

MBX SQUARE INSTRUCTIONS ITEM SET-UP

If you are organizing a Booster event, such as a parent party, performance, concert, fundraiser, or banquet, or if you are selling Booster merchandise or sponsorships, you have the option to sell your items through the Square platform. Please continue reading this document for essential setup and payment instructions to ensure a successful sales launch.

ROLES & RESPONSIBILITIES

Booster Clubs are responsible for:

- Creating items
- Checking transactions and fulfilling orders
- Fulfilling orders
- Running item reports and sending them to your Treasurer for reconciliation

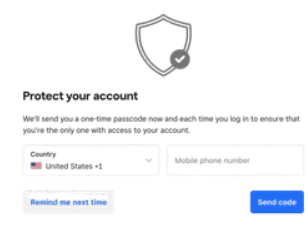
Julie Johnson at MBX is responsible for:

- Reviewing and activating products for online purchase
- Creating item buttons on your specific MBX Booster webpage
- Coordination and support for Online Square and Point of Sale Readers
- Security management, such as clearing 2-step verification lockouts

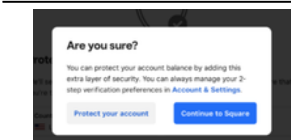
LOGIN to Square www.squareup.com/login

DO NOT INITIATE 2-step verification via your personal phone number.
Follow the step-by-step instructions below to avoid this issue.

*If you do set off the 2-step verification, please text Julie Johnson at 424.296.7605.
Identify yourself, your Booster Club, and your Booster Club Season (Fall, Winter, Spring, Year-round).*



If Square prompts you to protect your account by adding your phone number, please choose the **Remind me next time** gray button. **Do not add your personal phone number or it will trigger the 2-step verification process preventing other Booster Clubs from logging into Square.**



Square will then try to make you second guess yourself by asking "Are you sure?". This time choose the **Continue to Square** blue button.

NEW PRICING & FEES

Square charges a processing fee for every transaction, and these rates may vary depending on the sales avenue used. These fees are automatically deducted from the final sale price and billed to your Booster Club which can be viewed on your Treasurer's General Ledger report sent by MBX. To ensure your organization receives the full intended amount for each sale, we recommend pricing your items slightly higher to account for these costs. To better understand the fee schedules, watch this Square fee video overview: <https://www.youtube.com/watch?v=bMuxwTgBVEs>

CREATING A NEW ITEM

Navigation

1. From the Square Home Page, click "Items & Services" → "Items" → "Item Library"
2. In the upper right side click "Create Item"

Item Details & Formatting

Item Type

Square has added a few new product types, but select the **"Physical good"** category only.

Name (required)



You **must** follow this **MBX Naming Convention format**:

- ALL CAPS Booster Prefix (see list below), followed by space
- Then Category Number (310, 315, 320, 325, 330, or 335)
- Then - (with no space before or after the hyphen)
- Then item name

Eg: BB(G) 310-hats

Note: Pay special attention to spaces and "-" as they make a difference for our back-end processing systems that capture sales automatically into Quickbooks.

Badminton	BADM	Ice Hockey	ICEH	Tennis - Boys	TEN(B)
Band	BAND	La Vista	LA-V	Tennis - Girls	TEN(G)
Baseball	BASEB	Lacrosse - Boys	LAX(B)	Track and Field	T&F
Basketball - Boys	BB(B)	Lacrosse - Girls	LAX(G)	Visual Arts	V-ARTS
Basketball - Girls	BB(G)	Media Arts	M-ARTS	Volleyball, Beach - Boys	VB-BCH(B)
Cheer	CHEER	MUN	MUN	Volleyball, Beach - Girls	VB-BCH(G)
Choir	CHOIR	Orchestra	ORCH	Volleyball, Indoor - Boys	VB-IND(B)
Cross Country	XCO	Rugby - Boys	RGBY(B)	Volleyball, Indoors - Girls	VB-IND(G)
Dance	DNC	Rugby - Girls	RGBY(G)	Water Polo - Boys	WP(B)
Drama Tech	D&T	Soccer - Boys	SCR(B)	Water Polo - Girls	WP(G)
Flag Football - Girls	FFB(G)	Soccer - Girls	SCR(G)	Winter Guard	W-GUARD
Football	FBL	Softball	SOFTB	Wrestling	WRL
Golf - Boys	GOLF(B)	Surf	SURF		
Golf - Girls	GOLF(G)	Swim	SWIM		

Item Details & Formatting (cont'd)

Price

Include a price for your item.

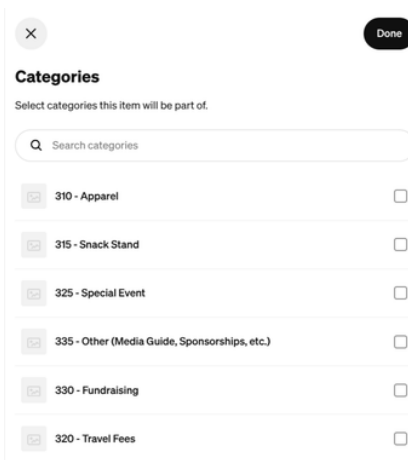
Description

Enter item description. Add text "Please ignore any shipping or pick-up information. EVENTS: Your purchase is your admission to the event. ITEMS: Your payment confirms your purchase and we will contact you if there are any fulfillment instructions."

Categories

Select one of the following 6 existing categories and ensure that category number is the one included in your item name above. (No new categories should be created.)

Eg from above: BB(G) **310**-hats



A screenshot of a modal window titled "Categories" with a close button (X) in the top left and a "Done" button in the top right. Below the title is the instruction "Select categories this item will be part of." followed by a search bar labeled "Search categories". Below the search bar is a list of six categories, each with a category icon, a name, and a checkbox:

- 310 - Apparel
- 315 - Snack Stand
- 325 - Special Event
- 335 - Other (Media Guide, Sponsorships, etc.)
- 330 - Fundraising
- 320 - Travel Fees

Locations

Click and a complete list will come up. Unclick "Select All", then scroll down and click on your Booster Club.

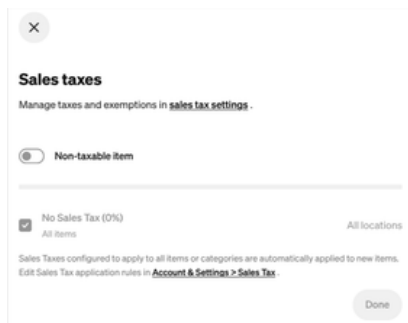
Images

Upload an image of your item.

Taxes

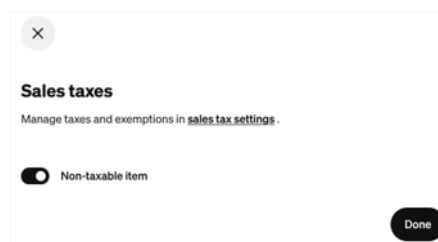
Select "Non-Taxable" (not: No Sales Taxes 0%)

Incorrect:



A screenshot of the "Sales taxes" modal window. The title is "Sales taxes" and the subtitle is "Manage taxes and exemptions in [sales tax settings](#)". There is a toggle switch for "Non-taxable item" which is currently turned off. Below this is a section for "No Sales Tax (0%) All items" with a checkbox that is checked and the text "All locations". At the bottom right is a "Done" button.

Correct:



A screenshot of the "Sales taxes" modal window. The title is "Sales taxes" and the subtitle is "Manage taxes and exemptions in [sales tax settings](#)". There is a toggle switch for "Non-taxable item" which is currently turned on. At the bottom right is a "Done" button.

SKUs

Copy and paste the name of the item (BB(G) 310-hats) into the SKU box.

Variations

If there are different sizes, colors, prices (e.g. XSmall, Small, Medium), select "Add Variations". Enter the Variation Name (e.g. XS, S, M), price and SKU for each variation. See below for naming convention for variation SKUs.

- **MBX Naming Convention for Variation SKUs:**

Use the newly corrected title of the item + size / short description

Item Name	Variation SKUs:
BB(G) 310-hats	BB(G) 310-hats XS BB(G) 310-hats S BB(G) 310-hats M BB(G) 310-hats L BB(G) 310-hats XL

Variations

3 variations

Variation	GTIN ⓘ	SKU ⓘ	Price	Online sale...	Weight	Inventory	+
<input type="checkbox"/> XS	UPC, EAN or ISBN	BB(G) 310-...	\$20.00	\$0.00	0.00 lb	Available	x
<input type="checkbox"/> S	UPC, EAN or ISBN	BB(G) 310-...	\$21.00	\$0.00	0.00 lb	Available	x
<input type="checkbox"/> M	UPC, EAN or ISBN	BB(G) 310-...	\$22.00	\$0.00	0.00 lb	Available	x

Create variation Manage stock Edit Stock Tracking

Modifiers

Use this section to request buyer information or player credits. There are a variety of already created modifiers. If you don't see one that fits your needs, you can create a new modifier.

Fulfill orders

Go to Online fulfillment methods, click edit, uncheck Shipping, and select "Pickup" only.

OR:

Fulfillment

Go to Online fulfillment methods, click edit, uncheck Shipping, and select "Pickup" only.

Save & Submit

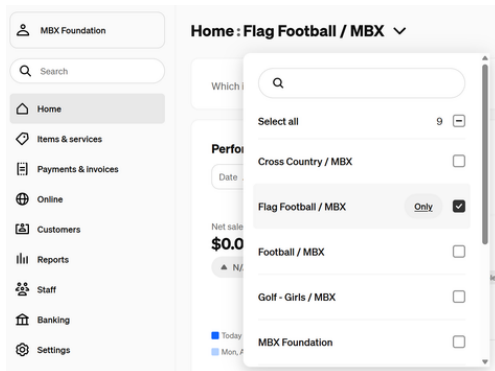
When complete click Save.

*Email Julie Johnson at julie@mbxfoundation.org and let her know the item name/s. She will review for accuracy, add your items to your online store, and email your item url. QR codes can be created from this url.

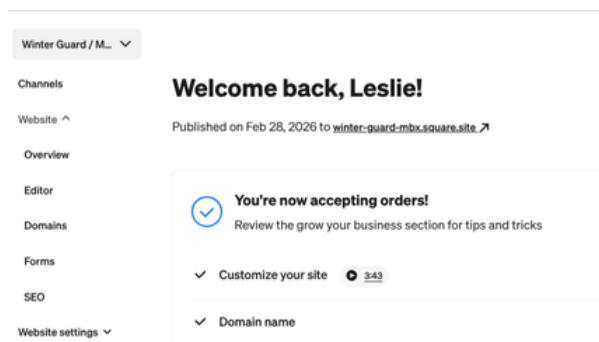
MANAGING YOUR ONLINE STOREFRONT

Rearranging Items in your Online Store

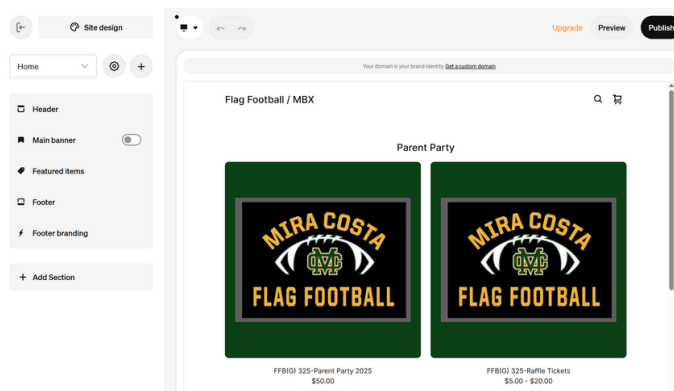
- 1 From Home, go to All Locations and select your Booster Club



- 2 Go to "Online" > "Websites" > "Editor"



- 3 Click the "Featured Items" section you want to adjust.



- 4 You can add items, change item order, or delete items from the webstore. Click the blue "DONE" button when finished to save. Items will reorder upon refreshing your browser with your Square store url.

- 5 Click "Publish".

MANAGING YOUR ONLINE STOREFRONT (cont'd)

Ending a Sale

Make an Item Unavailable for Online Sales

- Select "Items and services" on left side menu
 - Click "Items" and Select "Item Library"
 - Set the Location to your Booster Club at the top of page
 - Find your Item and click on the horizontal ellipsis at right (...) and select the "Edit" option
 - Scroll down to "Where it's sold" section and switch the item from "Visible" to "Unavailable"
- OR
- Go to "Channels and visibility" and click Edit and switch the item from "Visible" to "Unavailable"



Note: Simply removing an item from the online store is not enough; users can still find it via the search function unless it is set to "Unavailable."

Archive Unused Items

- Select "Items and Services" on left side menu
- Click "Items" and Select "Item Library"
- Set the Location to your Booster Club at the top of page
- Find your Item and click on the horizontal ellipsis at right (...) and select the "Archive" option

Note: Archive keeps the item for later use / reference, but keeps your store item list clean and updated.

To access archived items click on Status at top of screen and check Archived.

