SalesPad Mobile Square Credit Card Reader Integration

Cavallo Support - 2024-11-22 - Sales Documents

Overview

As of version 1.4.0, SalesPad Mobile supports taking sales document payments using Square credit card readers. Users can insert, tap, or swipe a credit card to create an authorization or charge for a sales order or invoice. Users can also capture, void, and credit Square transactions.

SalesPad Mobile supports both of Square's credit card readers. Square's older reader connects via USB/lightning port and only supports swiping cards, while the newer model connects via Bluetooth and supports card tap and chip insert. For more information on Square's credit card readers, review their product pages:

- Square Reader for magstripe
- Square Reader for contactless and chip (2nd generation)

Licensing

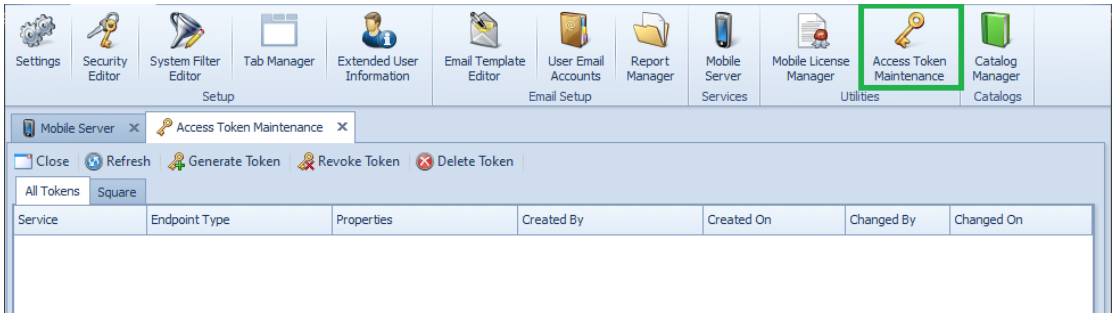
Square payment processing is licensed separately and is not automatically available for SalesPad Mobile users. If you are already licensed for Square in SalesPad, then you can simply ask your account executive to also enable the Mobile Square license. If you purchase a Square license and you already have SalesPad Mobile, then you simply need to inform your account executive whether you will be using Square with SalesPad and/or Mobile so that you are provided the appropriate licenses. There is no additional charge to use Square payment processing with both applications.

Unlike other SalesPad Mobile licenses, Square is a site license, so one Square license will provide access to Square payment functionality for all users. The Mobile License Manager will not show the Square license, as administrators will manage access to Square payment functionality within the Security Editor.

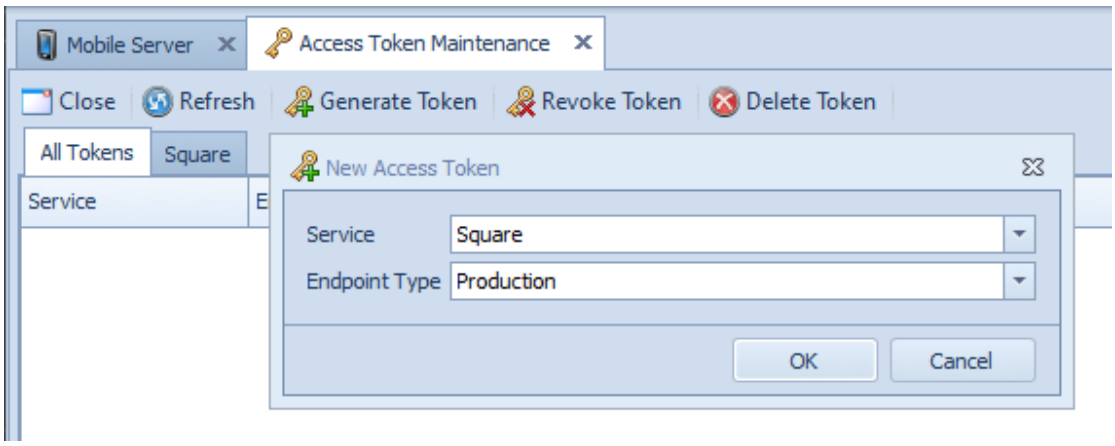
Setup

Access Token Maintenance

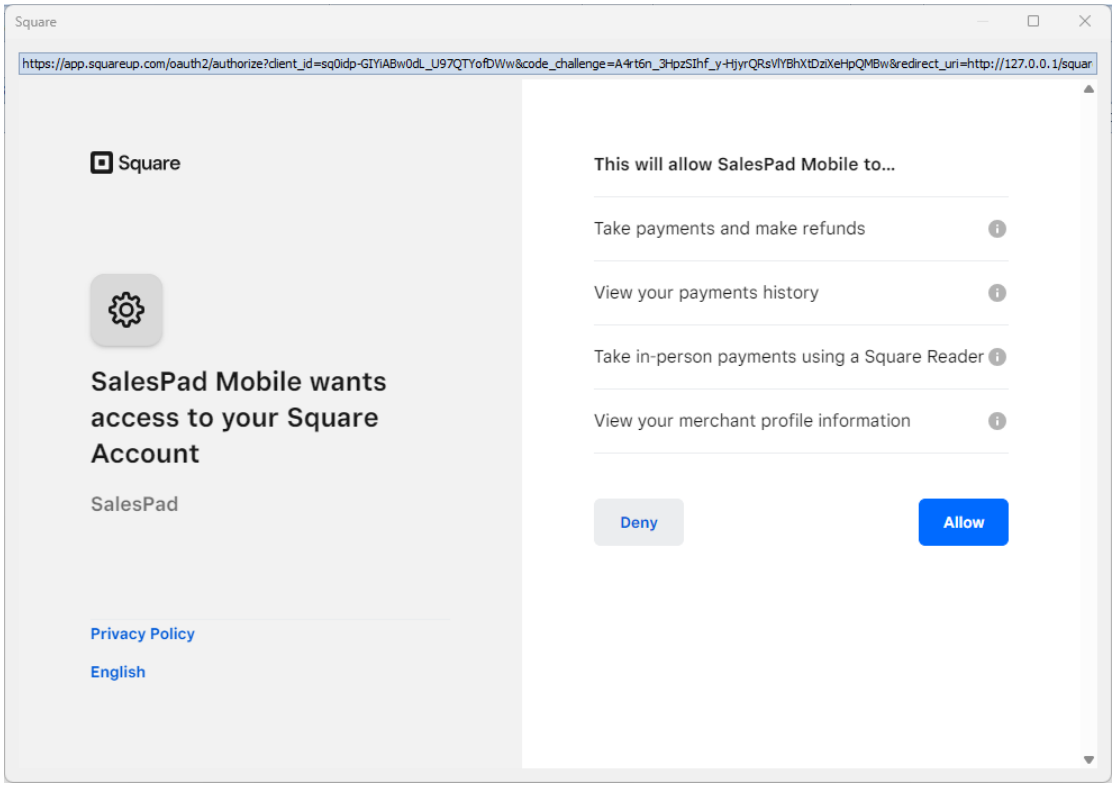
Square requires an access token to establish a connection between SalesPad Mobile and a Square account. The SalesPad Mobile Server has an Access Token Maintenance screen for creating and managing this access token. Users who have access to Access Token Maintenance can launch it from the main ribbon.



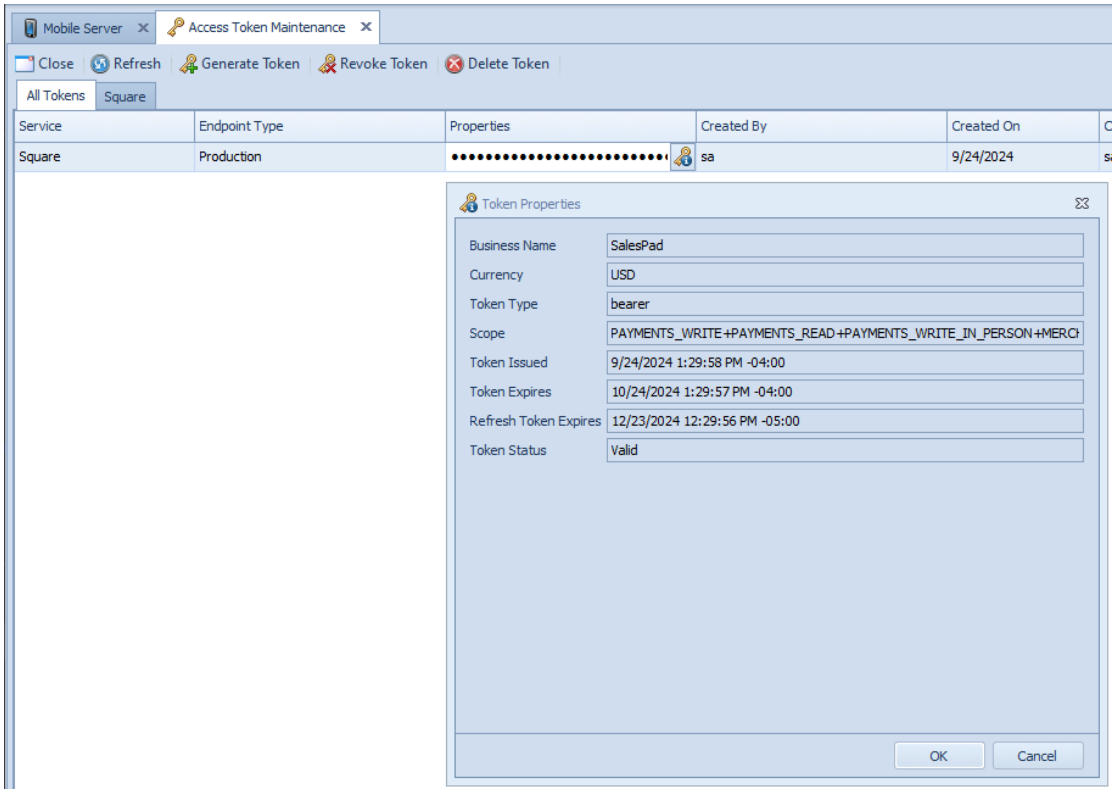
To generate an access token for Square, click the Generate Token button and select Square from the Service dropdown. This button will only be available if the sub-security Can Generate Tokens is set to True.



After clicking OK, the server will show a Square login page in an embedded web browser. Sign in with the Square production account that will be used for payment processing. After logging in, Square will ask whether SalesPad Mobile should be allowed to access the account.



Click Allow and the server will close the web browser and display a message that it “Successfully generated an access token”. Dismiss the prompt and a new row will appear in the grid for the new access token. Select the Properties cell in the row and click the key button to review more information about the access token.

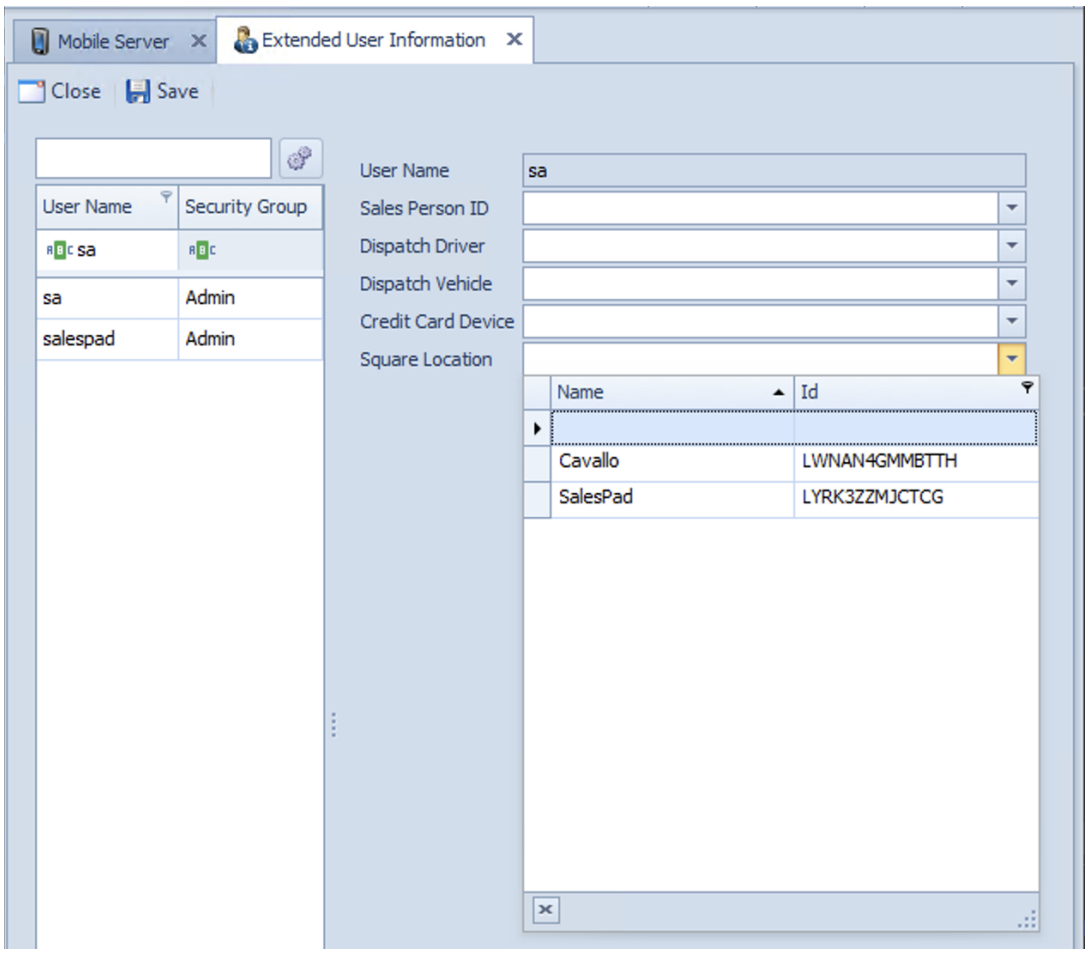


Square Location Selection

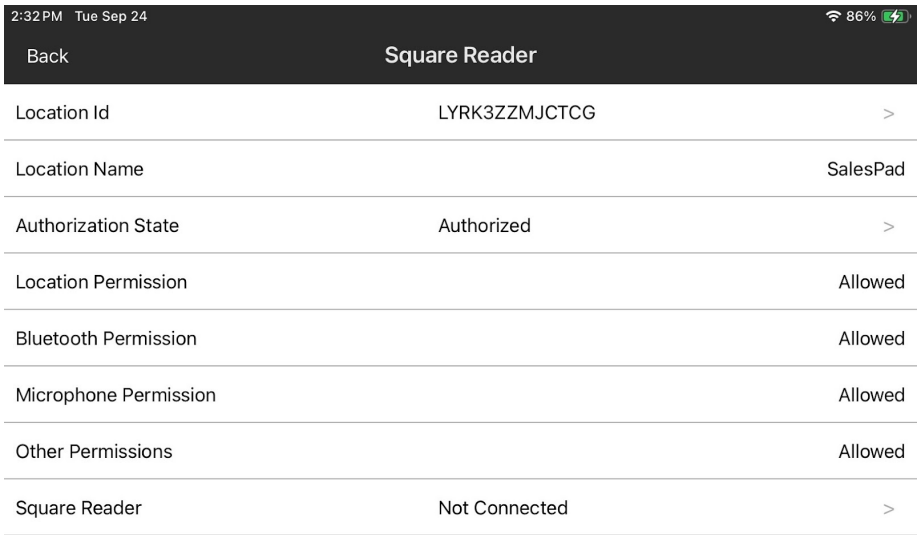
Every Square account has at least one location, and more locations can be added as needed. Square readers must know which location to use for payments. SalesPad Mobile offers three ways to set up locations: one global default setting and two ways to set up user-specific locations.

1. SalesPad Mobile Server has a Default Square Location setting. All users which are not assigned to a user-specific location will use this default location.

2. The Extended User Information screen in SalesPad Mobile Server has a Square Location field. Administrators can assign a location to each user by selecting the user in the left grid and then selecting their Square Location from the dropdown menu.



1. The mobile app has a Square Reader Settings screen which can be accessed in Accessories by selecting Square Reader. Users can tap the Location Id field to view a list of locations. If the user selects a location, the app will save that location to the Square Location field in that user's Extended User Information. This option allows mobile users to manage their Square locations directly instead of requiring an administrator to configure them in the server, which makes it easy to change the location on-the-fly. For more details about Square Reader Settings, review that section of the documentation.



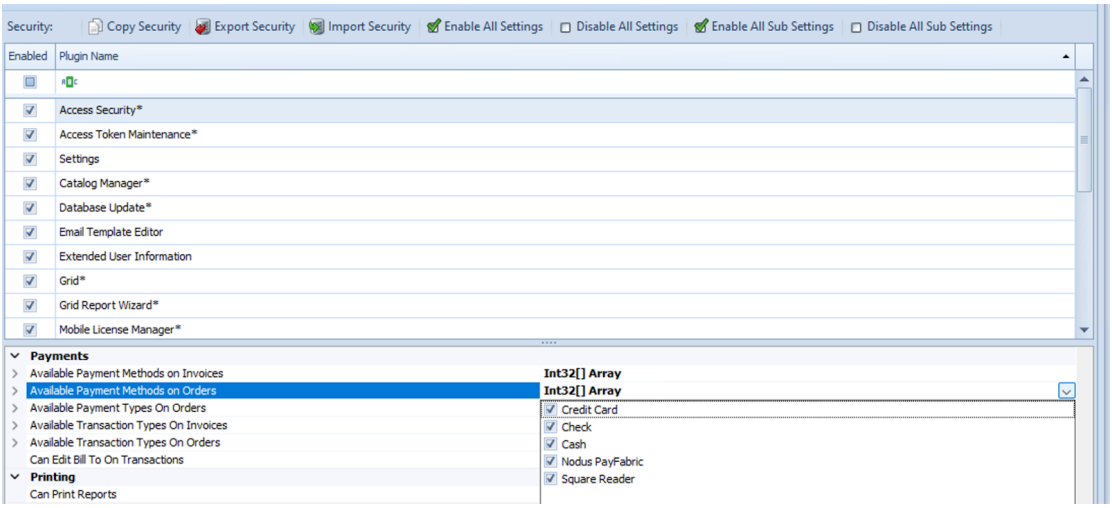
Securities

Access Security

For the following two security settings, Square Reader is now an option and must be selected in order to allow users to take payments with a Square reader:

Available Payment Methods On Invoices - The payment methods which a user can choose from when entering a new transaction for a sales invoice. If only one payment method is available for a user, the app will automatically use that payment method. Defaults to credit card, check, and cash.

Available Payment Methods On Orders - The payment methods which a user can choose from when entering a new transaction for a sales order. If only one payment method is available for a user, the app will automatically use that payment method. Defaults to credit card, check, and cash.



Available Payment Types On Orders - The payment types which a user can choose from when entering a new non-authorization transaction for a sales order or when capturing an authorization. If only one payment type is available for a user, the app will automatically use that payment type. Defaults to payment and deposit.

Available Transaction Types On Invoices - The transaction types which a user can choose from for sales invoices. When entering a new Square transaction, the options are authorization and charge. When selecting an existing Square authorization, the options are capture and void. When selecting an existing Square capture or charge, the options can be credit and reattempt save to GP. Defaults to authorization, capture, charge, void, and credit.

Available Transaction Types On Orders - The transaction types which a user can choose from for sales orders. When entering a new Square transaction, the options are authorization and charge. When selecting an existing Square authorization, the options are capture and void. When selecting an existing Square capture or charge, the options can be credit and reattempt save to GP. Defaults to authorization, capture, charge, void, and credit.

Access Token Maintenance

Can Delete Tokens - If set to 'True', users can delete access tokens. NOTE: This action will not revoke tokens from the service. Defaults to 'False'.

Can Generate Tokens - If set to 'True', users can generate new access tokens. Defaults to 'False'.

Can Revoke Tokens - If set to 'True', users can revoke access tokens. Defaults to 'False'.

Can View Token Properties - If set to 'True', users can revoke access tokens. Defaults to 'False'.

Settings

SalesPad Mobile Server - Square category

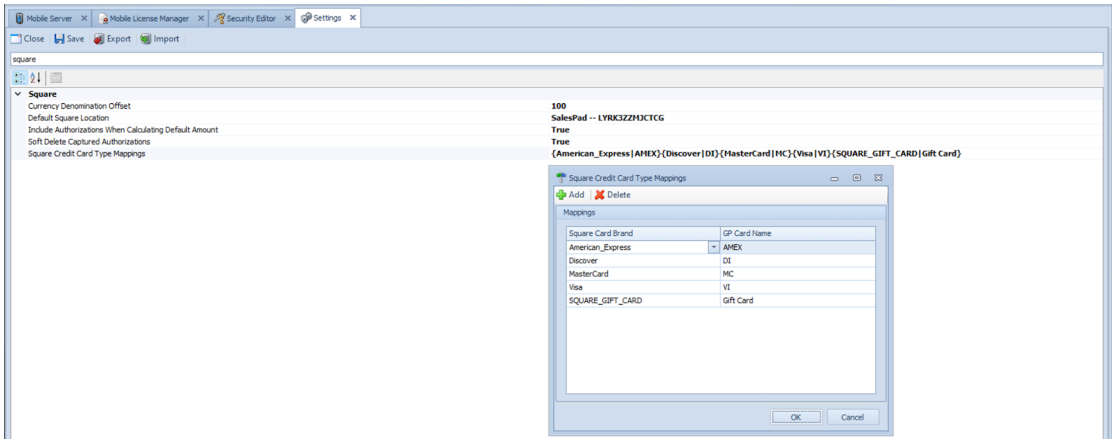
Currency Denomination Offset - The difference between your Square currency's normal denomination (e.g. dollars) and its smallest denomination (e.g. cents). For United States Dollars and many other currencies, this would be 100. Defaults to '100'.

Default Square Location - The default location to use for Square payments. If a user has a Square location assigned via Extended User Information or Square Reader Settings, the app will use that location instead of this setting's location. Defaults to nothing.

Include Authorizations When Calculating Default Amount - If set to 'True', the app will include existing authorizations when calculating the default amount for new Square transactions. Note that this setting works exactly the same as the SalesPad setting of the same name, meaning that it will include authorizations on related sales documents which SalesPad would show whereas SalesPad Mobile only shows transactions which belong to the current sales document. Defaults to 'True'.

Soft Delete Captured Authorizations - If set to 'True', captured authorizations will stay in the database and be hidden from payment lists. This setting's value should generally match SalesPad's Enable Multiple Capture setting. Defaults to 'False'.

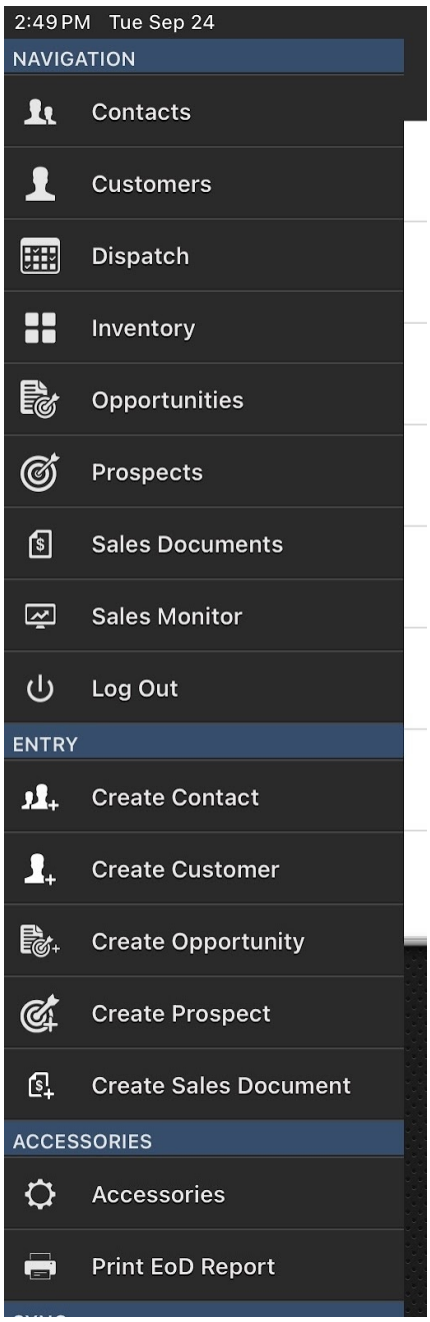
Square Credit Card Type Mappings - Mapping of Credit Card Types to Dynamics GP. This setting must be filled out correctly or else captures and charges will fail to save to Dynamics GP due to lacking a valid credit card type. Unlike other Credit Card Type Mappings settings, this setting has an '…' button which provides an editor which can help with setting up this setting. Defaults to all Square credit card types mapped to sample Dynamics GP credit card types, which might not correspond to Dynamics GP credit card types in your system.



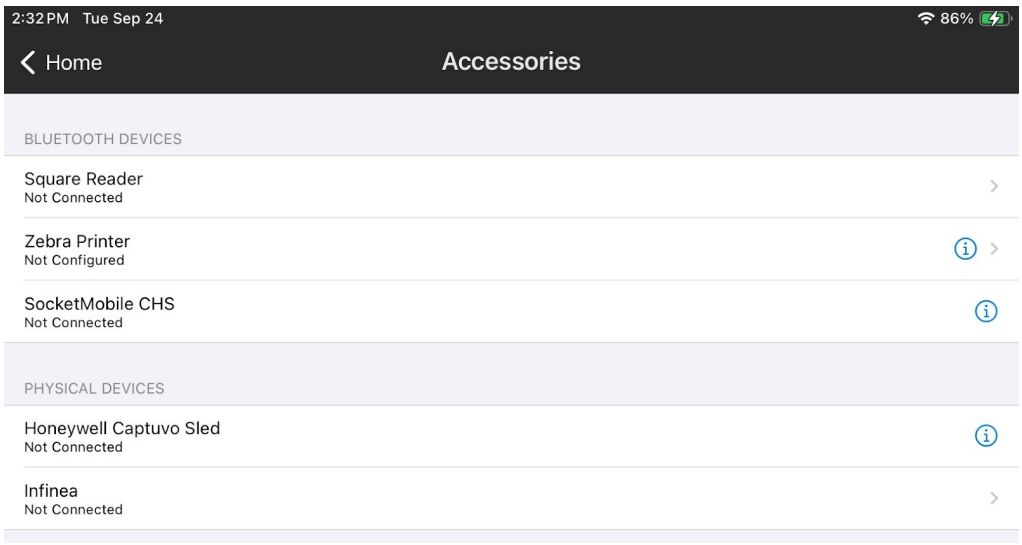
SalesPad Mobile iOS and Android - Square Reader Settings

SalesPad Mobile has a screen within the mobile iOS and Android apps for pairing with Square readers, updating the current user's Square location, and viewing the current status of the Square integration. This screen must be used to pair with a Square reader which uses Bluetooth, but it is optional for users who only use a Square reader for magstripe.

To navigate to the Square Reader Settings screen, open the slide menu and select Accessories within the Accessories section.

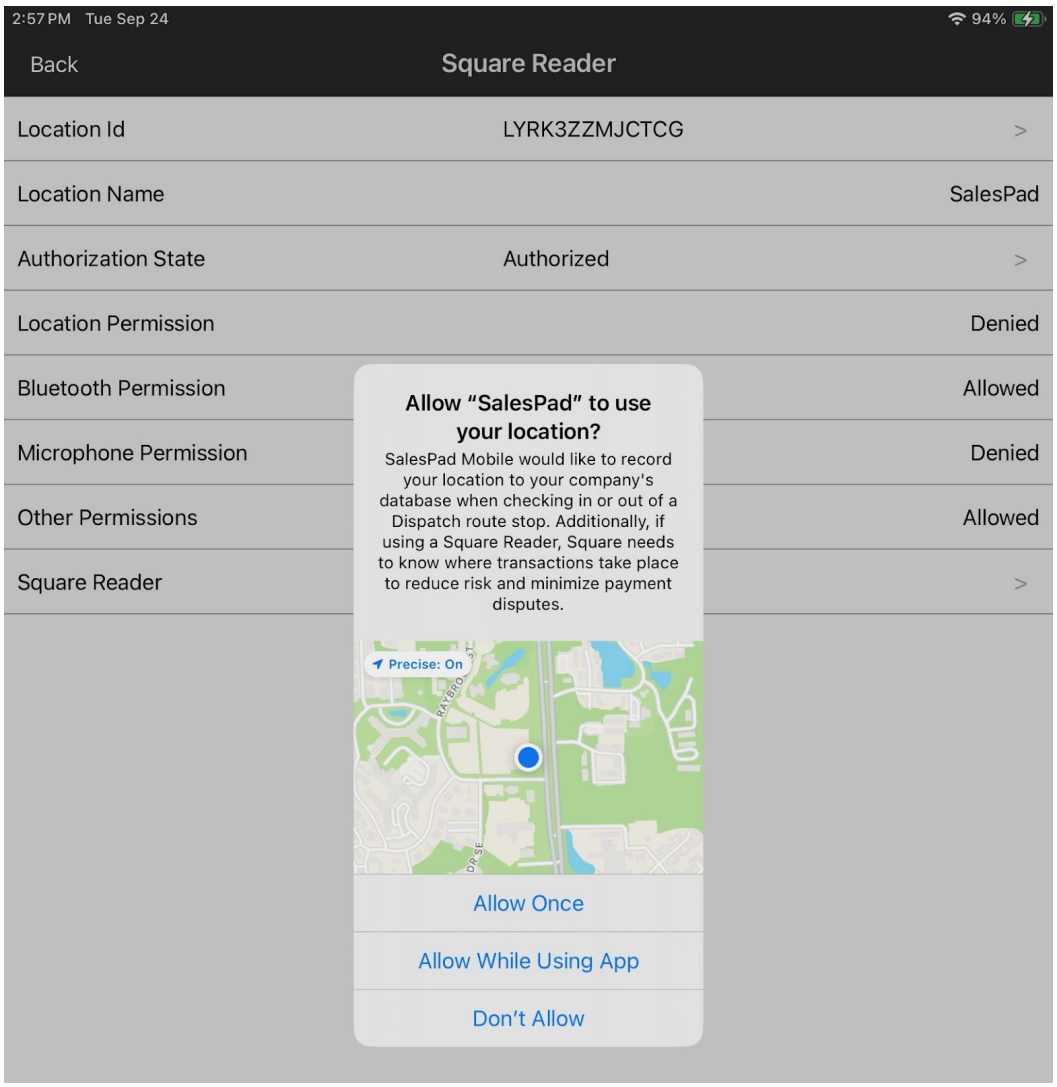


After opening the Accessories screen, select Square Reader.



When first opening the screen, SalesPad Mobile will ask for various permissions which Square readers can use:

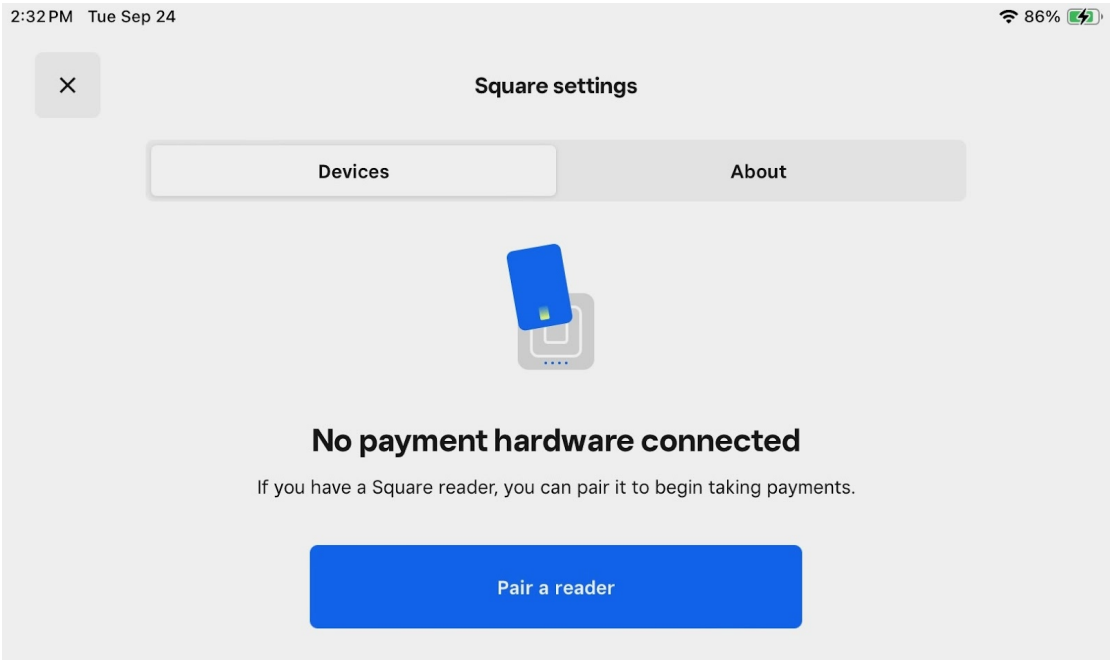
- Square requires location permissions because Square needs to know where transactions take place in order to reduce risk and minimize payment disputes.
- When using a Square reader which uses Bluetooth, SalesPad Mobile needs Bluetooth permissions (also known as nearby devices permission) in order to connect to and communicate with nearby Square readers.
- When using a Square reader for magstripe, SalesPad Mobile needs microphone permissions (also known as record audio permission) in order to communicate with the attached Square reader.
- SalesPad Mobile Android also asks for permission to “make and manage phone calls”, which Square uses to identify with which device it is communicating.



Square Reader Settings displays whether each of these permissions is allowed or denied. Apple and Google both discourage repeatedly asking for denied permissions, so if you deny a permission and later want to allow it, you must enable it within your mobile device's Settings app. Another option is to uninstall the SalesPad Mobile app, reinstall it, and navigate back to Square Reader Settings.

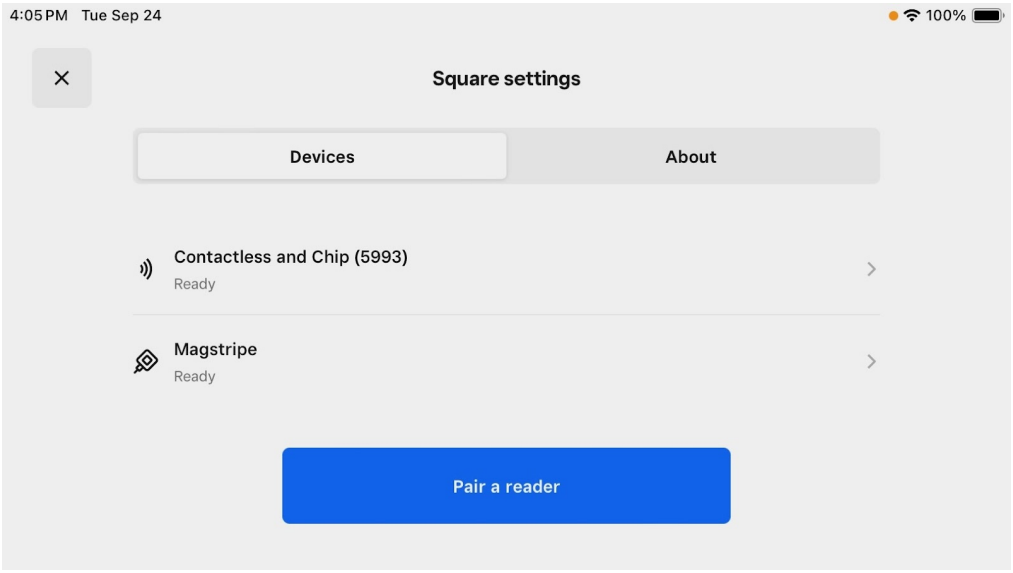
This screen also allows users to change to which Square location they are connected. If the Location Id and Location Name cells are empty, a location must be selected before using a Square reader.

The most important part of this screen is the Square Reader field at the bottom. Tapping on this field will open a Square Settings screen which allows users to pair with a Square reader, view information on connected Square readers, and view some basic Square account information.



Tap the “Pair a reader” button and follow the instructions to pair with a Square reader which uses Bluetooth. Note that pairing with a device will not always work on the first attempt, especially on Android devices. If the Square reader fails to connect after a few attempts, we recommend resetting the reader as described in this Square documentation.

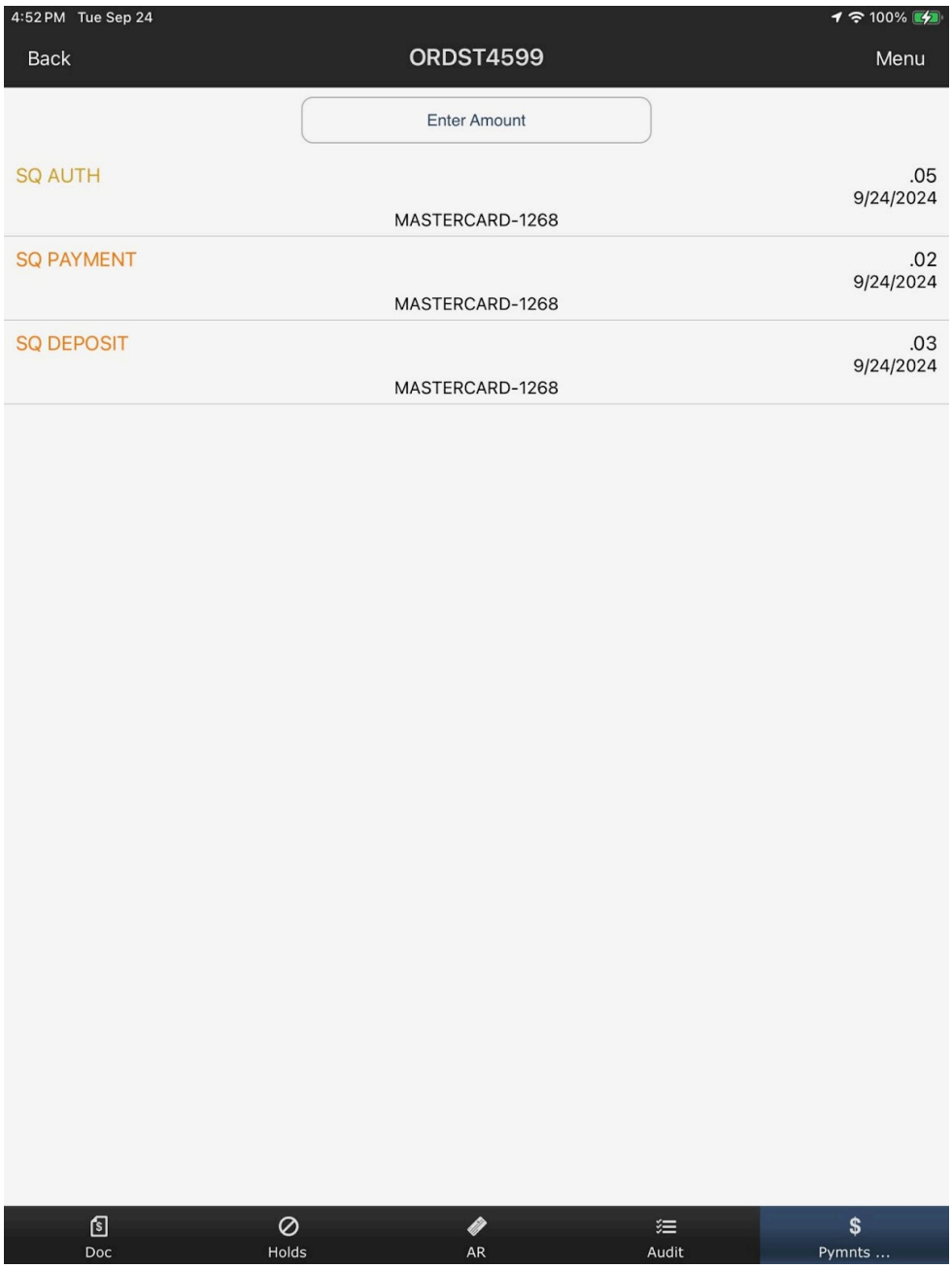
The Devices tab will show paired Bluetooth readers as well as connected magstripe readers. Tapping on a reader will display some information about the reader, such as its serial number.



Usage

Sales orders and invoices have a Payments tab. Most Square functionality lives in this tab. Users can see the sales document’s current transactions, enter new transactions, and capture, void, and credit current transactions.

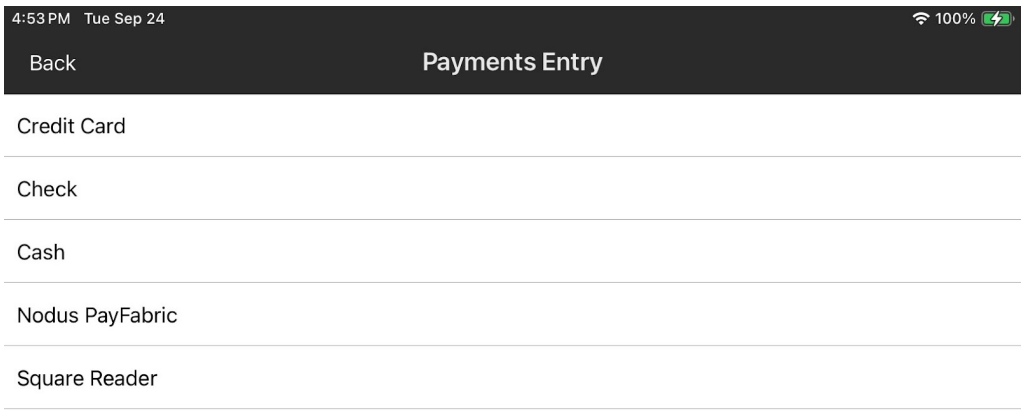
The Payments tab shows a list of transactions which belong to the current sales document. Square transaction cells show the transaction type at the top left, the amount at the top right, the payment date at the center right, and the card type and last 4 digits at the bottom. Square transaction types all start with “SQ”.



Enter an Authorization or Charge

On the Payments tab, click the Enter Amount button to begin payment entry. Payments Entry will ask to select a payment method, a transaction type, and a payment type as applicable. If a user only has access to one option for one of those pages, the app will automatically select that option and skip the page.

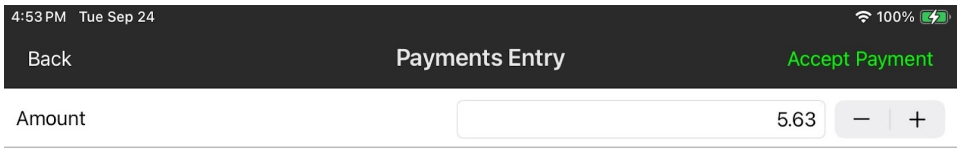
The first page asks which payment method to use. Select Square Reader to enter a transaction using a Square reader. This page is skipped if the only possible payment method is Square Reader.



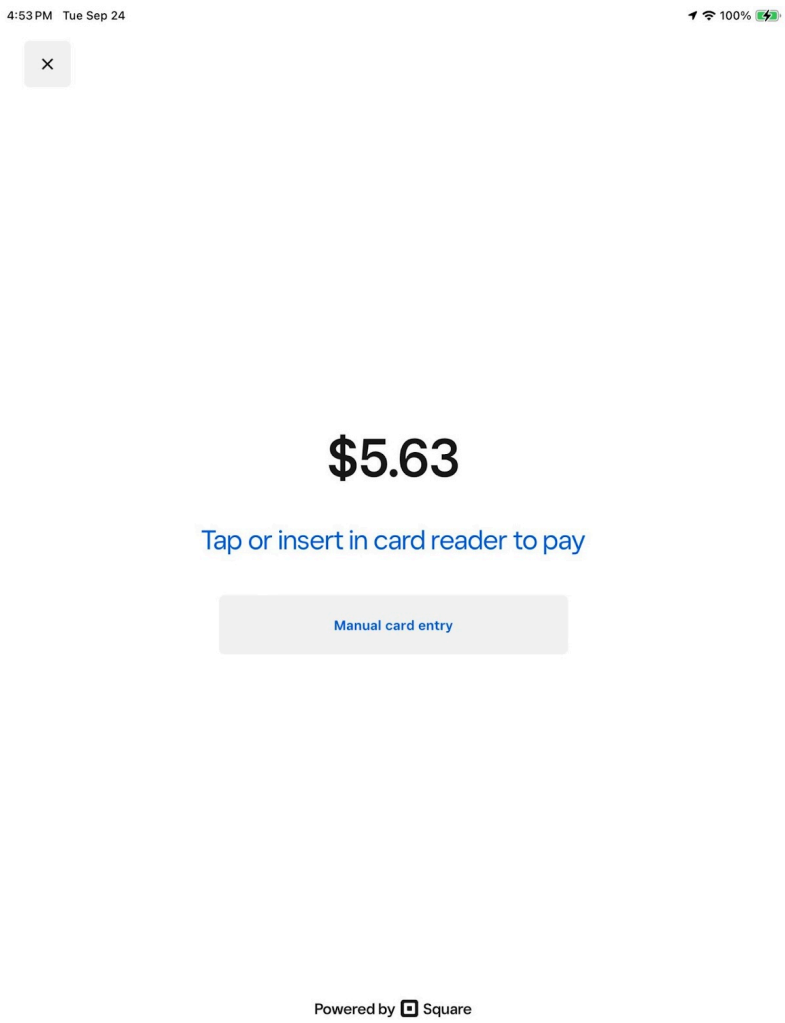
The second page asks which transaction type to use. For Square readers, the options are Authorization and Charge. This page is skipped if there is only one allowed transaction type.

The third page asks which payment type to use. For charges on sales orders, the options are Payment and Deposit. Payment types are not applicable for authorizations or sales invoices. This page is skipped if there is only one allowed payment type.

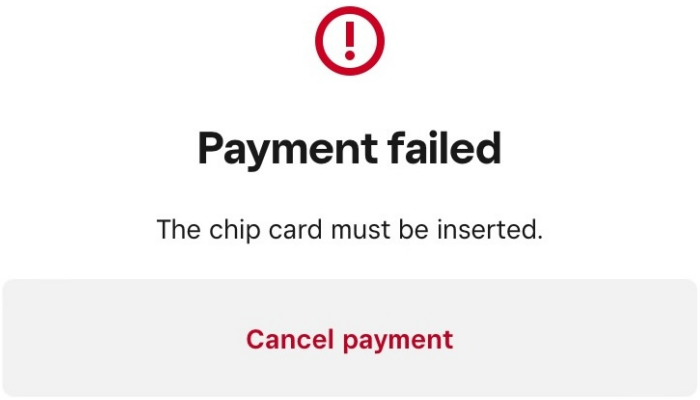
Afterwards, Payments Entry will ask for the payment amount. The Amount field defaults to the sales document's remaining amount, which can include Square authorizations if the Include Authorizations When Calculating Default Amount setting is set to True. Once the amount is set, tap the Accept Payment or ">" button at the top right of the screen.



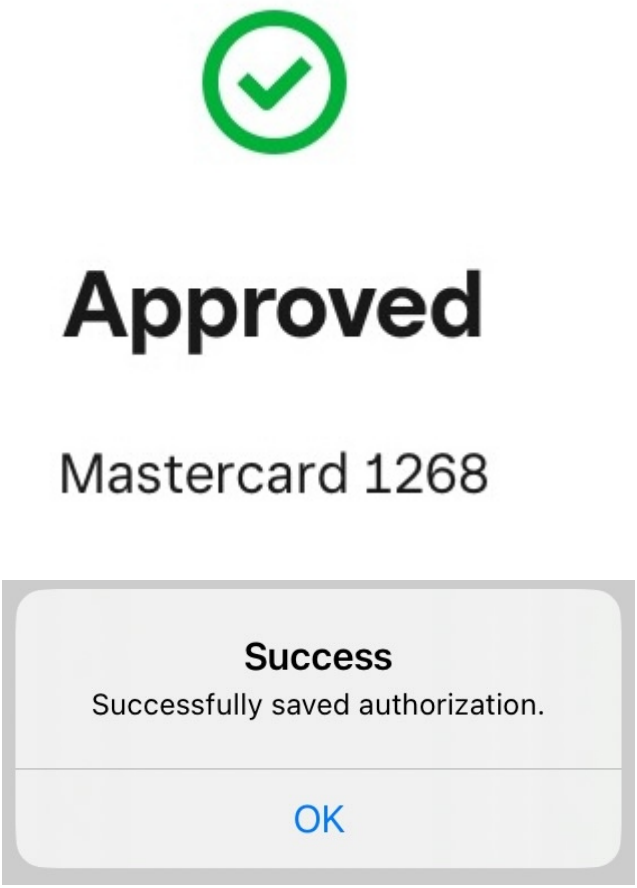
SalesPad Mobile will then show Square's screen for processing the payment. Follow the instructions on the screen to complete the transaction.



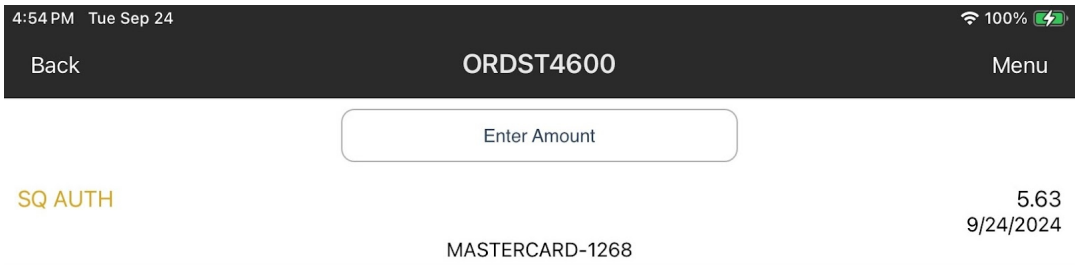
Any payment errors will result in a displayed error message. It may be necessary to click the “Cancel payment” button to abort payment processing. After cancelling the payment, the amount entry page will be displayed again, and another error message with additional information may be displayed. For example, if the phone or tablet is connected to both a swipe reader and a chip reader, trying to swipe a chip card will fail.



If the payment succeeds, two messages will report success. The green checkmark indicates that Square successfully processed the transaction, while the “Successfully saved” prompt indicates that SalesPad Mobile saved the transaction details to the database and applied it to the sales document.

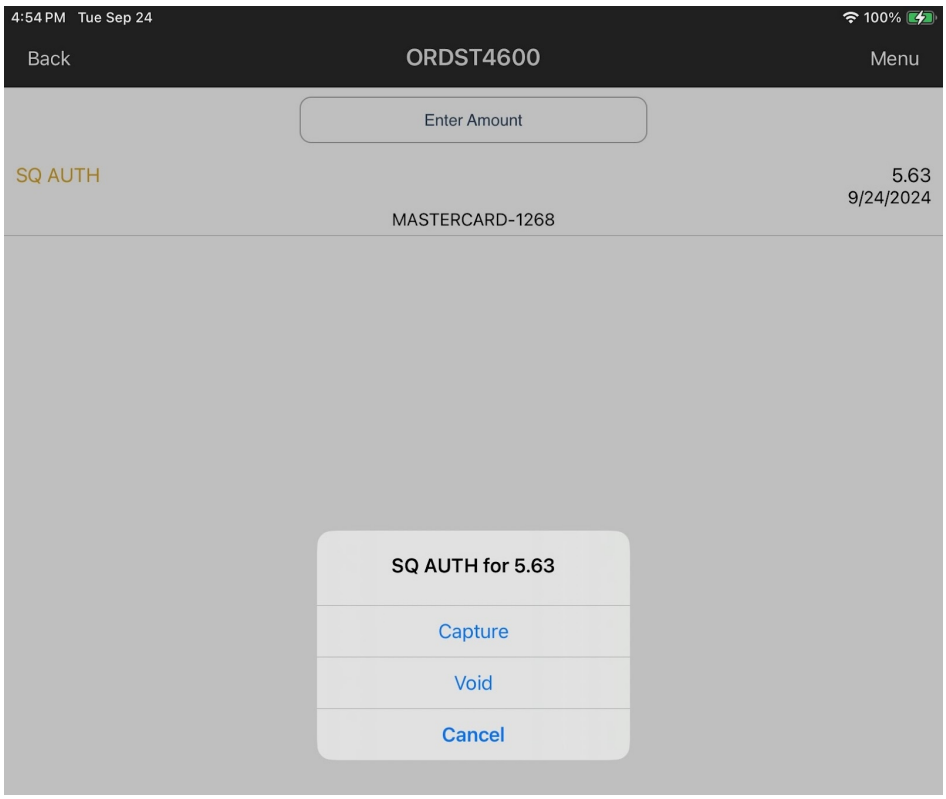


After creating a payment, it will appear on the Payments tab.

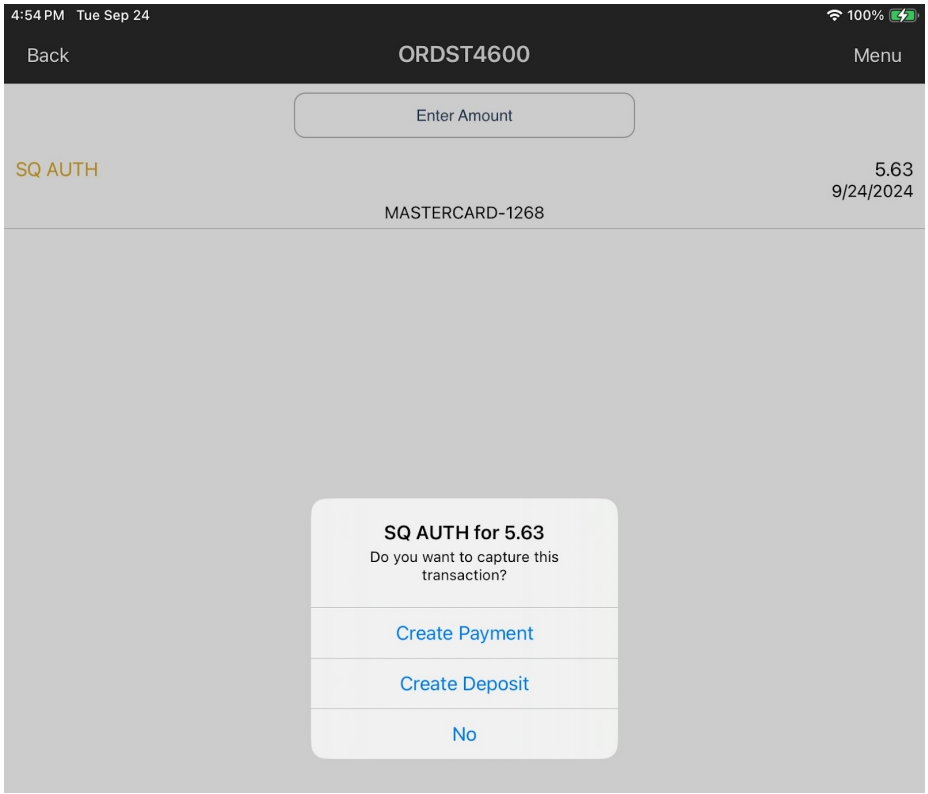


Capture an Authorization

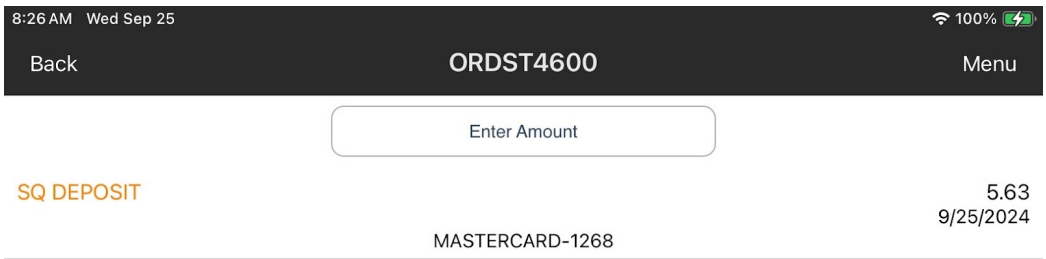
To capture an authorization, tap on an authorization in the Payments tab. When asked whether to capture or void the transaction, choose Capture. If the user only has access to one of those two actions, the app will skip this prompt and will only show the confirmation prompt.



The app will ask to confirm whether the authorization should be captured. If the sales document is an order, and the user is allowed to create either payments or deposits, the app will also ask whether to create a payment or a deposit as part of the confirmation prompt.

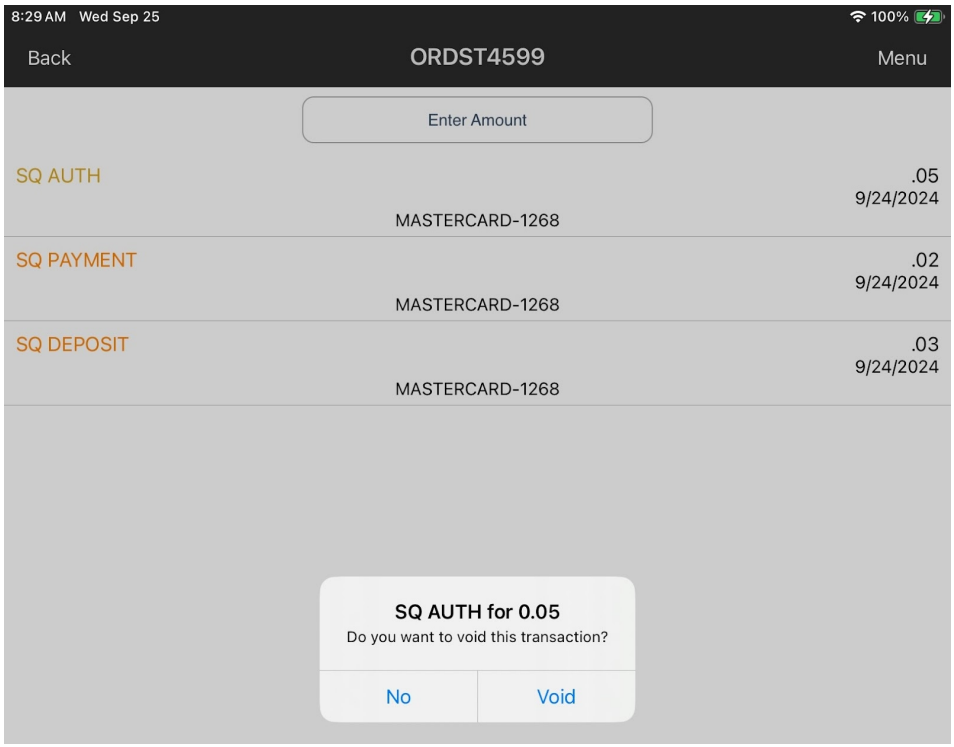


If capturing succeeds, the app will refresh the Payments tab and show the new Square payment or deposit instead of the authorization.

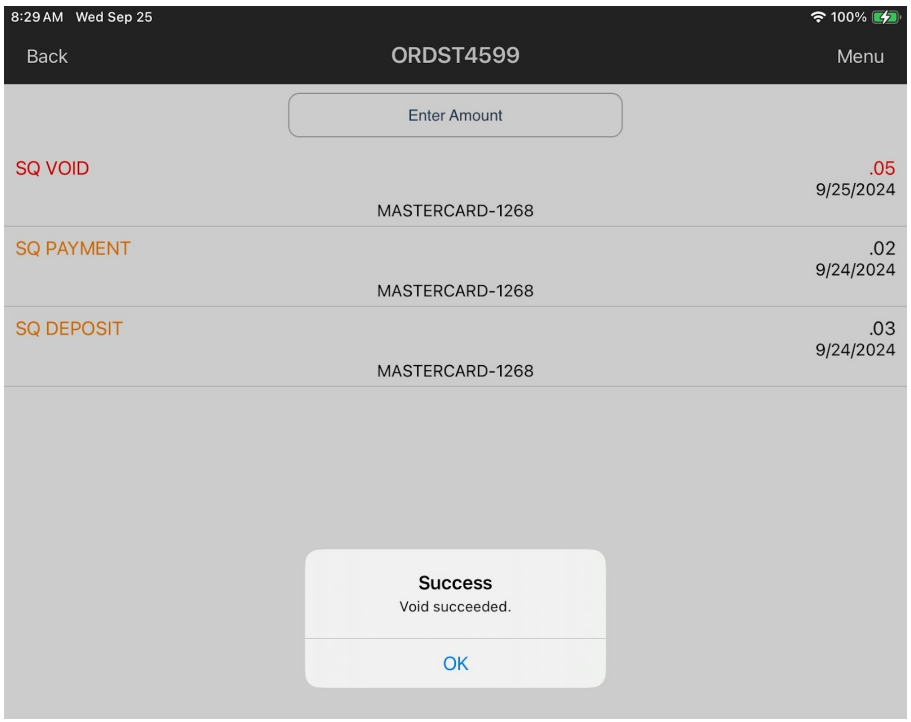


Void an Authorization

To void an authorization, tap on an authorization in the Payments tab. When asked whether to capture or void the transaction, choose Void. The app will then ask to confirm whether the authorization should be voided.

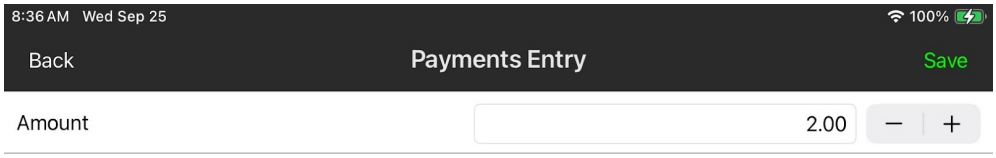


If voiding succeeds, the app will refresh the Payments tab and show a voided transaction record instead of the authorization.

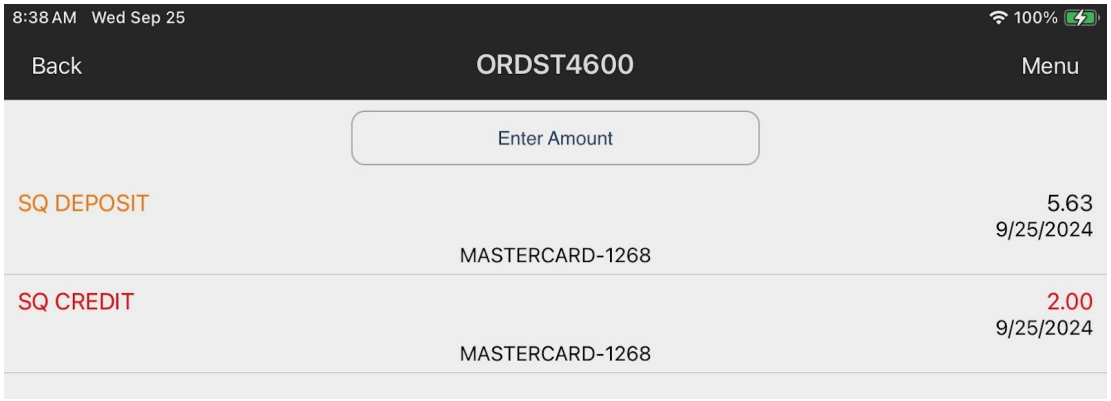


Credit a Capture or Charge

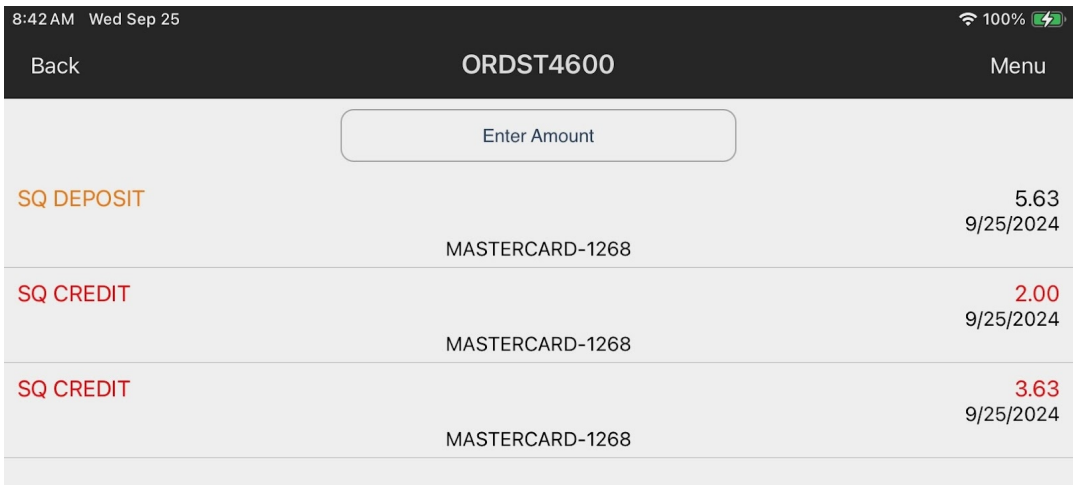
To credit a capture or charge, tap on a Square payment or deposit in the Payments tab. The app will ask to confirm whether the transaction should be credited. If confirmed, the app will then ask for the amount to credit. The amount will default to the full payment amount, but this can be changed to a smaller amount if only part of the transaction should be credited.



Tapping the Save button will process the credit. If it succeeds, the app will refresh the Payments tab and show a credit transaction in addition to the original payment or deposit. Note that the original payment and deposit will show the original payment amount, but in Dynamics GP the payment will either be deleted or have a lower amount as applicable.



If a payment or deposit is not fully credited, the remaining amount can be credited as well. When choosing to credit a payment which has already been partially credited, the amount will default to the remaining amount.



Once a payment or deposit is fully captured, it will no longer perform actions when tapped.