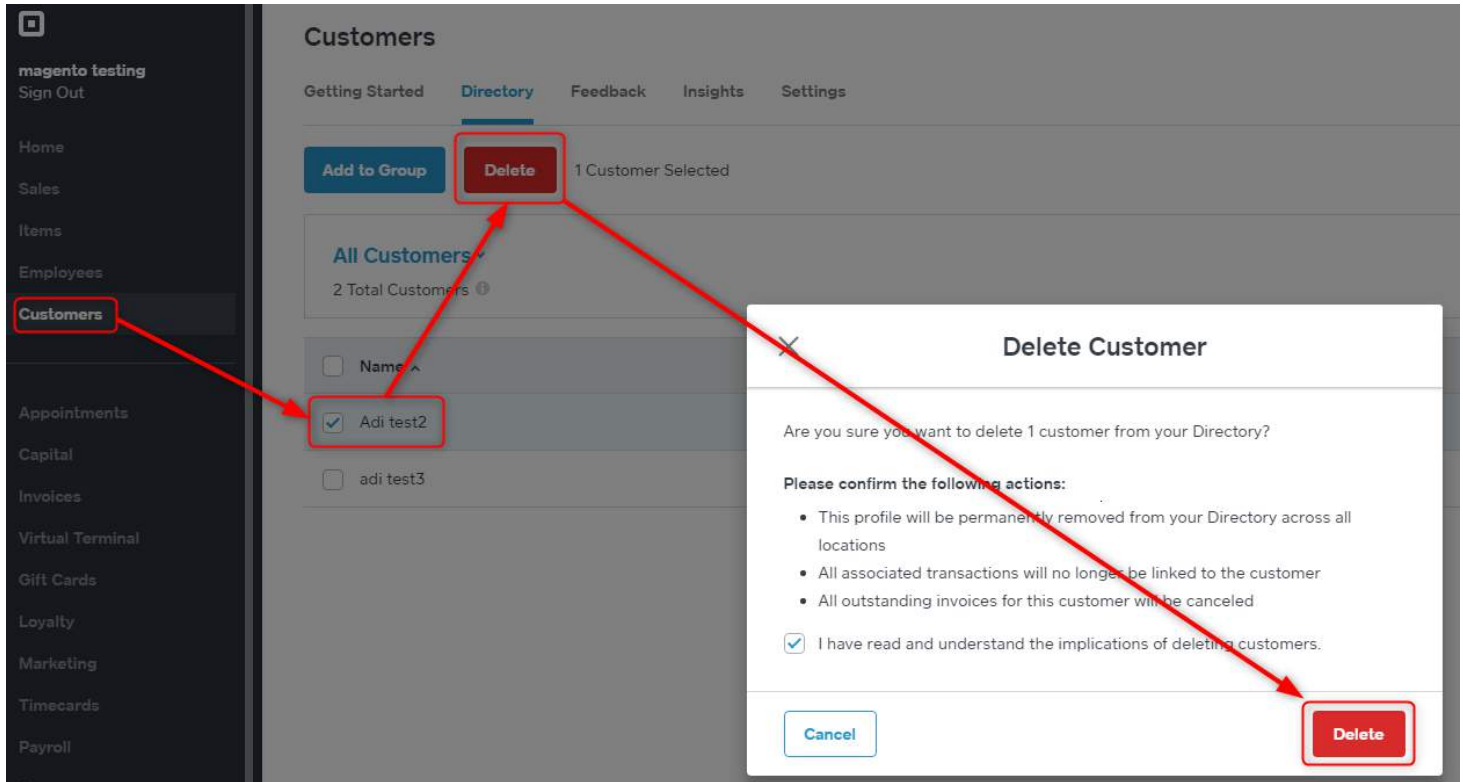
6.5.5 Delete a Customer in Magento

Deleting a customer from the Magento admin with the Customer synchronization enabled instantly removes them from the Square platform as well. If the sync is disabled, they will be removed the next time the cron runs with the option enabled:

The screenshot displays the Magento admin interface for the 'Customers' section. On the left is a dark sidebar with navigation options including 'Home', 'Sales', 'Items', 'Employees', 'Customers', 'Appointments', 'Capital', 'Invoices', 'Virtual Terminal', 'Gift Cards', 'Loyalty', 'Marketing', 'Timecards', 'Payroll', 'Apps', 'Online Store', 'Account & Settings', and 'Software Overview'. The main content area is titled 'Customers' and includes tabs for 'Getting Started', 'Directory', 'Feedback', 'Insights', and 'Settings'. A search bar at the top contains the text 'adrian.becherete1'. Below the search bar, a dropdown menu shows 'All Customers' with '0 Matching Customers'. A red box highlights this dropdown, and a red arrow points from it to a yellow notification banner at the bottom of the page that reads 'A total of 1 record(s) were deleted.' The notification banner also contains a green checkmark icon. Below the notification, there is a search bar with the text 'Search by keyword', a 'Filters' button, and a 'Default View' dropdown. At the bottom, there is an 'Actions' dropdown, '2 records found', a '20 per page' dropdown, and pagination controls showing '1 of 1'.

6.5.6 Delete a Customer in Square

To delete a customer from the Square platform, navigate to Customers, select the user you want removed, click on “more options” shown on the right, then “Delete Customer”. Confirm that you understood the implications of removing a customer, then hit “Delete”:



Once the cron runs, the customer is also removed from Magento:

One or more [integrations](#) have been reset because of a change to their xml configs. System Messages: 2

Customers

[Add New Customer](#)

Search: [Filters](#) [Default View](#) [Columns](#) [Export](#)

Active filters: **Keyword: adrian.becherete2@ro.osf-global.com** [Clear all](#)

1 records found | 20 per page | 1 of 1

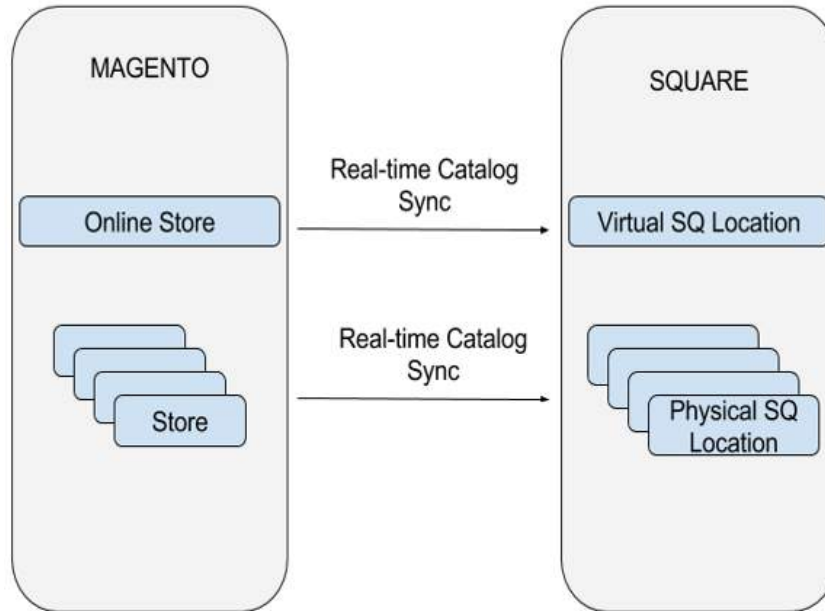
Actions	ID ↑	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site
<input type="checkbox"/>	4	adi test3	adrian.becherete3@ro.osf-global.com	General	1231231233	10004	United States	New York	Jun 14, 2018 5:55:00 AM	Main Webs

Copyright © 2018 Magento Commerce Inc. All rights reserved. Server time: 2018-06-14 06:49:4. **Magento** ver. 2.2. [Report an Issue](#)

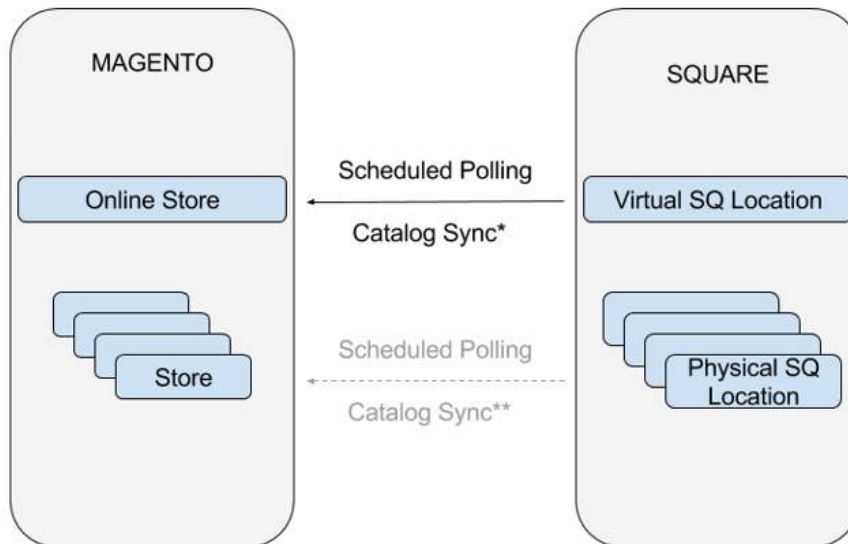
6.6 - Catalog Management Synchronization

6.6.1 Sources of Records

There are two possible ways the catalog synchronization can be achieved. If Magento is set to be the source of records, the sync with Square is done in real time and is triggered every time an item is created, modified or removed:

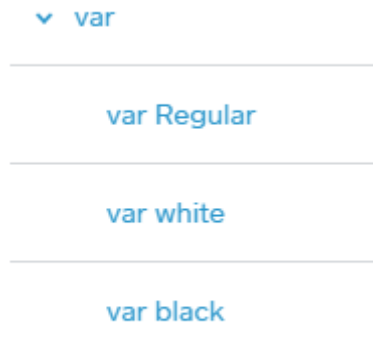


If Square is set to be the source of records, new additions, updates or removals are pushed to Magento during a cron that runs every 30 minutes:



6.6.2 Configurable Products Notes

Please consider that the behavior of configurable products is different in Magento than it is in Square. In Square, the configurable product and its variations make an entity in its own right: the variations are shown as sub-products in a hierarchical tree-like display.



In Magento 2, the configurable product is a separate entity from its variations: the variations are simple normal products, associated to a configurable product. This allows for the same variation to be used in more than one configurable product. To see the variations of a configurable, enter the product details and expand the Configurations tab:

New Product ← Back to register or connect an account Add Attribute Save ▼

Square Id [store view]

Square Variation Id [store view]

Square Variation [global]

Content ⌵

Configurations ✎ ⌵

Configurable products allow customers to choose options (Ex: shirt color). You need to create a simple product for each configuration (Ex: a product for each color). [Add Products Manually](#) **Create Configurations**

Current Variations < 1 of 1 >

Image	Name	SKU	Price	Quantity	Weight	Status	Attributes	Actions
+	03_conf-Blg	03_conf-Blg	\$ 10	100	1	Enabled	Square Variation: Blg	Select ▼
+	03_conf-Small	03_conf-Small	\$ 10	100	1	Enabled	Square Variation: Small	Select ▼

Images And Videos ⌵

When a configurable product is created in Square, a configurable entity is also created in Magento, and all the variations from Square are brought to Magento as simple products and associated correctly to the configurable. These variations in Magento, in fact simple products, have “Child product” in their description by default:

The screenshot displays the Magento admin interface for configuring a product variation. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area has a breadcrumb trail starting with '07_var_big', which is highlighted with a red box. Navigation buttons include 'Back to register or connect an account', 'Add Attribute', and 'Save'. The configuration fields are as follows:

- Country of Manufacture** [website]: A dropdown menu.
- Square Id** [store view]: A text input field containing 'IT7543ETBJR6TFNHGDSV6HFZ'.
- Square Variation Id** [store view]: A text input field containing 'IT7543ETBJR6TFNHGDSV6HFZ'.
- Square Variation** [global]: A dropdown menu with '07_var_big' selected, highlighted by a red box.

Below the configuration fields is the **Content** section, which includes a 'Description' field [store view]. A 'Show / Hide Editor' button is located above the description text area. The description text area contains a rich text editor toolbar and the text 'Child product', which is also highlighted with a red box.

6.6.3 Admin Settings

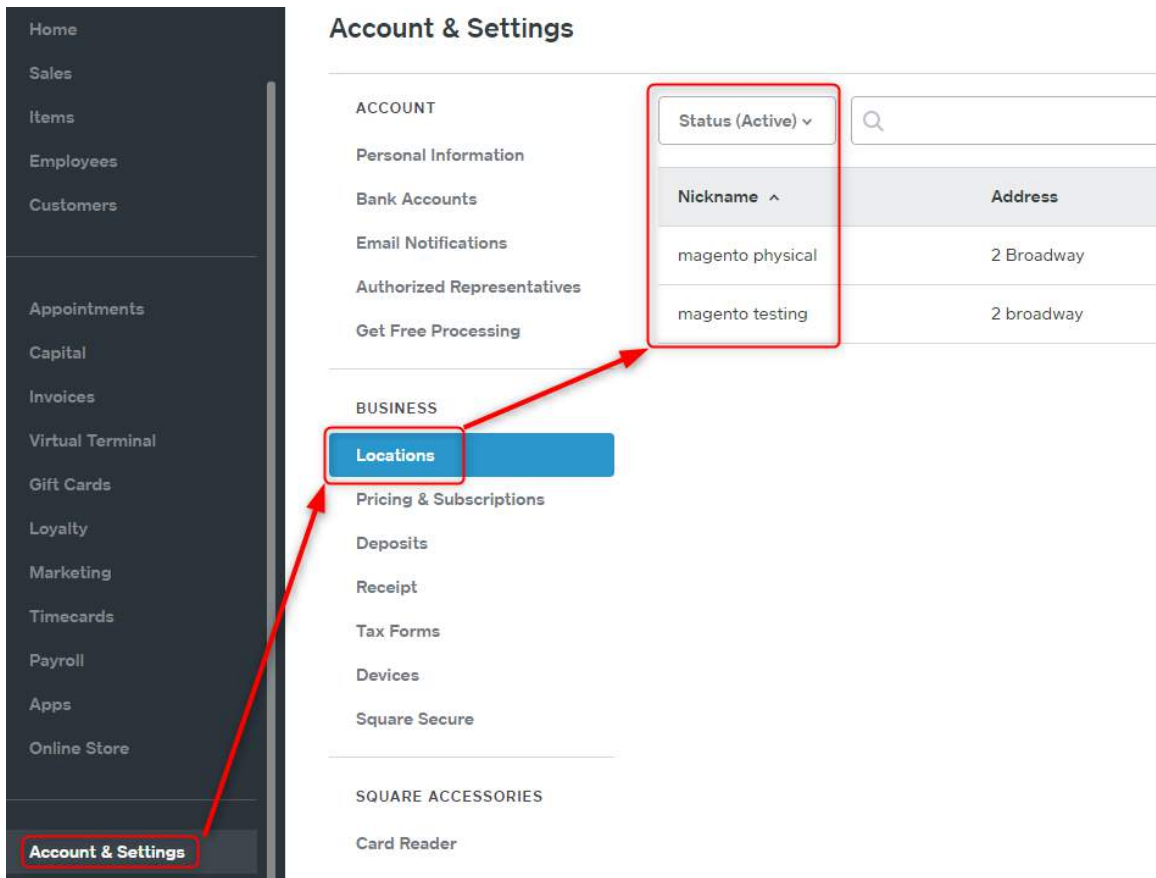
To enable the synchronization of products between the source of records and the client, please make sure the "Enable Catalog Synchronization" is set to "Yes". To find this setting, navigate to Admin > Stores > Configuration > Square > Square Configuration > Catalog and Inventory Synchronization. In the same tab, select the source of records from the drop down to establish the way the records are synchronized:

The screenshot shows the 'Configuration' page in the Magento Admin interface. The left sidebar contains navigation options: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, MAGEPLAZA, REPORTS, STORES, SYSTEM, and FIND PARTNERS. The main content area is titled 'Configuration' and 'Catalog and Inventory Synchronization'. A 'Save Config' button is in the top right. The configuration settings are as follows:

- Enable Catalog Synchronization** (store view): Set to 'Yes'. Description: 'Enable the synchronization of products between system of records and the client. Please enable Catalog Sync in order to enable Inventory Sync.'
- System of records** (store view): A dropdown menu with 'Magento' selected. Other options are 'Square' and 'Magento'.
- Price Attribute** (store view): Set to 'Special Price'. Description: 'If it is needed to send a different price than standard one to Square select desired product attribute on this field.'
- Manual Catalog Sync** (store view): A button labeled 'Run Catalog Sync'. Description: 'Manually trigger catalog sync.'
- Enable Inventory Synchronization** (store view): Set to 'Yes'. Description: 'Enable the synchronization of inventory between system of records and the client.'
- Manual Inventory Sync** (store view): A button labeled 'Run Inventory Sync'. Description: 'Manually trigger inventory sync.'

6.7 - Locations and Inventory Synchronization

Locations created in the Square platform are instantly visible and selectable in Magento.



6.7.1 Set Location from Magento Admin

Locations can be selected in Magento by navigating to System > Stores > Configuration > Square > Square Configuration > General Configuration > Square Location for Online Payments

WARNING!

Please note that the inventory displayed in Magento products grid and in the product's inventory tab has the value matching ONLY the selected location. Switching the default location here will also make all the inventories displayed in the grid take the values matching the quantities on the selected location. If the products have 0 inventory on the newly selected location, then the inventory displayed will be 0.

Note that by switching the location from one with inventory to another without inventory, the quantities are not lost. All quantities on all locations are visible in the Locations tab of the product details. Also, switching back from a location without inventory to one with inventory will display the quantities again.

Configuration

Store View: Default Config

GENERAL

CATALOG

SQUARE

Square Configuration

CUSTOMERS

SALES

MAGEPLAZA EXTENSIONS

DOTMAILER

General Configuration

Application Mode [store view] Production

Production Application ID [store view] sq0idp-9q4y91CLhbV_DdVU3wr0wg
Square Developer Portal > Applications > App > OAuth

Production Application Secret [store view]
Square Developer Portal > Applications > App > OAuth

Production Location [store view] Location 1
Square Developer Portal > Applications > App > Locations

Navigation menu: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, MAGEPLAZA, REPORTS, STORES, SYSTEM

6.7.2 Set Location During the Get OAuth Token Process

To avoid having no location selected in Magento Admin and a correct locations association, choosing a location can be done during the Get OAuth Token Process. Navigate to System > Stores > Configuration > Square > Square Configuration > Oauth Configuration and click on Get OAuth Token. After logging in to Square, a success message is displayed and along with it, a prompt to select a location:

The image shows a composite screenshot illustrating the process of setting a location during the OAuth token retrieval. On the left, the Magento Admin sidebar is visible, with the 'STORES' menu item highlighted. A red box highlights the 'STORES' menu, and a red arrow points from it to the 'Configuration' section in the main content area. The 'Configuration' section is also highlighted with a red box. Below it, the 'SQUARE' configuration section is expanded, and the 'Square Configuration' sub-section is highlighted with a red box. A red arrow points from this sub-section to the 'Oauth Configuration' section. The 'Oauth Configuration' section is also highlighted with a red box. A red arrow points from the 'Get OAuth Token' button in the 'Oauth Configuration' section to a browser window. The browser window shows a success message: 'Your token was successfully saved'. Below the message, there is a prompt: 'Please select a default location'. A dropdown menu is open, showing 'Location 1' selected. A red box highlights the dropdown menu, and a red arrow points from it to the 'Get OAuth Token' button in the 'Oauth Configuration' section. The 'Oauth Configuration' section contains the following information:

- Important Message!** Before starting the oauth authorization flow make sure that you have filled and saved the General Configuration tab.
- Redirect Url** `https://square2.osf-demo.com/squareupomni/index/callback/`
Redirect Url for oauth configuration in square
- Get OAuth Token** `Retrieve OAuth Token`
- Revoke OAuth Token** `Revoke OAuth Token`
Revoke all OAuth tokens for the current merchant. After the token is revoked you need to refresh the cache to enact the change.

6.7.3 Inventory Synchronization: Square is SOR

Each time the inventory cron runs, any changes in the quantity of a product – analyzed for each location – is also updated in Magento. A quantity update also happens during a sale, so even if the order synchronization is disabled, the quantity will still be updated after a sale, as long as the inventory synchronization is enabled. Please have a look at [6.7.5 View and Edit Inventory per Location in Magento](#) for more details related to the possibilities to view the inventory of a product for each location.

The screenshot shows the 'Configuration' page in Magento, specifically the 'Catalog and Inventory Synchronization' section. The left sidebar contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Catalog and Inventory Synchronization' and includes a 'Save Config' button in the top right corner. The configuration options are as follows:

- Enable Catalog Synchronization** [store view]: Set to 'Yes'. Description: Enable the synchronization of products between system of records and the client. **Please enable Catalog Sync in order to enable Inventory Sync.**
- System of records** [store view]: Set to 'Square'. Description: Select the system of records in order to know the way the records are synchronized.
- Manual Catalog Sync** [store view]: A button labeled 'Run Catalog Sync'. Description: Manually trigger catalog sync.
- Enable Inventory Synchronization** [store view]: Set to 'Yes'. Description: Enable the synchronization of inventory between system of records and the client.
- Important Message** [store view]: Please note that only sales using Square Payments will affect inventory on Square Dashboard. If a store uses other payment methods than Square Payments it is necessary to create custom code to affect inventory on the Square Dashboard end for those payment methods.
- Manual Inventory Sync** [store view]: A button labeled 'Run Inventory Sync'. Description: Manually trigger inventory sync.

6.7.4 Inventory Synchronization: Magento is SOR

Each time a modification in the quantity of a product happens in Magento— analyzed for each location – the inventory is also updated in Square. There are several ways to change the inventory of a product for a location with Magento as SOR: when a new order is created, when the Magento inventory is edited or when the Square inventory for an external location is edited from the Square tab in the product’s details page. In all these cases, the changes in quantity are pushed to Square instantly. Please see *6.7.5 View and Edit Inventory per Location in Magento* for more details related to the possibilities to view and edit the inventory of a product for each location.

The screenshot displays the 'Configuration' page for the Square Extension for Magento 2.x. On the left is a vertical navigation menu with icons and labels for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Configuration' and includes a 'Save Config' button in the top right corner. The settings are organized into several sections:

- Enable Catalog Synchronization** [store view]: A dropdown menu set to 'Yes'. Description: Enable the synchronization of products between system of records and the client. **Please enable Catalog Sync in order to enable Inventory Sync.**
- System of records** [store view]: A dropdown menu set to 'Magento', which is highlighted with a red box. Description: Select the system of records in order to know the way the records are synchronized.
- Price Attribute** [store view]: A dropdown menu set to 'Price'. Description: If it is needed to send a different price than standard one to Square select desired product attribute on this field.
- Upc Attribute** [store view]: A dropdown menu set to 'upc'. Description: The select product attribute on this field will be exported as UPC field on Square end. Only attributes without options are allowed.
- Manual Catalog Sync** [store view]: A button labeled 'Run Catalog Sync'. Description: Manually trigger catalog sync.
- Enable Inventory Synchronization** [store view]: A dropdown menu set to 'Yes'. Description: Enable the synchronization of inventory between system of records and the client.
- Important Message** [store view]: A text block stating: Please note that only sales using Square Payments will affect inventory on Square Dashboard. If a store uses other payment methods than Square Payments it is necessary to create custom code to affect inventory on the Square Dashboard end for those payment methods.
- Manual Inventory Sync** [store view]: A button labeled 'Run Inventory Sync'. Description: Manually trigger inventory sync.

6.7.5 View and Edit Inventory per Location in Magento

The default location selected in the General Configuration settings is used as the base reference for the inventory of a product – this will be the Square location used for Online Payments:

The screenshot shows the Magento Admin interface. On the left sidebar, the 'Configuration' menu item is highlighted with a red box. A red arrow points from this menu item to the 'GENERAL' section of the configuration page. Another red arrow points from the 'SQUARE' sub-section to the 'Production Location' dropdown menu. The 'Production Location' dropdown is open, showing 'Location 1' selected. The 'Production Location' field is also highlighted with a red box.

Once this location has been selected, the inventory for each product (for the “default” location) can be viewed inside the product details page – the Magento standard Inventory tab. Creating a new product and setting its inventory during the creation process will assign its quantity to the same “default” location.

Navigation sidebar with icons and labels: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, FIND PARTNERS & EXTENSIONS.

07_var_regular

Store View: All Store Views [?] [Back to register or connect an account](#) [Add Attribute](#) [Save](#)

Enable Product [website] Yes

Attribute Set Default

Product Name * [store view] 07_var_regular

SKU * [global] 07_var_regular

Price * [global] \$ 10.00
[Advanced Pricing](#)

Tax Class [website] Taxable Goods

Quantity [global] 100
[Advanced Inventory](#)

Stock Status [global] In Stock

Weight [global] 1 lbs This item has weight

Editing this quantity while Magento is in SOR will push the change to your Square dashboard.

The inventory displayed in the product's details page as described above can also be seen in the Magento Products grid:

Products

One or more integrations have been reset because of a change to their xml configs. System Messages: 2

Keep in mind the inventory you see here is for the default online location

The locations where this product has inventory are listed here

20 per page 1 of 1

Actions	ID ↓	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Location	Action
<input type="checkbox"/>	24		07_var_regular	Simple Product	Default	07_var_regular1	\$10.00	100.0000	Not Visible Individually	Enabled	Main Website	magento physical	Edit
<input type="checkbox"/>	25		07_var_big	Simple Product	Default	07_var_big1	\$10.00	100.0000	Not Visible Individually	Enabled	Main Website	magento testing	Edit
<input type="checkbox"/>	26		07_var_small	Simple Product	Default	07_var_small1	\$10.00	100.0000	Not Visible Individually	Enabled	Main Website	magento physical, magento testing	Edit

The quantity displayed in the grid is the one corresponding to the default online location, as described earlier. The locations column allows you to filter the products according to a specific location – only products with inventory on the selected location will be displayed in the grid.

In order to view the inventory of the product on all locations, while inside the Product's details in Magento 2, scroll down to the Locations Inventory section:

07_var_small ← Back to register or connect an account Add Attribute Save

Related Products, Up-Sells, and Cross-Sells

Customizable Options

Product in Websites

Locations Inventory

Location Name	Status	Quantity	Calculated At	Received At
magento physical	1	100	2018-06-14 11:01:06	2018-06-14 11:01:22
magento testing	1	100	2018-06-14 11:01:06	2018-06-14 11:01:22

This tab displays a list of all locations on which the product has an inventory. If Square is the system of records, the quantity for the locations cannot be edited from here, since any modifications should be done in Square. If Magento is the system of records, then the product's inventory can be changed for any location from within this section:

07_var_small ← Back to register or connect an account Add Attribute Save

Product in Websites

Locations Inventory

Location Name	Status	Quantity	Calculated At	Received At	Actions
magento physical	1	<input type="text" value="100"/>	2018-06-14 11:01:06	2018-06-14 11:01:22	<input type="button" value="Update qty"/>
magento testing	1	<input type="text" value="100"/>	2018-06-14 11:01:06	2018-06-14 11:01:22	<input type="button" value="Update qty"/>

Add location

Design

From the same menu, you can assign the product and set its inventory for any of your locations, by clicking the "Add location" button:

The screenshot shows the Magento 2.x admin interface. The top navigation bar includes a logo, the product name "07 var regular", and buttons for "Back to register or connect an account", "Add Attribute", and "Save". The left sidebar contains various menu items: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, and SYSTEM. The main content area displays the "Product in Websites" section, with a sub-section for "Locations Inventory". A table lists the current location:

Location Name	Status	Quantity	Calculated At	Received At	Actions
magento physical	1	100	2018-06-14 11:01:06	2018-06-14 11:01:21	Update qty

Below the table is an "Add location" button. A modal dialog is open, showing a form to add a new location. The "Location name" dropdown is set to "magento testing", and there is a "Quantity" input field. A "Save" button is visible in the modal. A red box highlights the "Add location" button, and a red arrow points from it to the modal dialog.

6.8 - Order and Transaction Synchronization

6.8.1 Magento Settings

The extension always creates the corresponding orders in Square:

The screenshot shows the Magento configuration interface for the Square extension. The left sidebar contains navigation options: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area is titled 'Configuration' and includes a 'Save Config' button. The 'Order and Transactions Synchronization' section is highlighted with a red box and contains the following settings:

- Create Square order** [store view]: Yes (dropdown menu). Description: Create Square Order when transaction is completed through Magento E-Commerce store.
- Import transaction and re-funds** [store view]: Yes (dropdown menu). Description: Import transaction and refunds from physical location.
- Manual Transactions and Re-funds Sync** [store view]: Run (button). Description: Run the Transactions and Refunds sync before the cron job does it.

The first option, "Import transactions and refunds", if enabled, retrieves the transactions from Square into Magento.

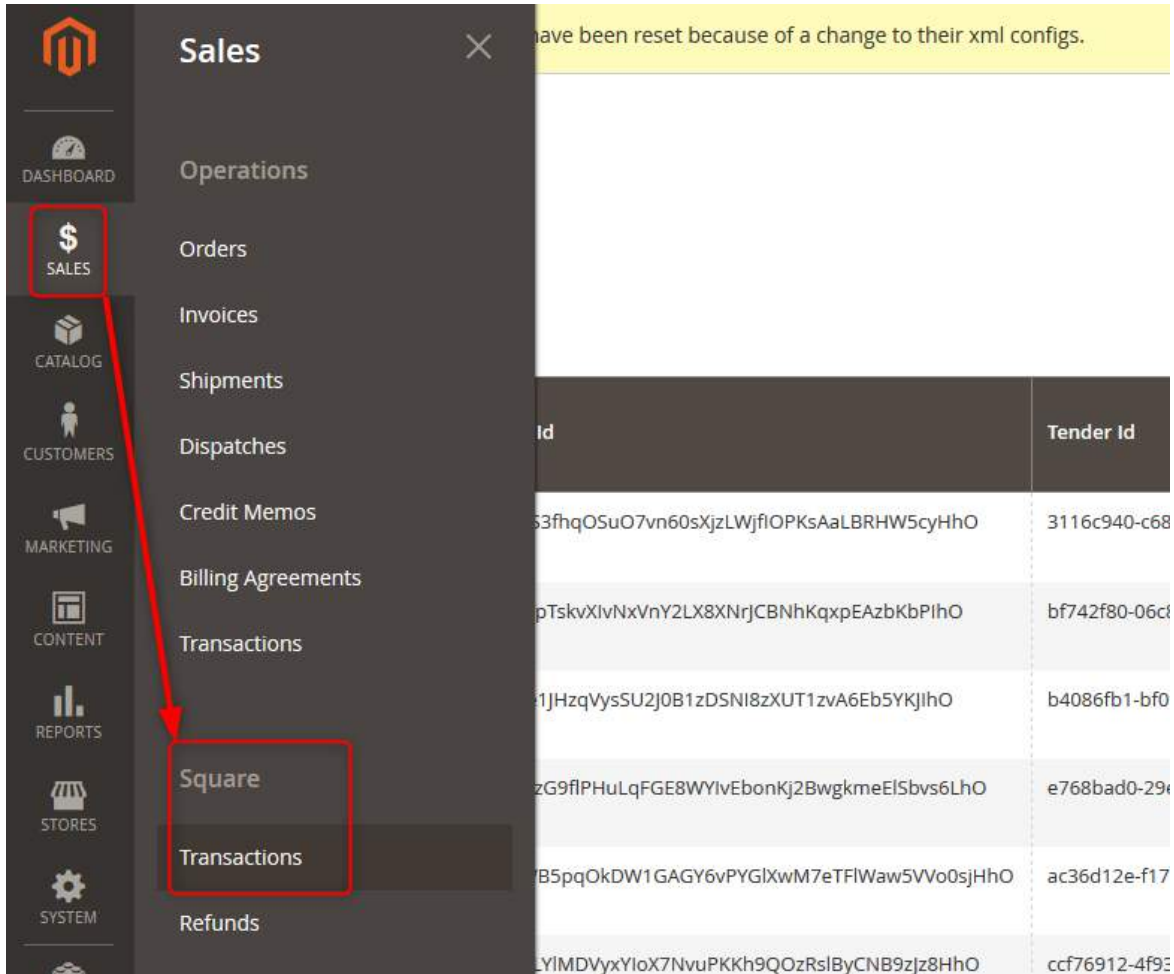
The second option, Convert Transactions into orders, if enabled, converts transactions retrieved from Square into Magento orders (as long as the retrieved Square transaction has all customer data associated to it and as long as the items on the order are already synced between Magento and Square).

The Run Transactions and Refunds Sync button forces the synchronization to run: it imports the transactions from Square to Magento before the cron job enabled by the "Yes" option above does the import.

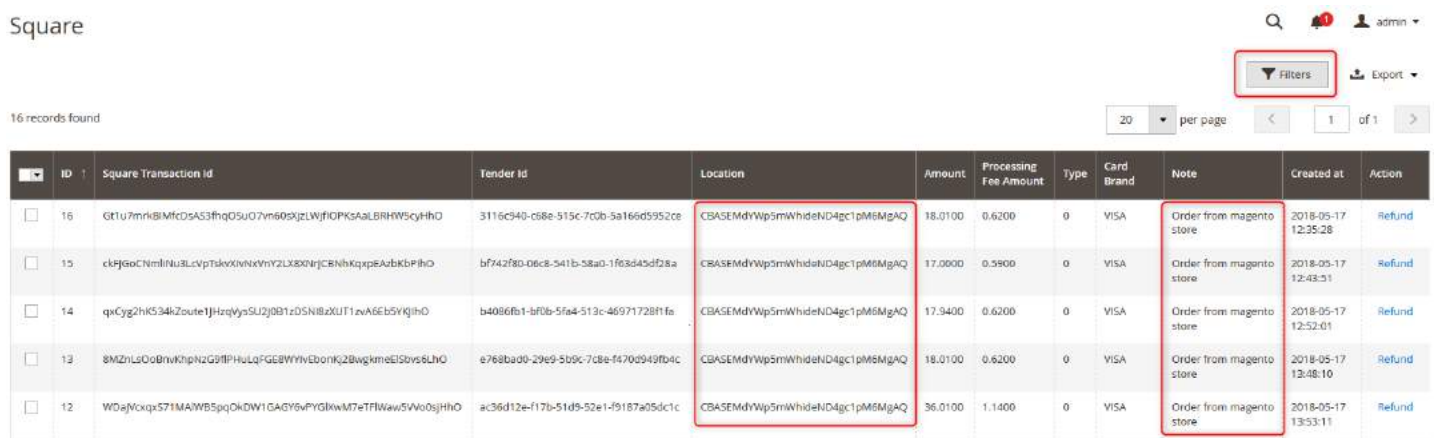
6.8.2 View Square Transactions

There are two ways for the transactions done in physical locations to be viewed in Magento.

The first is to view them globally by navigating in Sales > Square > Transactions:



All transactions are displayed, and can be filtered by external location by clicking the Filters button:



The second method is to view the transactions for specific customers, from inside their details page.

Navigate to Customers > All Customers > Select a customer, and click on Transactions:

One or more [integrations](#) have been reset because of a change to their xml configs.

Adi test 5

← Back to register or connect an account Delete Customer Reset Create

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Orders
- Newsletter
- Billing Agreements
- Product Reviews
- Wish List
- Transactions**
- Refunds

Search [Reset Filter](#) 16 records found

ID	Square Transaction Id
From	<input type="text"/>
To	<input type="text"/>
1	ajDkiz5DnAL5cYRWz4JNWXM4idfD07AgMnKXRgSdjCHCkQcKt2kTlI
2	CzXgm6TAPV0laQpzQvl0nRQpcAlhxxE5qqQ25w8FuUoRwtammNBE
3	uV191MYKPOdb3HuLYG1Nvxh514Gujwm2Lq2Zd3zSRSmZPQXfyUC
4	qVOFrizf0TsaeNCKrleytIX6IEZfyOp65rUUvIO11ymrj7aMty25BMhO
5	4UwuSEICkctStdAU60mG4UWtf15PKHwkyMtCv56Y9ntr0zqfweH4I

All transactions coming from external locations are visible in the grid:

System Messages: 2

Adi test 5

Back to register or connect an account Delete Customer Reset Create Order Reset Password Force Sign-in Save and Continue Edit Save Customer

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Orders
- Newsletter
- Billing Agreements
- Product Reviews
- Wish List
- Transactions

Search Reset Filter 16 records found

Export to: CSV Export

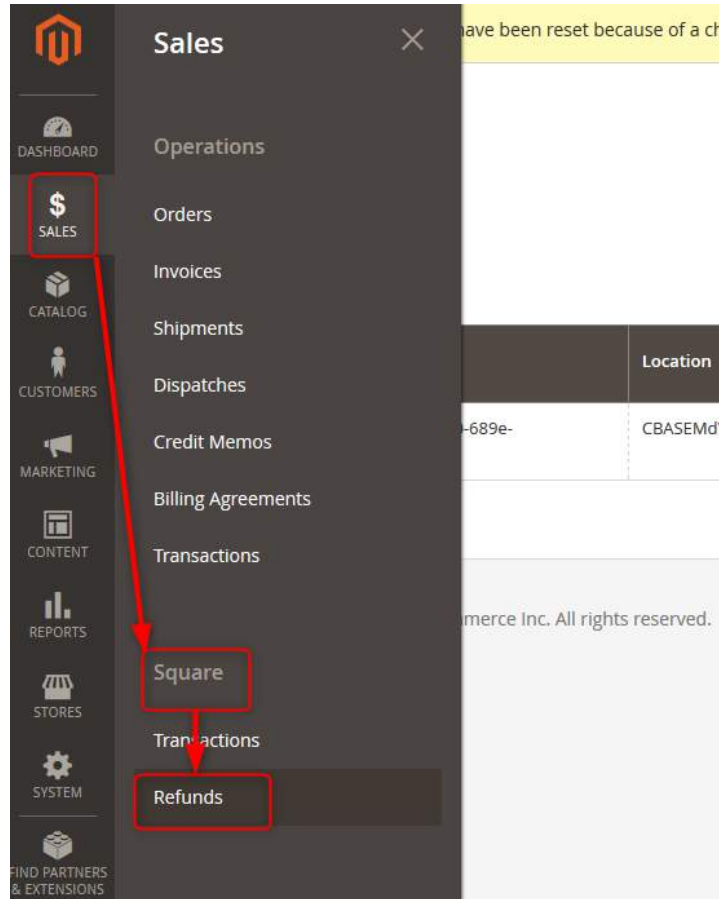
20 per page 1 of 1

ID	Square Transaction Id	Tender Id	Location	Customer Id	Amount	Processing Fee Amount	Type	Card Brand	No
1	ajOkz5DnALSr9Wz9jWzXM6d1007AgmV0Rg5dJChCkQ9z2lTNO	832a011d-59c3-5ba3-4c96-ad1d81adeed2	Coffee & Toffee NYC		\$15.00	\$0.54	CARD	VISA	Ma #0
2	Czgm6TAPV0uQpQzV0r#QpA7hXkE3qzQZ5w8FuJoRwAmnn1Bkq,hD	2915a18b-905d-5ada-7252-1e3a8642ae15	Coffee & Toffee NYC		\$15.00	\$0.54	CARD	VISA	Ma #0
3	uV181MVKP0ub3tHwLYG1Nue1514Gjgwn2Lq2Z032uRSin2PQ0FYU0PEIHQ	we831b37-7347-5813-61b5-81620549138	Coffee & Toffee NYC		\$15.00	\$0.54	CARD	VISA	Ma #0
4	qVDFr20T0aehKxley5X8EZYCps5UUM0r1ym74mBy25BMNO	0160a64-ee15-584e-7be0-df65e0f1838	Coffee & Toffee NYC		\$15.00	\$0.54	CARD	VISA	Ma #0

6.8.3 View Square Refunds

There are two ways for the refunds done in physical locations to be viewed in Magento 2.

The first is to view them globally by navigating in Sales > Square > Refunds:



All refunds are displayed:

The image shows a screenshot of the Magento 2 admin interface displaying the 'Square Refunds' page. At the top, there is a yellow notification banner that reads: "One or more Integrations have been reset because of a change to their xml configs." Below the banner, the page title is "Square". On the right side, there are search, notification, and user profile icons. Below the title, there is a "Filters" button and an "Export" button. The page indicates "1 records found". Below this, there is a table with the following columns: ID, Square Refund Id, Location, Transaction, Tender Id, Amount, Processing Fee Amount, Reason, and Reason. The table contains one record with the following data:

ID	Square Refund Id	Location	Transaction	Tender Id	Amount	Processing Fee Amount	Reason	Reason
1	a4a14b8a-133b-3310-089a-3e5096145751	CBASEMdyWp5mWhideNDag:1pMMgAQ	2Dq34v0Ys3TFr0taUWickPhk2VllhskGw084j0JubW3mQBYYa48MhD	Zc3d901e-f2da-50f1-4b0f-b864279cd809	8.9900	0.3000	test_smoke_refund	1

The second method is to view the transactions for specific customers, from inside their details page.

Navigate to Customers > All Customers > Select a customer, and click on Square refunds:

The screenshot displays the Square Extension for Magento 2.x interface. A vertical sidebar on the left contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The 'CUSTOMERS' icon is highlighted with a red box. A red arrow points from this icon to the customer name 'Adi test 5' at the top of the main content area. Another red arrow points from 'Adi test 5' down to the 'Refunds' link in the 'CUSTOMER INFORMATION' sidebar. A yellow warning banner at the top states: 'One or more integrations have been reset because of a change to their xm'. Below the banner is a 'Back to register or connect an account' link. The 'CUSTOMER INFORMATION' sidebar lists various customer details, with 'Refunds' highlighted. To the right, a search bar and a table are visible. The table has columns for 'ID' and 'Square ID' and contains one row of data.

ID	Square ID
1	a4e13e3e

All transactions coming from external locations are visible in the grid:

Adi test 5

← Back to register or connect an account Delete Customer Reset Create Order Reset Password Force Sign-In Save and Continue Edit **Save Customer**

CUSTOMER INFORMATION

Customer View

Account Information

Addresses

Orders

Newsletter

Billing Agreements

Product Reviews

Wish List

Transactions

Refunds

Export to: CSV Export

Search Reset Filter 1 records found 20 per page 1 of 1

Square Refund Id	Location	Transaction Id	Tender id	Amount	Processing Fee Amount	Reason	Status	Created at
a4a14b8a-133b-53f0-089e-3e5096145751	Coffee & Toffee NYC	2Dq34v0ky5TFn0lauWickPhki2VilthkGa08-djDjubW3-mQBYYa48MhO	2c3d901e-f2de-50f1-4b3f-b864379cd809	\$8.99	\$0.36	test_smoke_refund	APPROVED	Jun 6, 2018, 3:40:19 PM

Note: to issue partial refunds, use the Adjustment Fee field when issuing a credit memo. That way the customer will be refunded only with the remaining value. (Example: if the total is \$100 and you only want to refund \$40, then put \$60 in the adjustment fee section).

6.9 - In-Store Pickup Functionality

6.9.1 Prerequisites for enabling In-Store Pickup

In Magento Admin, please make sure the following configurations are performed:

1. In Admin > Stores > Configuration > Square > Square Configuration:
 - o The credentials are set and a location is selected.

General Configuration

Application Mode <small>[store view]</small>	Production
Production Application ID <small>[store view]</small>	<input type="text"/>
	Square Developer Portal > Applications > App > OAuth
Production Application Secret <small>[store view]</small>	<input type="password"/>
	Square Developer Portal > Applications > App > OAuth Important: Do not share your Application Secret with anyone Do not store this value anywhere, you will not need to re-enter it
Production Location <small>[store view]</small>	Location 1
	Square Developer Portal > Applications > App > Locations

- o The Get OAuth Token process was completed.

OAuth Configuration

Important Message! <small>[store view]</small>	Before starting the oauth authorization flow make sure that you have filled and saved the General Configuration tab.
Redirect Url <small>[store view]</small>	https://square2.osf-demo.com/squarepomni/index/callback/ Redirect Url for oauth configuration in square
Get OAuth Token <small>[store view]</small>	<input type="button" value="Get OAuth Token"/> Retrieve OAuth Token
Revoke OAuth Token <small>[store view]</small>	<input type="button" value="Revoke OAuth Token"/> Revoke all OAuth tokens for the current merchant. After the token is revoked you need to refresh the cache to enact the change.

- The Catalog Inventory Synchronization must be enabled and the catalog items and inventory synced (the extension checks for locations inventory before showing them as a pickup option to customer during checkout).

Catalog and Inventory Synchronization

Enable Catalog Synchronization [store view] Yes ▼
 Enable the synchronization of products between system of records and the client
Please enable Catalog Sync in order to enable Inventory Sync.

System of records [store view] Magento ▼
 Select the system of records in order to know the way the records are synchronized

Price Attribute [store view] Price ▼
 If it is needed to send a different price than standard one to Square select desired product attribute on this field

Manual Catalog Sync [store view] Run Catalog Sync
 Manually trigger catalog sync

Enable Inventory Synchronization [store view] Yes ▼
 Enable the synchronization of inventory between system of records and the client

Manual Inventory Sync [store view] Run Inventory Sync
 Manually trigger inventory sync

Enable Catalog Images Synchronization [store view] Yes ▼

2. In Admin > Stores > Configuration > Sales > Payment Methods, the Square payment solution must be enabled (the extension sends the Square order and the pickup details inside order fulfillment at the moment the order is invoiced). Please note that Pickup functionality can only be used with Square payment functionality, no other payment method is allowed. If a customer selects a location to pick up from as delivery method, then all the other payment methods will be suppressed from the checkout process and only Square payment will show up to the customer.

☰ Square Payment Solution

Enabled [website] Yes ▼

Important Message [store view] **In order to use this payment solution you need to go to the [Square configuration screen](#) and configure your account in order to be able to process transactions using Square.**

Title [store view] Credit Card

Payment Action [website] Authorize and Capture ▼
 If you select Authorize Only please make sure you are creating the invoice not longer than 6 days, otherwise you will not be able to capture the amount.

- In Admin > Stores > Configuration > Sales > Shipping Methods, the Square Pickup delivery method must be enabled.

Square Pickup

Enabled [website]

In order to use Square pickup, please make sure "Square Payment Solution" payment is enable on Sales > Payment Methods section.

6.9.2 Configuring the In-Store Pickup functionality

The settings for configuring the In-Store Pickup functionality are found in Admin > Stores > Configuration > Sales > Shipping Methods > Square Pickup:

Enabled [website]	<input type="text" value="Yes"/>	<input type="checkbox"/> Use system value
<small>In order to use Square pickup, please make sure "Square Payment Solution" payment is enable on Sales > Payment Methods section.</small>		
Title [website]	<input type="text" value="Square Pickup"/>	
Use all Locations [website]	<input type="text" value="Yes"/>	<input type="checkbox"/> Use system value
Location label [website]	<input type="text" value="{name}, {locality}, {address}"/>	
<small>Specifies how the locations will show on store frontend. It is possible to use one of these variables, inside brackets: name, address, locality, district, postal_code, country.</small>		
Schedule type [website]	<input type="text" value="As soon as possible"/>	<input checked="" type="checkbox"/> Use system value
<small>The schedule type of the pickup fulfillment.</small>		
Time to prepare [website]	<input type="text" value="1"/>	
<small>The duration of time, in hours. it takes to prepare this fulfillment.</small>		
ASAP label [website]	<input type="text" value="Available to pickup in {prep_time_duration}"/>	
Handling fee [website]	<input type="text" value="0"/>	
Ship to Applicable Countries [website]	<input type="text" value="All Allowed Countries"/>	<input checked="" type="checkbox"/> Use system value
Ship to Specific Countries [website]	<div style="background-color: #f0f0f0; padding: 5px; min-height: 150px;"> <ul style="list-style-type: none"> Afghanistan Åland Islands Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda </div>	
Sort Order [website]	<input type="text" value="15"/>	

- Enabled: enable/disable functionality
- Title: the name of the shipping method, as it will be displayed to the customer on frontend
- Use all locations: yes/no field, if "no" option is selected then "Locations to exclude" field shows up and allow the merchant to select locations that will not show as a pickup option.
 - If there is not enough quantity of any products on cart to fulfil the order on the default location, then only Square pickup shipping method is available.
 - If there is not enough quantity of any product on cart to fulfil the order on one of the pickup locations, then that location is excluded from the locations' options on the front.
- Locations to exclude: selected locations will not show up as a pickup option
- Location label: this field gives the opportunity to the merchant to modify how the locations are named when the customers sees the locations during checkout on the front. E.g. merchant may want to show only the address; or maybe it is better to show location city only. This field work as a template, which can have text and some variables. Default value is "{address}, {locality}" and possible variables are: name, address, locality (city), district, postal code, country
- Schedule type: this version only contemplated "As soon as possible" option
- Time to prepare: time for order preparation, in hours
- ASAP label: will be showed to customers to know when their order will be ready for pick up. Default value is "Available to pick up in {prep_time_duration}", prep_time_duration variable will show "Time to prepare" setting followed by "hour" or "hours" string
- Handling fee: the amount to charge the customer for pickup, the default value is zero
- Ship to Applicable Countries: this is a default Magento setting, which allows the merchant to use pickup for all countries or to only use it on countries selected on "Ship to Specific Countries" setting
- Ship to Specific Countries: if "Ship to Applicable Countries" option is set to "Specific Countries", this field will be enabled to select countries
- Sort Order: this is a default Magento setting, which allows the merchant to define the order of the shipping methods during the checkout process

6.9.3 Order journey

If the product is available in multiple locations not excluded from pickup:

Locations Inventory



Location Name	Status	Quantity	Calculated At	Received At	Actions
Location 1	1	<input type="text" value="4"/>	2020-08-25 14:44:47	2020-08-25 14:44:47	<input type="button" value="Update qty"/> <input type="button" value="Remove"/>
Location 2	1	<input type="text" value="2"/>	2020-08-25 12:24:43	2020-08-25 12:24:51	<input type="button" value="Update qty"/> <input type="button" value="Remove"/>
Location 3	1	<input type="text" value="2"/>	2020-08-25 14:39:56	2020-08-25 14:39:56	<input type="button" value="Update qty"/> <input type="button" value="Remove"/>
<input type="button" value="Add location"/>					

...then all these locations will be displayed to the customer during checkout when selecting the shipping method:

Shipping Methods

- \$5.00** Fixed Flat Rate

- \$0.00** Free Free Shipping

- \$0.00** Location 1, New York, 5th Avenue Square Pickup - Available to pickup in 1 hour

- \$0.00** Location 2, San Francisco, 1455 Market ST Square Pickup - Available to pickup in 1 hour

- \$0.00** Location 3, San Francisco, 1455 Market St Square Pickup - Available to pickup in 1 hour

[Next](#)

If the customer selects one of the Square Pickup options, then the only payment method available during the next step will be the Square payment solution:

Payment Method:

Credit Card

My billing and shipping address are the same

a1 a2

2 Broadway

New York, New York 10004

United States

7052533254

Pay with a Credit Card

Card Number:

CVV:

Expiration Date:

Postal Code:

Save this credit card for future payments

I agree with the terms and conditions


The user can see in their order details their selection for pick-up:

Order Summary

Cart Subtotal	\$1.00
Shipping	\$0.00
Square Pickup - Available to pickup in 1 hour - Location 3, San Francisco, 1455 Market St	
Tax	\$0.08

Order Total	\$1.08
--------------------	---------------

1 Item in Cart ^

	Coffee	\$1.00
	Qty: 1	

Once the order is placed, the location is displayed in the order details in the customer's account:

Order # 000001056 CLOSED

August 25, 2020

[Reorder](#)

[Print Order](#)

Items Ordered	Invoices	Refunds		
Product Name	SKU	Price	Qty	Subtotal
Coffee	coffee	\$1.00	Ordered: 1 Refunded: 1	\$1.00
Subtotal				\$1.00
Shipping & Handling				\$0.00
Tax				\$0.08
Grand Total				\$1.08

Order Information

Shipping Address

a1 a2
2 Broadway
New York, New York, 10004
United States
T: 7052533254

Shipping Method

Square Pickup - Available to pickup
in 1 hour - Location 3, San Francisco
1455 Market St

Billing Address

a1 a2
2 Broadway
New York, New York, 10004
United States
T: 7052533254

Payment Method

Credit Card

Credit Card Type MASTERCARD

The store owner can see the pickup location in the admin area, in the order's details:

#000001056



adiadmin ▾

← Back

Send Email

Reorder

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Transactions

Order & Account Information

Order # 000001056 (The order confirmation email was sent)

Order Date Aug 25, 2020, 7:29:06 AM

Order Status Closed

Purchased From Main Website
Main Website Store
Default Store View

Placed from IP

Account Information [Edit Customer](#)

Customer Name a1 a2

Email

Customer Group General

Address Information

Billing Address [Edit](#)

a1 a2
2 Broadway
New York, New York, 10004
United States
T: 7052533254

Shipping Address [Edit](#)

a1 a2
2 Broadway
New York, New York, 10004
United States
T: 7052533254

Payment & Shipping Method

Payment Information

Credit Card

Credit Card Type:

Shipping & Handling Information

Square Pickup - Available to pickup in 1 hour - Location 3, San Francisco, 1455 Market St \$0.00


If the order is invoiced, the details will also be available in the Square dashboard:

Order Detail


New

Order Details
1 item (Pickup)
Location 3
Placed Aug. 25, 2020 at 4:04 pm
a1 a2
adrian.becherete122@ro.osf-global.com

Pickup Details
a1 a2
705-253-3254



Ordered Items

Item	Qty	Amount
 Coffee Regular, SKU coffee	1	\$1.00
Subtotal		\$1.00
Tax		\$0.08
Total		\$1.08
MasterCard 4771		\$1.08

6.9.4 In-store Pickup functionality notes

The inventory is decreased from the location selected by the customer for picking up. This is visible in both the Magento Admin and in Square Dashboard. If the chosen delivery method was other than the pic-up in store, then the inventory will be subtracted from the default location selected in Magento in the default location setting found in the Square general settings screen, as described in 6.9.1.

In the same way, if an order is canceled / refunded and the product is returned to stock, then the stock will be rebuilt from the location where the product was originally picked up from.

For gift cards, the extension needs to create a Square order on the location selected by the customer before order completion. If the customer changes location after a Square order is created, then the extension cancels any existing gift card authorizations and the customer will need to re-enter and re-apply gift cards.

6.10 - Subscriptions Functionality

6.10.1 What Does the Square Subscriptions Functionality Do?

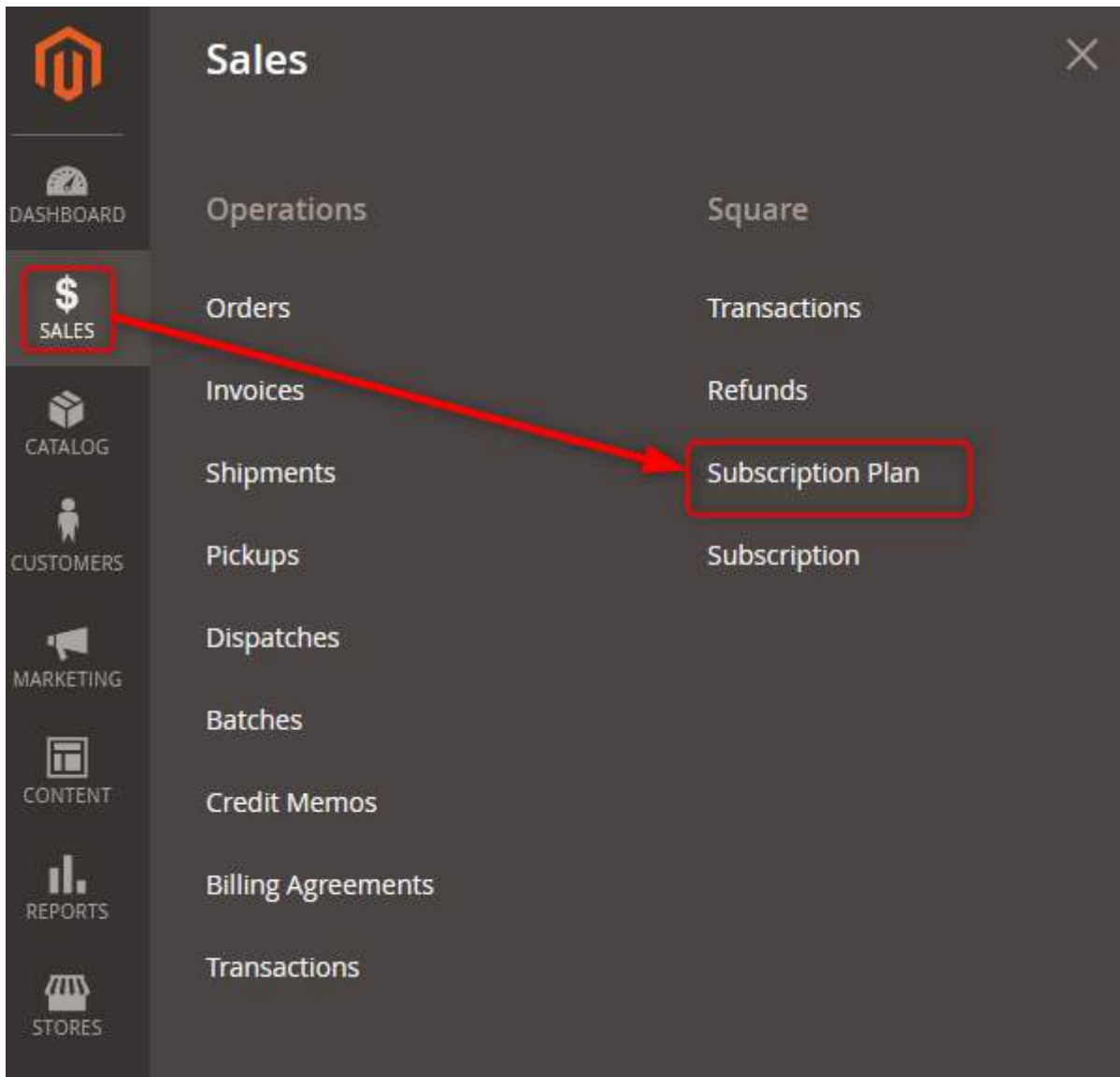
- Merchants can create as many subscription plans as needed
- A product can have one or more subscription plans attached to it
- Customers can select a plan on the product's details page and purchase a subscription
- Subscriptions are created on Square side, which handles payment and recurring invoicing
- Every Square invoice created will generate an order on Magento side
- Customers can see their subscriptions and generated orders on Magento
- Customers can cancel their subscriptions any time on Magento
- Customers can change the stored credit card used for a subscription
- Merchants can manage subscriptions

6.10.2 Prerequisites for Enabling Subscriptions

The Square subscriptions can be used only if the Square payment method is enabled. Additionally, one of the options that enable the extension to store the credit card must be active (store credit cards are needed for recurring payments).

6.10.3 See the List of Active Subscription Plans

In order to see a table with the active subscription plans and their properties, navigate to admin > Sales > Square > Subscription Plan:



For each plan, the admin can see the status, the billing frequency, total number of Periods (cycles), the initial fee type (percentage or fixed amount), the initial fee value, the discount type (fixed amount or percentage), the discount value, the number of cycles over which the discount is applied (if any) and the number of free cycles (trial periods).

<input type="checkbox"/>	ID ↓	Name	Status	Total Periods	Initial Fee	Initial Fee Amount	Discount	Discount Amount	Discount Cycles	Free Trial Periods	Action
<input type="checkbox"/>	4	Two week plan	active	0	fixed	7	no	10	0	0	Select ▼
<input type="checkbox"/>	5	Monthly plan	active	15	percentage	10	no	0	5	5	Select ▼
<input type="checkbox"/>	6	Annual plan	active	20	no	0	percentage	10	5	0	Select ▼
<input type="checkbox"/>	7	Daily plan	active	30	no	0	no	0	0	0	Select ▼

6.10.4 Add a New Subscription Plan

In order to add a new subscription plan, navigate to admin > Sales > Square > Subscription Plan and click on “Add new Subscription plan”:

The screenshot displays the Magento 2 admin interface. On the left, a sidebar menu is open to the 'Sales' section. The 'SALES' menu item is highlighted with a red box, and a red arrow points from it to the 'Subscription Plan' option in the 'Square' sub-menu. Another red arrow points from 'Subscription Plan' to a red-bordered button labeled 'Add new Subscription Plan' in the top right corner of the main content area. The main content area shows a table with columns: Discount, Discount Amount, Discount Cycles, Free Trial Periods, and Action. The first row of data shows 'Product price percentage' with values 5, 2, and 0. The table also includes pagination controls showing '20 per page' and '1 of 1' items.

Discount	Discount Amount	Discount Cycles	Free Trial Periods	Action
Product price percentage	5	2	0	Select ▾

From here, the admin will be able to name the plan, add a description, set the billing frequency, total number of Periods (cycles), the initial fee type (percentage or fixed amount), the initial fee value, the discount type (fixed amount or percentage), the discount value, the number of cycles over which the discount is applied (if any) and the number of free cycles (trial periods):

[← Back](#) [Save and Continue Edit](#) [Save Subscription Plan](#)

Name *

Description
Will appear on product page.

Status *

Billing Frequency

Total Periods
Number of periods subscription should do, zero is unlimited. Does not work for bundle products

Free Trial Periods
Number of cycles customer will receive as a free trial.

Initial Fee
Does not work for bundle products

Initial Fee Amount

Discount
Does not work for bundle products

Discount Amount

Discount Cycles
Number of cycles discount amount should be applied , zero is unlimited.

6.10.5 Subscriptions Extension Settings

To set up the properties of the Subscriptions extension, navigate to admin > Stores > Configuration > Square > Subscription. From here, the admin is able to enable or disable the extension. They can also force all the products to be orderable ONLY using a subscription or leave this setting on product level. The admin can also see the current subscription plans:

The screenshot displays the Magento 2.x admin interface. On the left sidebar, the 'Configuration' menu item is highlighted with a red box, and an arrow points to the 'Subscription' menu item, which is also highlighted with a red box. The main content area shows the 'Configuration' page for the 'Square' extension, specifically the 'Subscription' settings. The 'Store View' is set to 'Default Config'. The 'Enable' setting is set to 'Yes'. The 'Important Message' field contains the text: 'In order to use Square subscription, please make sure "Card on File" on "Square Payment Solution" is allow on Sales > Payment Methods section'. The 'Subscription only' setting is set to 'No'. The 'Subscription plans' list includes 'Two week plan', 'Daily plan', 'Once Per Year', and 'Free Trial Test'.

From the same location, several email notifications can be configured:

Email Notifications

Email sender <small>[store view]</small>	General Contact	▼
Notify new subscriptions <small>[store view]</small>	Yes	▼
Email template for new subscriptions <small>[store view]</small>	Email template for new subscriptions (Default)	▼
Notify trial period end <small>[store view]</small>	Yes	▼
Email template for trial period end <small>[store view]</small>	Email template for trial period end (Default)	▼
Notify subscription end <small>[store view]</small>	Yes	▼
Email template for subscription end <small>[store view]</small>	Email template for subscription end (Default)	▼
Notify subscription cancellation <small>[store view]</small>	Yes	▼
Email template for subscription cancellation <small>[store view]</small>	Email template for subscription cancellation (Default)	▼

6.10.6 Attach Subscription Plans to Products

From the Product Edit section in admin, you can:

- Enable subscription per product
- Define if normal purchase for the current product is available or not
- Set specific plans for a product or combined with global settings

Edit product fields

Enable Subscription
[store view]



Yes

Subscription only
[store view]



No

Subscription plans
[store view]

A dropdown menu with a white background and a grey border. It contains five options: 'Use Default Config', 'Two week plan', 'Monthly plan', 'Annual plan', and 'Daily plan'. The 'Two week plan' option is highlighted with a grey background.

Use Default Config
Two week plan
Monthly plan
Annual plan
Daily plan

6.10.7 Frontend Journey

If a product has a subscription plan associated, the customer will be able to select it while in the PDP (in case the product is purchasable only via a subscription, they will not be able to choose “Purchase only once”):

Coffee

Be the first to review this product

\$4.00

IN STOCK
SKU#: coffee

- Purchase Only Once
- Subscribe to this product

Qty

1

Add to Cart

Product Simple

Be the first to review this product

\$8.00

IN STOCK
SKU#: Product Simple

Regular
Price
\$10.00

- Purchase Only Once
- Subscribe to this product

Billing Frequency Cycles & Delivery:

- Every Two Weeks
- Daily
- Once Per Year
- Once Every 30 Days

Description: Receive your product every week

Initial Fee (excl. tax): \$7.00

Discount (excl. tax): \$0.40 per billing cycle



Discounted Cycles: 2

Total Periods: N/A (until failed or canceled)

Qty


1

Once the subscription is selected and the product added to cart, the billing cycle and the financial details are visible in both the minicart and the cart:

Search entire store here...  

1 Item in Cart Cart Subtotal :
\$4.40

[Proceed to Checkout](#)

 **Coffee**
See Details ^

Billing Cycle & Delivery:
Once Per Month


Numbers of Trials Days: 5

Initial Fee (excl. tax):

[View and Edit Cart](#)

Subscribe to this product

Shopping Cart

Item	Price	Qty
 Coffee Billing Cycle & Delivery: Once Per Month Numbers of Trials Days: 5 Initial Fee (excl. tax): \$0.40 Total Periods: 15	\$4.40	1

On the checkout, the customer will have to provide a credit card that will be stored:

Pay with a Credit Card

Card Number:


CVV:

Expiration Date:

Postal Code:

Save this credit card for future payments

The details of the subscription will be readable in the order summary as well:



Coffee
Qty: 1
\$4.40

[View Details ^](#)

Billing Cycle & Delivery:
Once Per Month

Numbers of Trials Days:
5

Initial Fee (excl. tax):
\$0.40

Total Periods: 15

Once the order is placed, the customer can view their subscriptions by going to their Account and selecting “My Subscriptions”:

Order #	Name	Frequency	Total Periods	Status	Action
000000363	Daily plan	Daily	30	ACTIVE	View Subscription

From this view they can check the details of their subscription by clicking on the “View Subscription” button:

Subscription ACTIVE

October 27, 2020

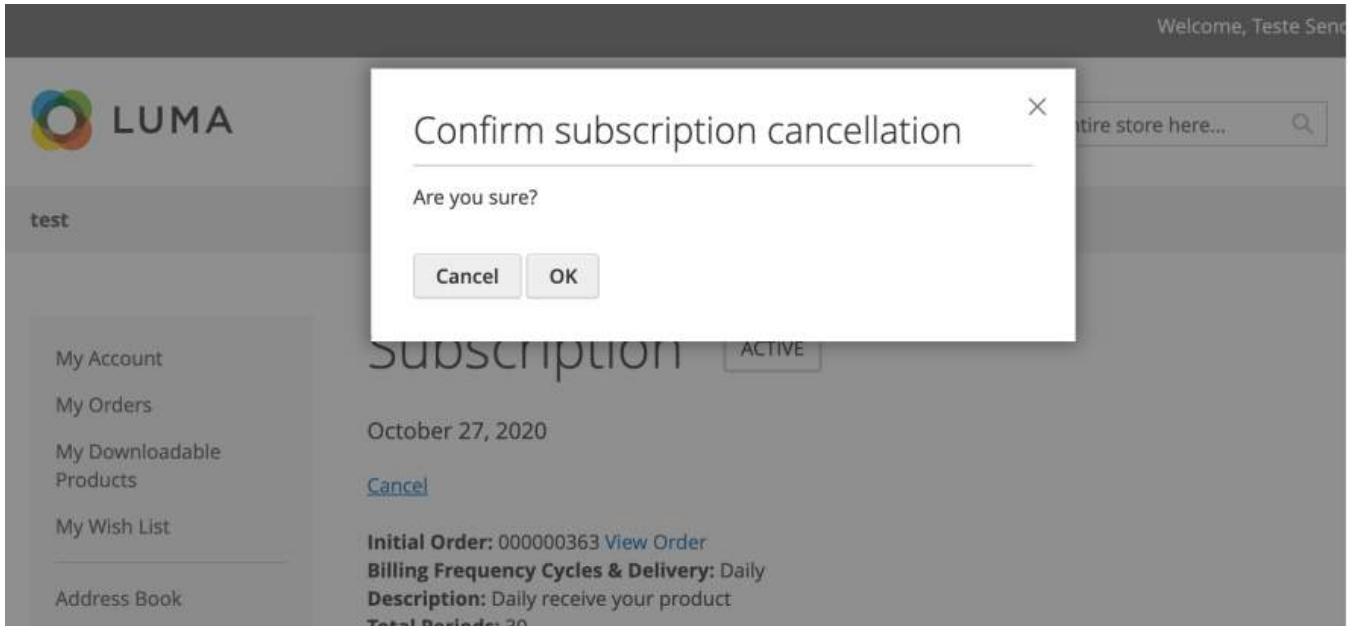
[Cancel](#)

Initial Order: 000000363 [View Order](#)
Billing Frequency Cycles & Delivery: Daily
Description: Daily receive your product
Total Periods: 30
Product: Spider Man Tom
Subscription ID: 33

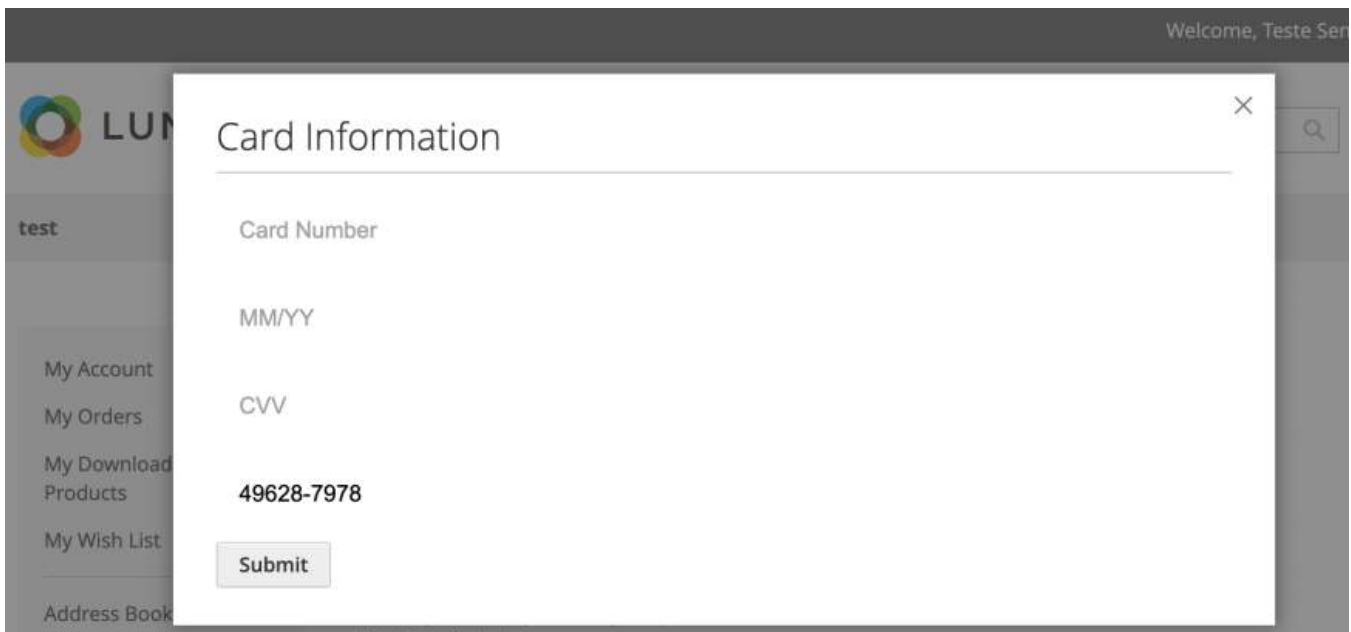
Payment

Credit Card: **** * 1111 [Change](#)

From this view, a customer is able to cancel their subscription:



From the same subscription details view, a customer is able to change the credit card:



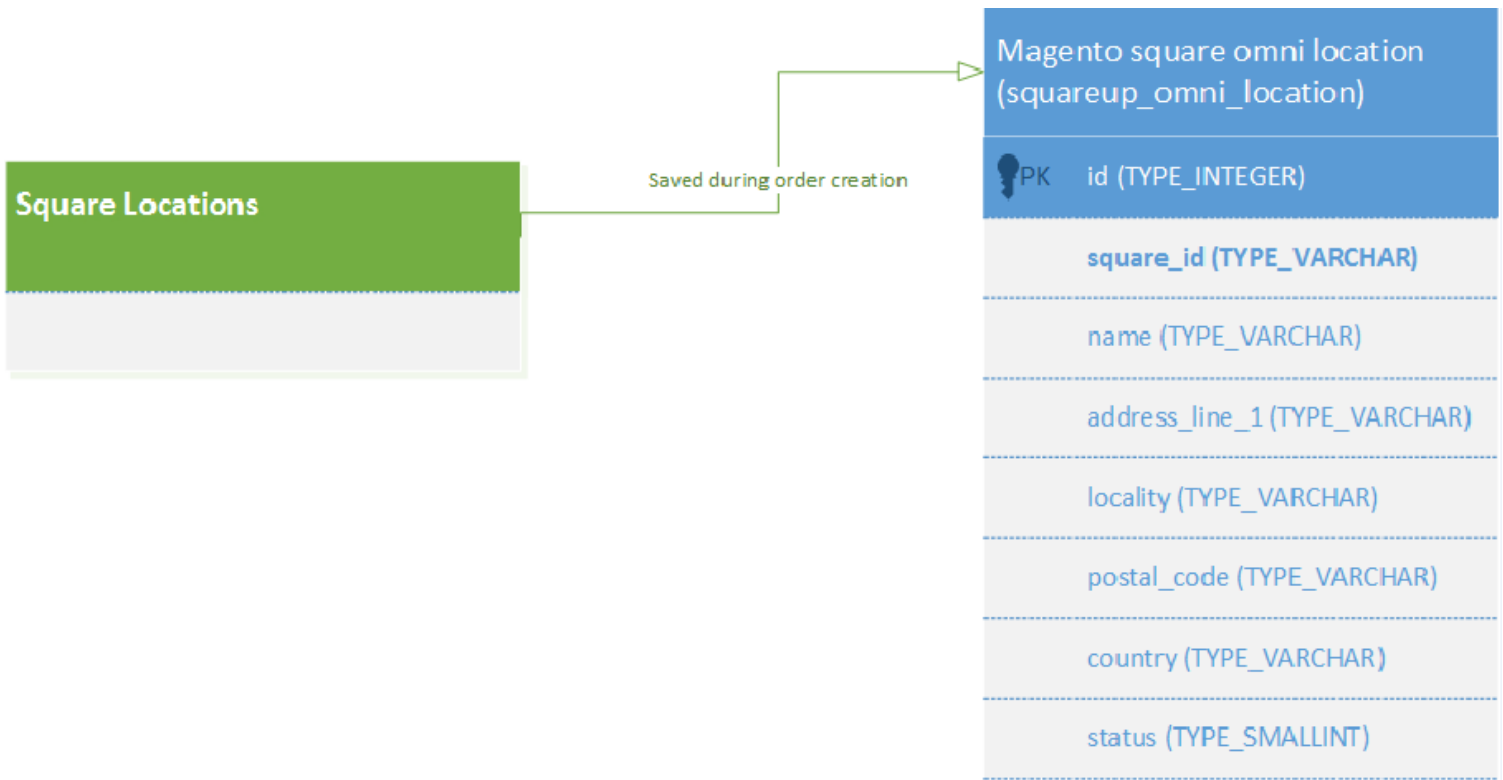
In the Invoices section of their account, Customers can see generated Square invoices and related Magento orders.

- If an invoice is paid it is possible to visualize its receipt on Square
- If an invoice is not paid for some reason (e.g.: failed credit card charge) it is possible to use "Pay" action to pay it on Square

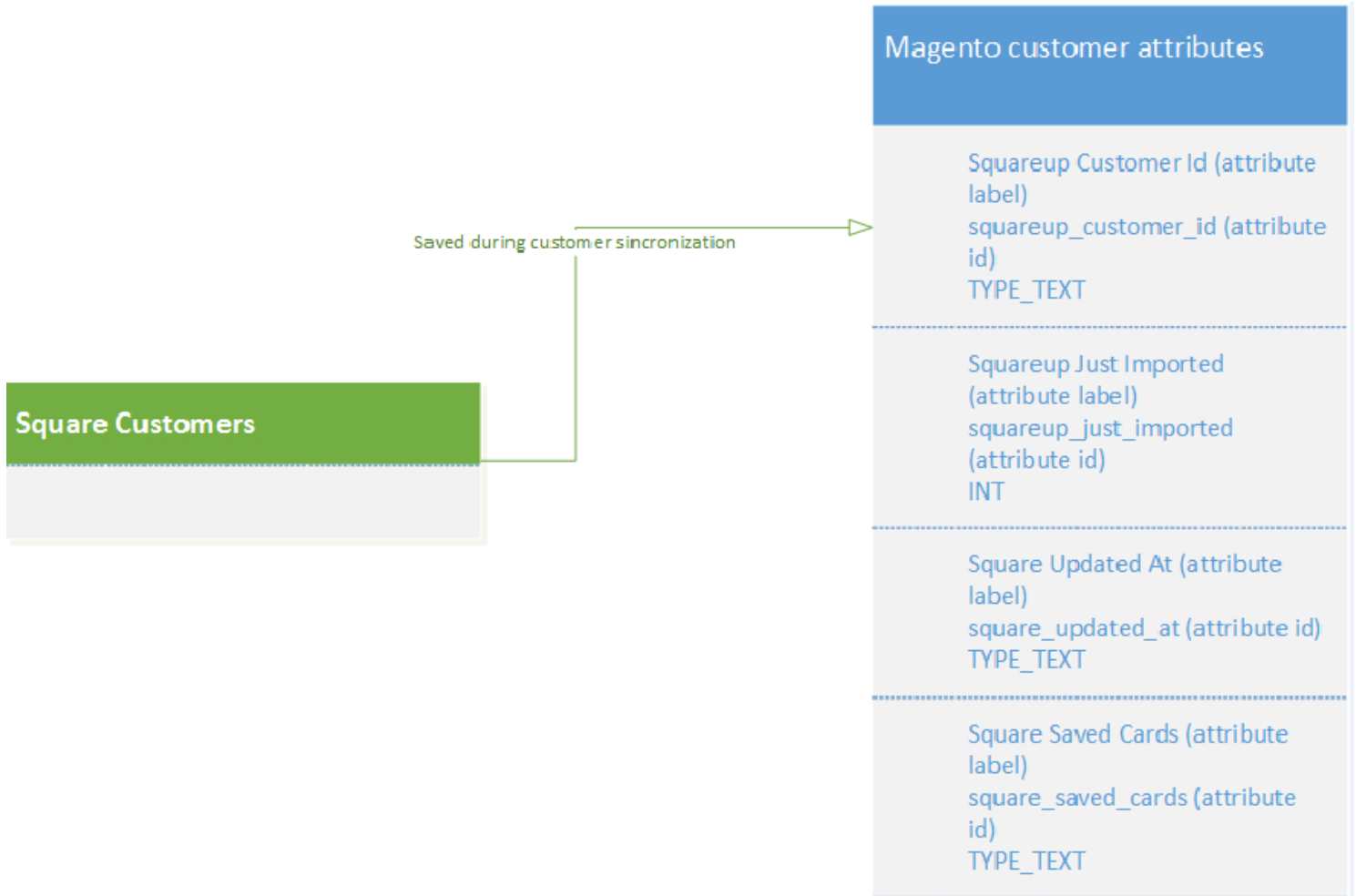
My Product Reviews	Invoices					
Newsletter Subscriptions	Order #	Invoice date	Bill-to Name	Status	Amount(US)	Action
My Subscriptions	000000343	Oct 9, 2020	Ébano Lopes	PAID	\$61.00	View Order View Receipt
Compare Products	000000344	Oct 16, 2020	Ébano Lopes	UNPAID	\$61.00	View Order Pay

Appendix-1 Entities mapping between Magento and Square

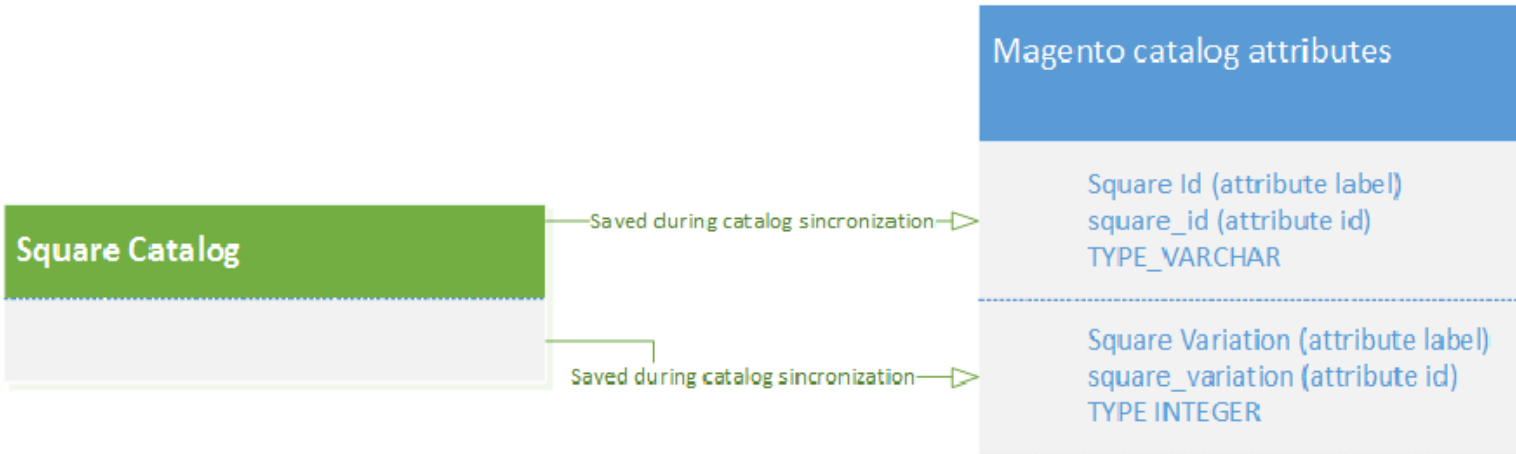
A-1.1 Square Locations



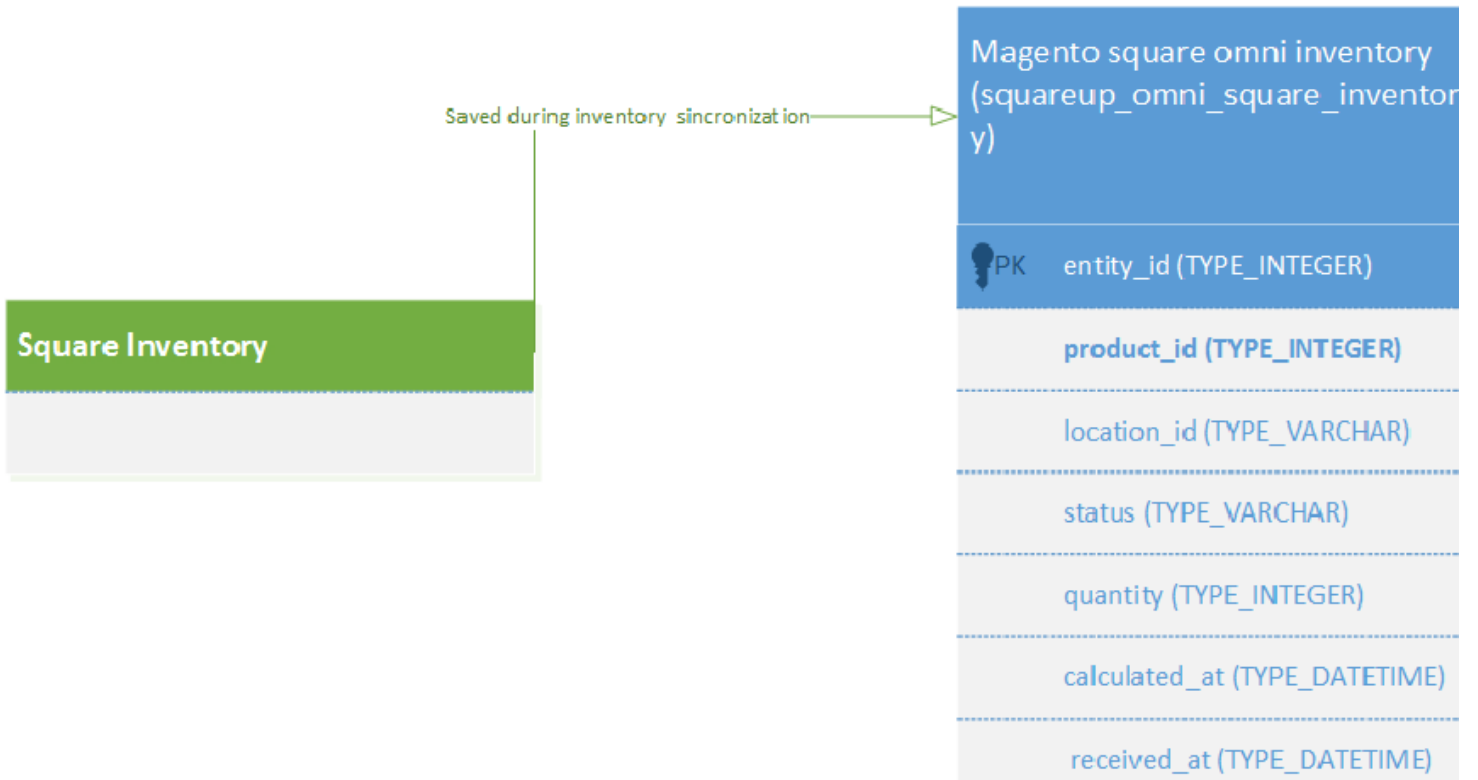
A-1.2 Square Customers



A-1.3 Square Catalog



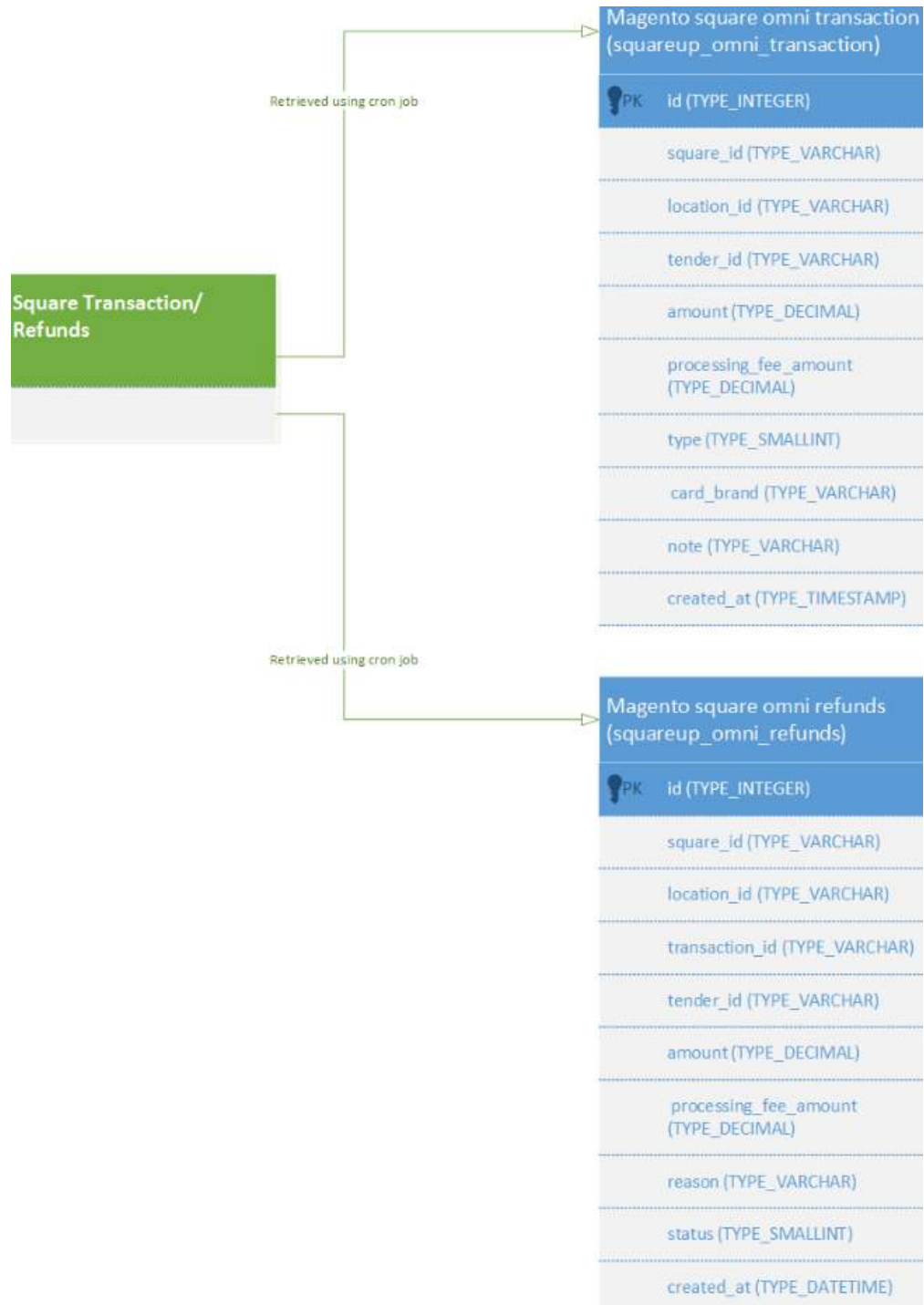
A-1.4 Square Inventory



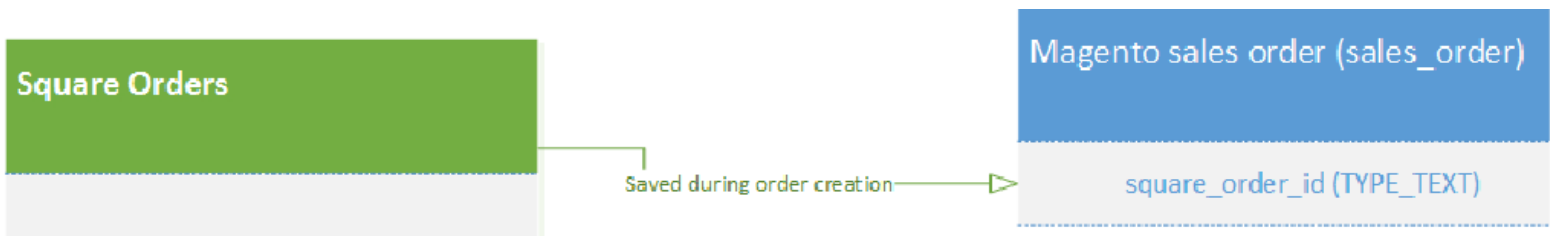
A-1.5 Square Payment Transaction



A-1.6 Square Transactions/Refunds



A-1.7 Square Orders



Appendix-2 Crons schedule

Job Name	Action	Frequency
customer_export	Exports all customers from Magento to Square	Twice each hour, at minutes 5 and 35
customer_import	Brings customers from Square to Magento and performs actions on them: update/create/delete	Twice each hour, at minutes 10 and 40
location_import	Imports all locations from Square to Magento	Once per hour, at minute 0
oauth_refresh	Prevents token expiration	Once per day, at 4 am
square_transactions_import	Imports transactions from Square to Magento	Twice each hour, at minutes 25 and 55
square_refunds_import	Imports refunds from Square to Magento	Twice each hour, at minutes 25 and 55
catalog_process	Synchronizes the products, in accordance with the system of records	Twice each hour, at minutes 15 and 45
inventory_process	Synchronizes the inventory of each product, in accordance with the system of records	Twice each hour, at minutes 20 and 50