Square Extension for Magento 2

User Guide

Version 2.19

Contents

1 - If You Only Need the Square Payment Method 2
1.1 Square Payment Method Set Up 2
1.2 Gift Cards 22
1.3 Apple Pay 29
1.4 Invoice Pay 34
1.5 PSD2 SCA 41
1.6 Square Terminal Payment 44
2 - If You Need the Full Omni Capabilities of the Extension 54
2.1 Square Payment Processing Configuration 54
2.2 Gift Cards 75
2.3 - Apple Pay 82
2.4 - In-Store Pickup Functionality 87
2.5 - Subscriptions Functionality 94
2.6 - Square Terminal API 112
Appendix-1 Entities mapping between Magento and Square 122
A-1.1 Square Locations 122
A-1.2 Square Customers 124
A-1.3 Square Catalog 125
A-1.4 Square Inventory 125
A-1.5 Square Payment Transaction 126
A-1.6 Square Transactions/Refunds 127
A-1.7 Square Orders 128
Appendix-2 Crons schedule 129
3 - Loyalty 130
3.1 Accessing Square Loyalty: Stores > Configurations > Square > Loyalty 130
3.2 Enable Square Loyalty: 130
3.3 Setting Up a Loyalty Program: 131
3.4 Show loyalty program bar: 131
3.5 Loyalty Program on Frontend: 132
3.6 Loyalty Program in SQUARE: 134
4 - Express Checkout 138
5 - Multi stock source Mode 141
5.1 Enable Multi stock source Mode: 141
5.2 Configuration of Sources 143
5.3 Manage Sources: 144
5.4 Assign Products to Sources: 146

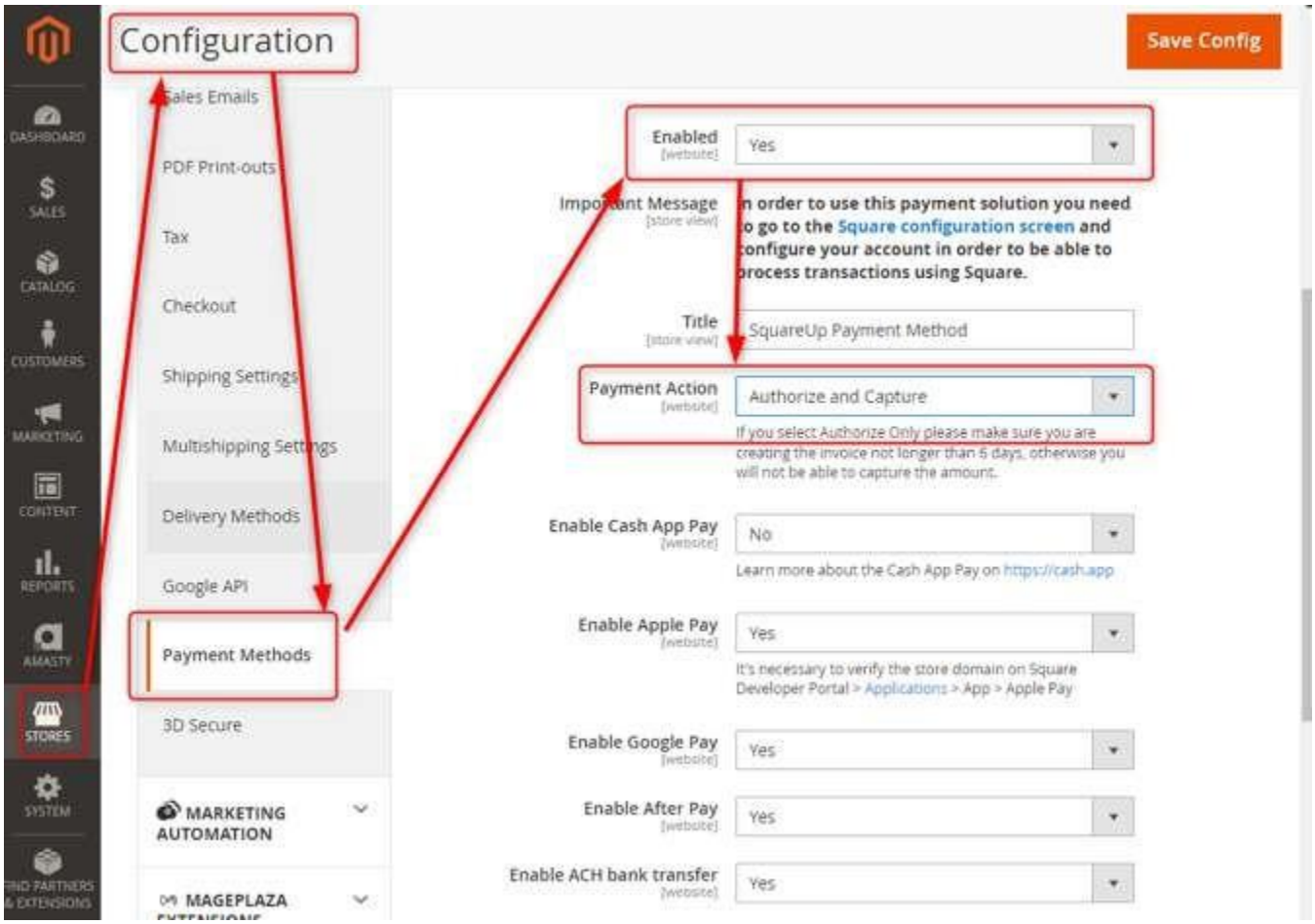
1 - If You Only Need the Square Payment Method

1.1 Square Payment Method Set Up

1.1.0 Authorize and Capture amount when Order is placed

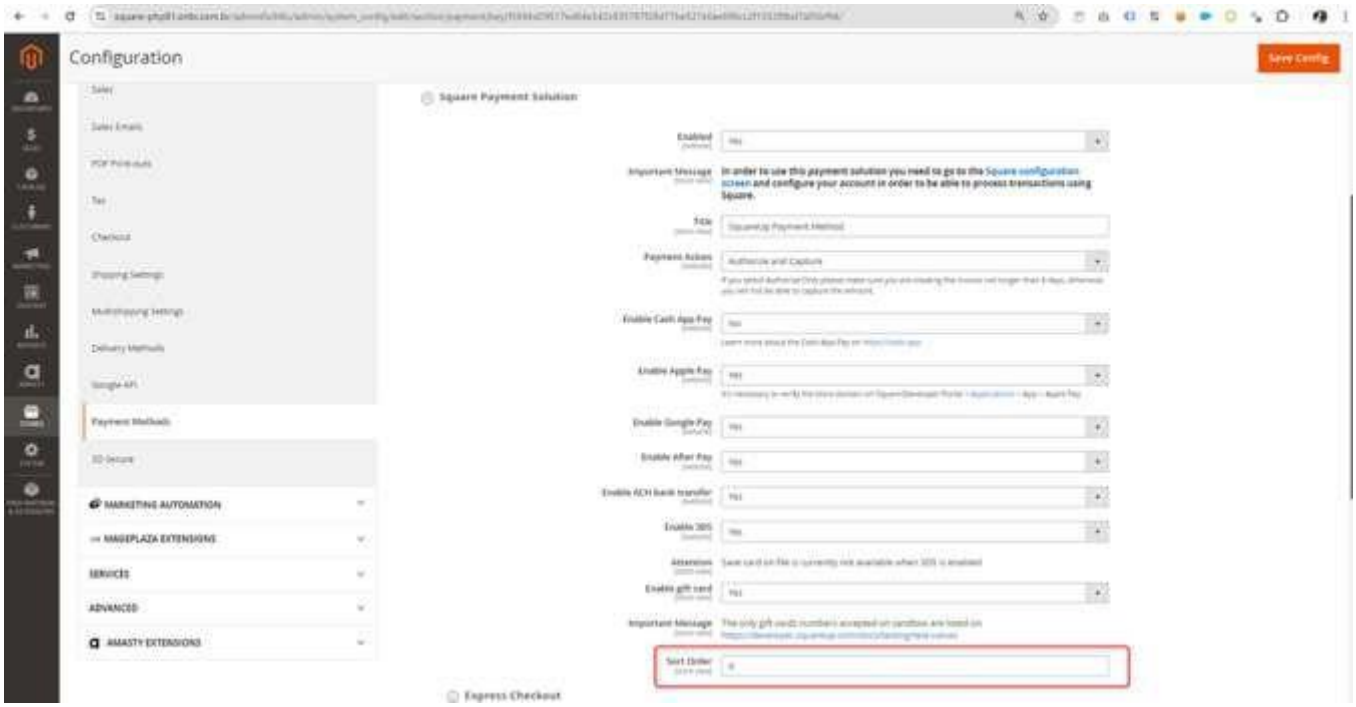
In order to enable the Square payment solution, please make sure it is Enabled in both Magento 2 and Square admin. There are two options to use the Square payment solution: either authorize only on order being placed (and capture the amount later when the invoice is generated), or authorize and capture 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 "S0rt Order" allows setting the display order of the enabled payment methods 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

○ Check / Money order

◉ SquareUp Payment Method

☑ My billing and shipping address are the same

laura teoo
Broadway
New York, New York 10005
United States
1231231234

Pay with a Credit Card

Card number MM/YY CVV

Pay with Google Pay

Pay with After Pay

Order Summary

Cart Subtotal	$11.00
Shipping Flat Rate - Fixed	$5.00
Order Total	**$16.00**

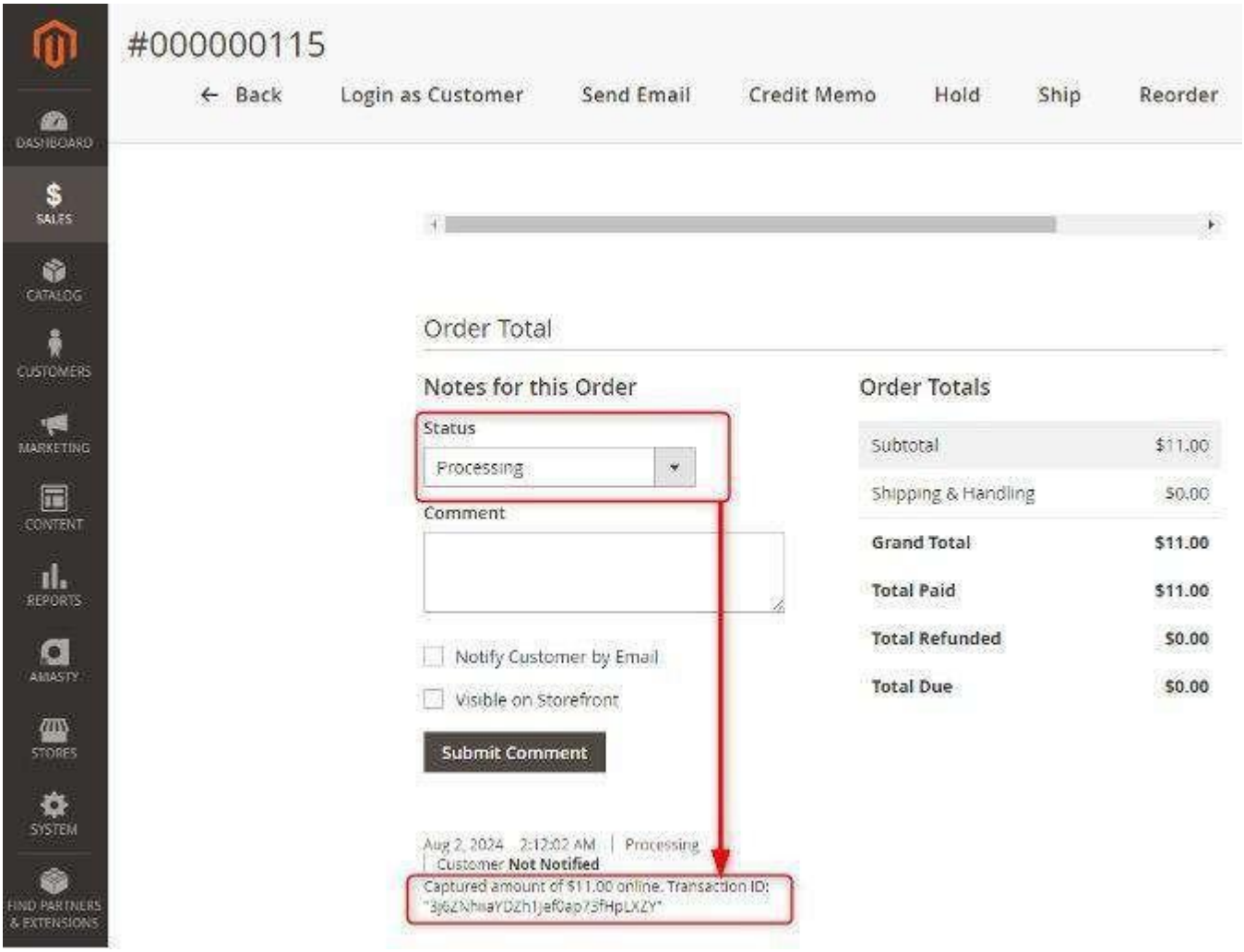
1 Item in Cart

Ship To:

laura teoo
Broadway
New York, New York 10005
United States
1231231234

Shipping Method:

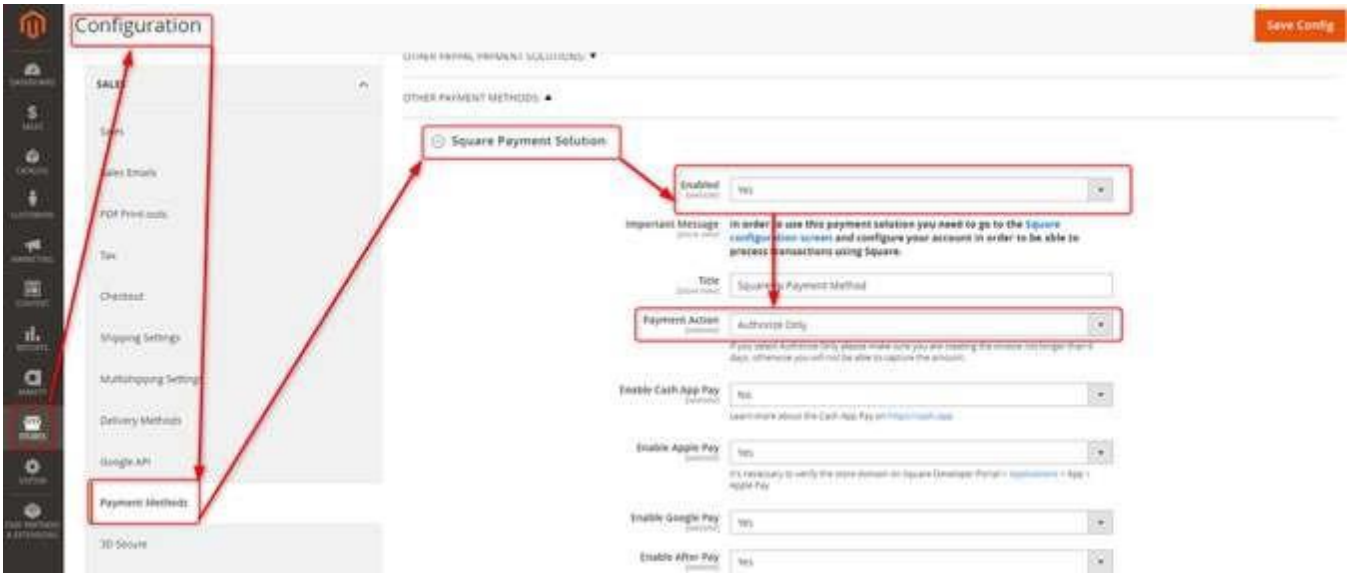
Flat Rate - Fixed



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:

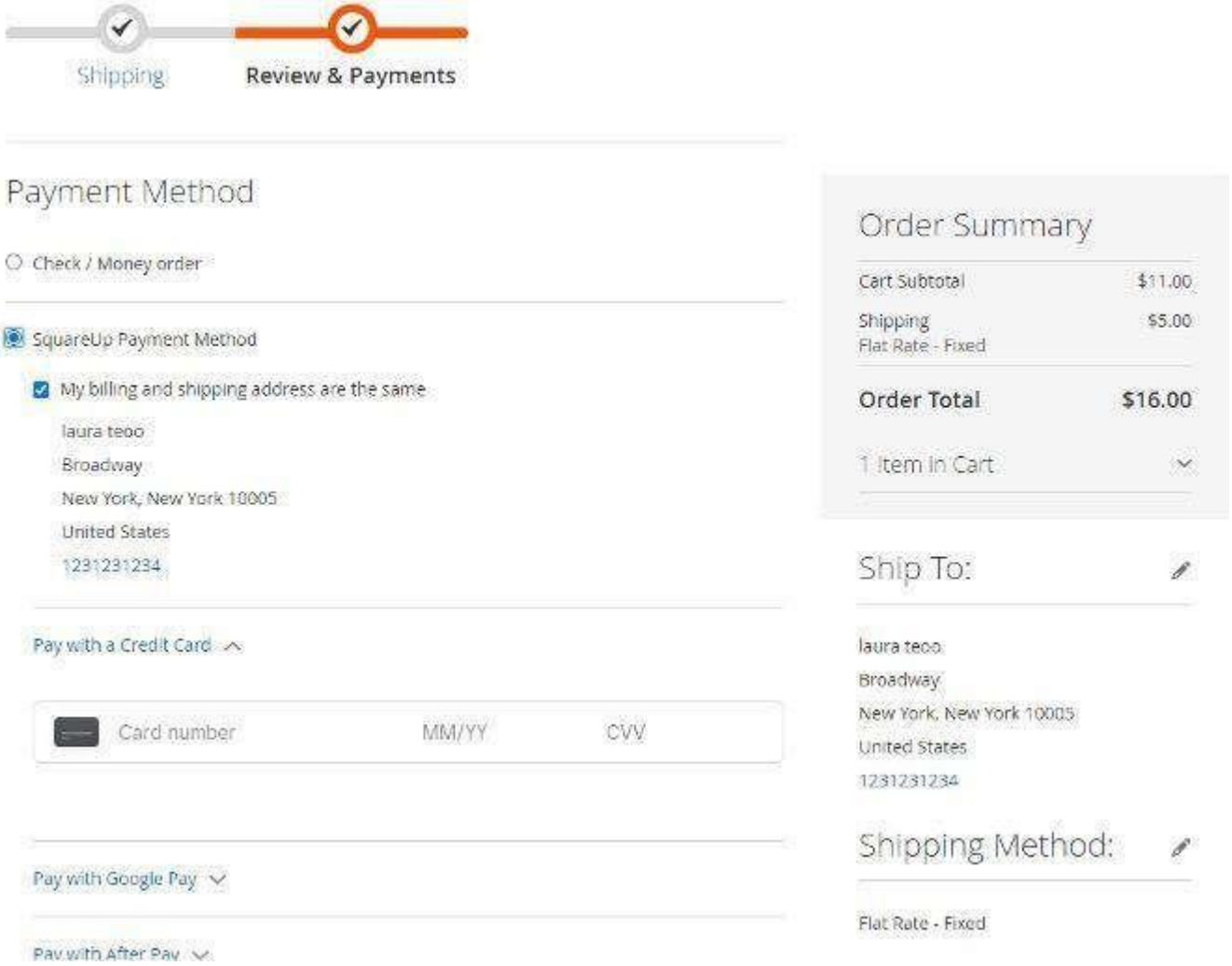
1.1.1 Authorize (without capture) amount when Order is placed

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.

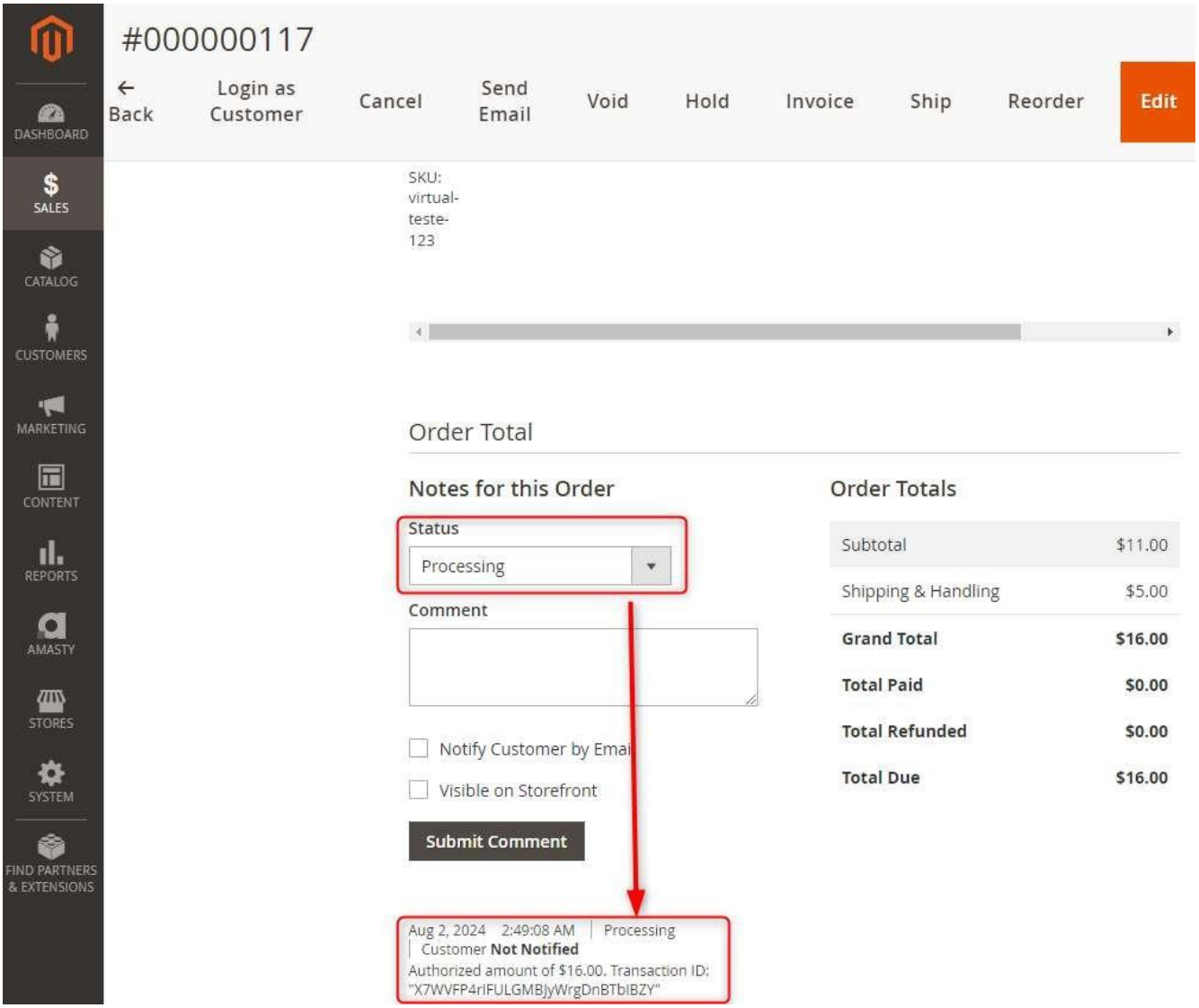


Save the current configuration, refresh the cache and try placing an order on the frontend.

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:



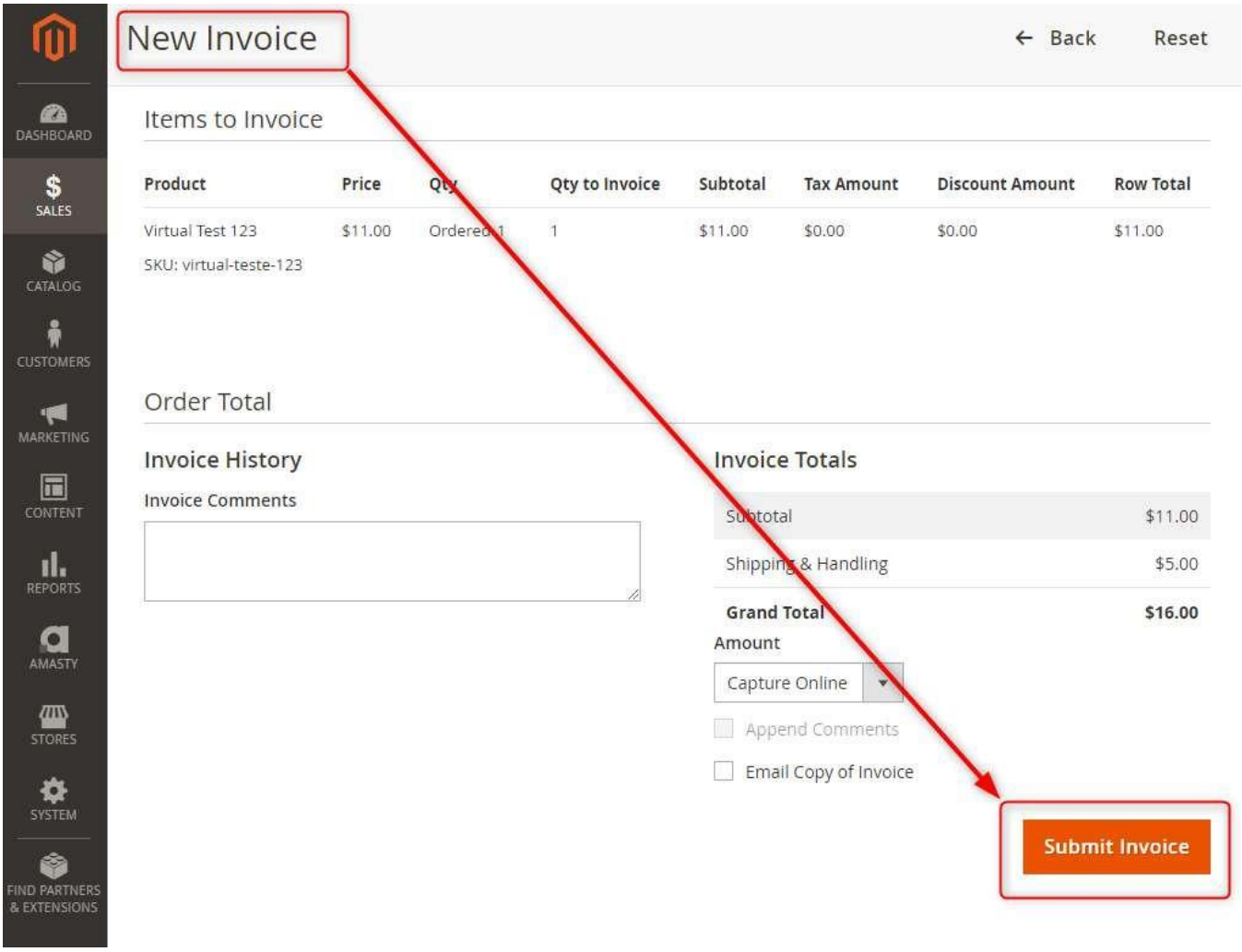
Finalize the placing of the order. Navigating back to Magento Admin, in Sales > Orders grid and selecting to view the details of the order that has just been placed, shows the order status as Processing and the order's amount being authorized:


#000000117
Back
Login as Customer
Cancel
Send Email
Void
Hold
Invoice
Ship
Reorder
Edit
DASHBOARD
SALES
CATALOG
CUSTOMERS
MARKETING
CONTENT
REPORTS
AMASTY
STORES
SYSTEM
FIND PARTNERS & EXTENSIONS
SKU: virtual-teste-123
Order Total
Notes for this Order
Status
Processing
Comment
Notify Customer by Emai
Visible on Storefront
Submit Comment
Aug 2, 2024 2:49:08 AM | Processing
Customer Not Notified
Authorized amount of $16.00. Transaction ID: "X7WVFP4rIFULGMBJyWrgDnBTbIBZY"
Order Totals
Subtotal $11.00
Shipping & Handling $5.00
Grand Total $16.00
Total Paid $0.00
Total Refunded $0.00
Total Due $16.00

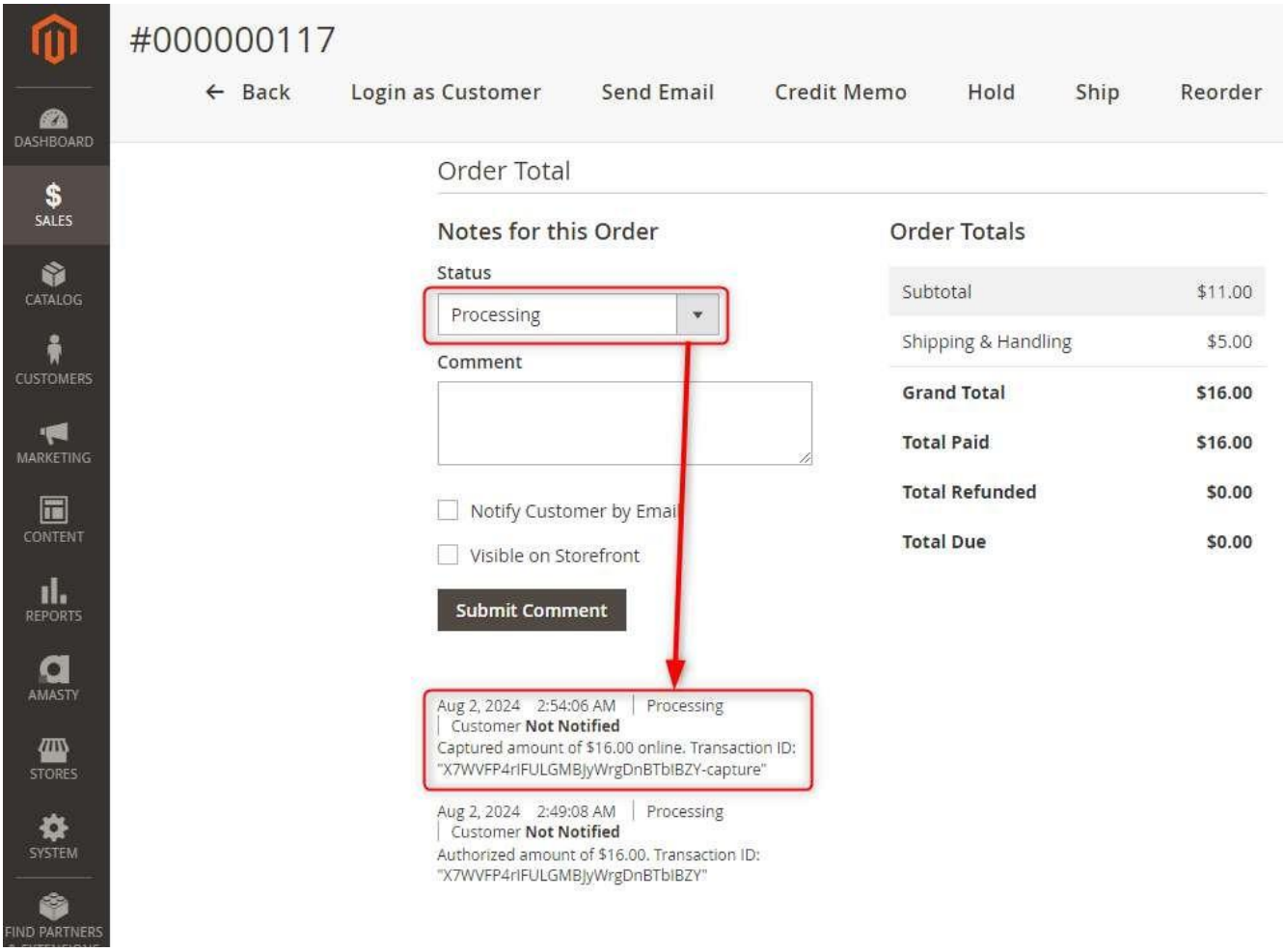
1.1.2 Capture amount when the Invoice is being created

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:



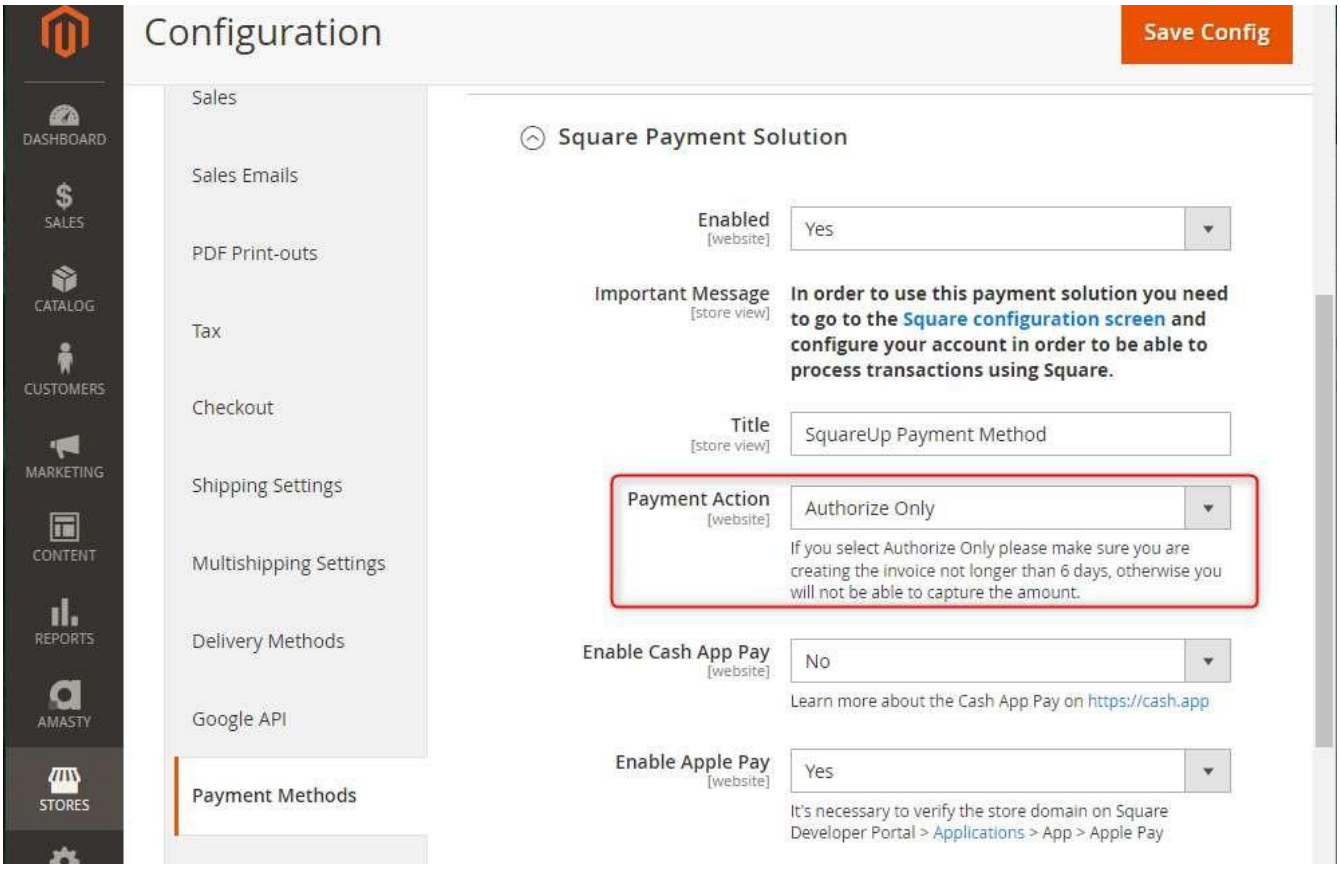
Going back to the orders details shows the order processing and the notification that the order amount has been captured online:

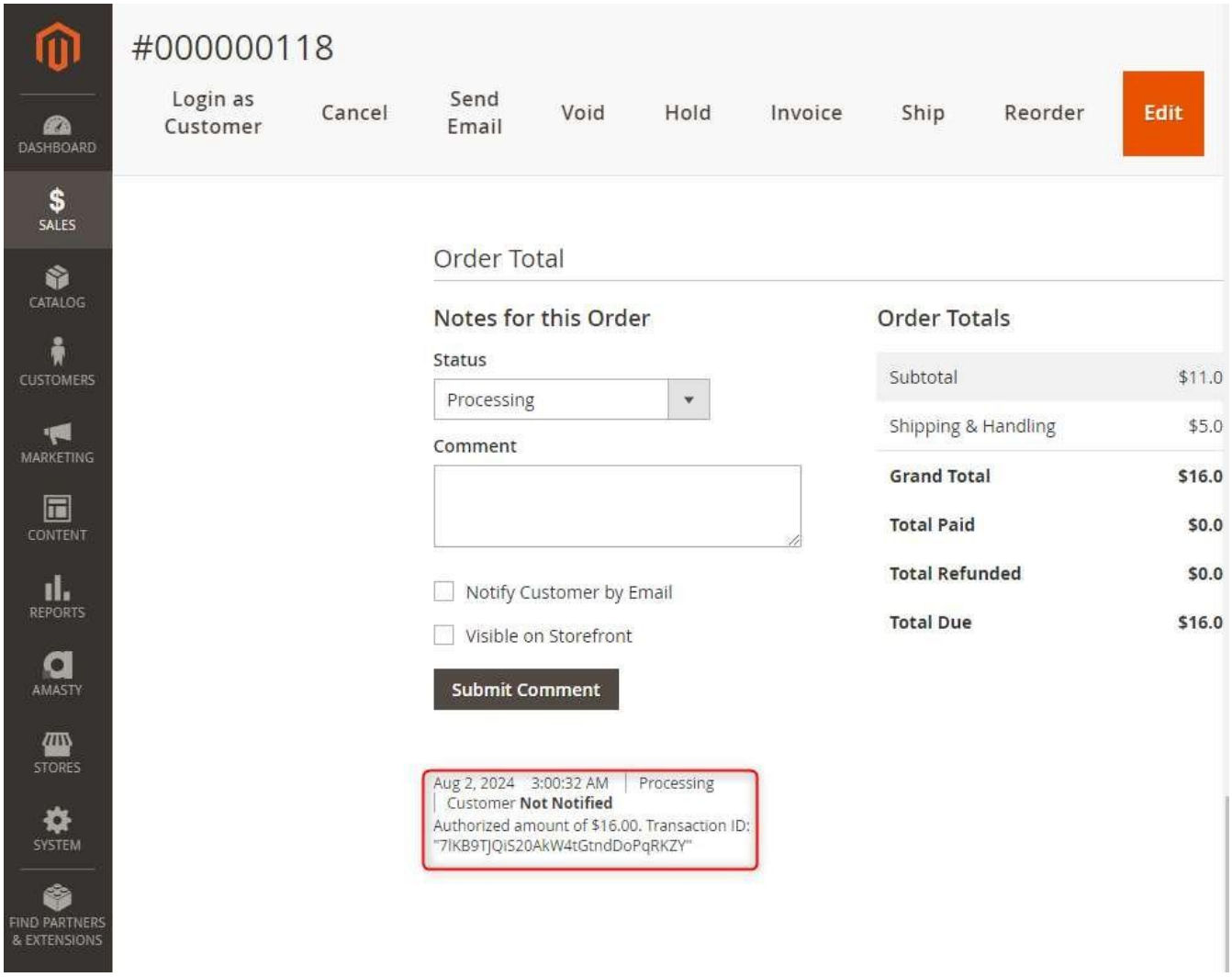


1.1.3 Void Transaction when an Order is Canceled

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

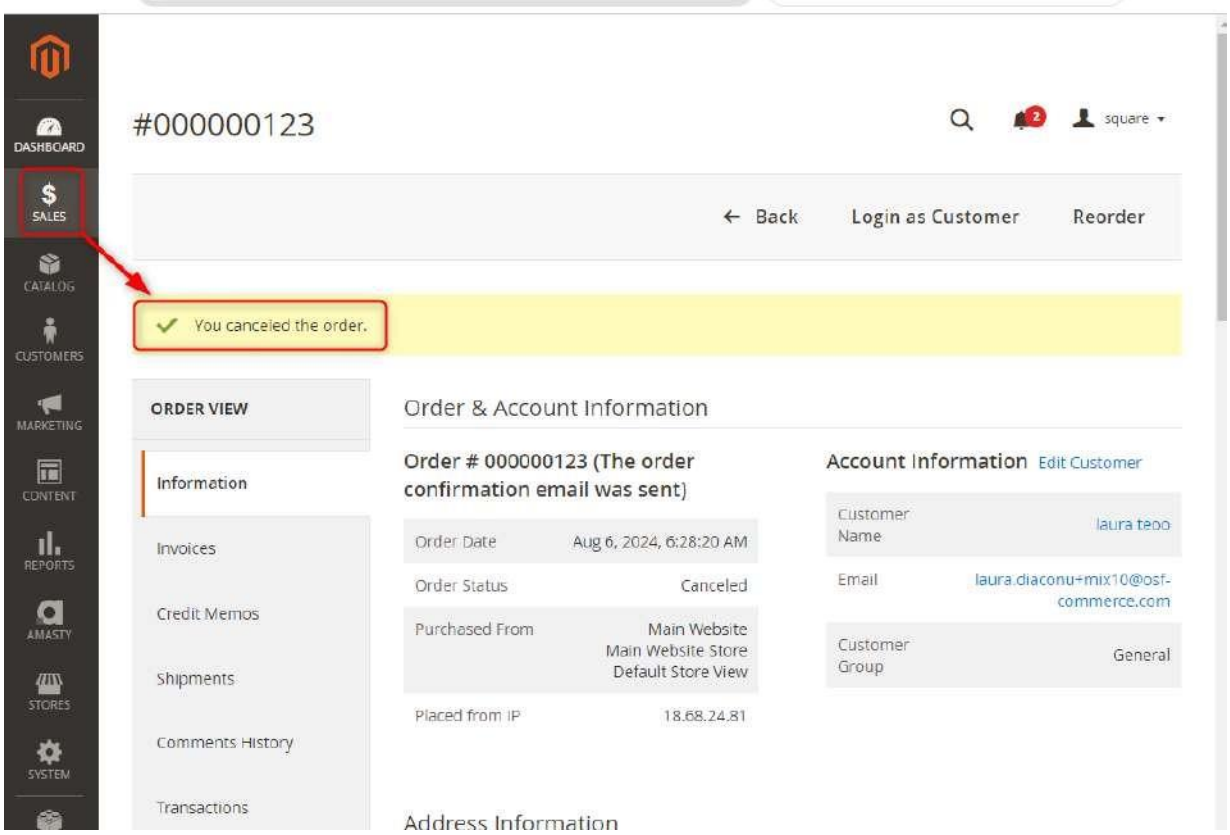
- The Square Payment Solution's payment action is set to Authorize Only:

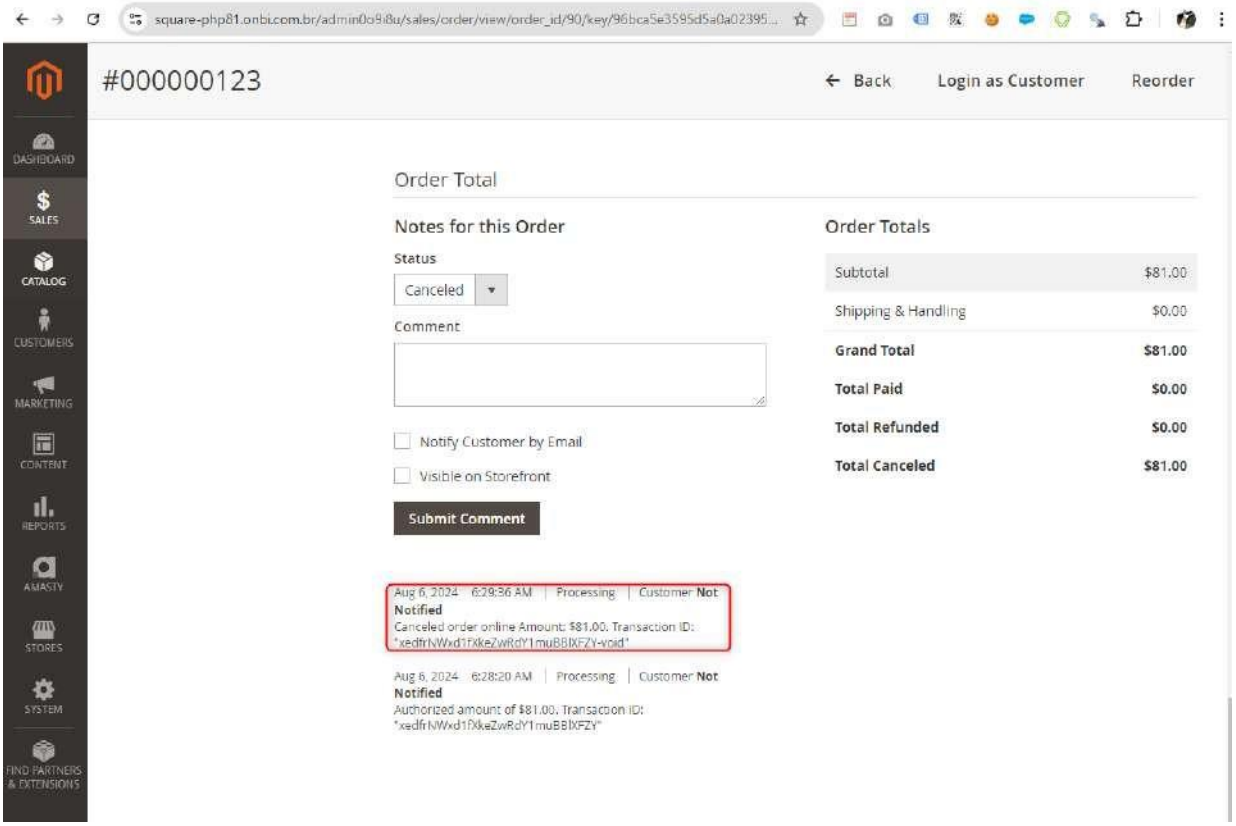




- An order has been placed and its corresponding invoice has not yet been emitted – the order therefore has the status “Processing” and the amount has not yet been captured:

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

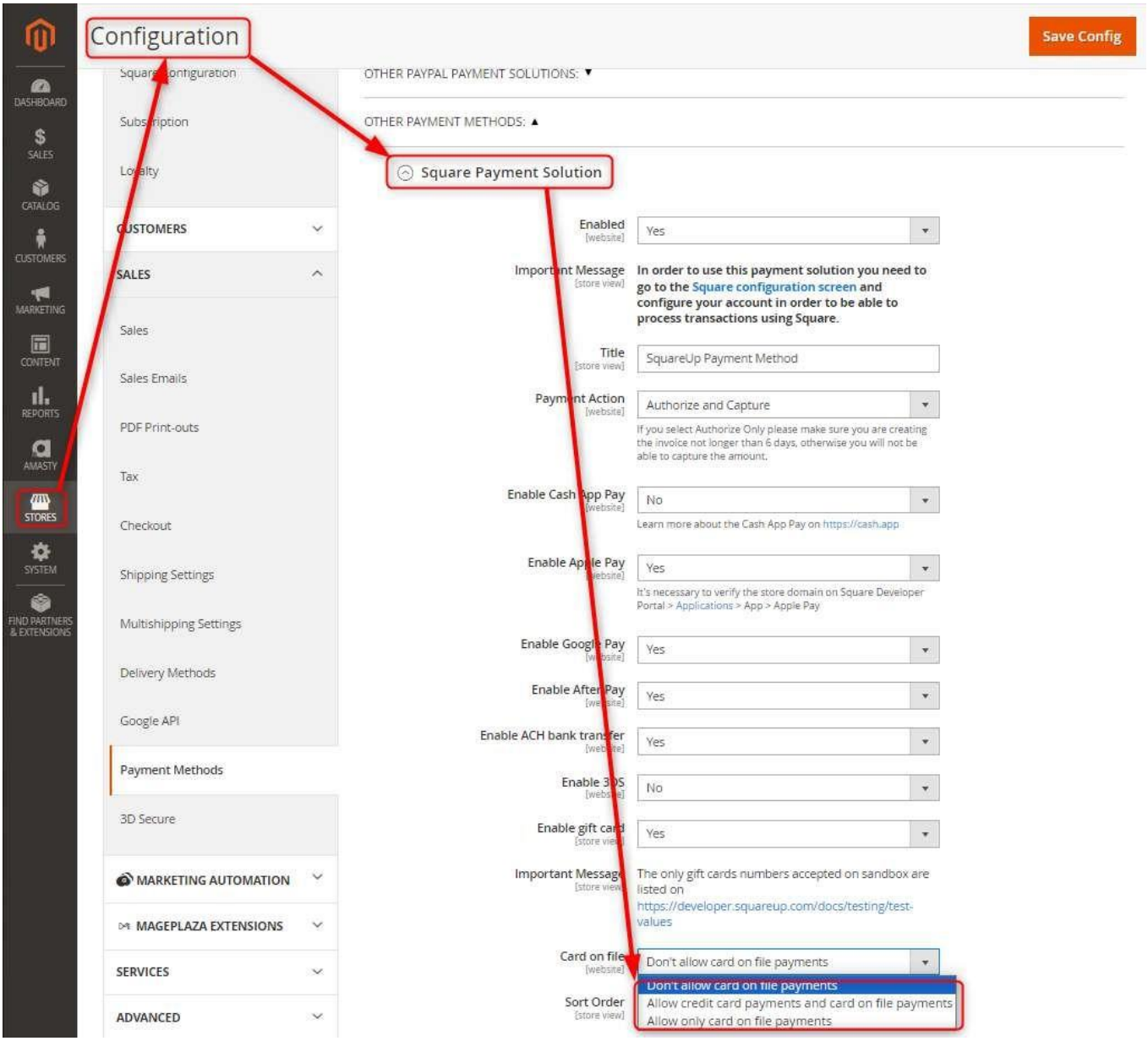




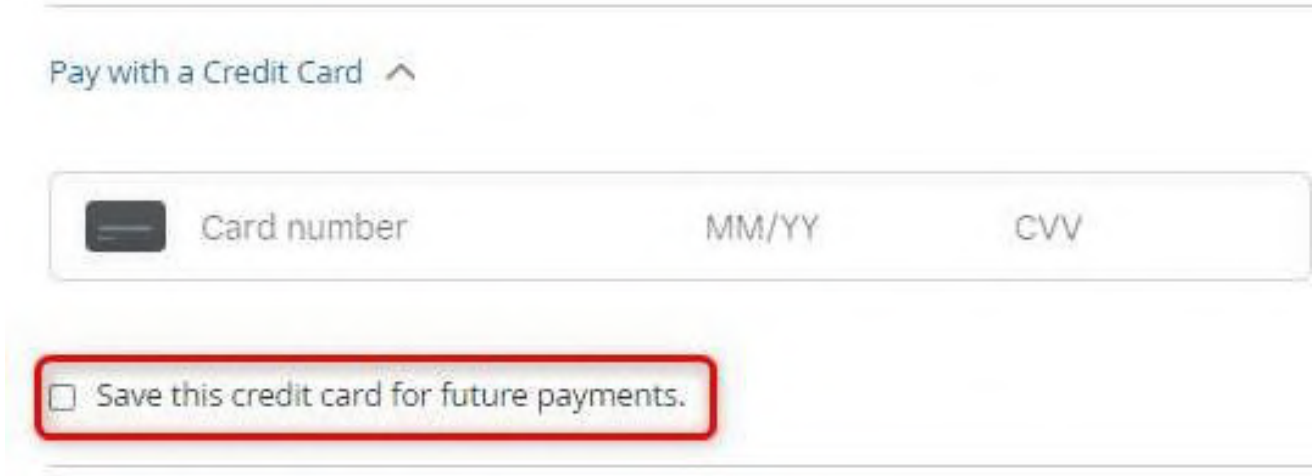
The new order's status is canceled and with it, the amount authorization.

1.1.4 Store Credit Card

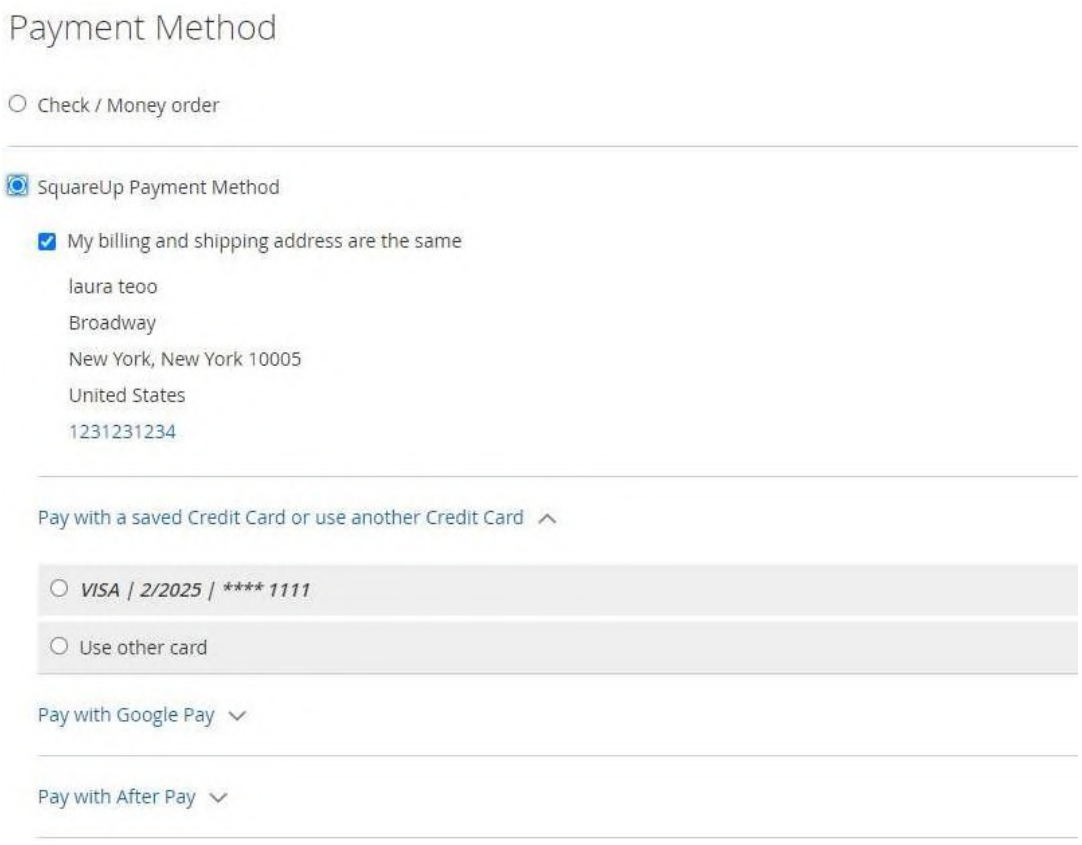
In order for customers to be able to store and reuse their credit cards, one of the “Allow card on file payments” options must be enabled in the Square Payment Solution:



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



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



Storing the credit card is not available when placing an order from the Magento Admin and Is not available when 3DS is enabled.

1.1.5 Multi-store Configuration for Square Payment Transactions

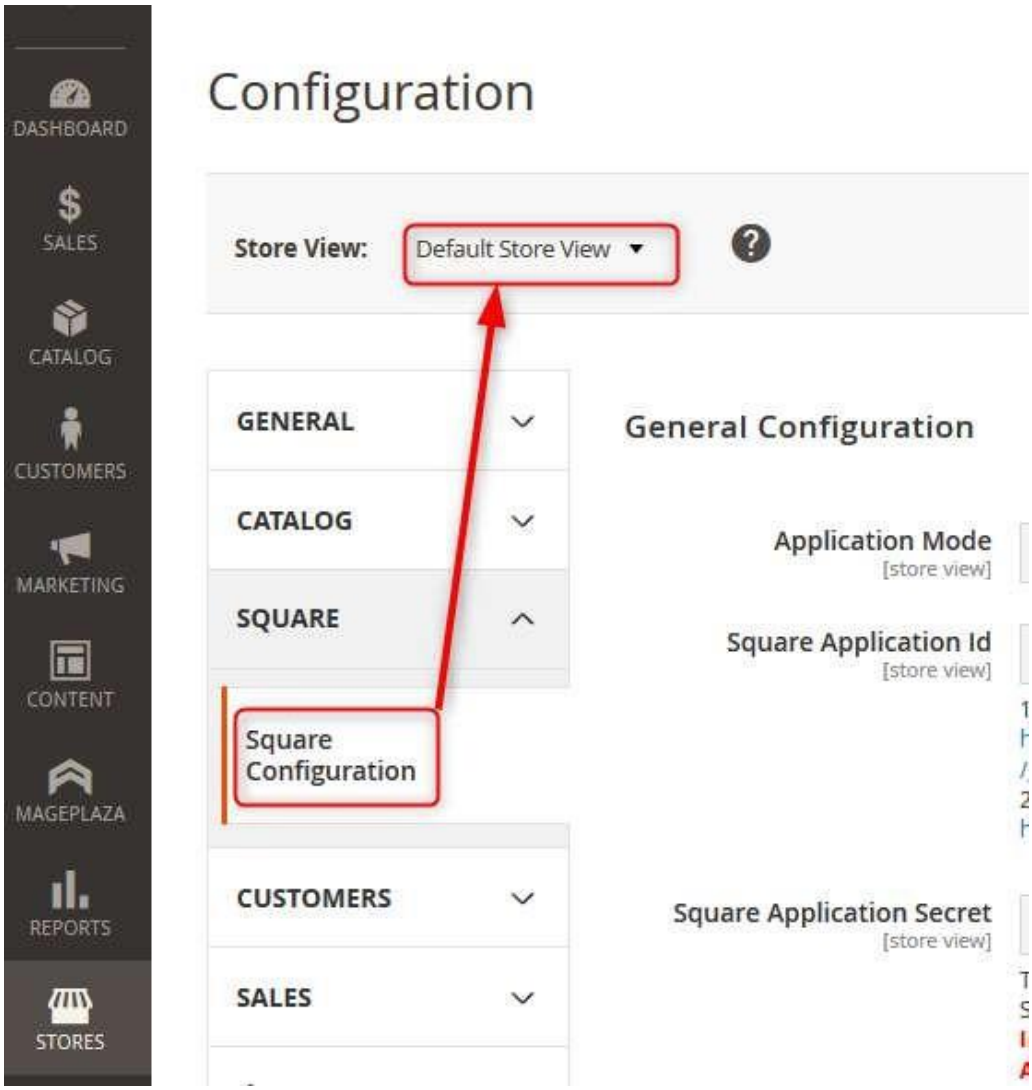
The Square configuration screen is only displayed on the Default Configuration scope and on the Store View scope.

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

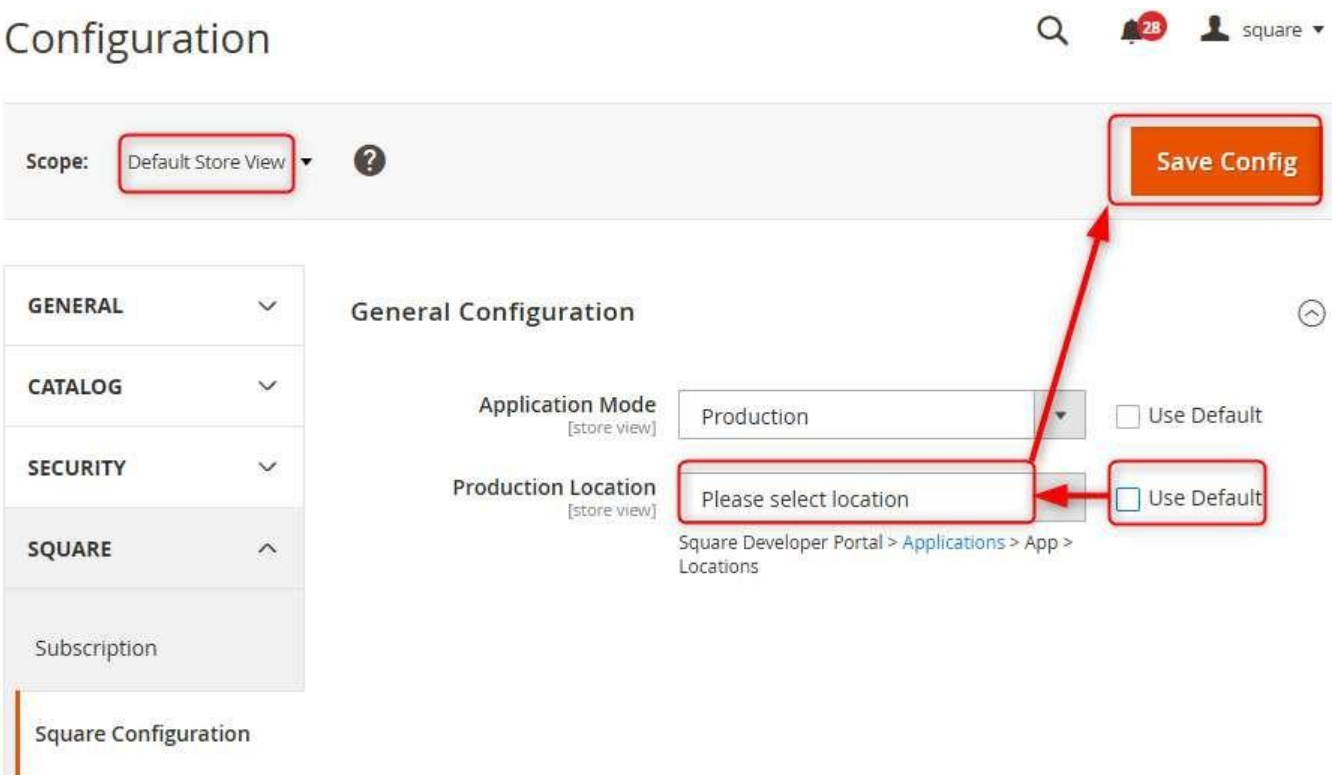
- The assumption is that you have a number of locations set in Square at least equal to the number of stores set in Magento.
- The result is that the payment is processed at the selected location for a specific store view

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:



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)

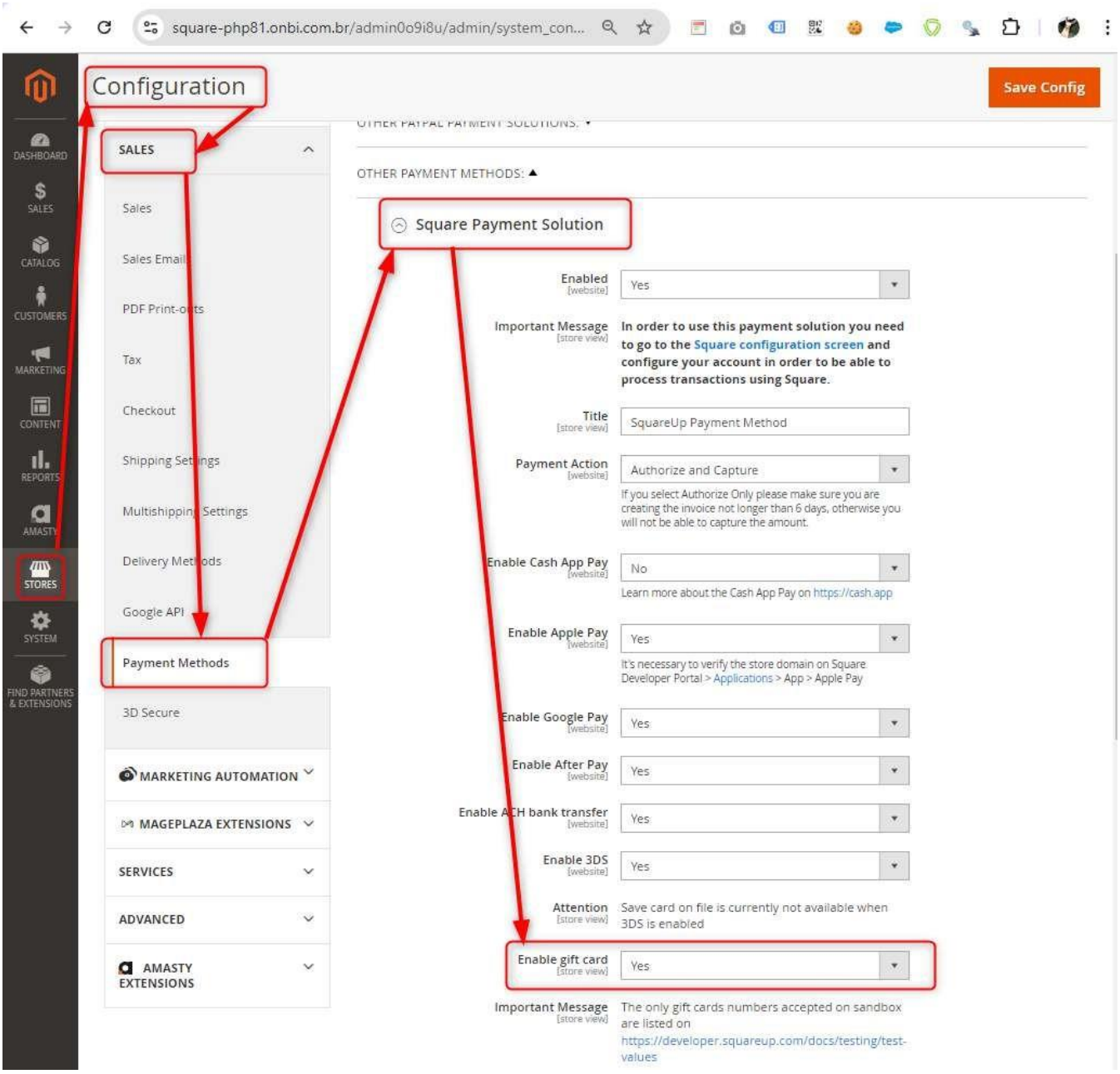
Remember to clear the cache after each time the configuration is changed.

1.2 Gift Cards

1.2.1 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.

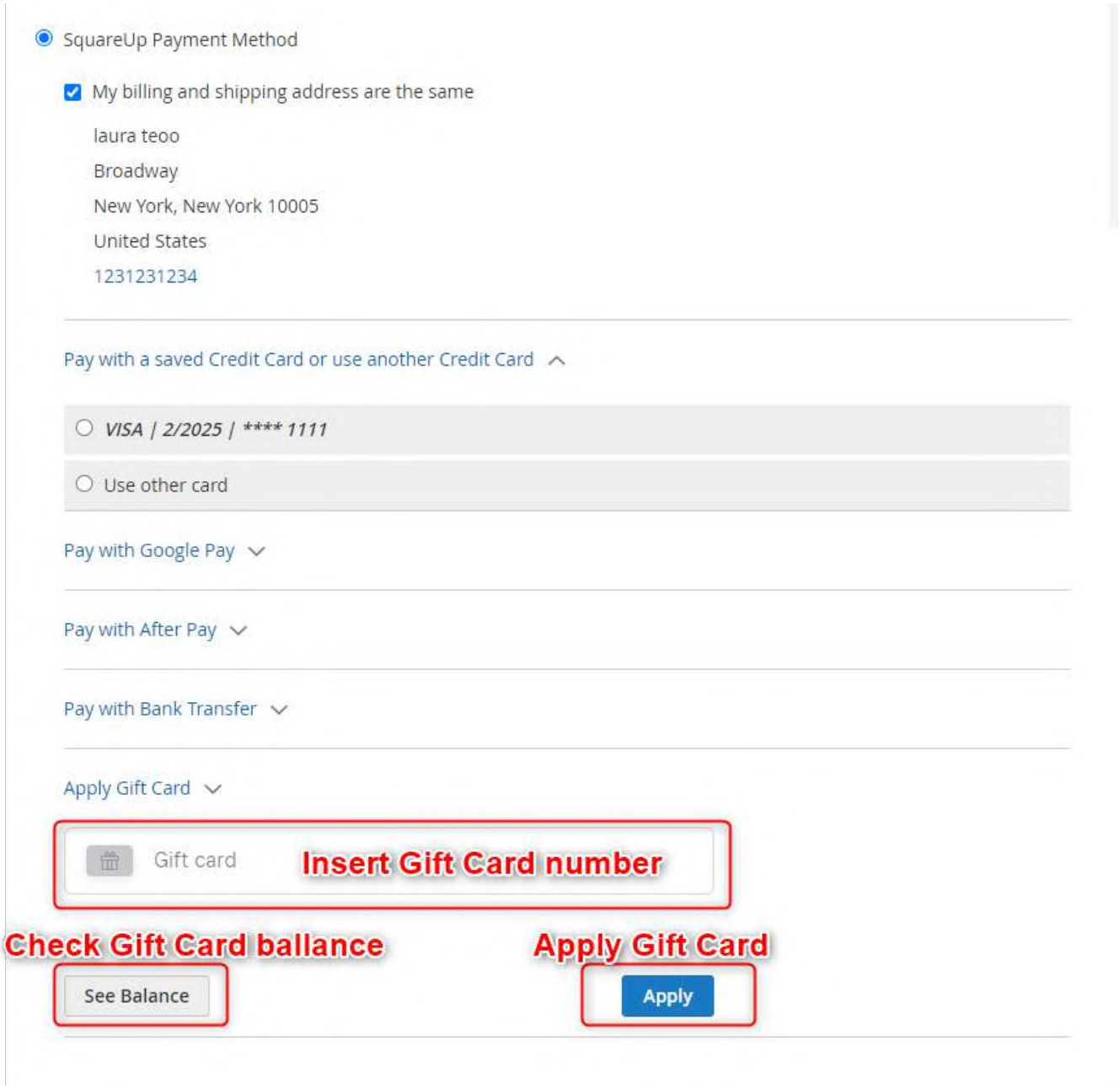
If you made sure the gift card functionality is enabled on your Square account, then you can activate it in Magento by navigating to Stores > Configuration > Sales > Payment Methods > Square Payments Solution > Enable Gift Card:



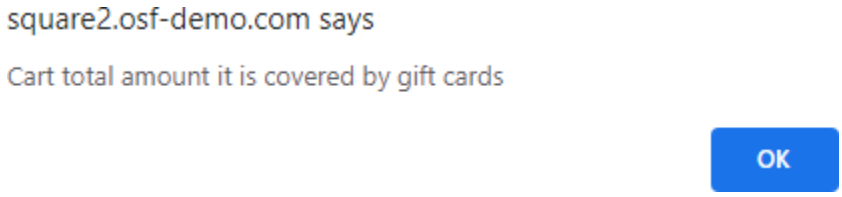
Enabling the gift card inserts a new section inside the Square payment form on the front, where the customer can check the value of a gift card, apply gift cards to their checkout, or remove a gift card from the ones they previously applied.

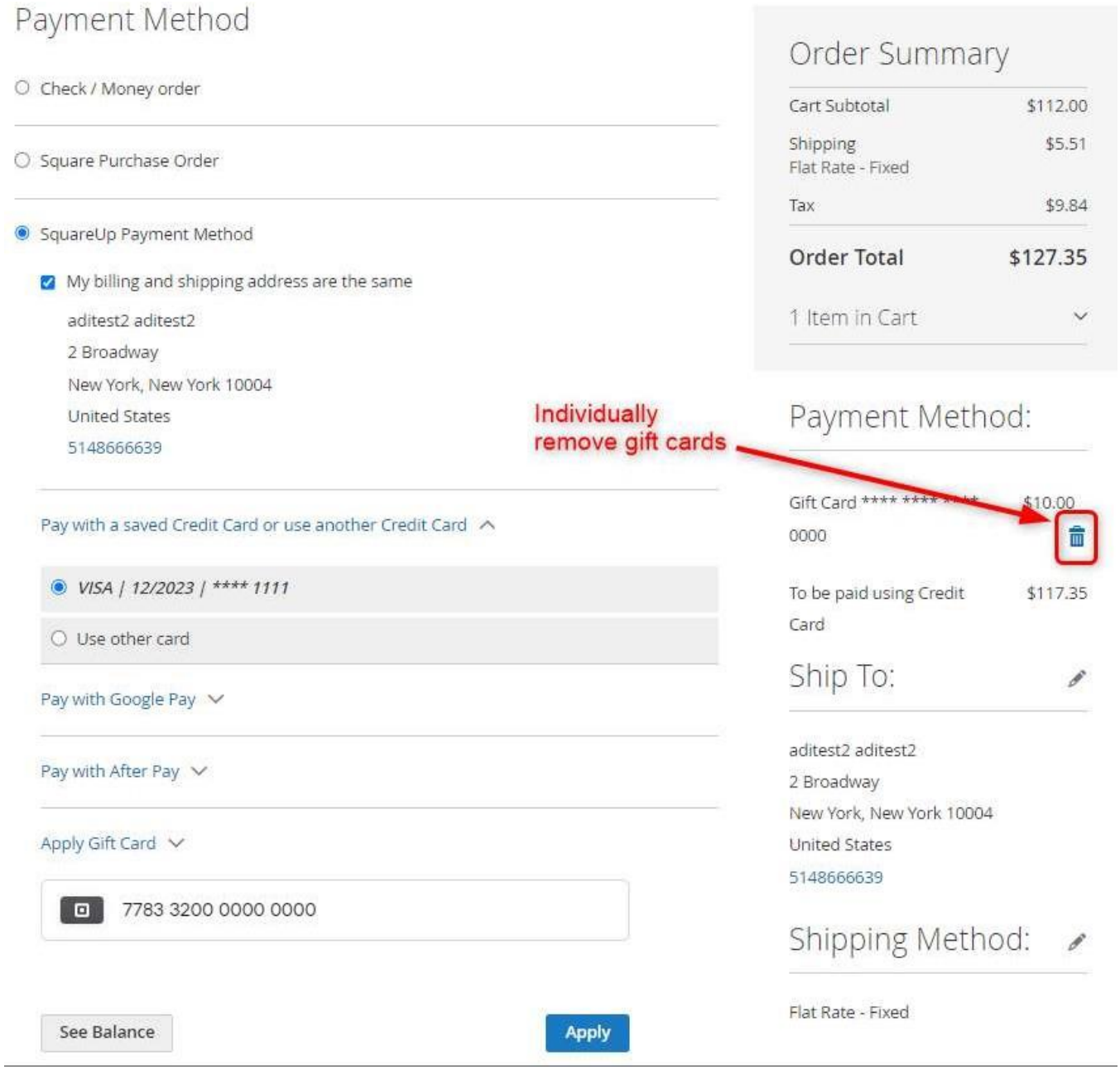
1.2.2 Checkout Using Gift Cards

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:



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:

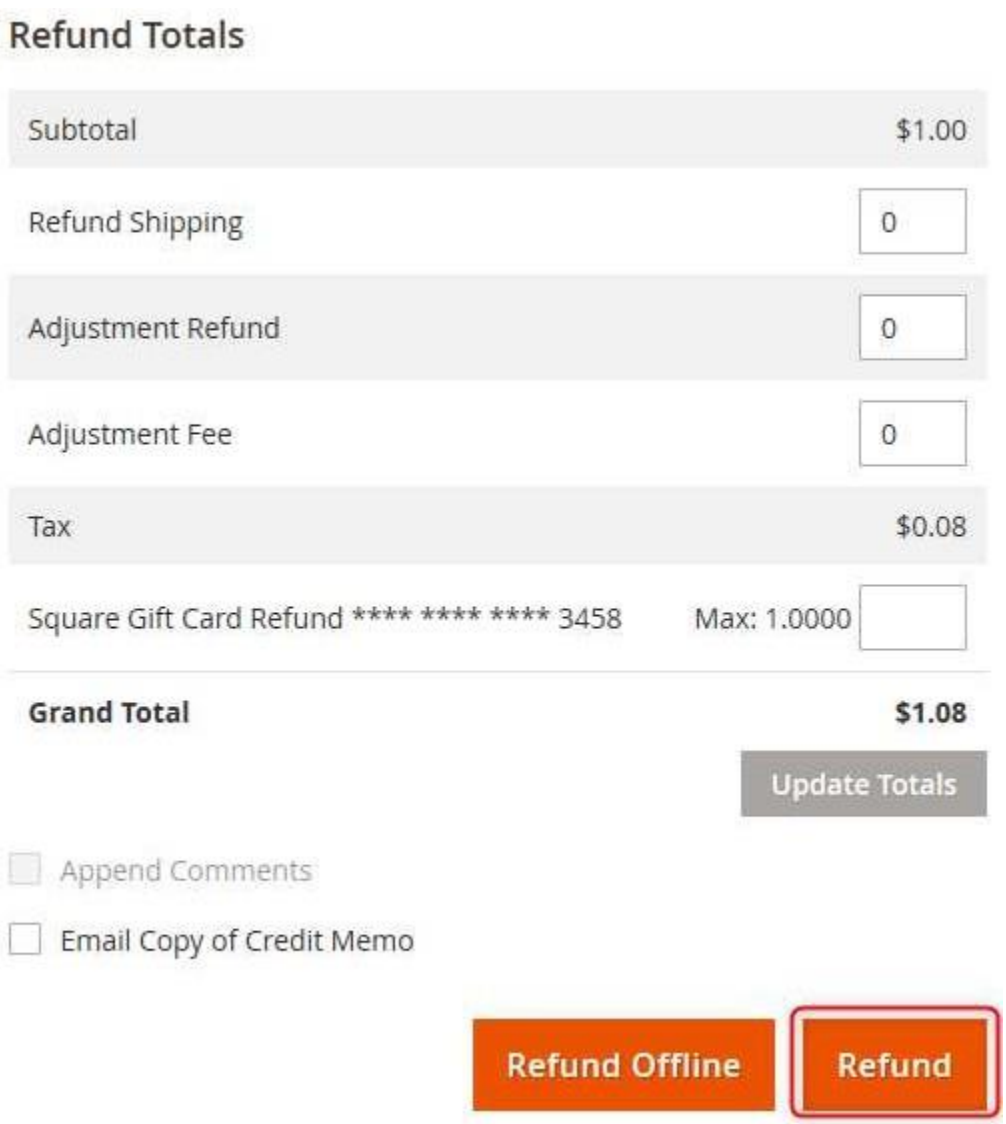




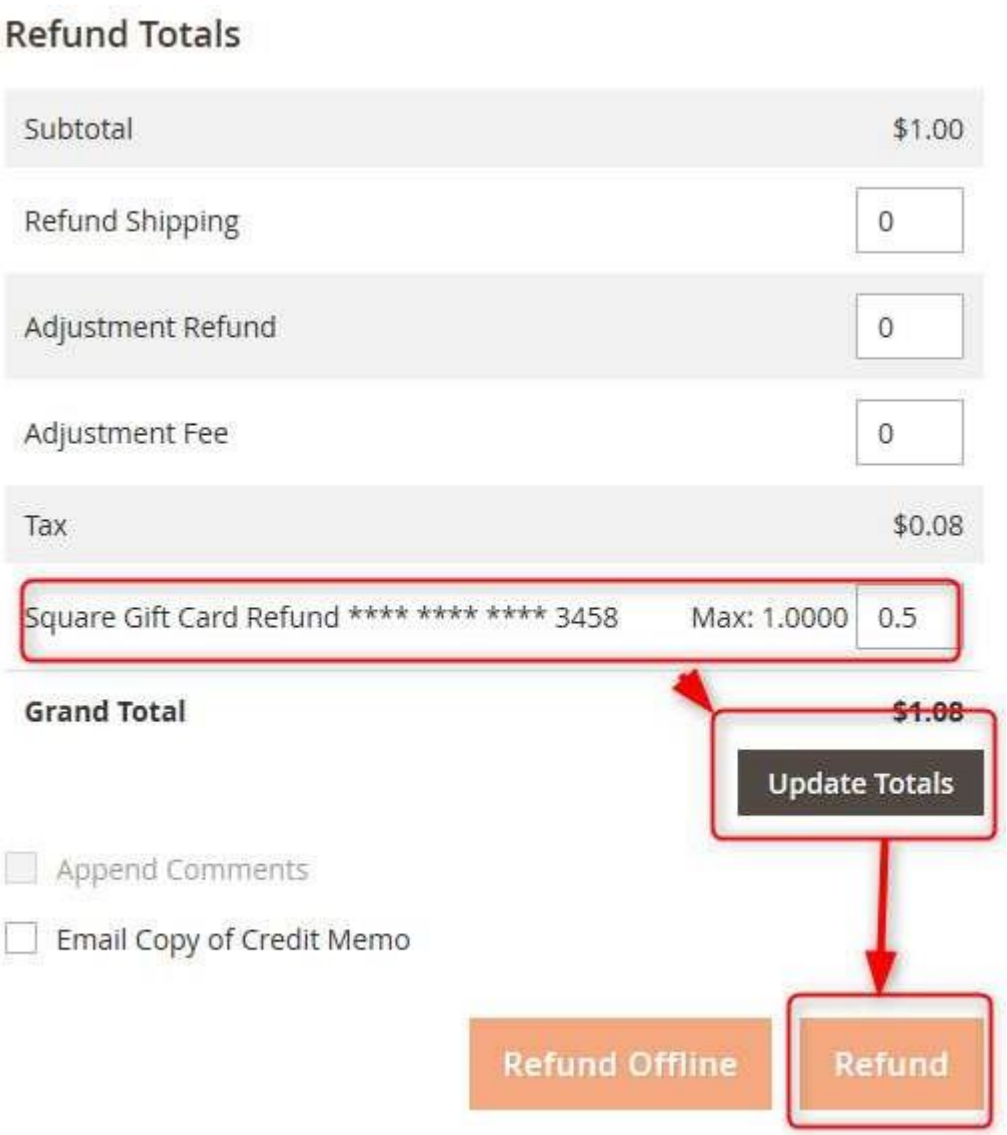
If the balance of a gift card is greater than the order value, the remaining amount will still be available for use during a future order.

1.2.3 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.



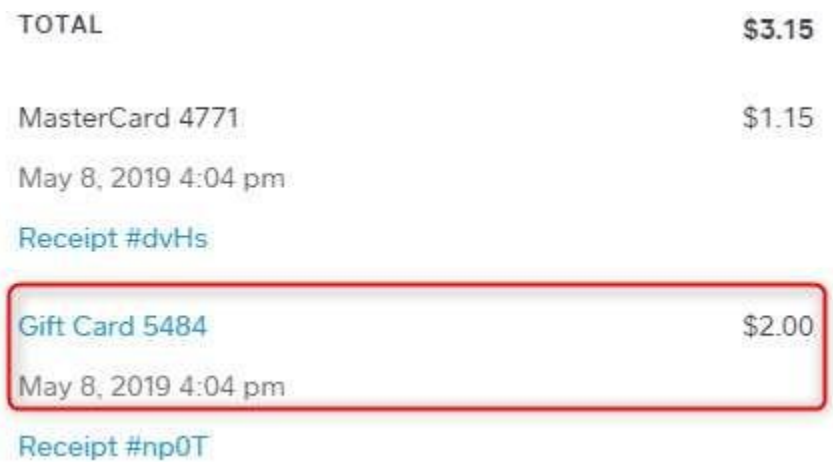
To refund gift cards used in an order using custom amounts, navigate to the orders grid, click to view the invoice of a specific order, create credit memo (the same process as when refunding an order online), type the amount you want to refund on a specific gift card, click “Update Totals”, and then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



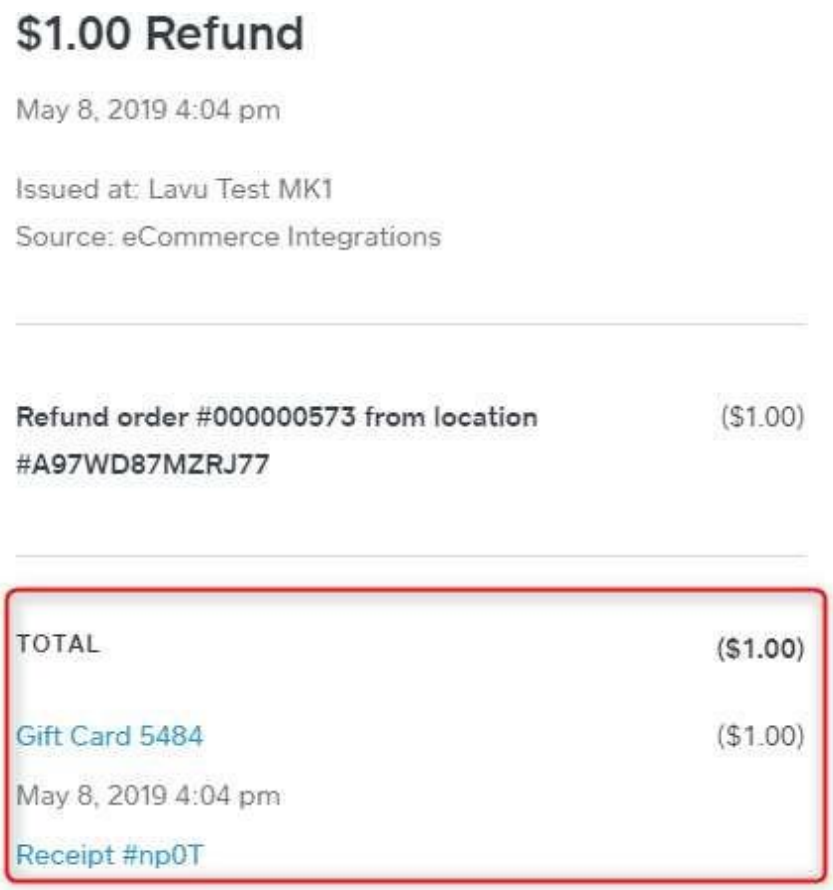
1.2.4 View Gift Card Transactions in Square Dashboard

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:



- Refund of a gift card in Square dashboard:



1.3 Apple Pay

1.3.1 Prerequisites

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

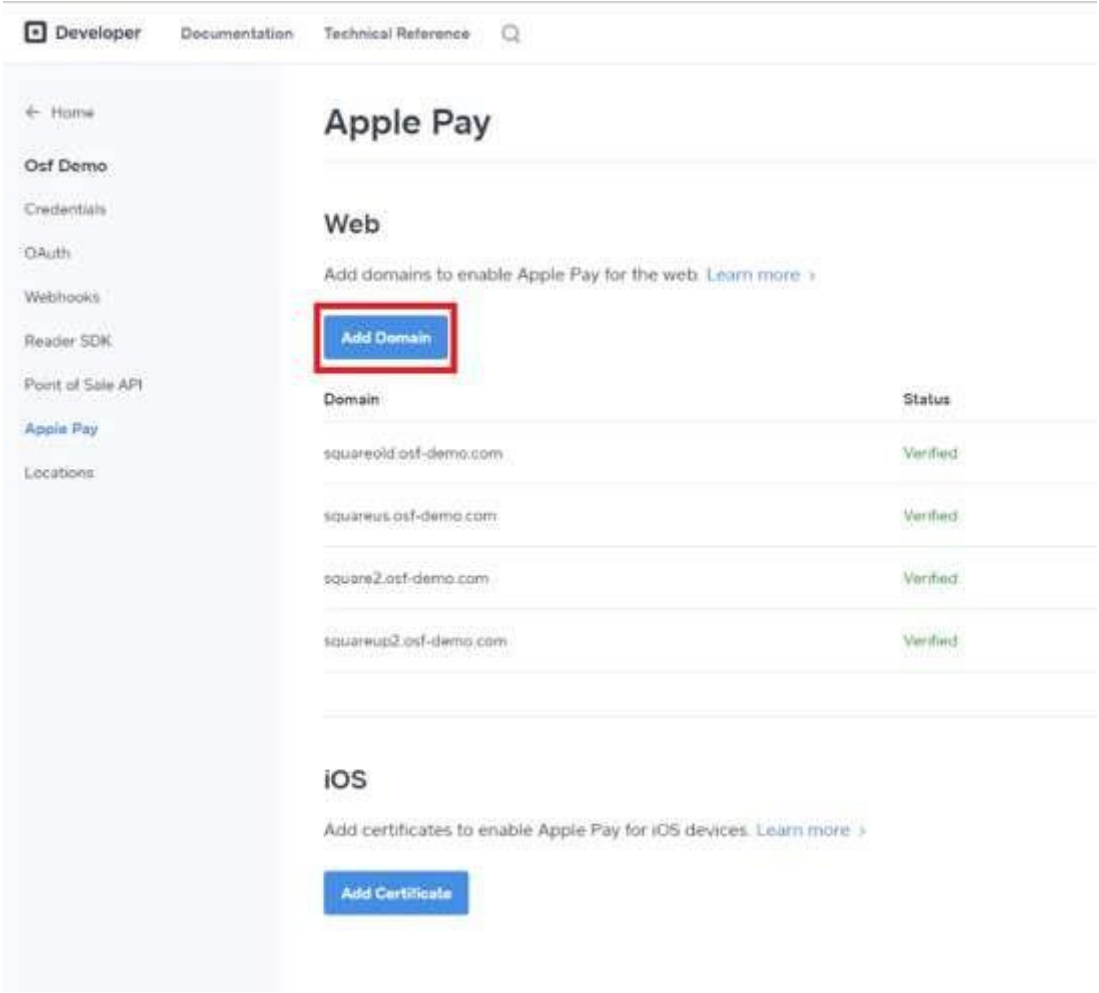
- you have https set up on your Magento store
- you have a Square production account connected In the Magento Admin
- your Square account Is based In the United States

1.3.2 Set Up

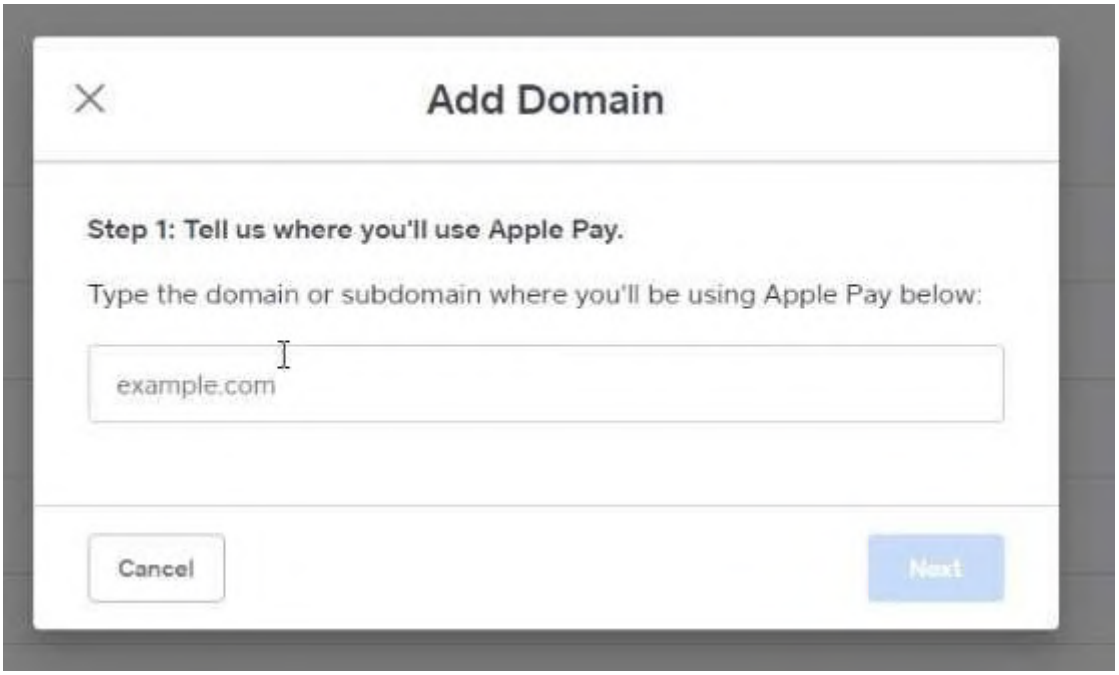
No configuration or setting up is needed in your Magento Admin.

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

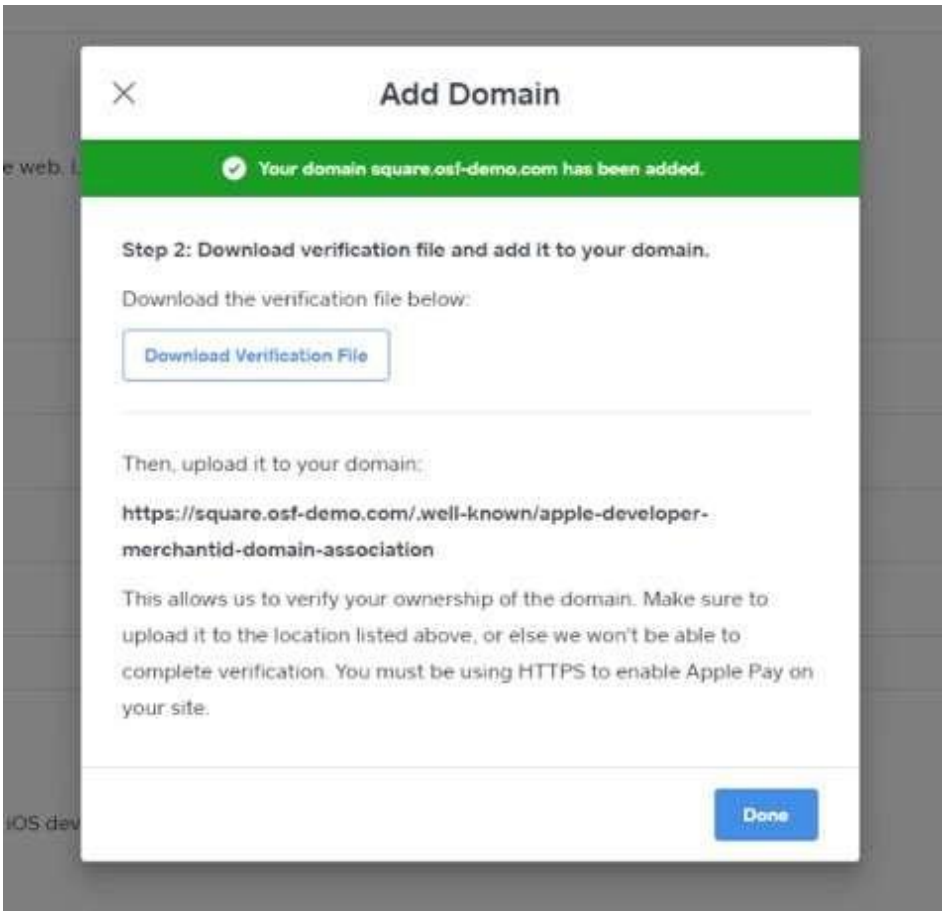
- Open the Application Dashboard, select the application associated with your SqPaymentForm implementation,
- Click on the Apple Pay tab for the selected application, then click on the "Add a new domain" link:



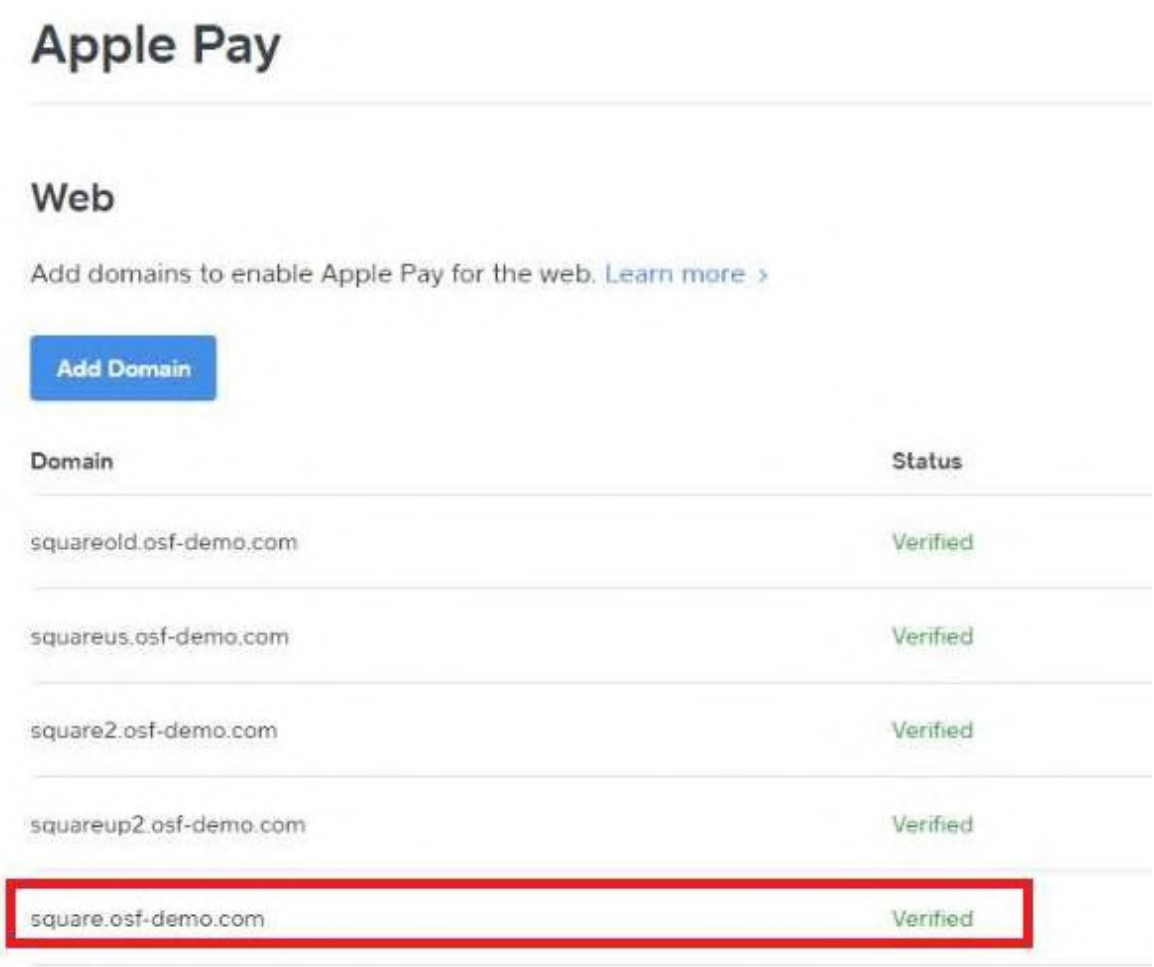
1. Type the domain name to your store:



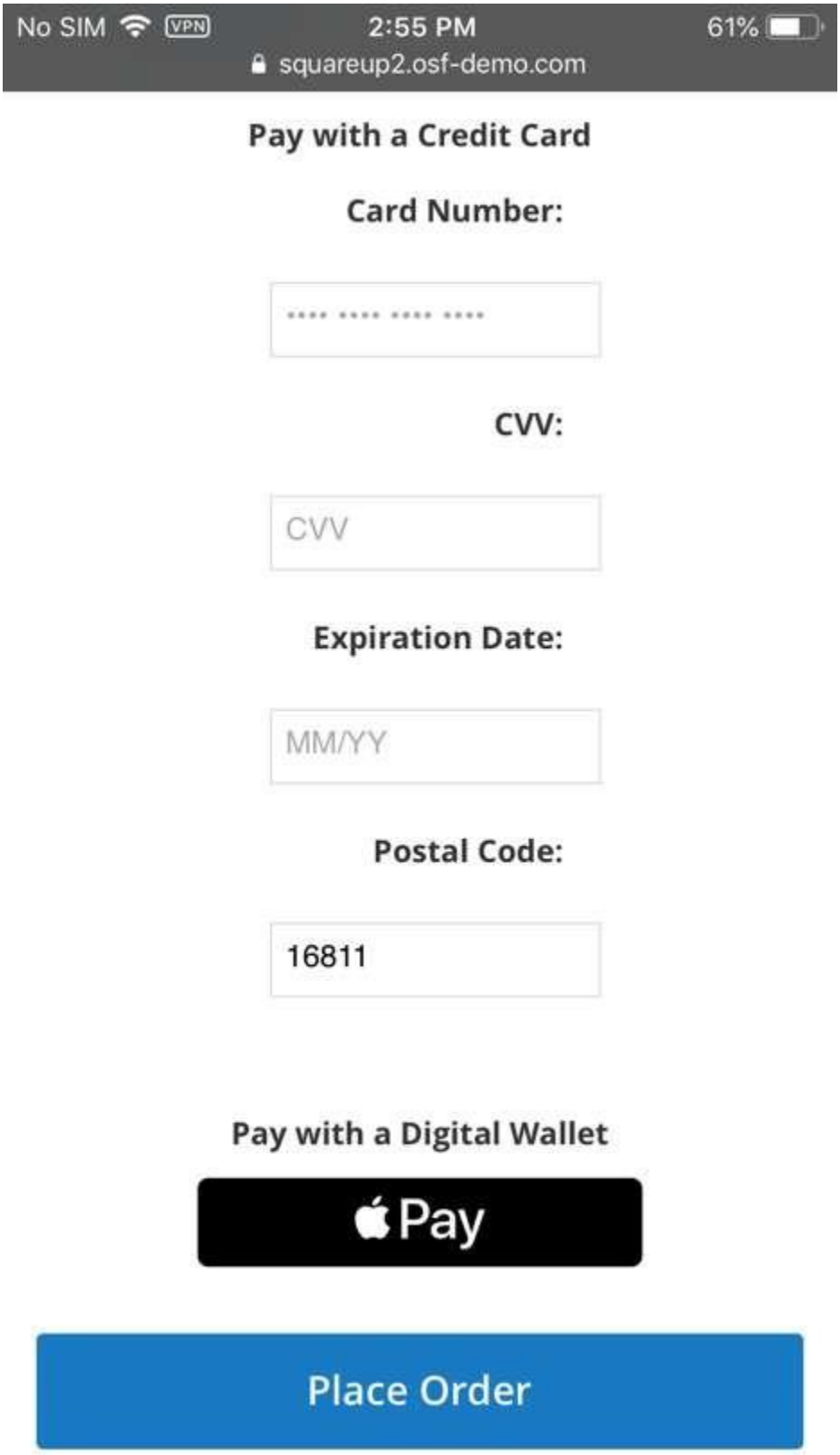
2. A success message will be displayed:



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:



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



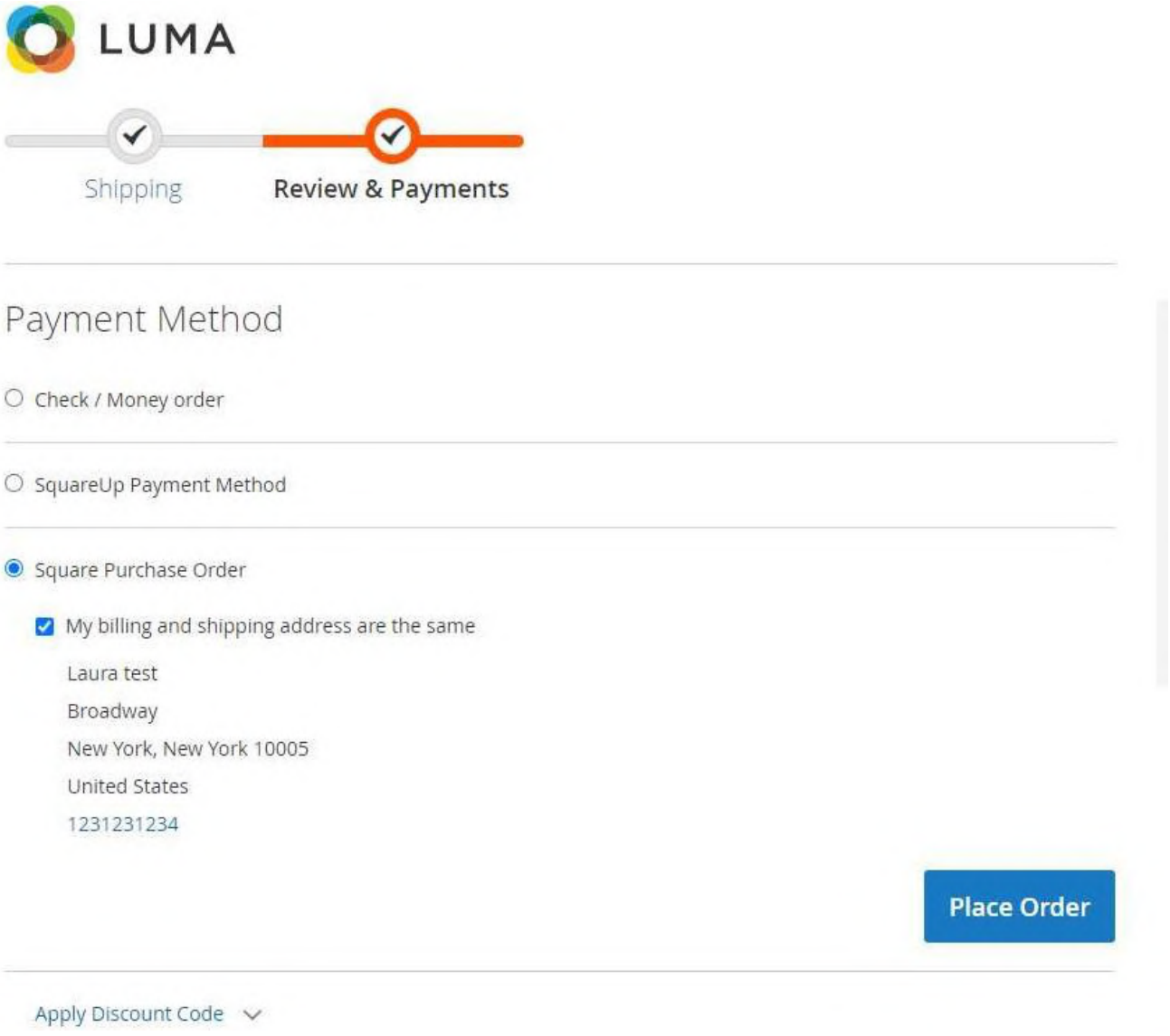
1.4 Invoice Pay

1.4.1 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.

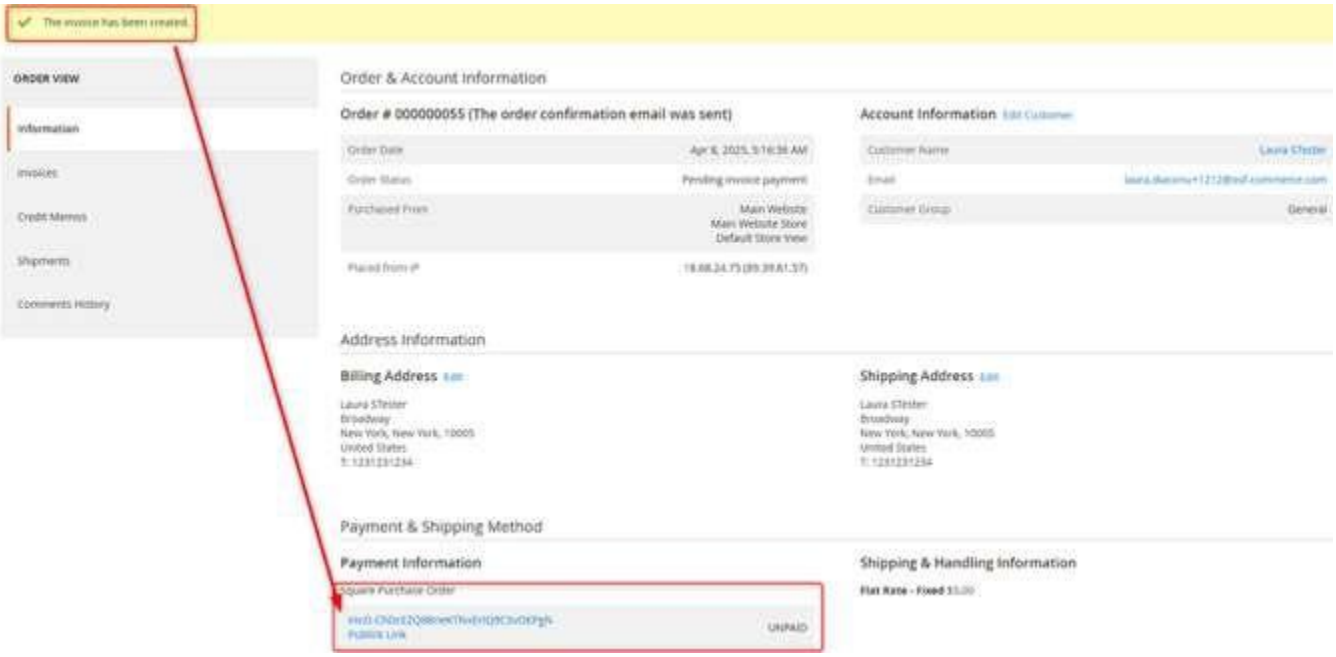
1.4.2 Journey

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

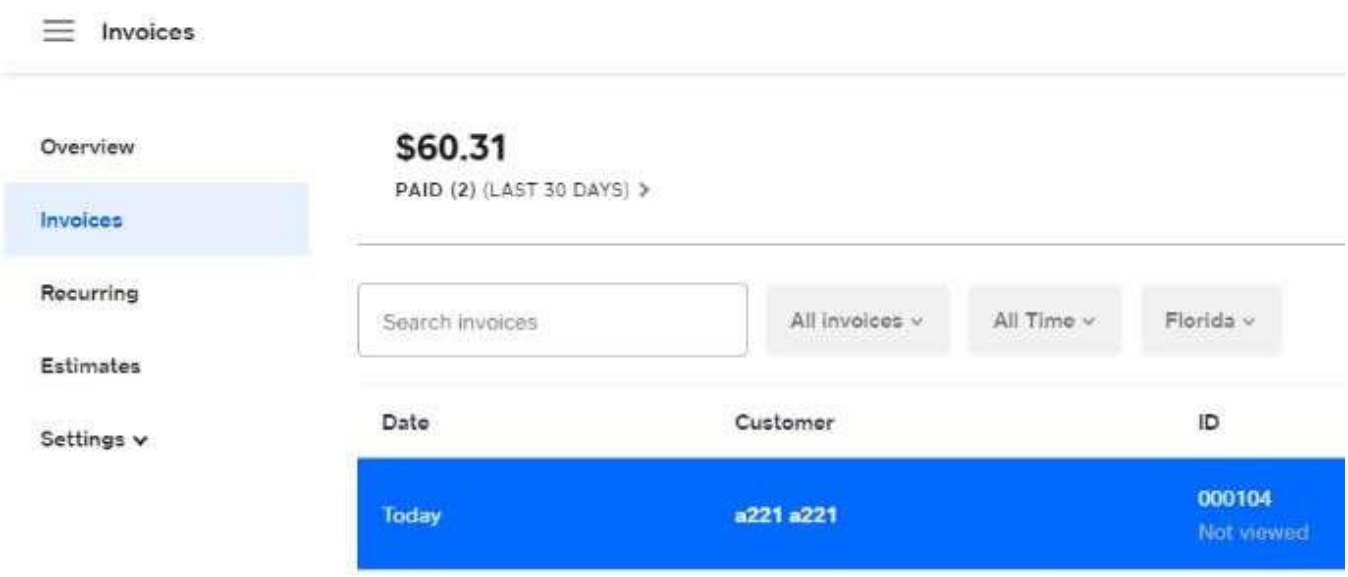


Once the order is placed, the store owner must make sure the order is invoiced in the admin area. The square invoice is created only if the Magento order has an Invoice associated to the order. Please

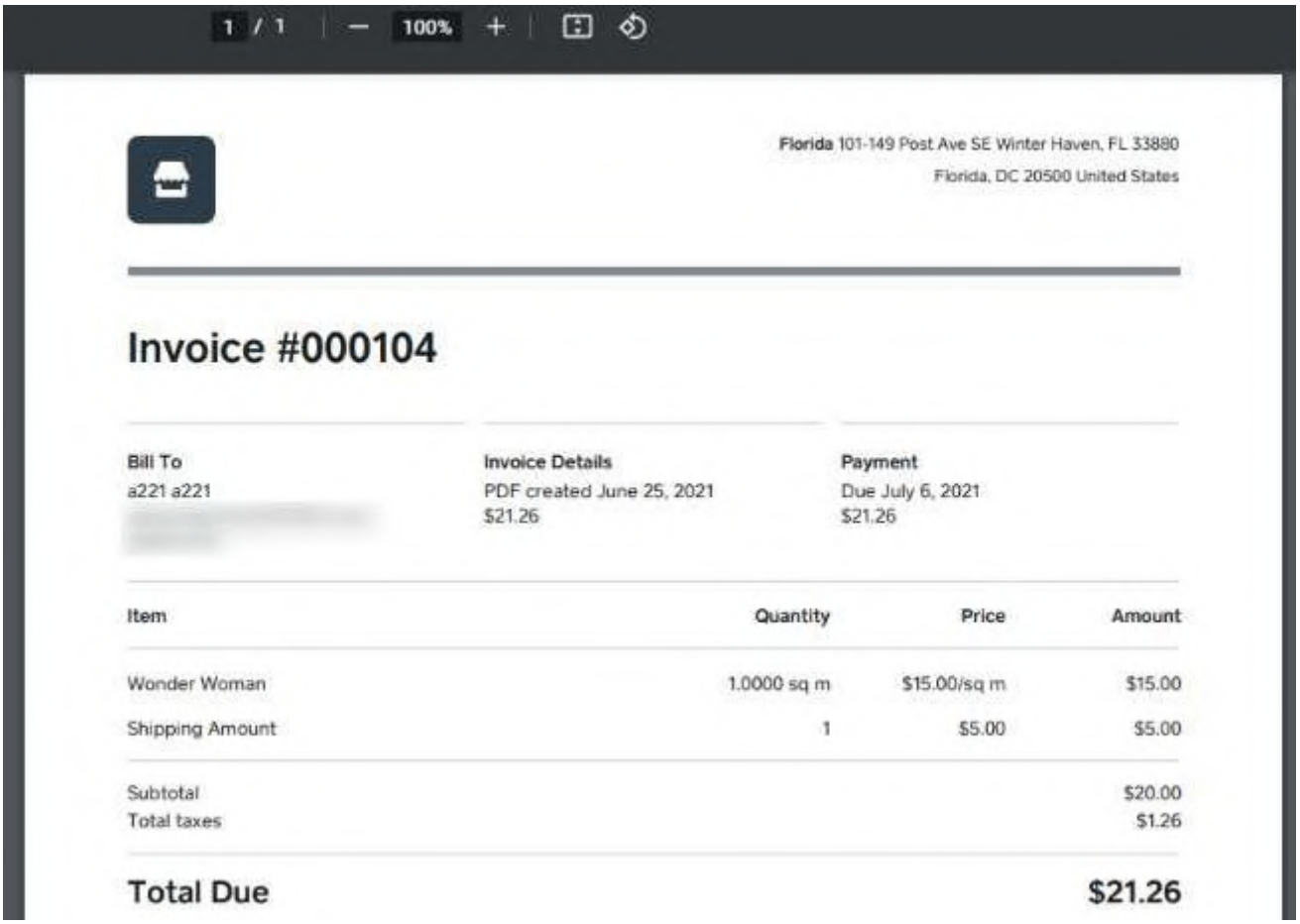
make sure the order is invoiced. After the invoice is generated by Magento, a payment link will be displayed in the order information, directing to the Square invoice.



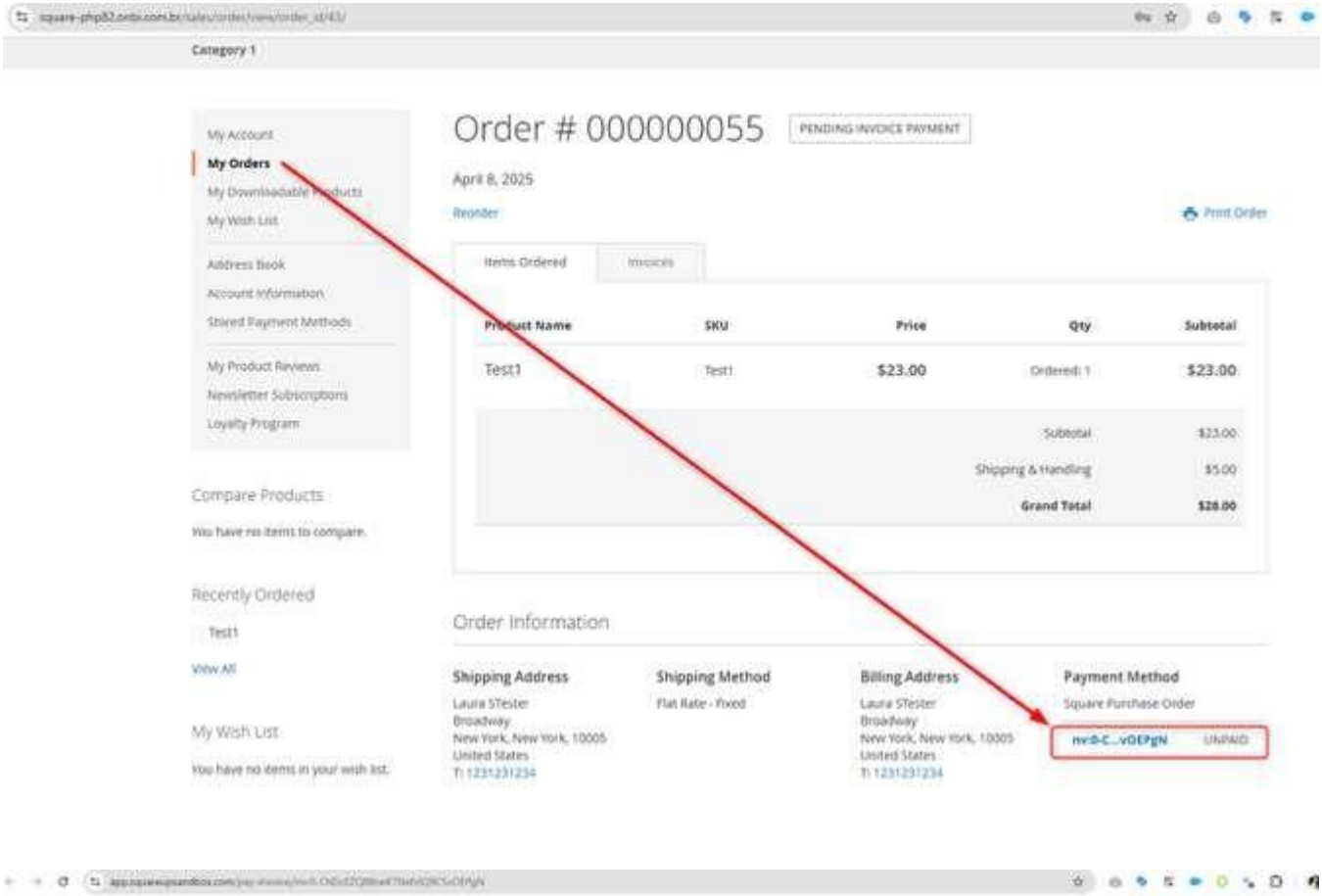
Once the order is invoiced, the corresponding invoice is also visible in the Square Dashboard > Invoices:

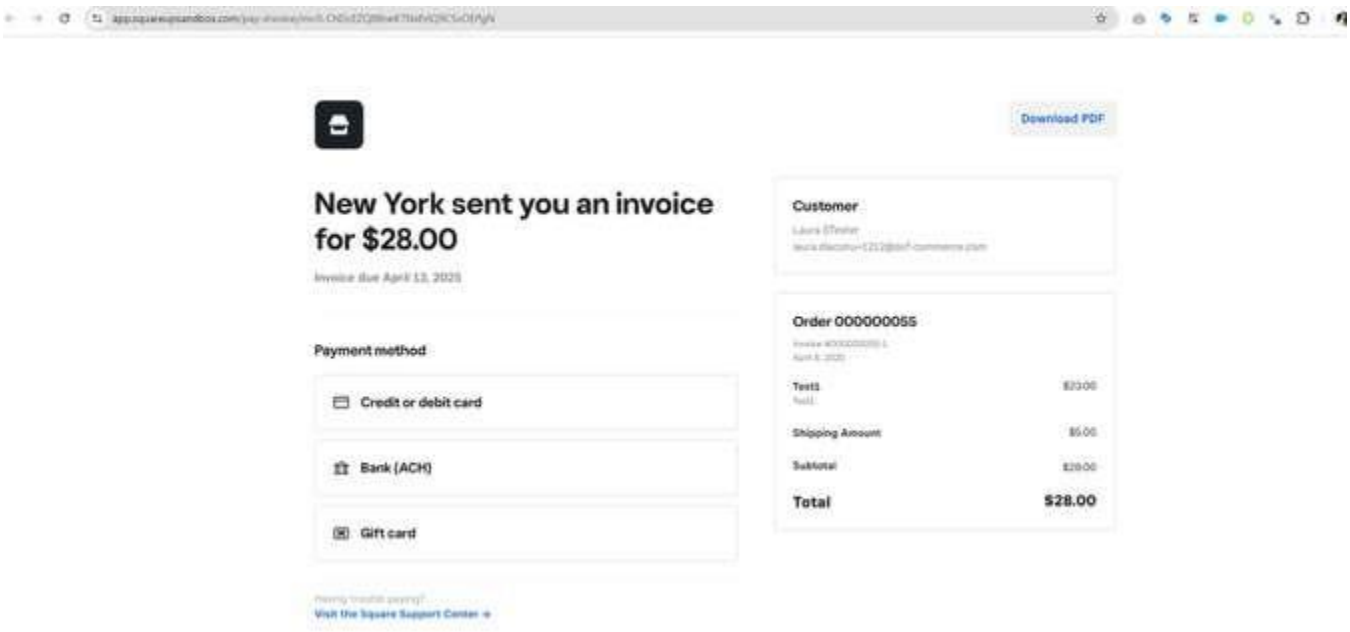


Opening the invoice details also provides it in downloadable PDF format:

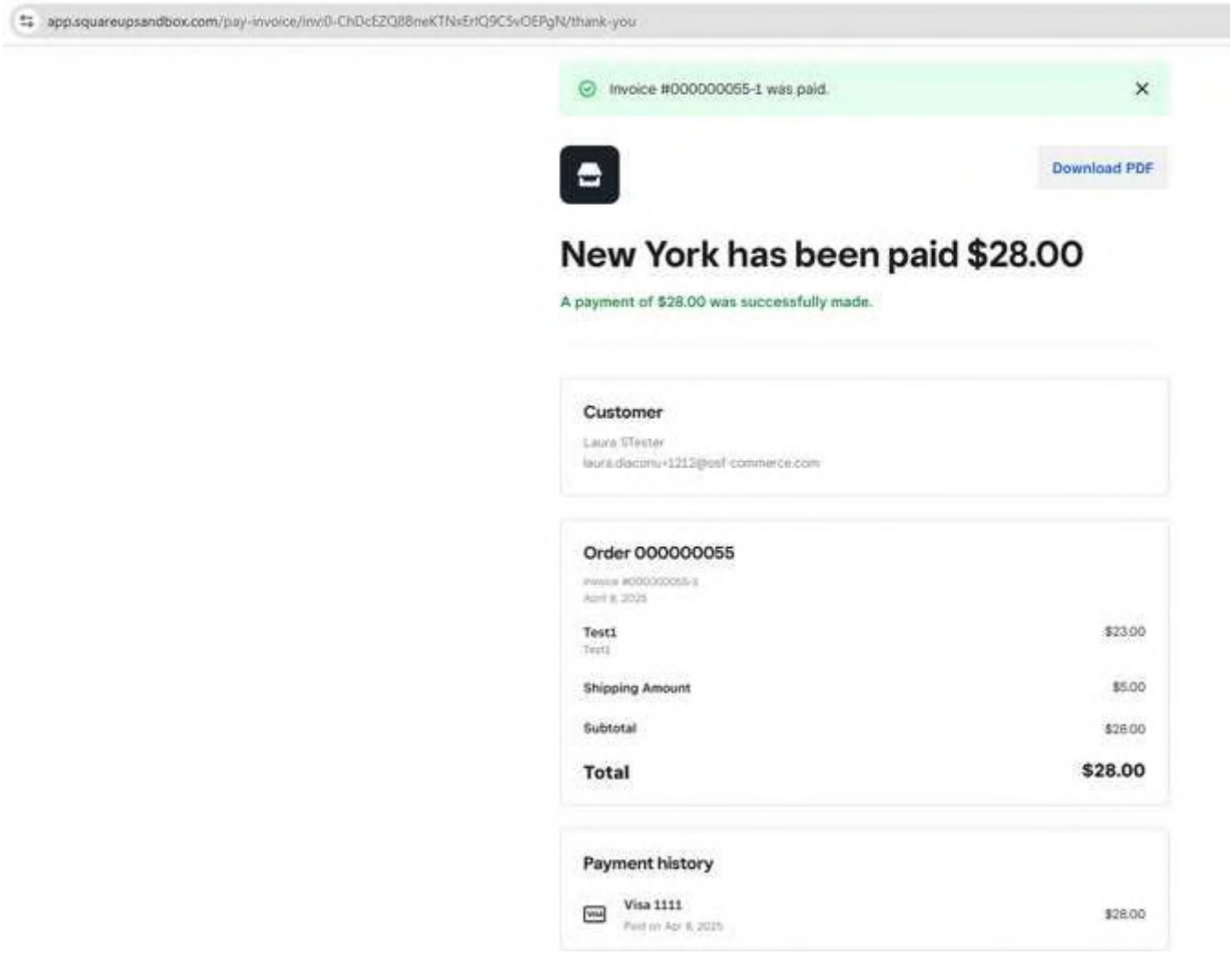


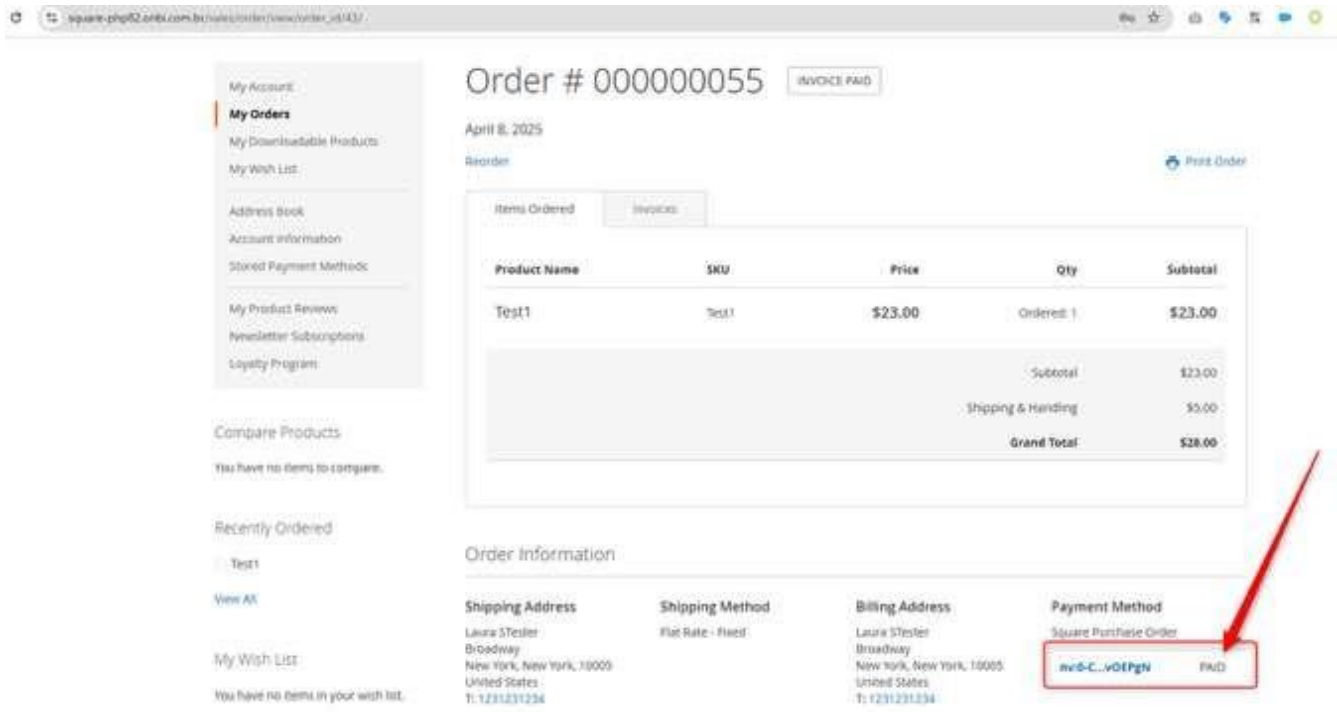
- There will also be a public link for the customer to make the payment.





- After payment, the "UNPAID" status will automatically update to "PAID."

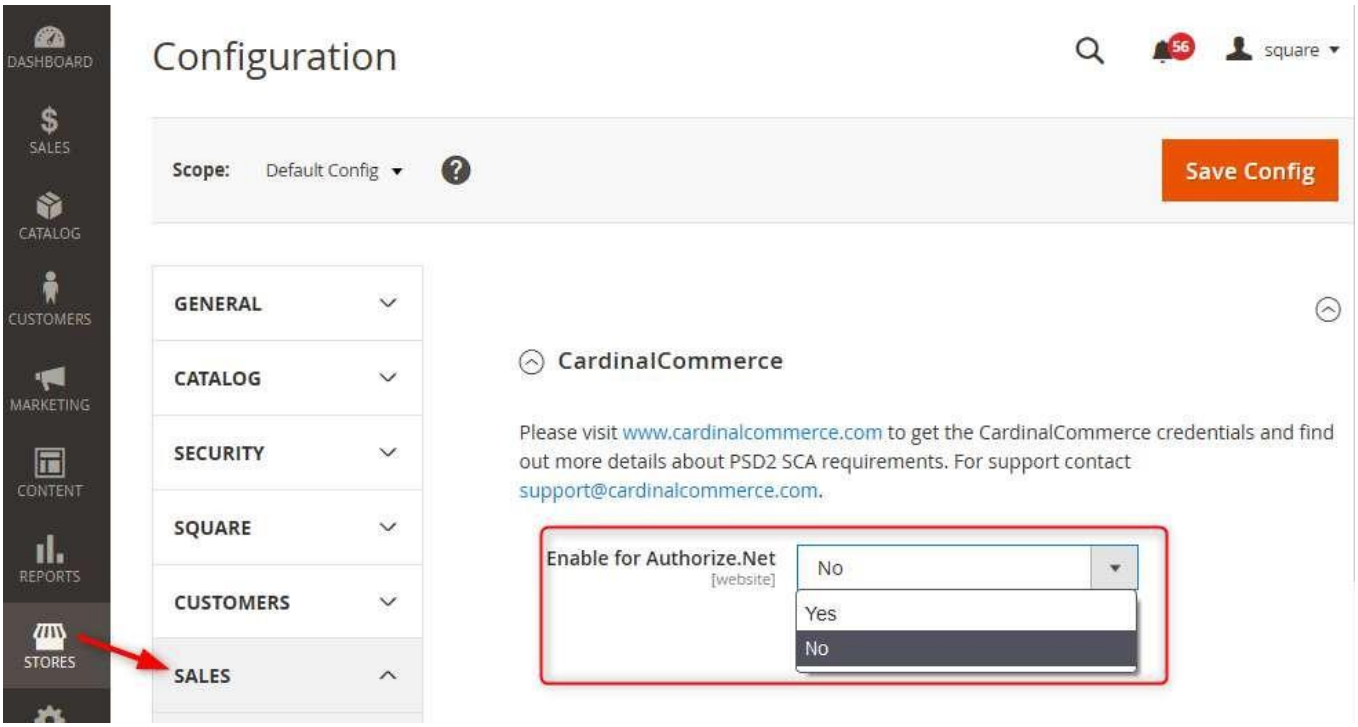

app.squareupsandbox.com/pay-invoice/invoi0-ChDcEZQ88neKTNxErfQ9C5vOEPgN/thank-you
Invoice #000000055-1 was paid.
Download PDF
New York has been paid $28.00
A payment of $28.00 was successfully made.
Customer
Order 000000055
Test1
$23.00
Shipping Amount
$5.00
Subtotal
$28.00
Total
$28.00
Payment history
Visa 1111
$28.00


My Account
My Orders
My Downloadable Products
My Wish List
Address Book
Account Information
Stored Payment Methods
My Product Reviews
Newsletter Subscriptions
Loyalty Program
Compare Products
You have no items to compare.
Recently Ordered
Test1
View All
My Wish List
You have no items in your wish list.
Order # 000000055
INVOICE PAID
April 8, 2025
Reorder
Print Order
Items Ordered
Invoices
Product Name
SKU
Price
Qty
Subtotal
Test1
Test1
$23.00
Ordered: 1
$23.00
Subtotal
$23.00
Shipping & Handling
$5.00
Grand Total
$28.00
Order Information
Shipping Address
Laura STester
Broadway
New York, New York, 10005
United States
T: 1231231234
Shipping Method
Flat Rate - Fixed
Billing Address
Laura STester
Broadway
New York, New York, 10005
United States
T: 1231231234
Payment Method
Square Purchase Order
inv0-C...vOEPgN
PAID

1.5 PSD2 SCA

1.5.1 Admin Settings

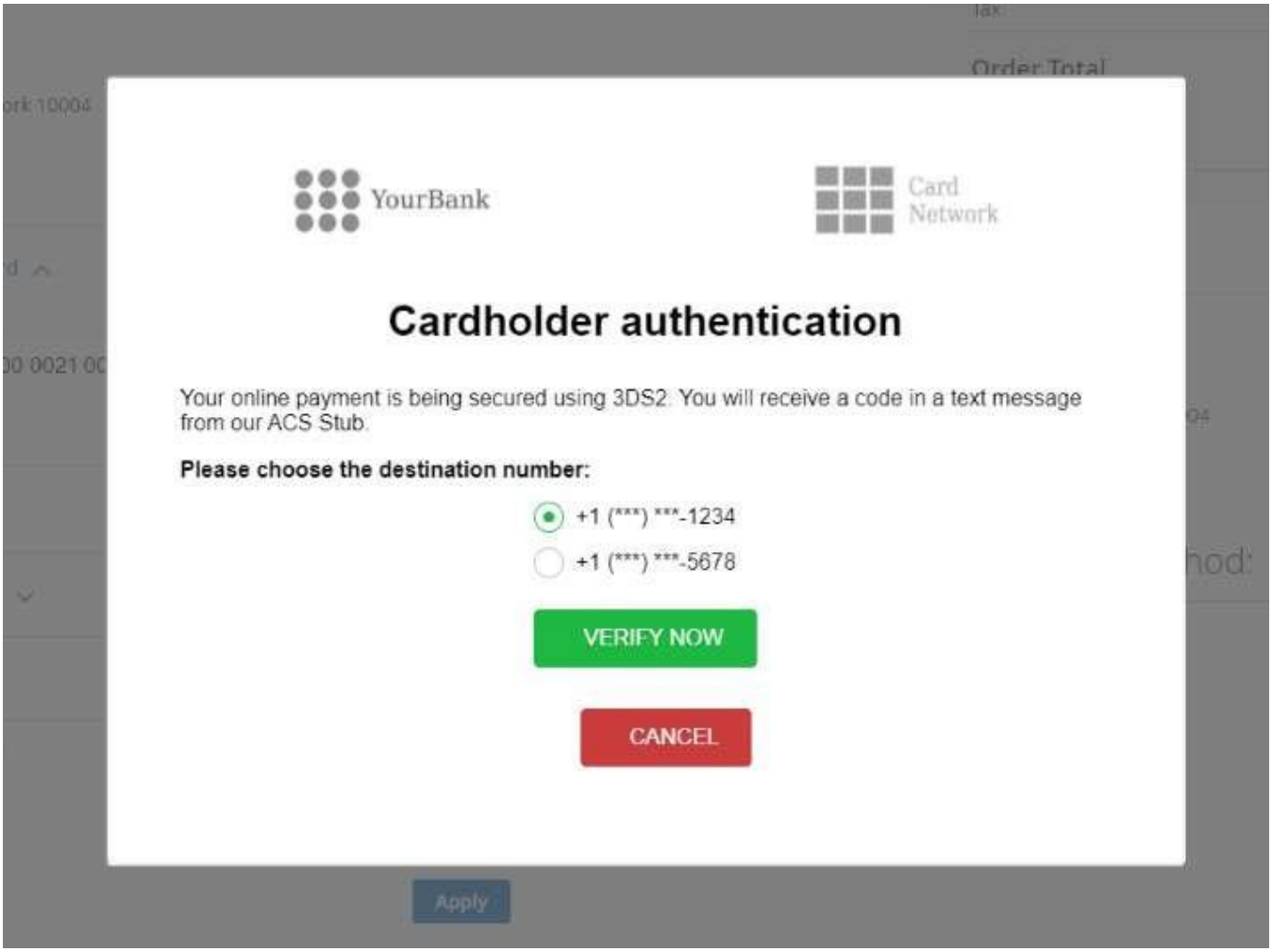
Whenever a customer on the front performs a payment using a credit card, 3D Secure validation can now be enabled. This can be done by navigating in admin to Stores > Configuration > Sales > 3D Secure:



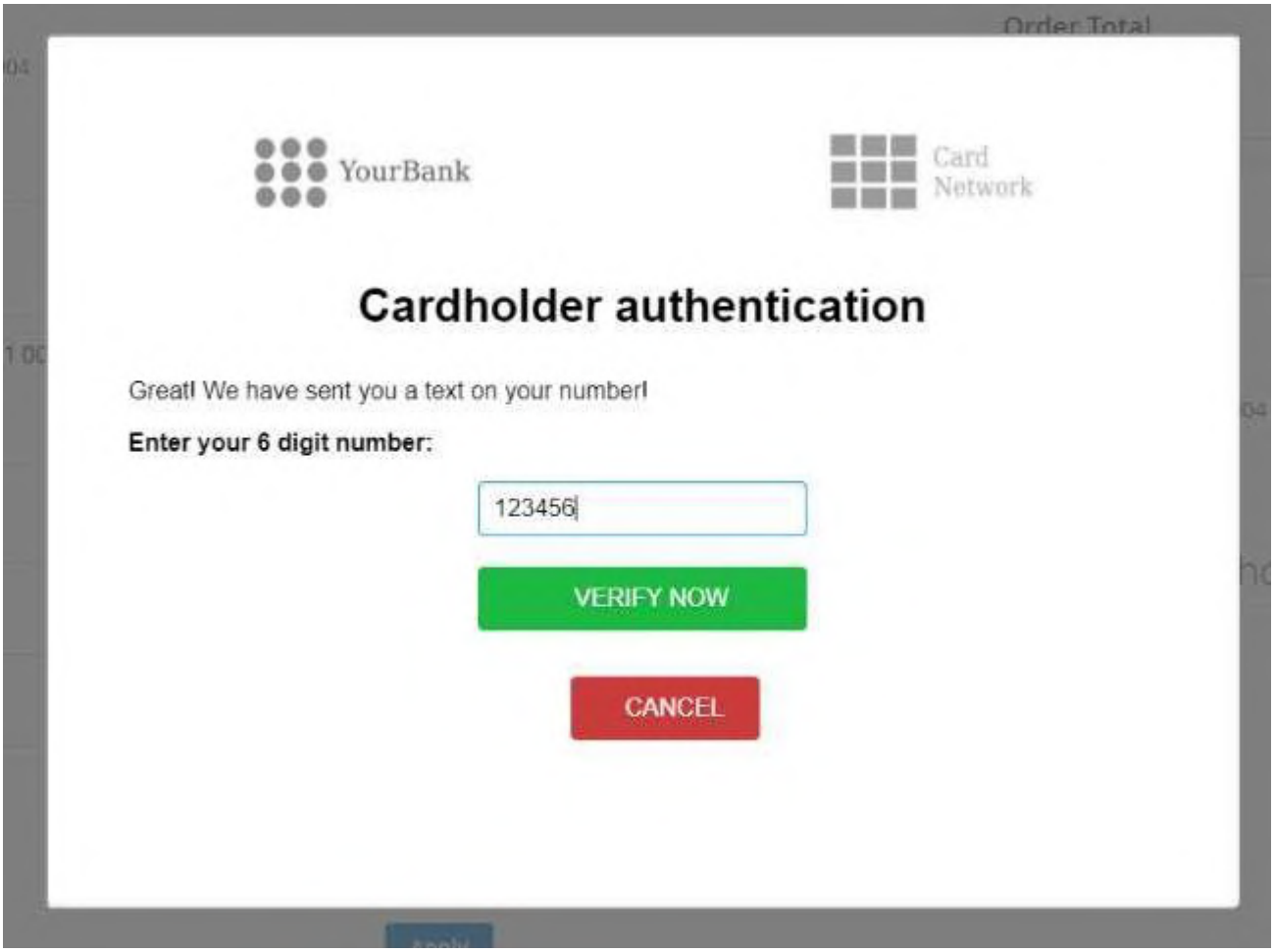
Once enabled, the customer journey on the front end will be changed so that before the order is placed, they must confirm the credit card transaction via a code they receive on their phone number.

1.5.2 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:

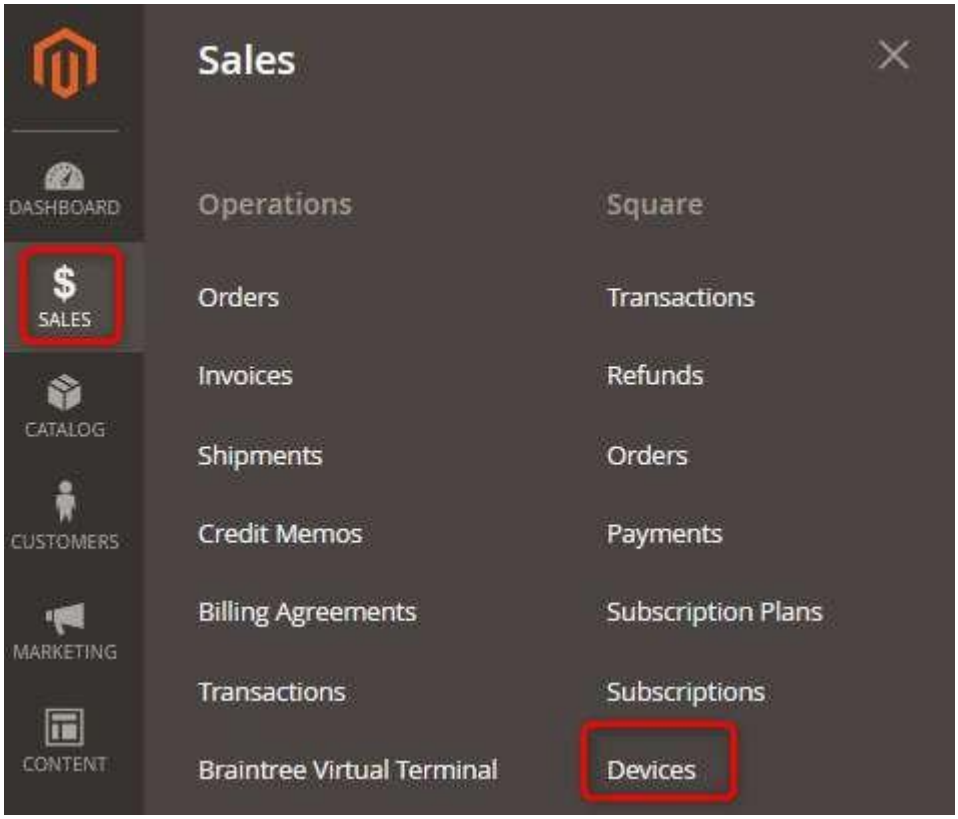


If the validation passes, the order is submitted immediately and no other interactions occur with the previously described flows.

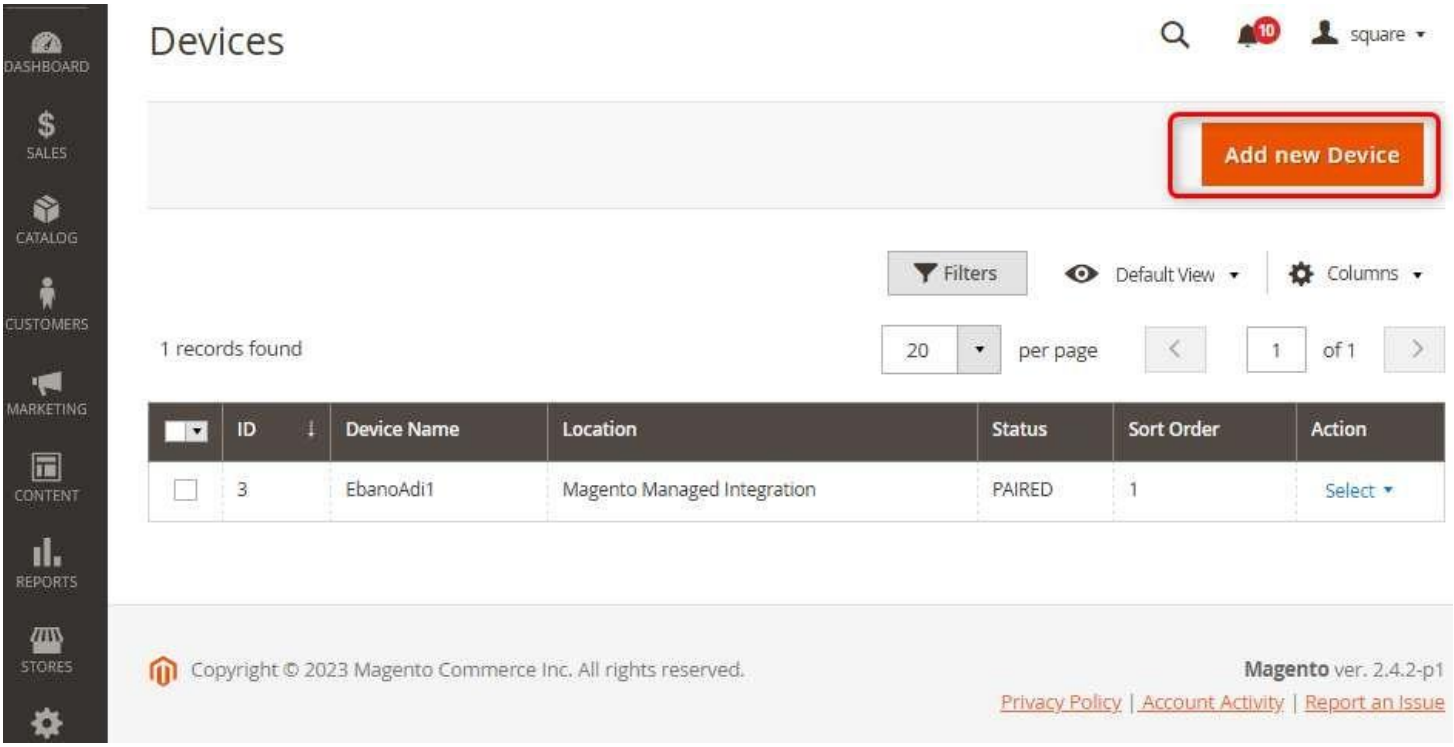
1.6 Square Terminal Payment

1.6.1 Register new device

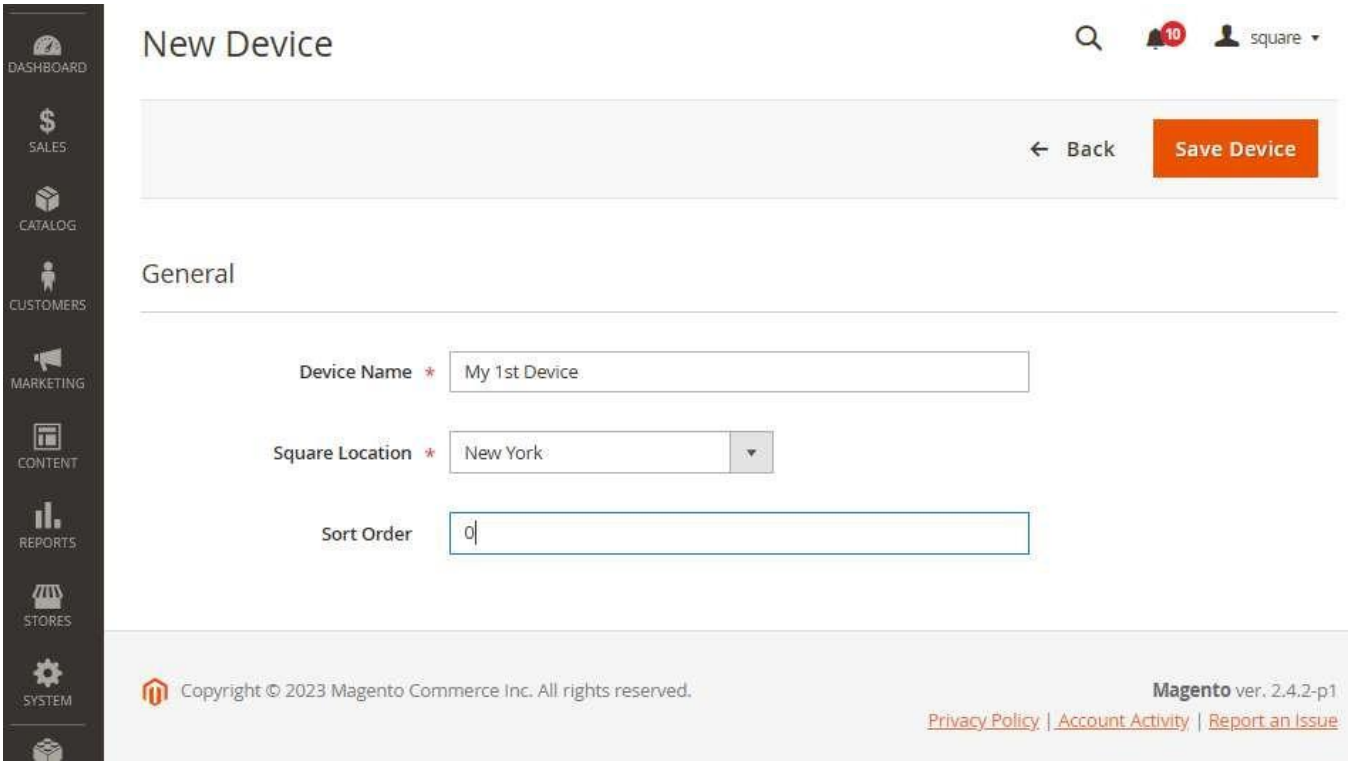
You must have at least a registered terminal in order to use terminal payments. Once you are in the physical possession of a terminal, navigate in the Admin area to Sales > Devices:



This opens a grid with the list of already registered devices. To register a new device, click Add new Device:



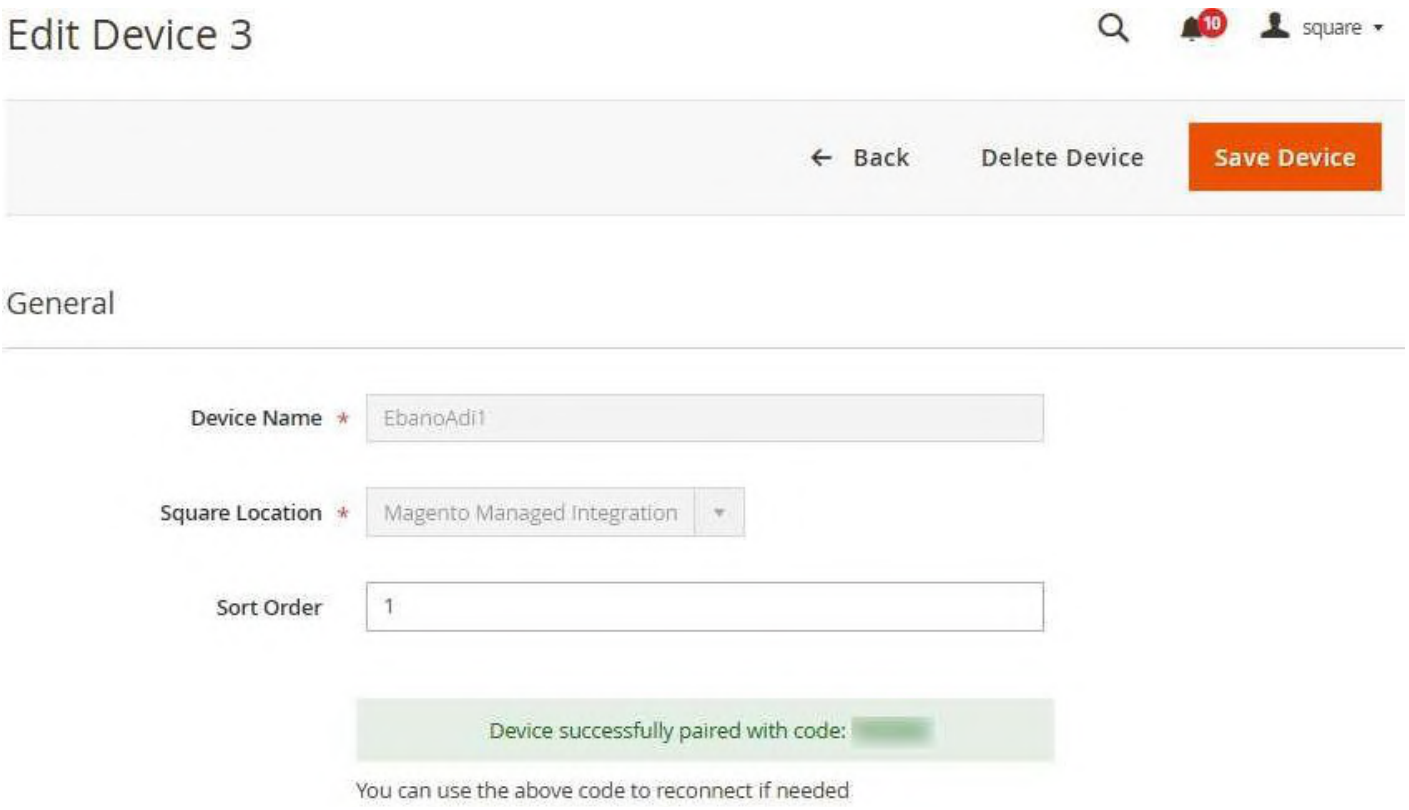
Provide an arbitrary name to the terminal. Select the location where the terminal will be active. If you have more than one device, provide a sort order index that will be used to order the devices in the payment method during admin checkout, then Save:



1.6.2 Pair the newly registered device

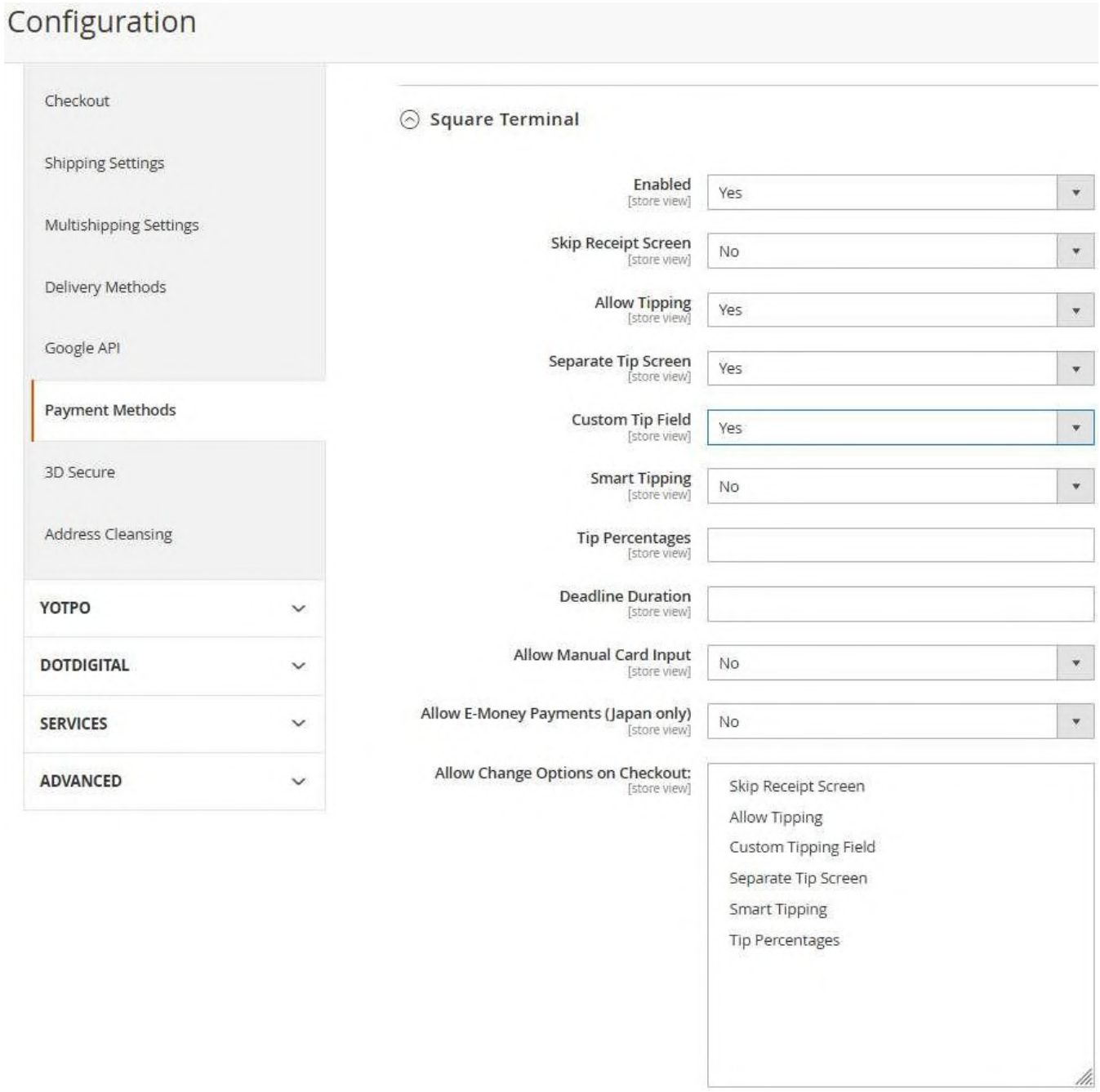
Once the device was added to the list, click to Edit its details. Start the pairing process and follow the steps displayed on the physical device. Please note that if there are two different Square accounts and the intention is to use the terminal on the account which the Magento catalog is not being synchronized to, then in order for the pairing to be successful you will have to cancel the catalog sync. Otherwise, if you only use a single Square account, the catalog and inventory syncs can be used with no issues.

Once the steps on the terminal have been followed through, the device details page in Magento automatically reloads to display the successfully paired status:



1.6.3 Square Terminal Payment Settings

Terminal payment settings can be found by navigating to Stores > Configuration > Sales > Payment Methods > Square Terminal:



The Square Terminal payment method will be available for admin orders if “Enabled” is set to Yes.

The fields below give you the opportunity to configure the screens displayed on the terminal.

- The receipt screen can be displayed or skipped
- Allow tipping, if set to yes, provides the function to capture tips.
- If tipping is enabled, then a dedicated screen for the tip can be displayed
- Custom tip field allows manual input of tips
- Smart tipping automatically calculates tips based on percentages

- Manual card input allows the user to input card details manually, when the card is not available for swipe.

1.6.4 Checkout Process using a Terminal

The merchant can use the terminal to place an order directly in Magento Admin area. The merchant can use the standard flow for creating an Admin order and Choose Square terminal as payment method. On the terminal, the merchant will be able to either swipe the credit/debit card or enter its details manually, if Manual card input was set.

1. When the Square Terminal payment method is selected, the merchant will have the following options:
   - Value: by default, will be populated with the order total amount
   - Device: list of devices available to the selected store view, ordered by the sort order
   - Skip Receipt Screen (if allowed on "Allow change options on checkout" setting)
   - Allow Tipping (if allowed on "Allow change options on checkout" setting)
   - Custom Tipping Field (if allowed on "Allow change options on checkout" setting)
   - Separate Tip Screen (if allowed on "Allow change options on checkout" setting)
   - Smart Tipping (if allowed on "Allow change options on checkout" setting)
   - Tip Percentages (if allowed on "Allow change options on checkout" setting)
   - Payment type: with the below options:
     - Credit card or debit card payments via tap, dip or swipe
     - Manual credit or debit card (if allowed on "Allow Manual Card input" setting)
     - iD checkout (if allowed on "Allow E-Money Payments" setting)
     - QUICPay (if allowed on "Allow E-Money Payments" setting)
     - Transportation Group (if allowed on "Allow E-Money Payments" setting)
     - FeliCa (if allowed on "Allow E-Money Payments" setting)

2. The merchant can modify the value field if splitting the payments on multiple transactions is needed, allowing the customer to pay with different credit cards or to use a Square gift card to cover part of the payment. It is not possible to add a value greater than the total amount to pay on this field.

3. After setting the desired options, the merchant must submit the payment to the Square Terminal. Magento will submit the terminal checkout request to the Square Terminal API and the merchant must collect payment when requested on the Square Terminal.

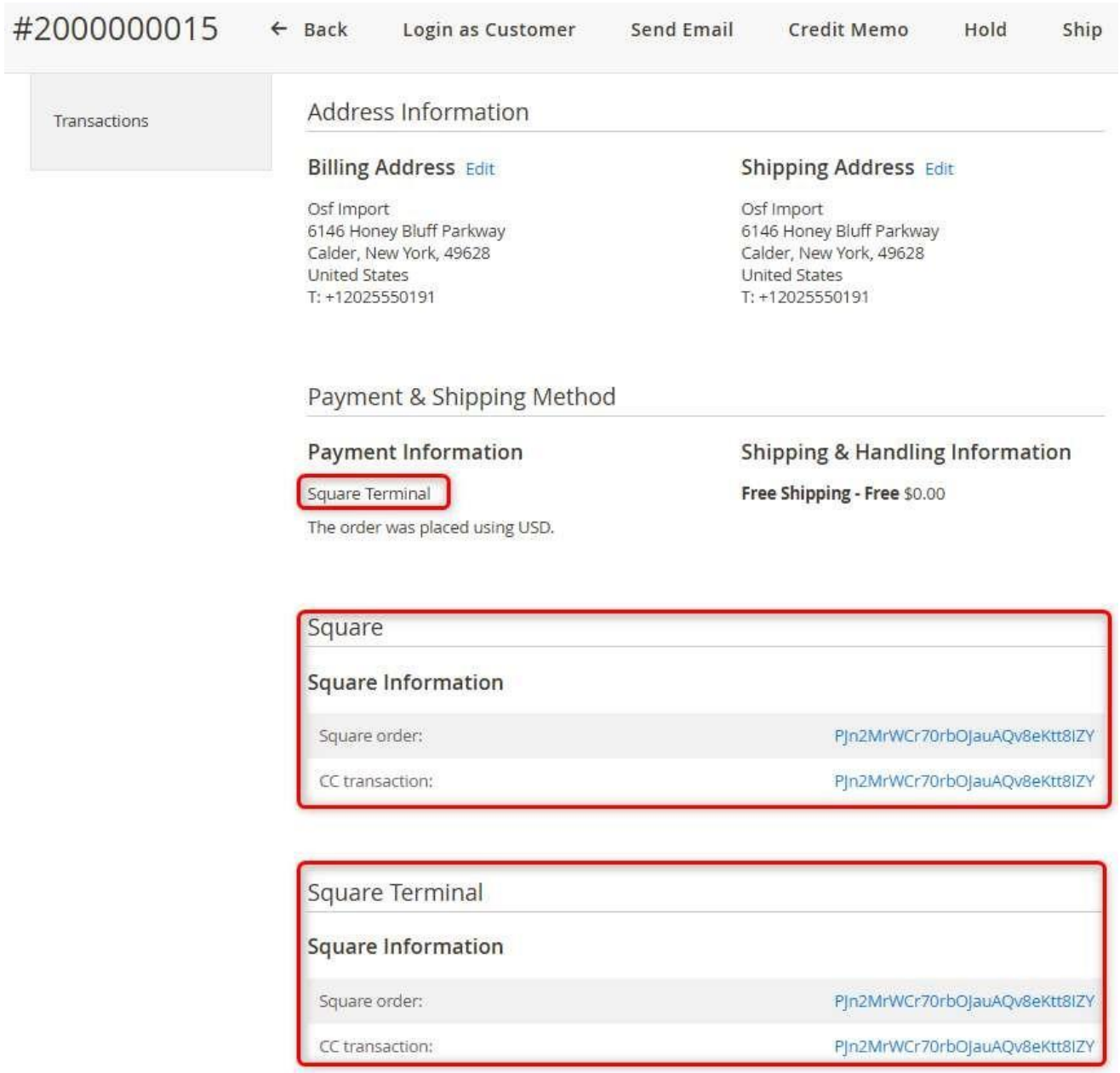
4. Magento will listen for webhooks and also check periodically (e.g. every 10 seconds) the terminal API for updates to the checkout process. While the payment is being processed on the

terminal, the screen will be blocked and the option to cancel the checkout request exists. If the merchant requests a cancellation, the request will be sent to the Terminal API.

- If the payment is canceled, the process completes without a payment and the merchant can restart the process.
- If the payment request was partial and there is an amount to be covered, the value field will be populated with the total remaining and the merchant can submit new checkout request.
- After each checkout request is completed on the Square Terminal, Magento will show the payment ID to the merchant.

5. After all the order amount is covered, by one or more payments, then the merchant can submit the order. Orders created with Square Terminal Payment will be automatically invoiced.

An order placed using the Square Terminal will display the payment method and assign an ID for the order and its corresponding transaction for both Square and Square terminal:



If a tip was included, it will also be displayed in the Order Totals section, below Taxes:

#2000000015 ← Back | Login as Customer | Send Email | Credit Memo | Hold | Ship

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Disc Amo
Terminal product SKU: terminal-product	Invoiced	$1.00	$1.00	Ordered 1 Invoiced 1	$1.00	$0.08	8.375%	$0.0

Order Total

Notes for this Order

Status

Processing

Comment

Notify Customer by Email

Visible on Storefront

Submit Comment

Feb 26, 2023 11:25:33 AM | Processing |
Customer **Not Notified**
Order Placed by yago bertolino using Admin Panel

Feb 26, 2023 11:25:33 AM | Processing |
Customer **Not Notified**
Order Placed by Store Administrator

Feb 26, 2023 11:25:33 AM | Processing |
Customer **Not Notified**
Captured amount of $1.08 online. Transaction ID: "PJn2MrWCr70rbOJauAQv8eKtt8IZY"

Order Totals

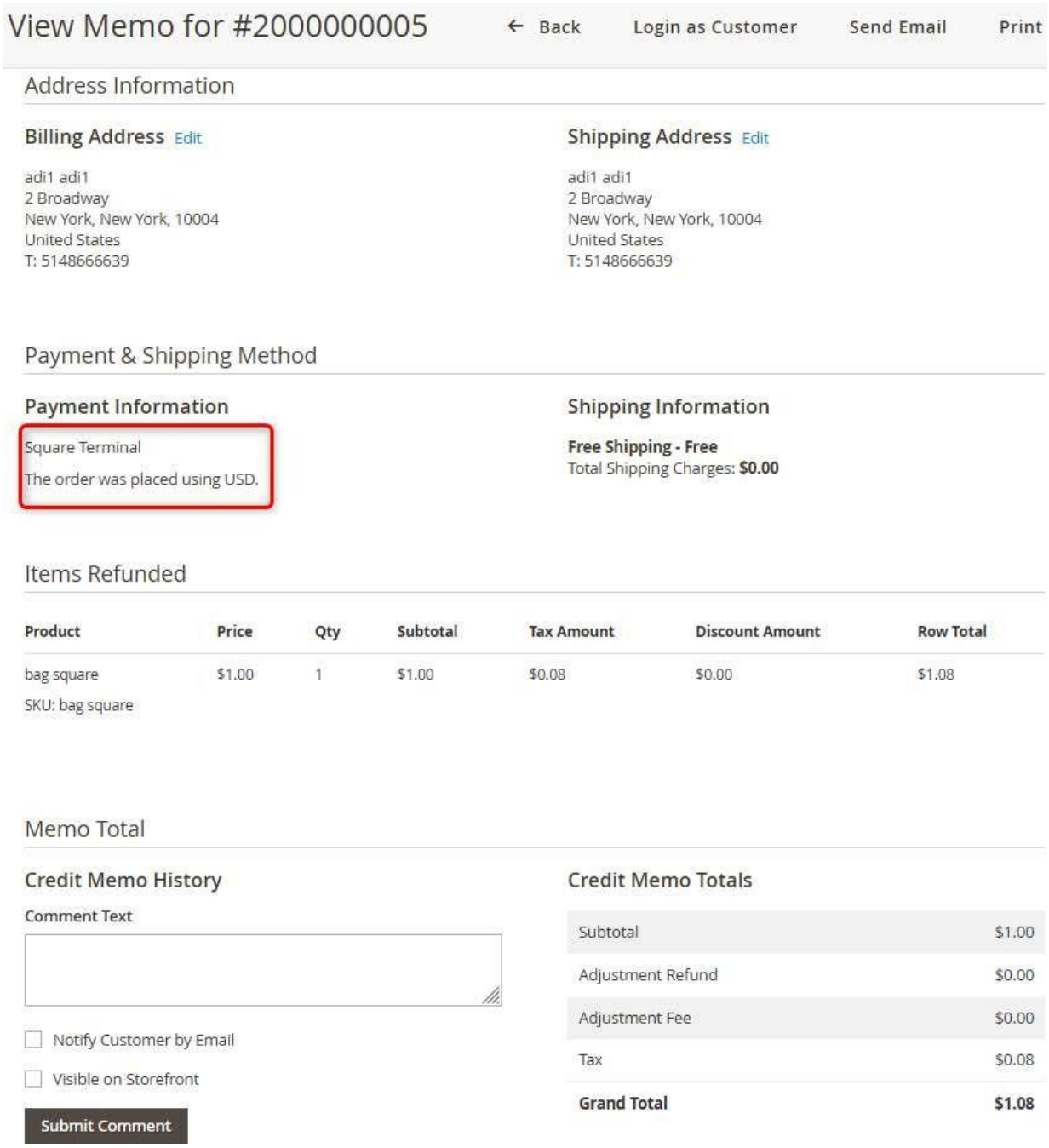
Subtotal	$1.00
Shipping & Handling	$0.00
Tax	$0.08
Tip Amount	$0.16
Grand Total	**$1.24**
Total Paid	**$1.08**
Total Refunded	**$0.00**
Total Due	**$0.16**

1.6.5 Refunding an order placed with a Square Terminal

Refunding an order placed with a Square Terminal can be done by following the standard procedure for refunding orders with online-captured payments.

Since all orders paid for using a Square terminal have their invoices automatically created, the store owner will navigate to the Order, switch to Invoice, create a Credit Memo and choose Refund. They can choose to refund the tip or not, if it was included.

Once the credit memo is submitted, the order is canceled and the credit memo is displayed as standard Magento:



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

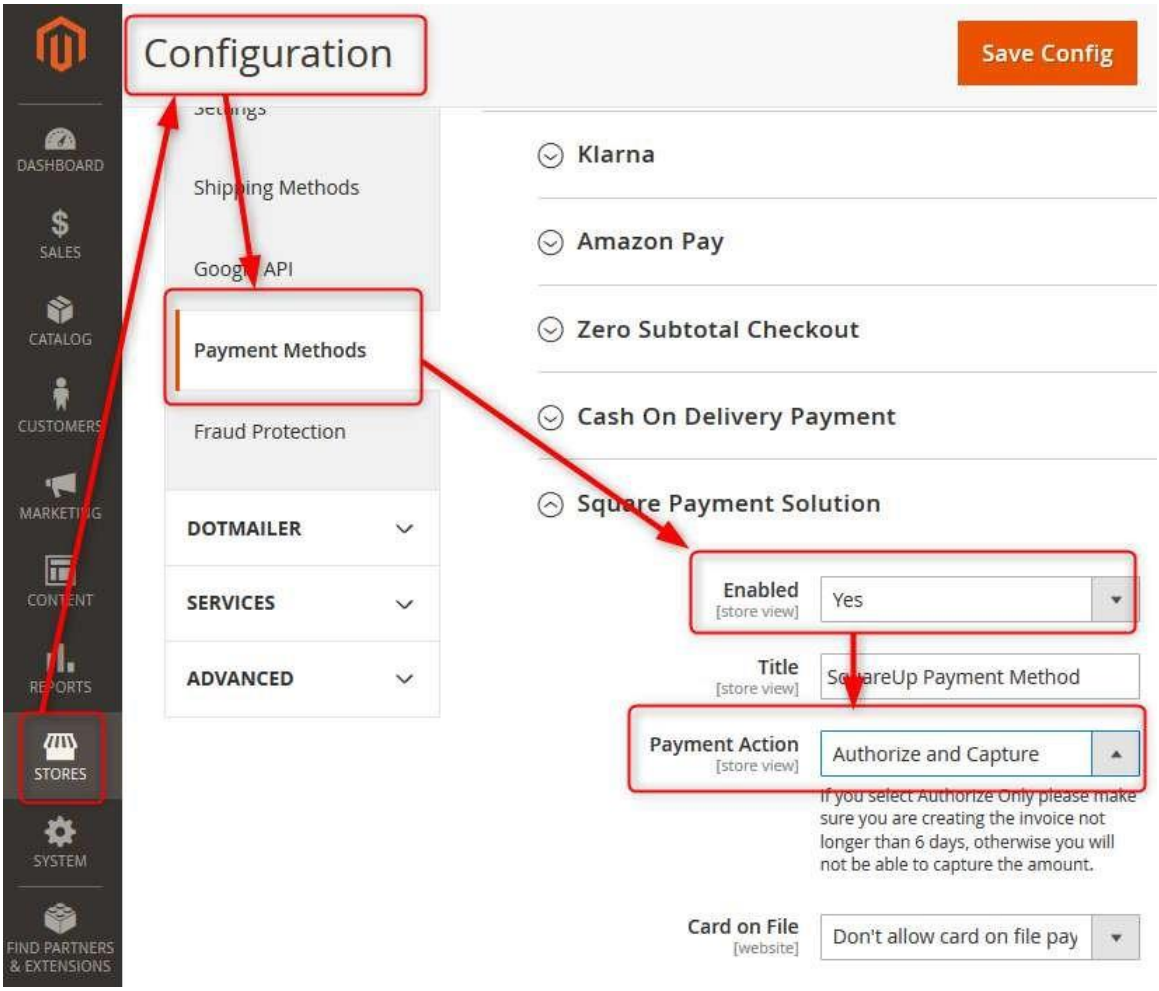
2.1 Square Payment Processing Configuration

2.1.0 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

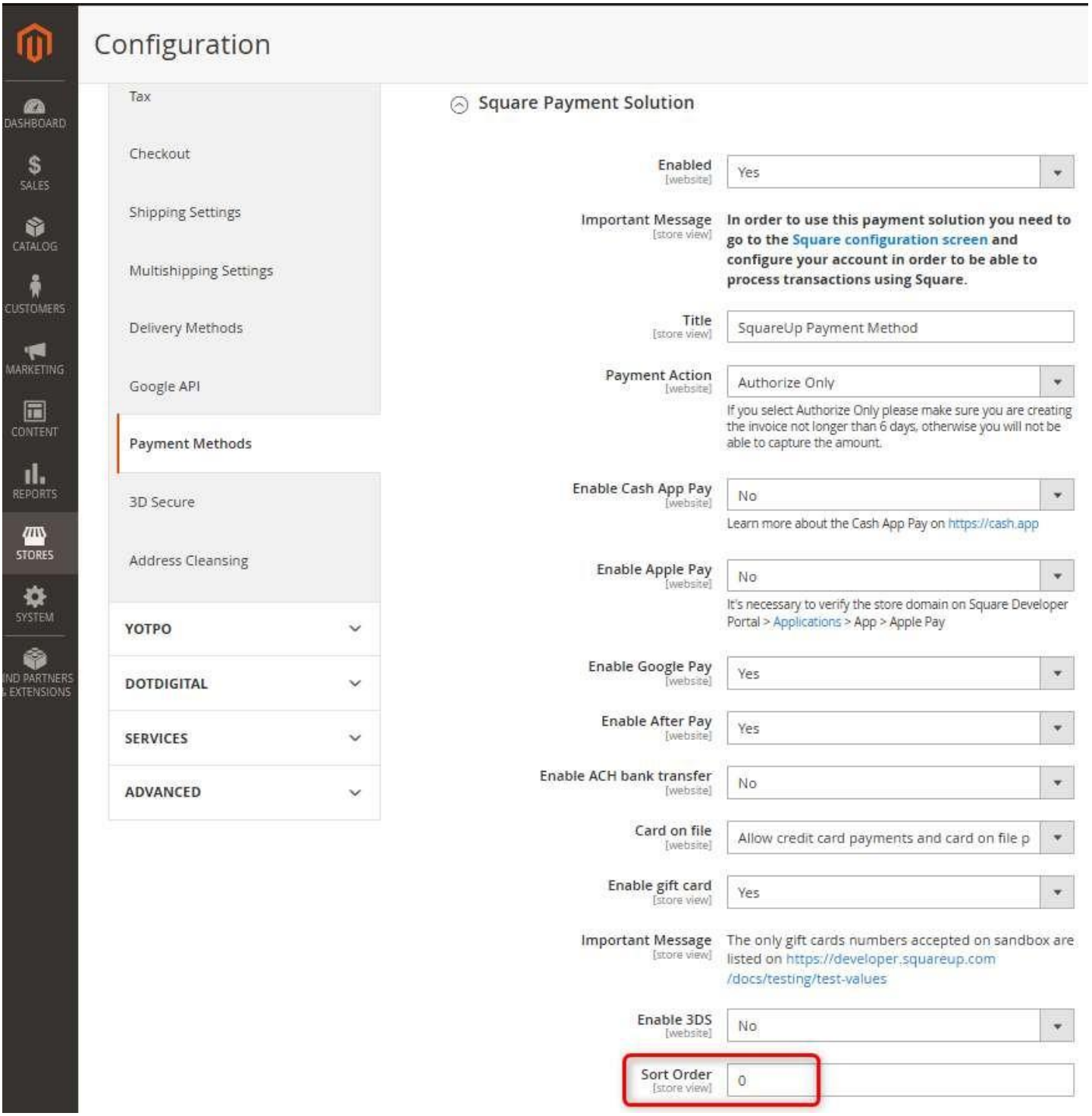
order being placed (and capture the amount later when the invoice is generated), or authorize and capture the amount the instant the order is placed.

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.

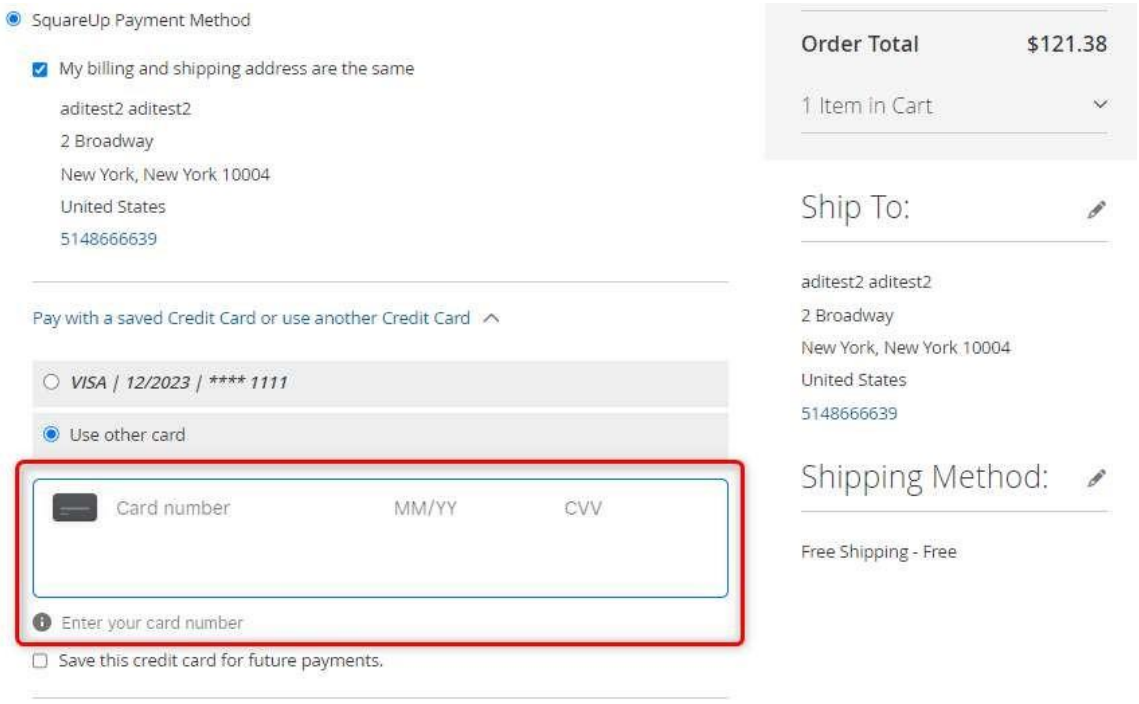


Save the current configuration, refresh the cache and try placing an order on the frontend.

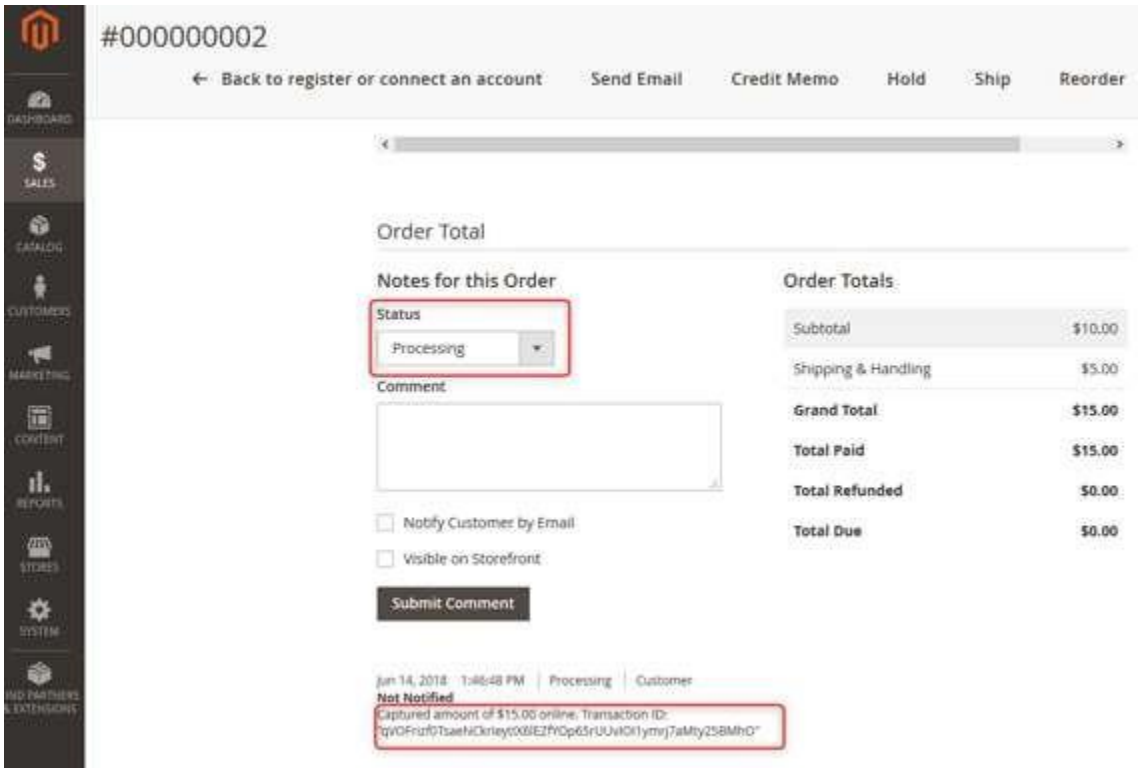
Note that the field "S0rt Order" allows setting the display order of the enabled payment methods on the frontend:



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:

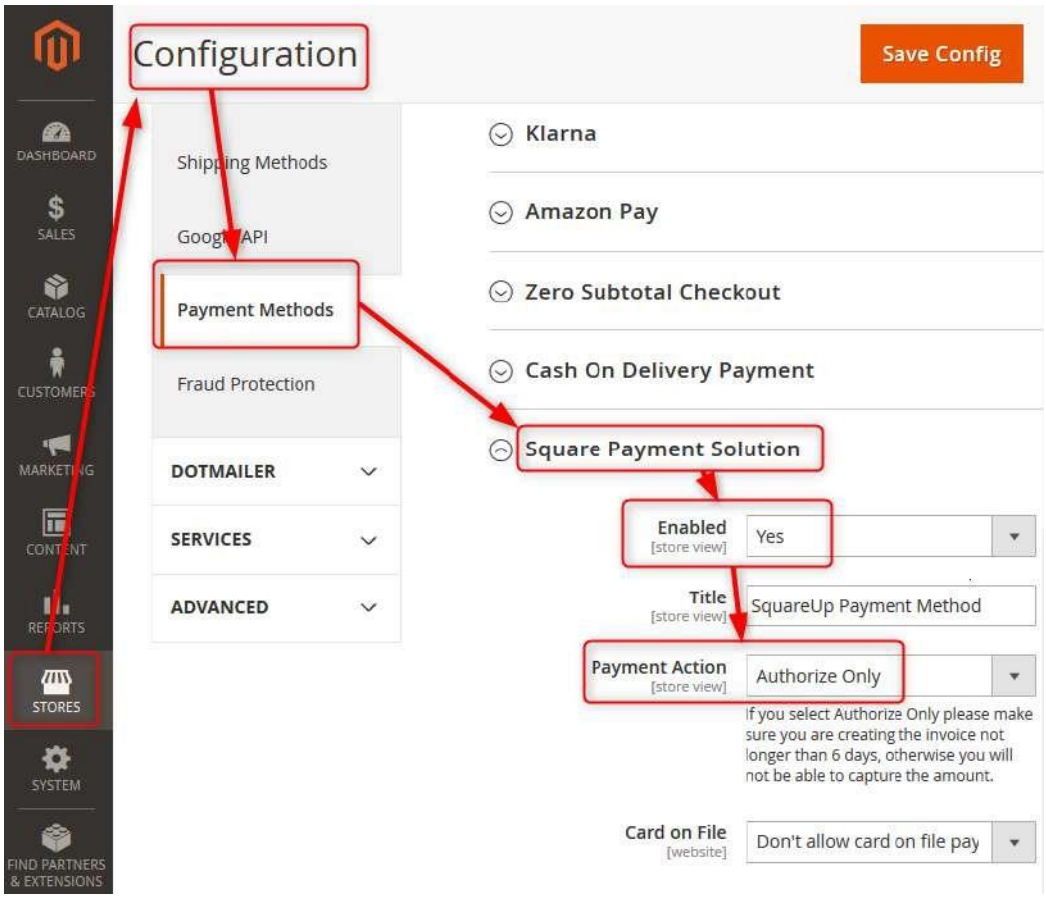


Finalize the placing of the order. Navigating back to Magento Admin, in Sales > Orders grid and selecting to view the details of the order that has just been placed, shows the order status as Processing and the order's amount being captured:



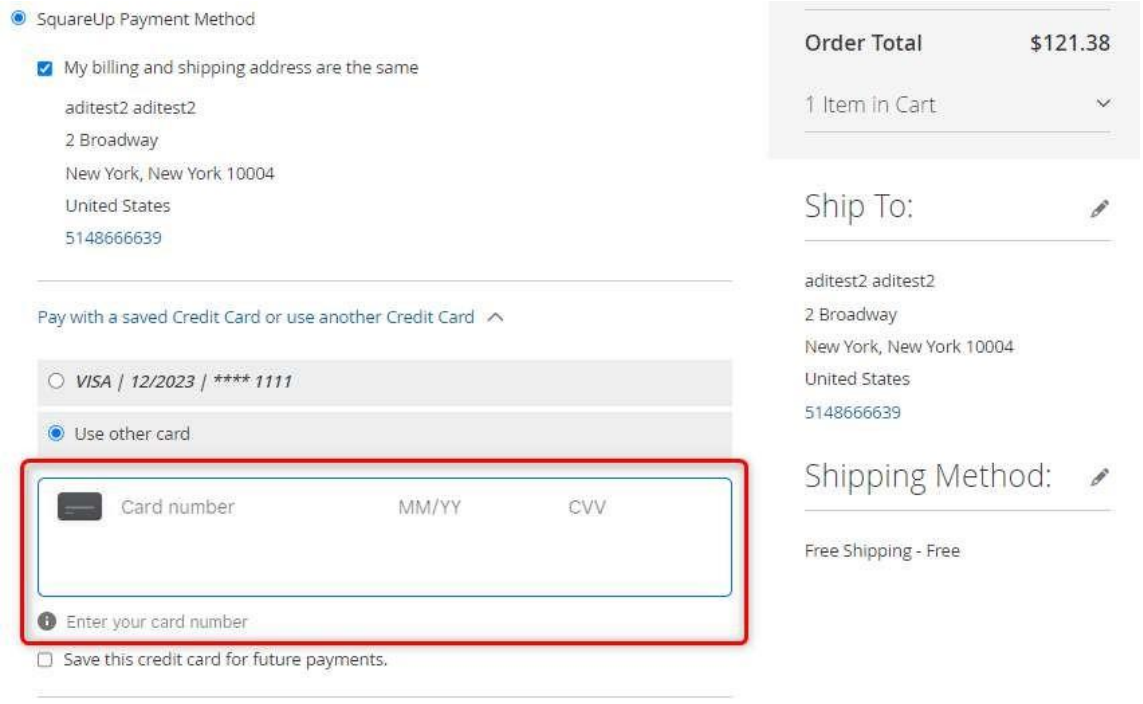
2.1.1 Authorize (without capture) amount when Order is placed

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.

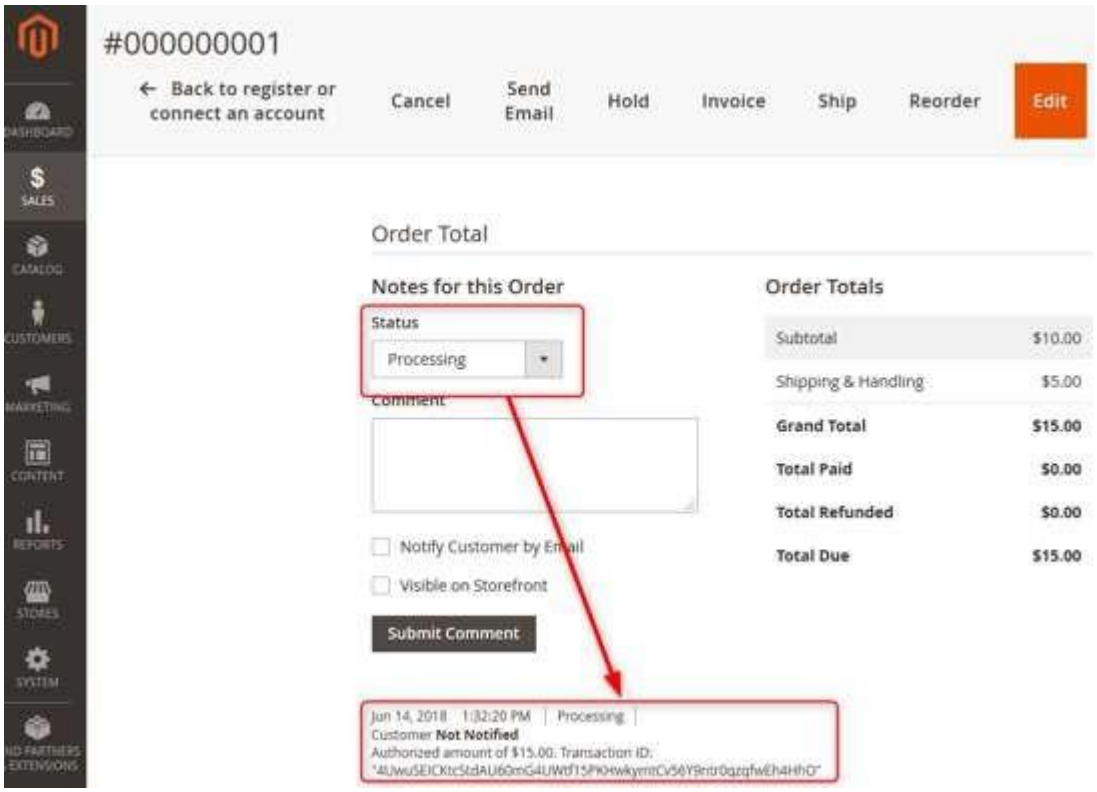


Save the current configuration, refresh the cache and try placing an order on the frontend.

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:



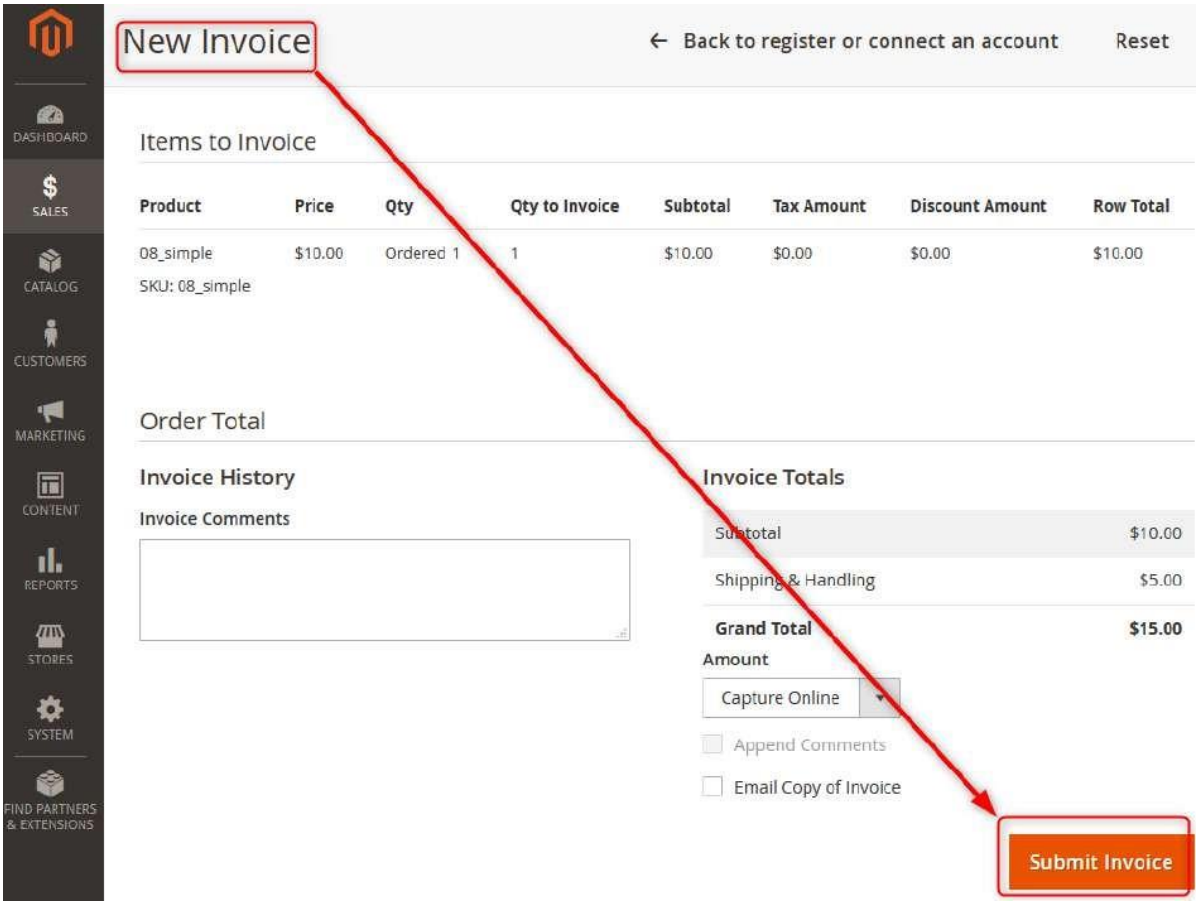
Finalize the placing of the order. Navigating back to Magento Admin, in Sales > Orders grid and selecting to view the details of the order that has just been placed, shows the order status as Processing and the order's amount being authorized:



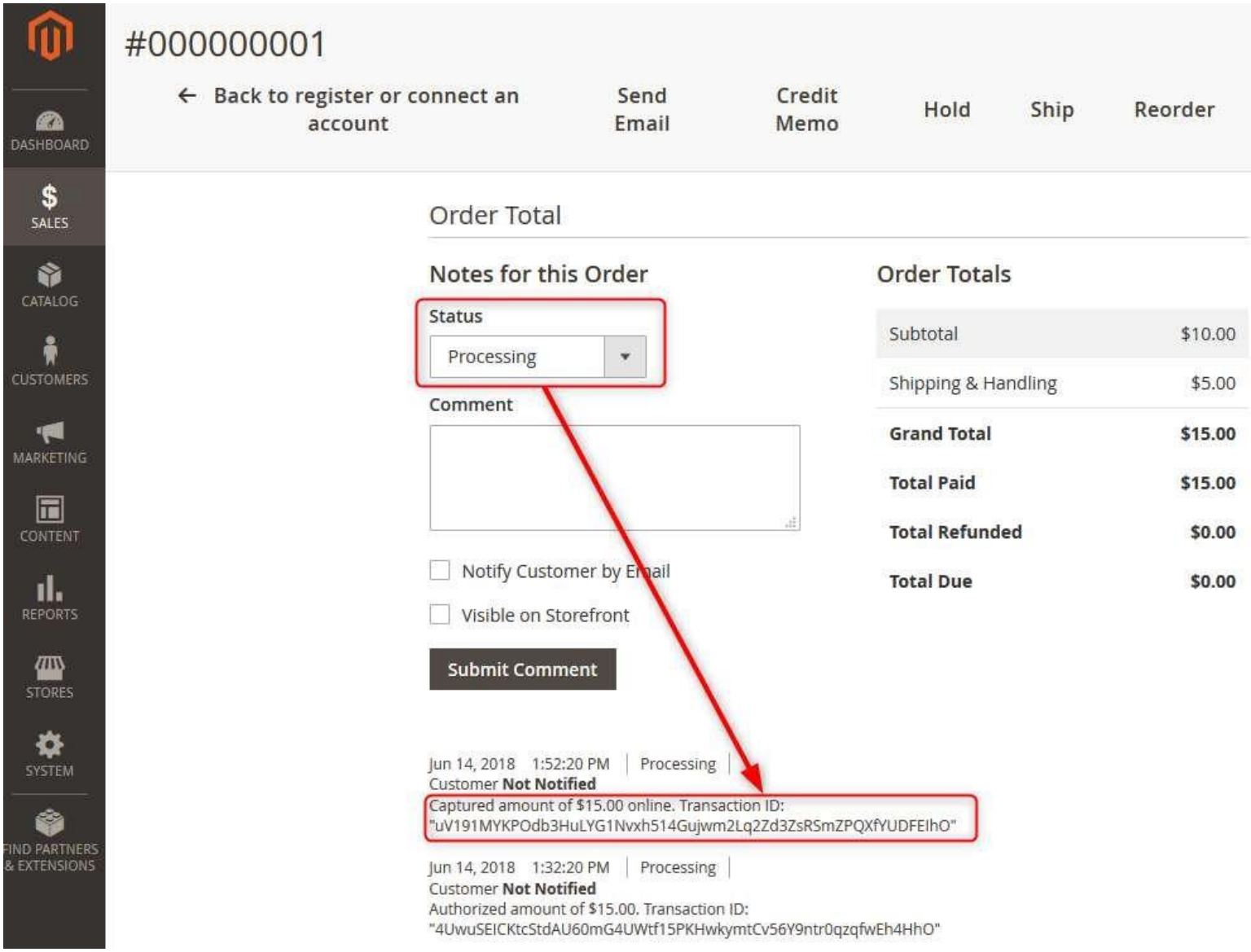
2.1.2 Capture amount when the Invoice is being created

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:



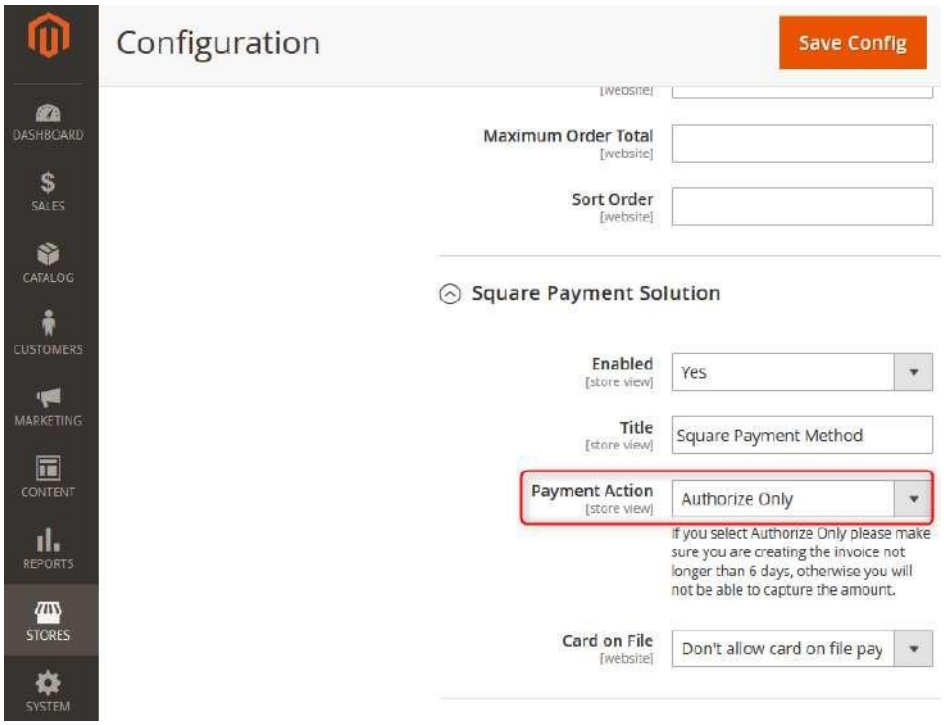
Going back to the orders details shows the order processing and the notification that the order amount has been captured online:



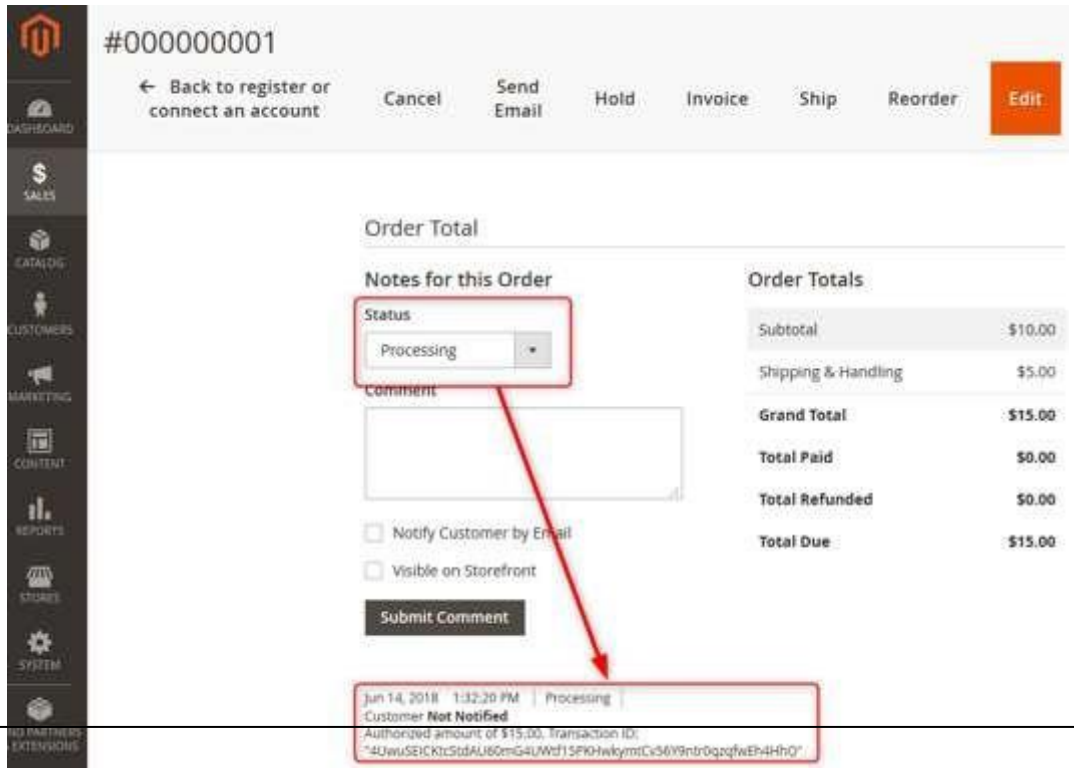
2.1.3 Void Transaction when an Order is Canceled

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

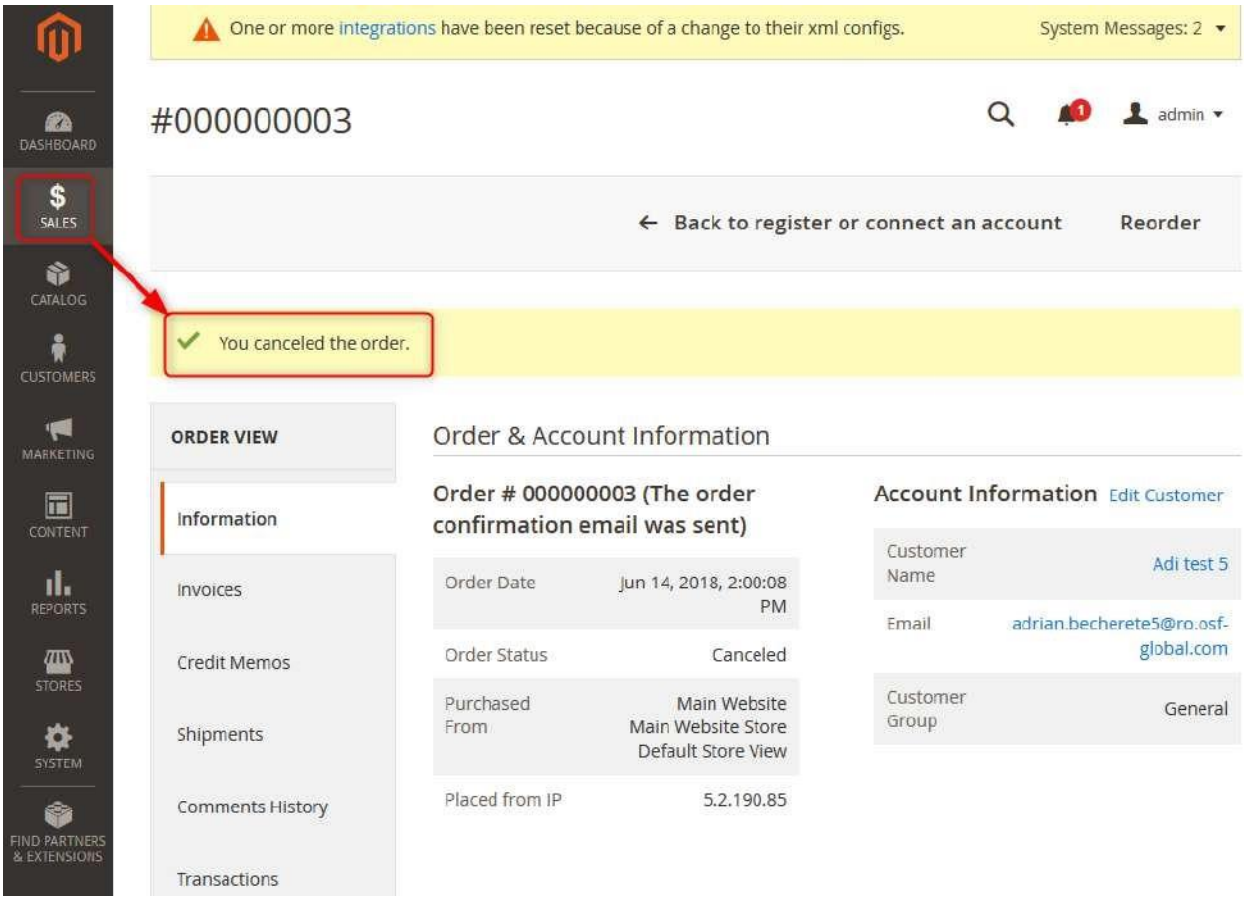
- The Square Payment Solution's payment action is set to Authorize Only:



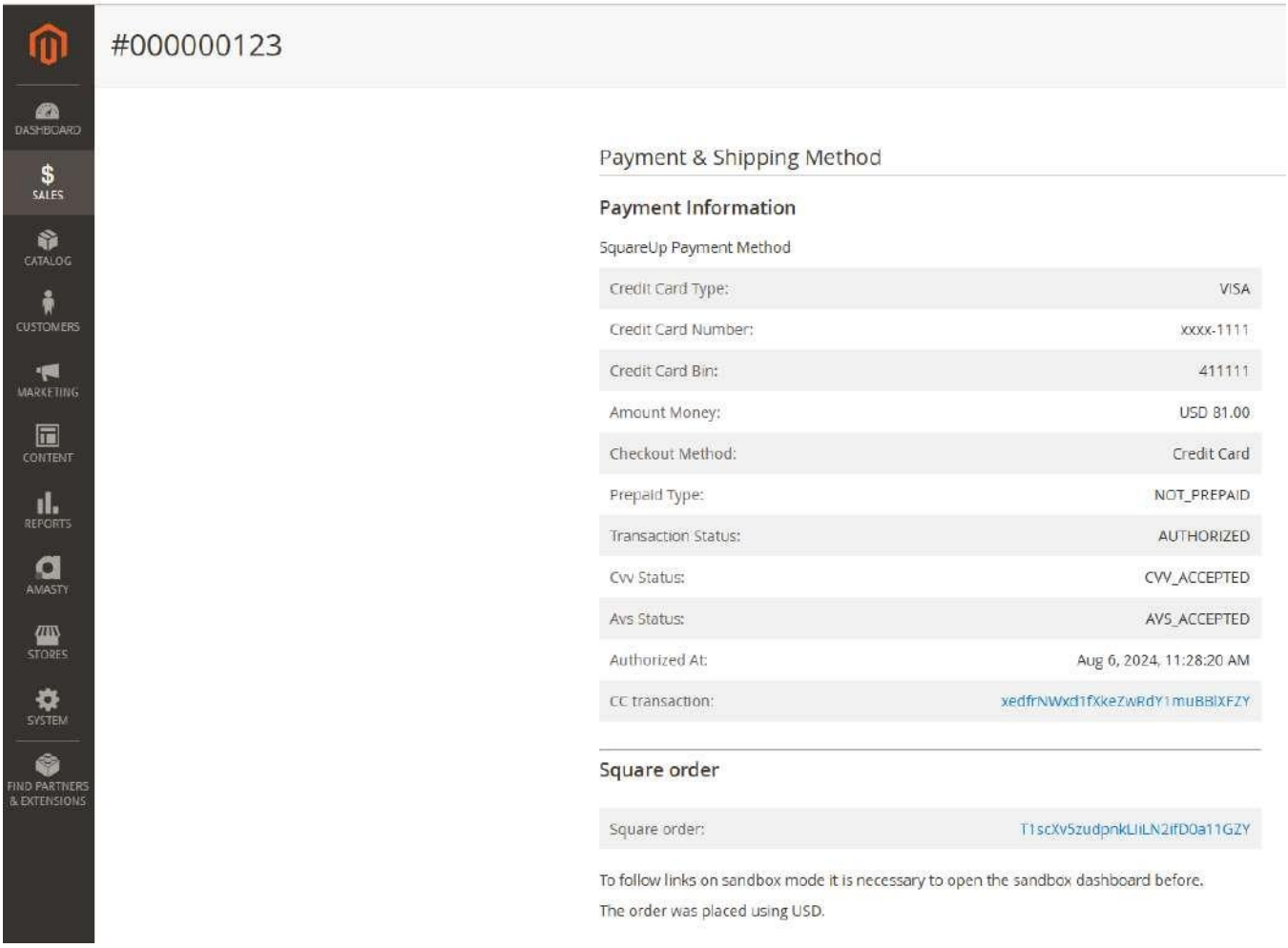
- An order has been placed and its corresponding invoice has not yet been emitted – the order therefore has the status "Processing" and the amount has not yet been captured:



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



Order information is displayed in this section:

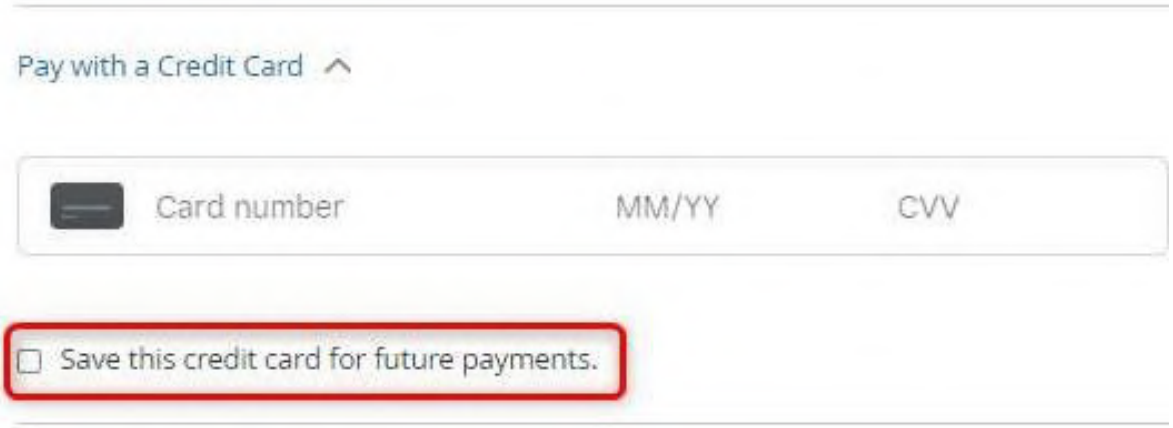


The new order’s status is canceled and with it, the amount authorization.

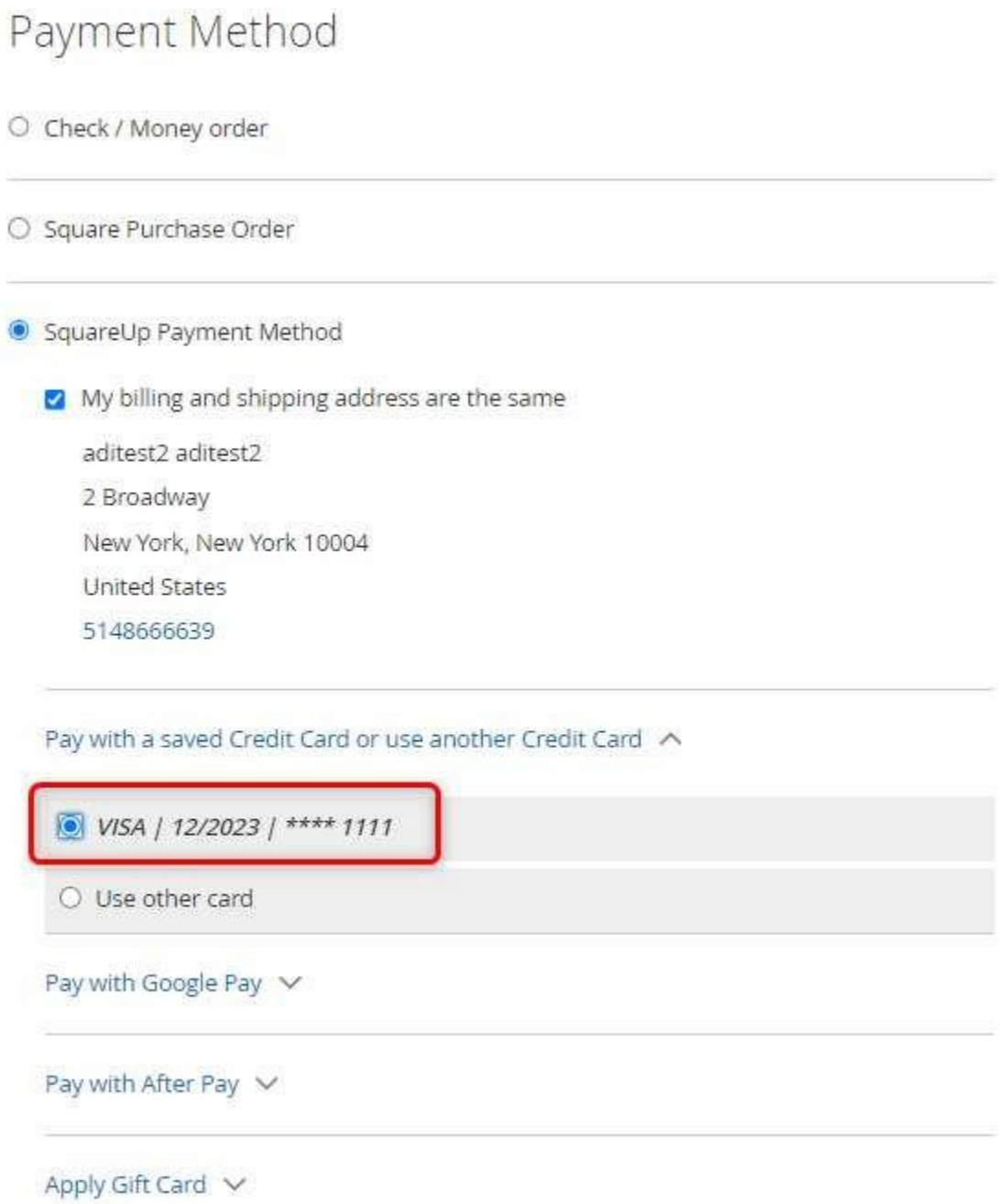
2.1.4 Store Credit Card

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:



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

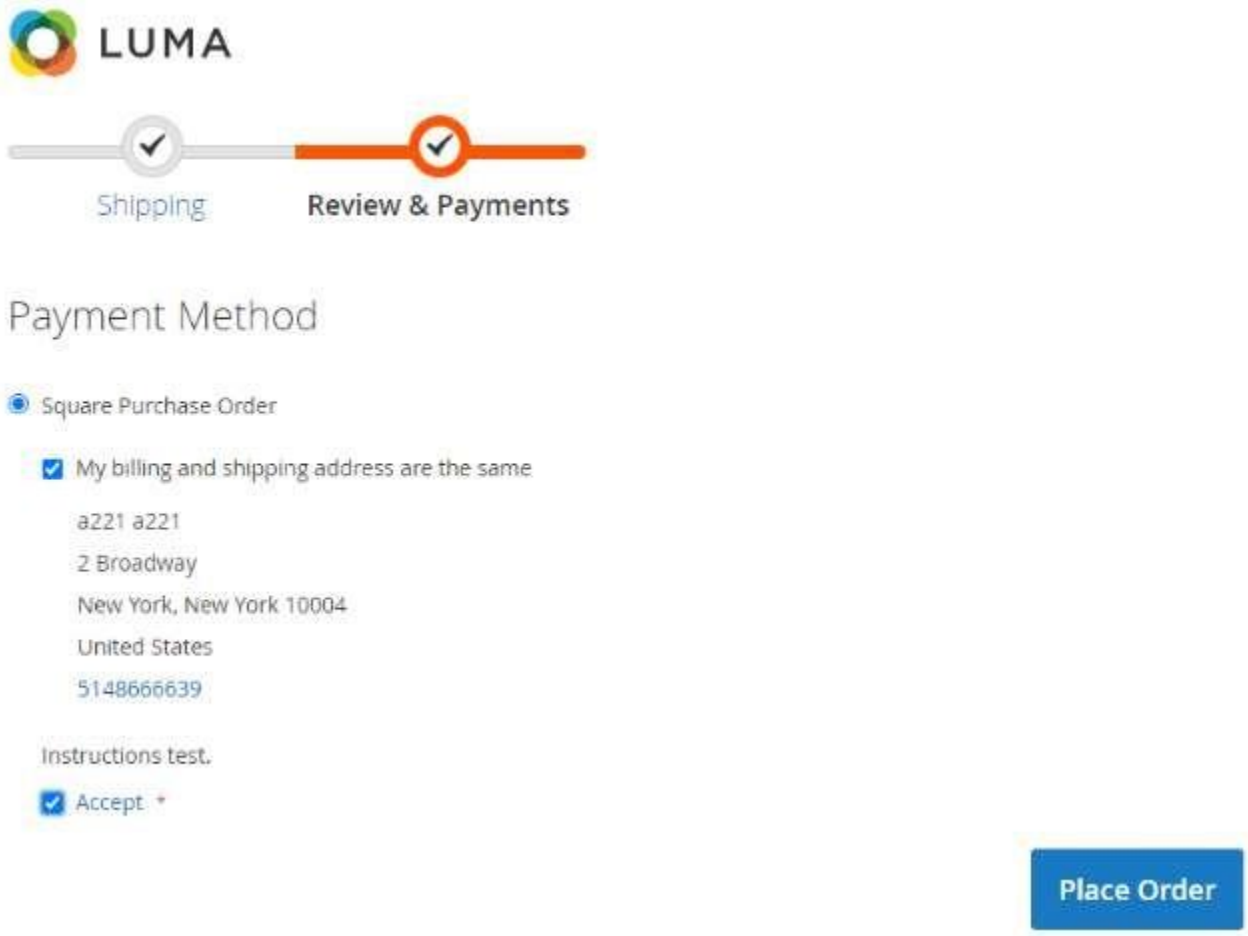


Storing the credit card is not available when placing an order from the Magento Admin.

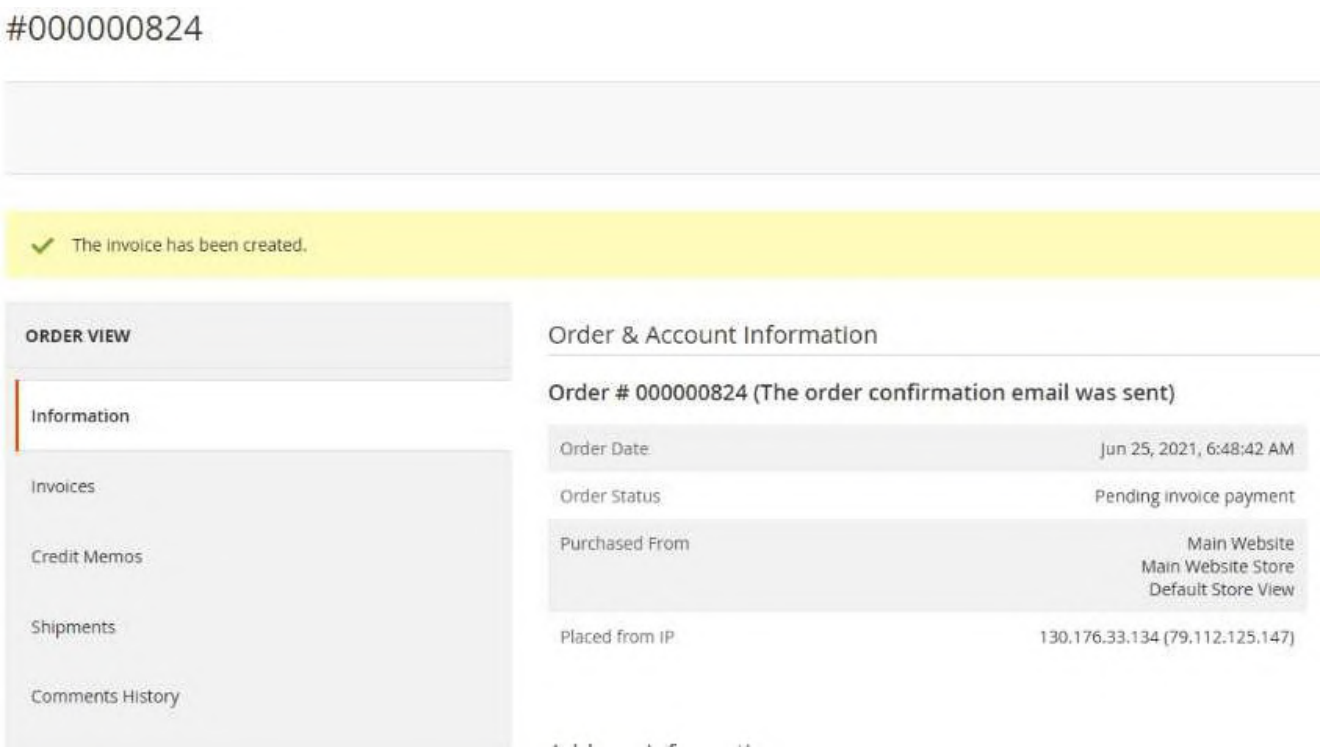
2.1.5 Invoice Pay

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.

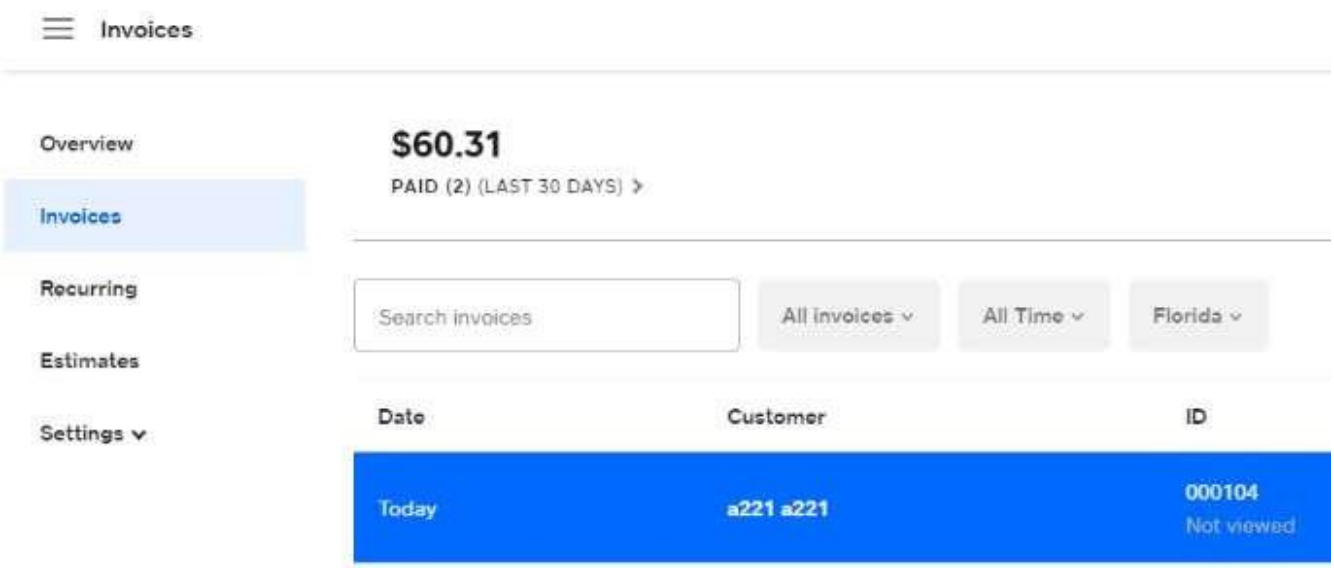
If the user is logged in, they have the possibility to choose Square purchase order payment method in the Payment step during checkout:



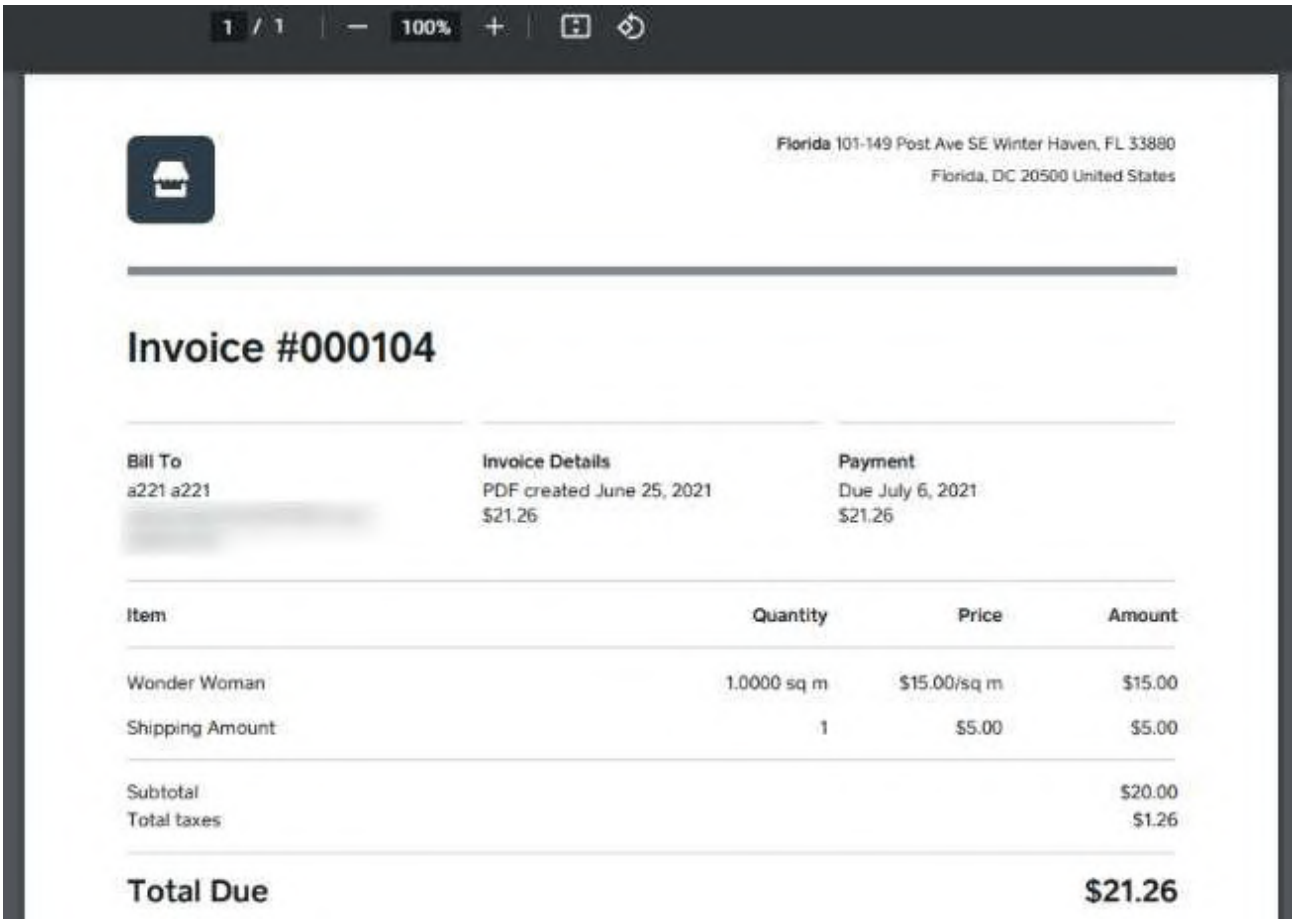
Once the order is placed, the store owner must make sure the order is invoiced in the Admin area. The square invoice is created only if the Magento order has an Invoice associated to the order. Please make sure the order is invoiced:



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

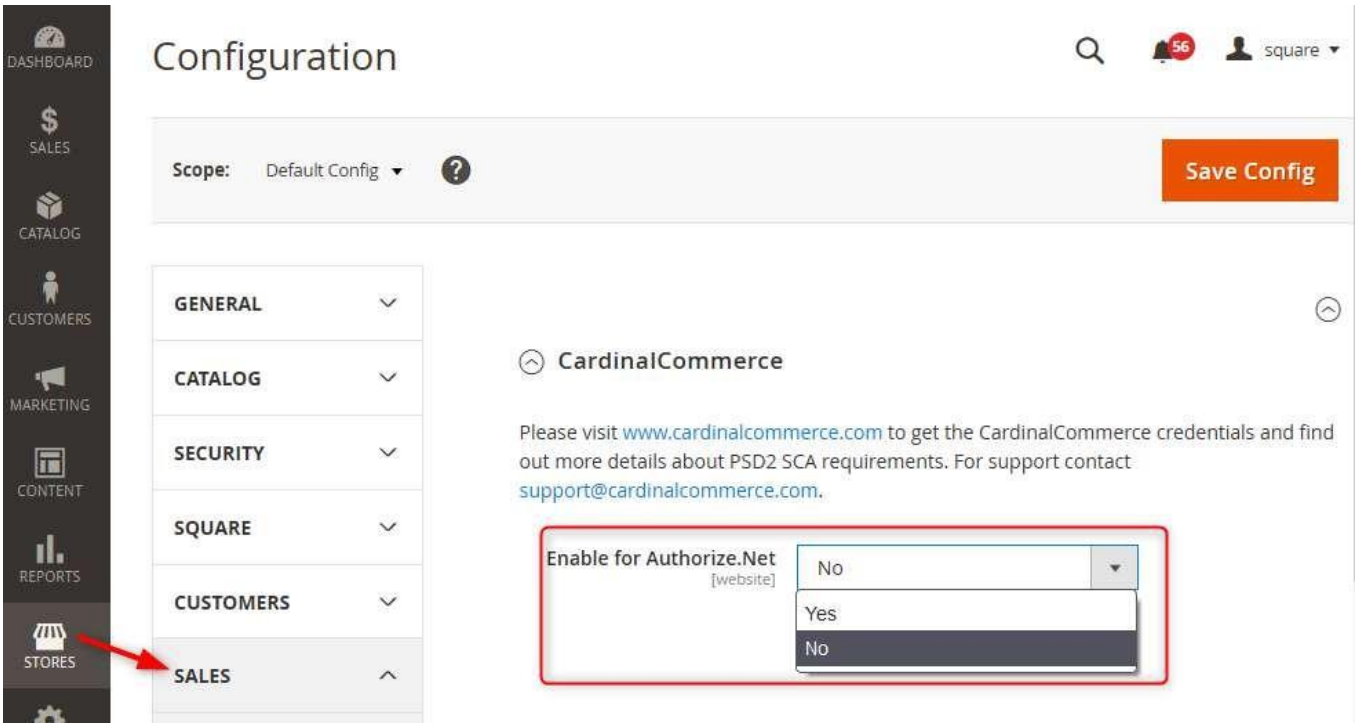


Opening the invoice details also provides it in downloadable PDF format:



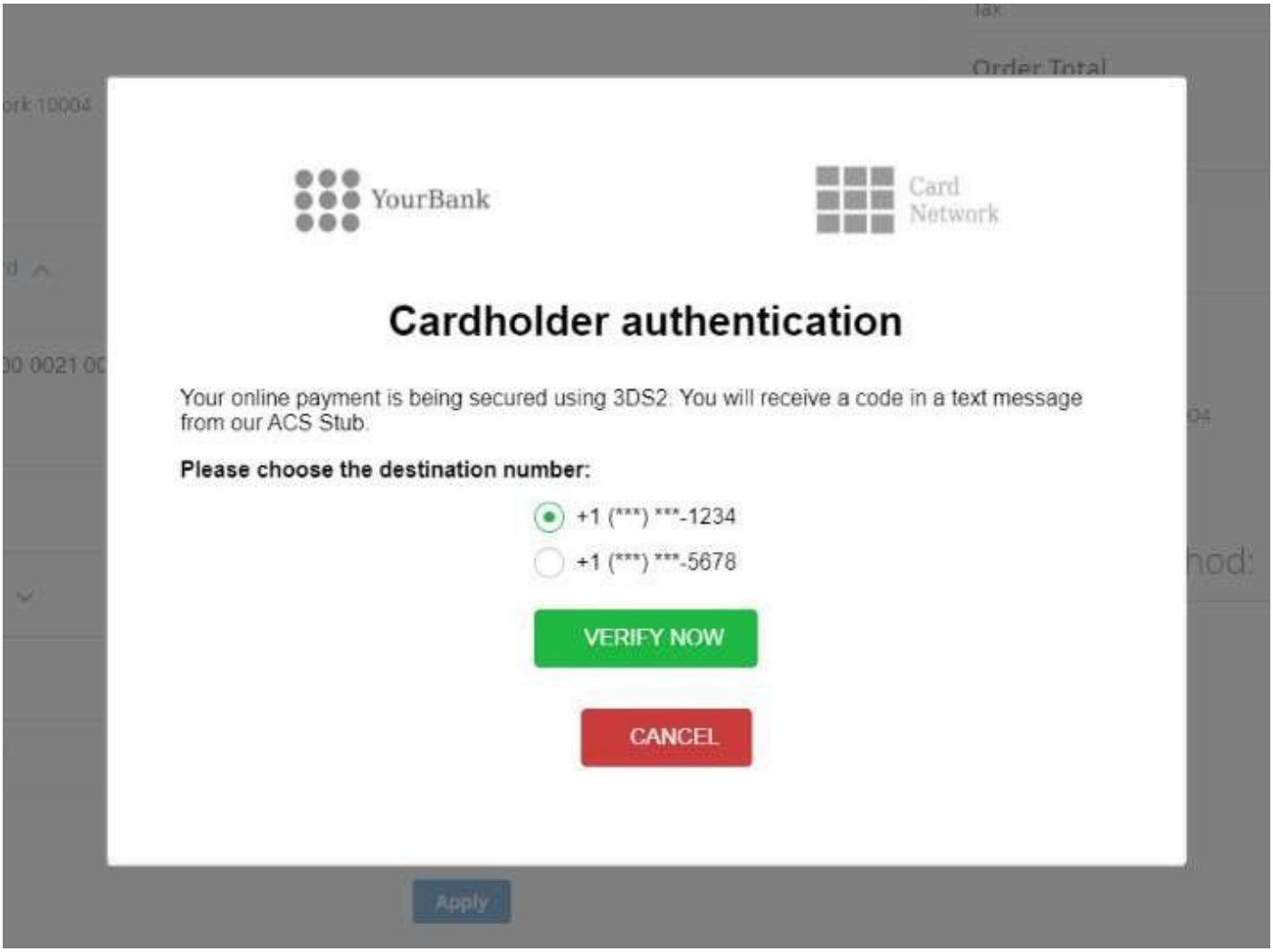
2.1.6 PSD2 SCA

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:

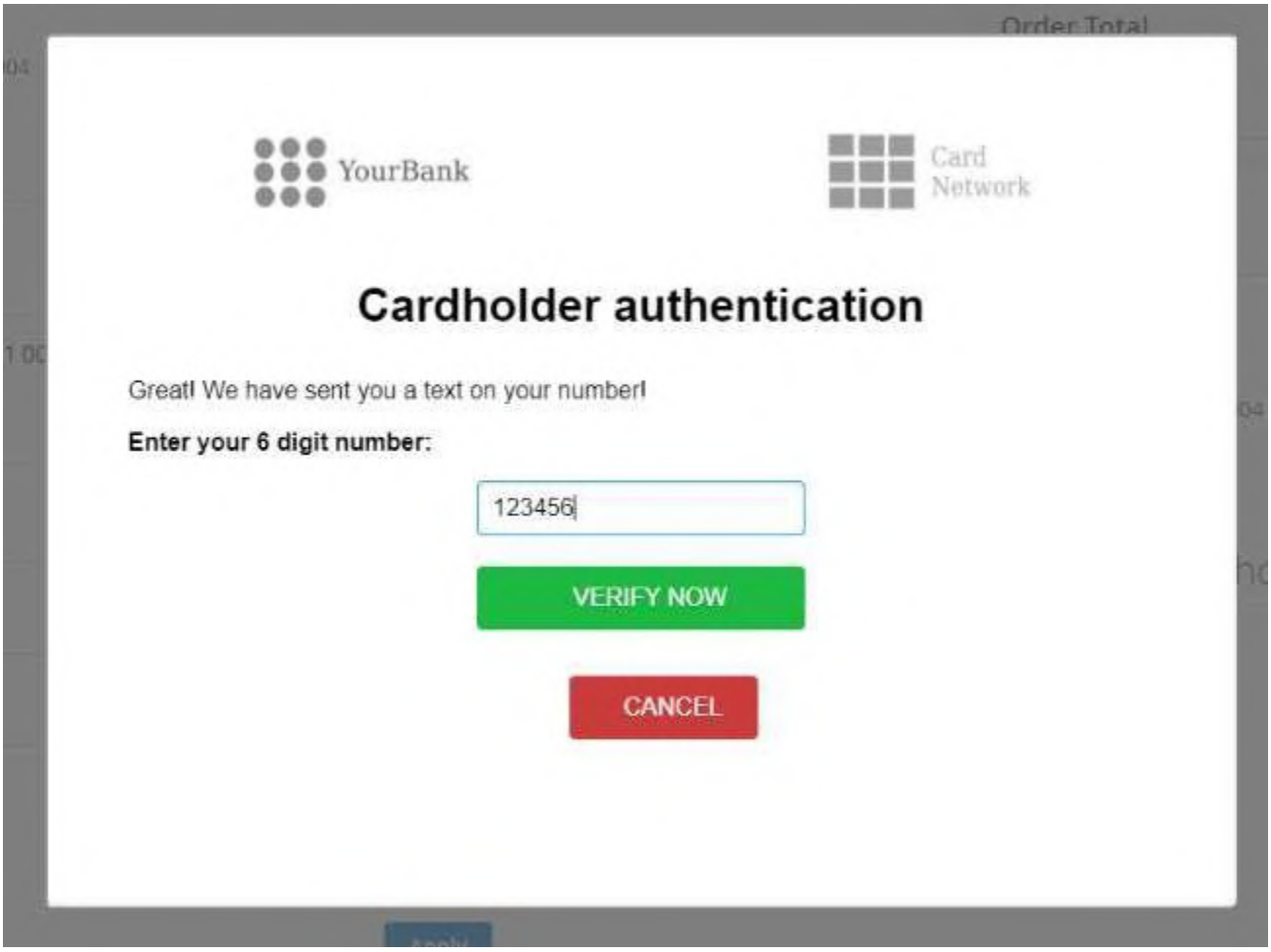


Once enabled, the customer journey on the front end will be changed so that before the order is placed, they must confirm the credit card transaction via a code they receive on their phone number.

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:


YourBank
Card Network
Cardholder authentication
Your online payment is being secured using 3DS2. You will receive a code in a text message from our ACS Stub.
Please choose the destination number:
+1 (***) ***-1234
+1 (***) ***-5678
VERIFY NOW
CANCEL
Apply

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.

2.1.7 Multi-store Configuration for Square Payment Transactions

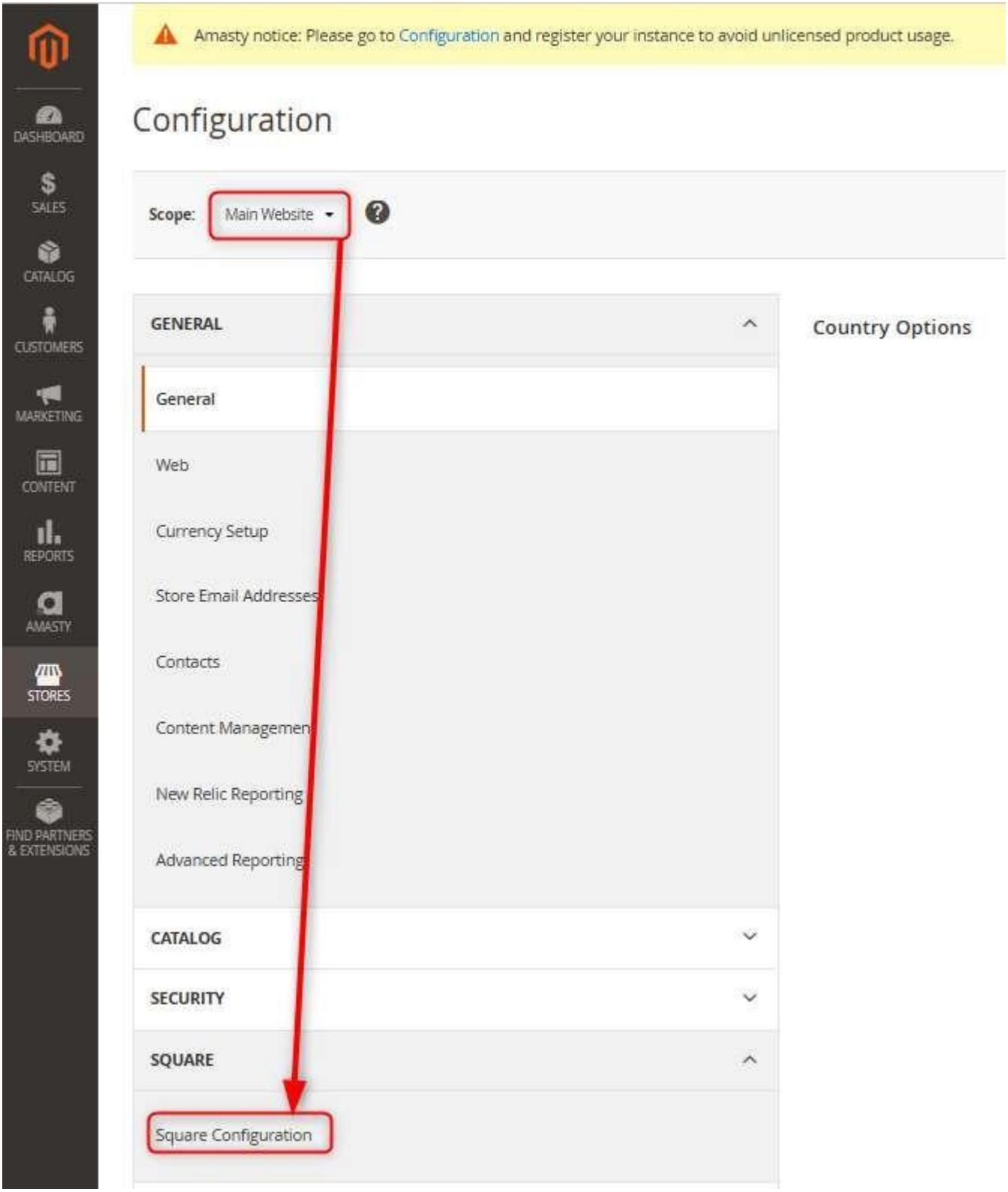
The Square configuration screen is only displayed on the Default Configuration scope and on the Store View scope.

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

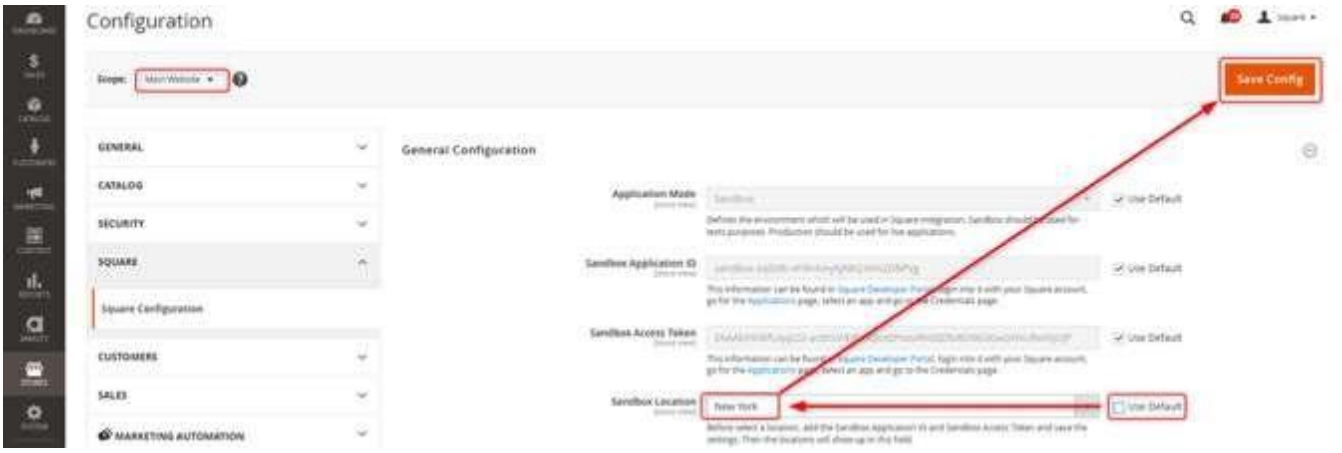
- The assumption is that you have a number of locations set in Square at least equal to the number of stores set in Magento.
- The result is that the payment is processed at the selected location for a specific store view

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 "Website view" of your first store:


Amasty notice: Please go to Configuration and register your instance to avoid unlicensed product usage.
Configuration
Scope: Main Website
DASHBOARD
SALES
CATALOG
CUSTOMERS
MARKETING
CONTENT
REPORTS
AMASTY
STORES
SYSTEM
FIND PARTNERS & EXTENSIONS
GENERAL
General
Web
Currency Setup
Store Email Addresses
Contacts
Content Management
New Relic Reporting
Advanced Reporting
CATALOG
SECURITY
SQUARE
Square Configuration
Country Options

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



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

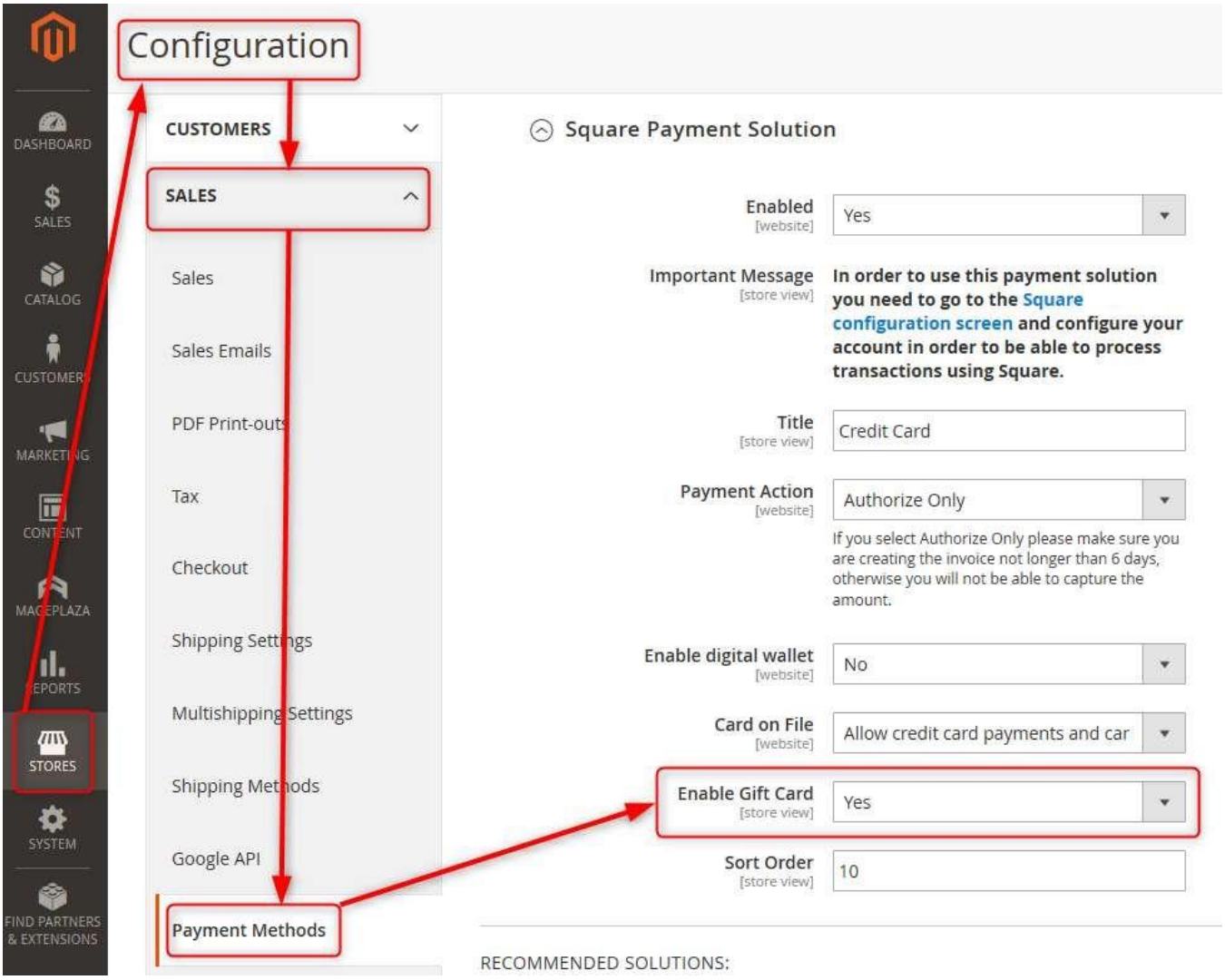
Remember to clear the cache after each time the configuration is changed.

2.2 Gift Cards

2.2.1 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.

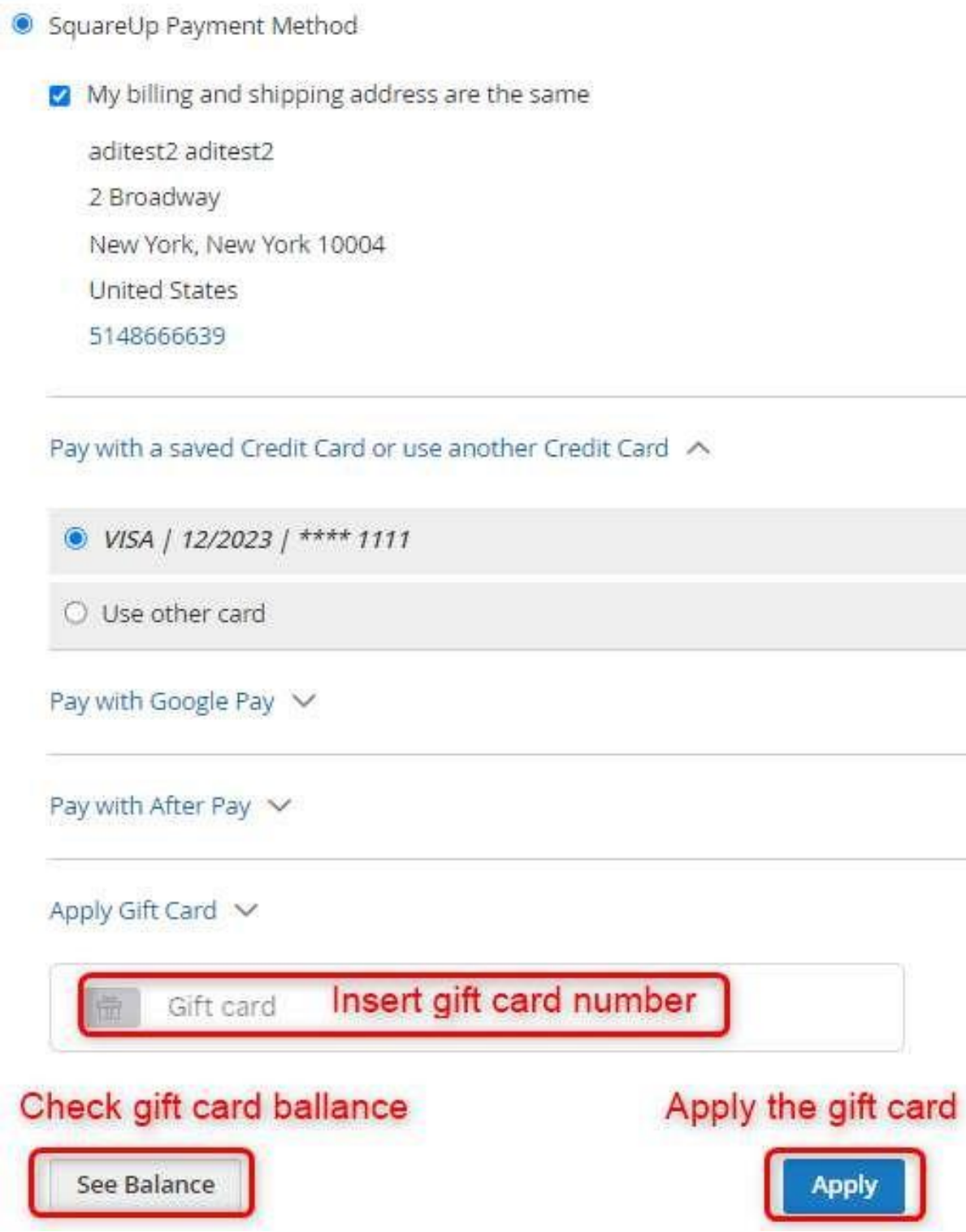
If you made sure the gift card functionality is enabled on your Square account, then you can activate it in Magento by navigating to Stores > Configuration > Sales > Payment Methods > Square Payments Solution > Enable Gift Card:



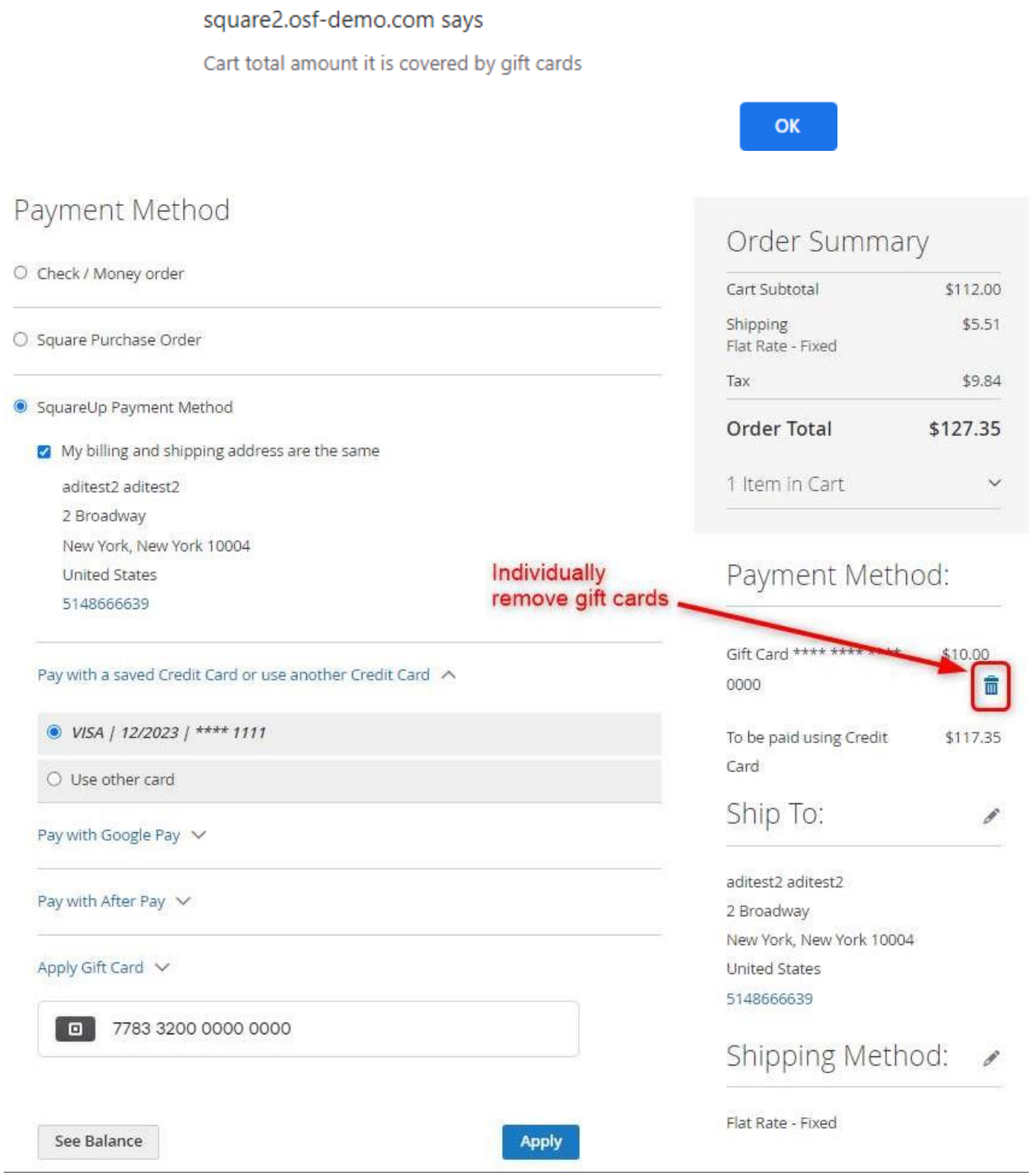
Enabling the gift card inserts a new section inside the Square payment form on the front, where the customer can check the value of a gift card, apply gift cards to their checkout, or remove a gift card from the ones they previously applied.

2.2.2 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:



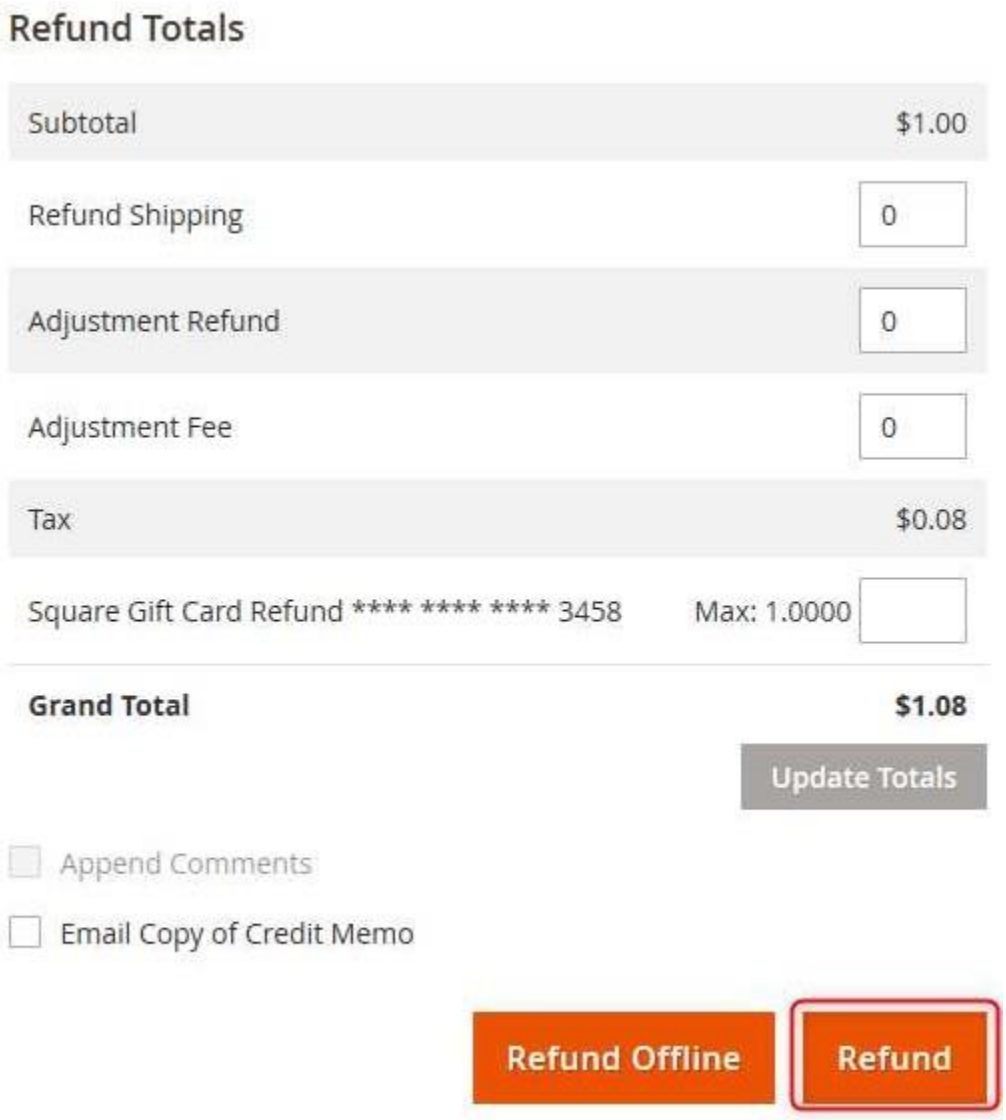
If the total balance of all applied gift cards is greater than the order value, no credit card information is required. At this point, the customer may also decide to remove an applied gift card:



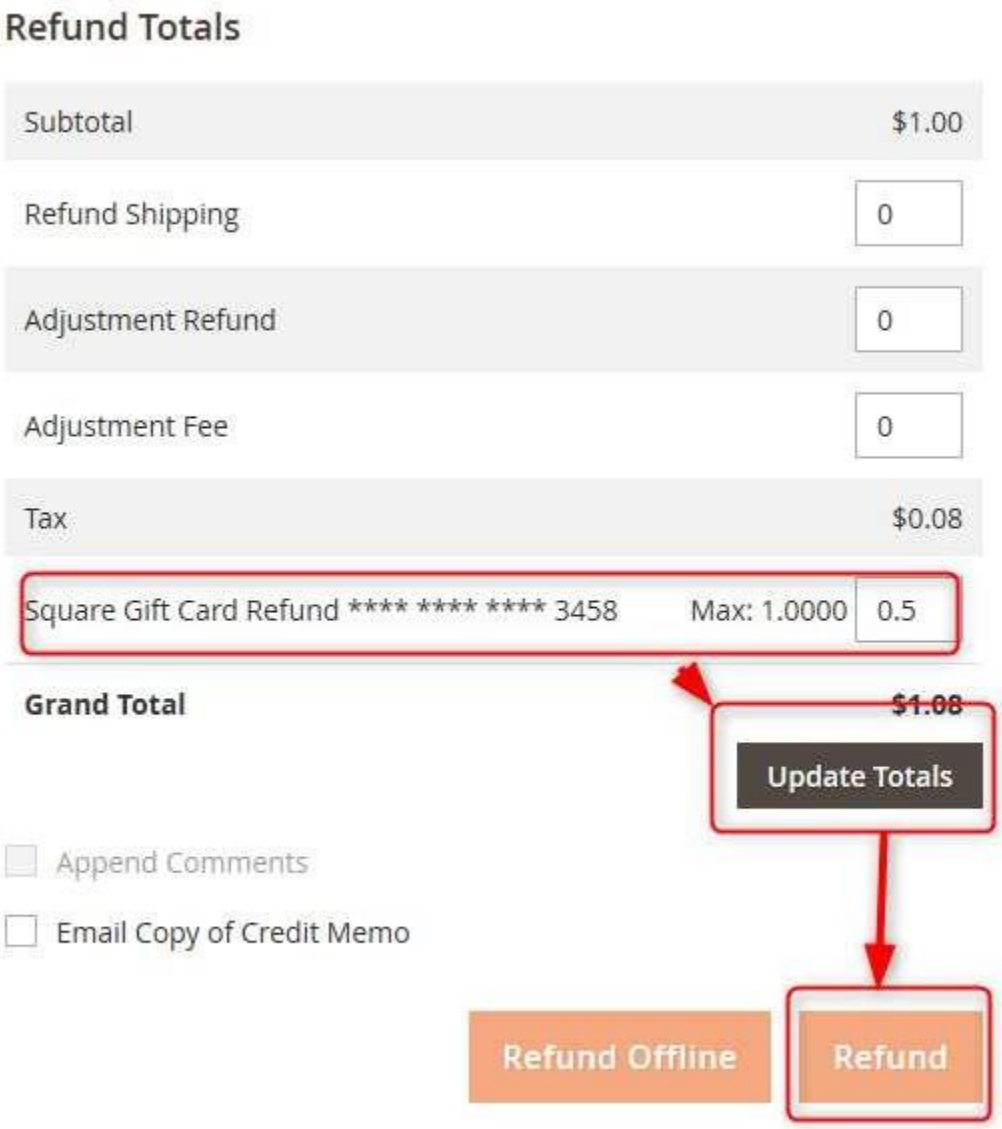
If the balance of a gift card is greater than the order value, the remaining amount will still be available for use during a future order.

2.2.3 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.



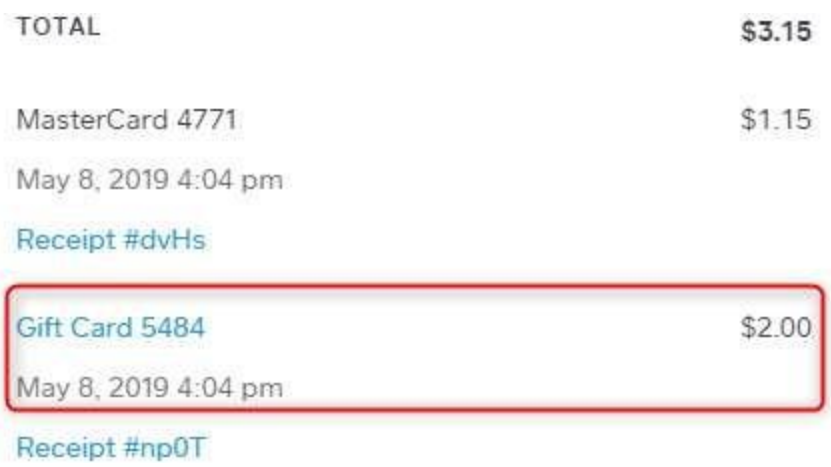
To refund gift cards used in an order using custom amounts, navigate to the orders grid, click to view the invoice of a specific order, create credit memo (the same process as when refunding an order online), type the amount you want to refund on a specific gift card, click “Update Totals”, and then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



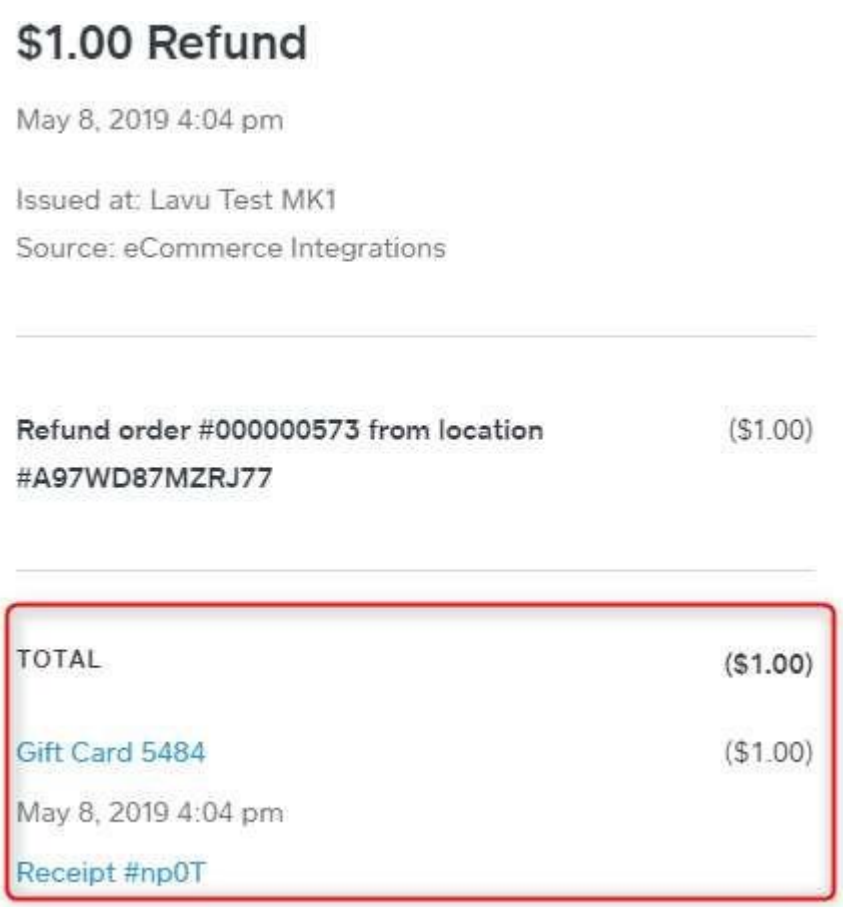
2.2.4 View Gift Card Transactions in Square Dashboard

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:



- Refund of a gift card in Square dashboard:



2.3 - Apple Pay

2.3.1 Prerequisites

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

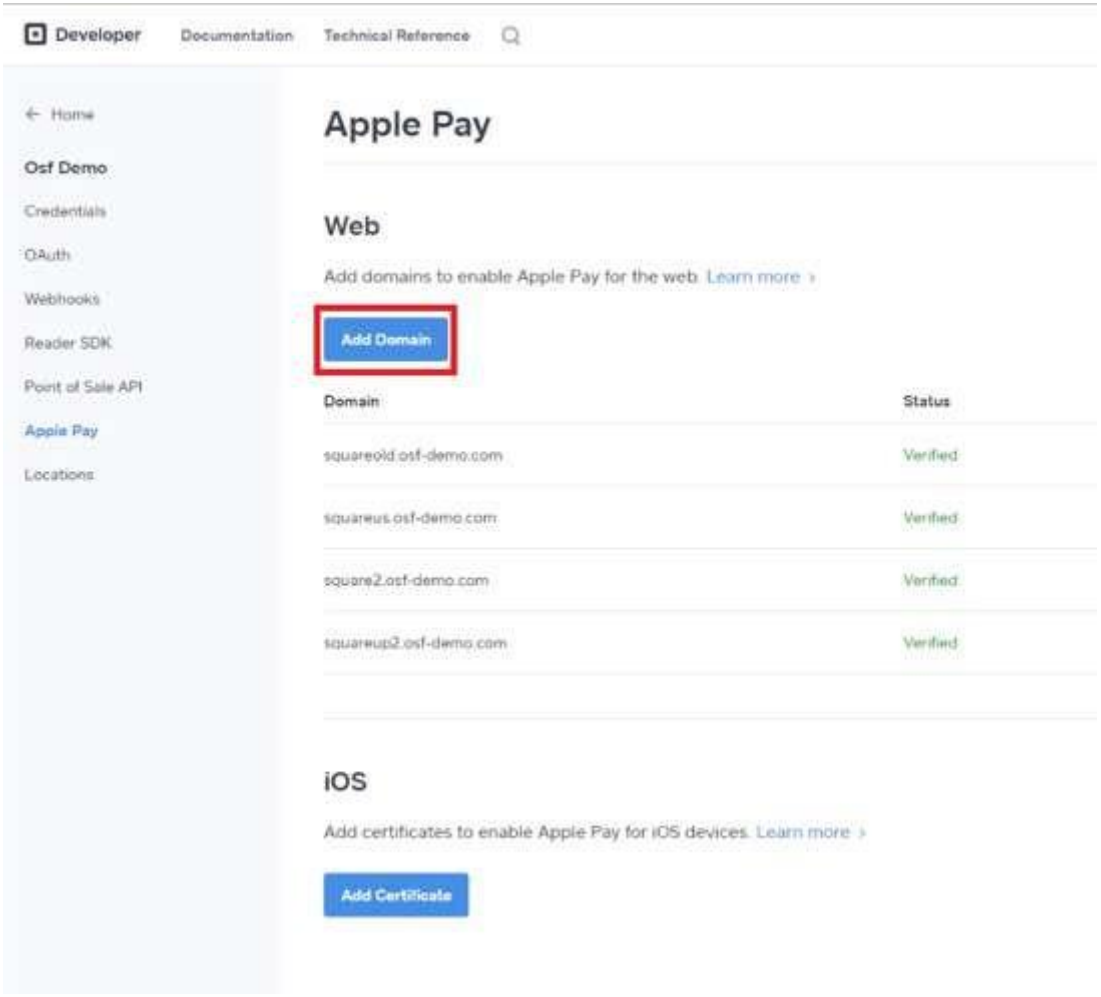
- you have https set up on your Magento store
- you have a Square production account connected In the Magento Admin
- your Square account Is based In the United States

2.3.2 Set Up

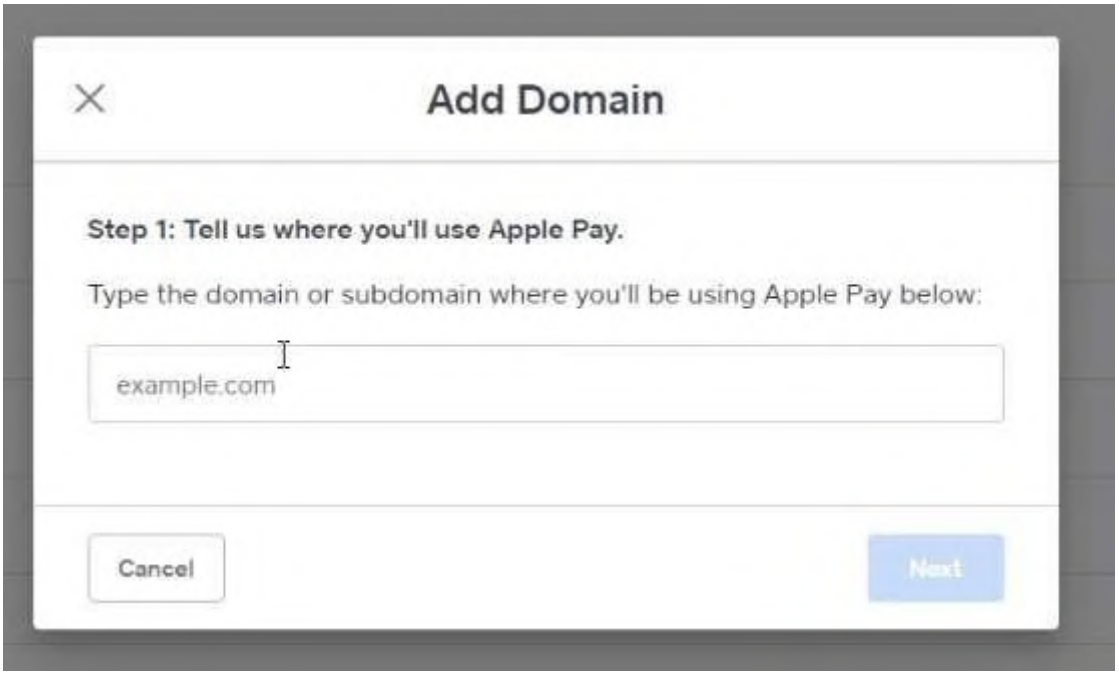
No configuration or setting up is needed in your Magento Admin.

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

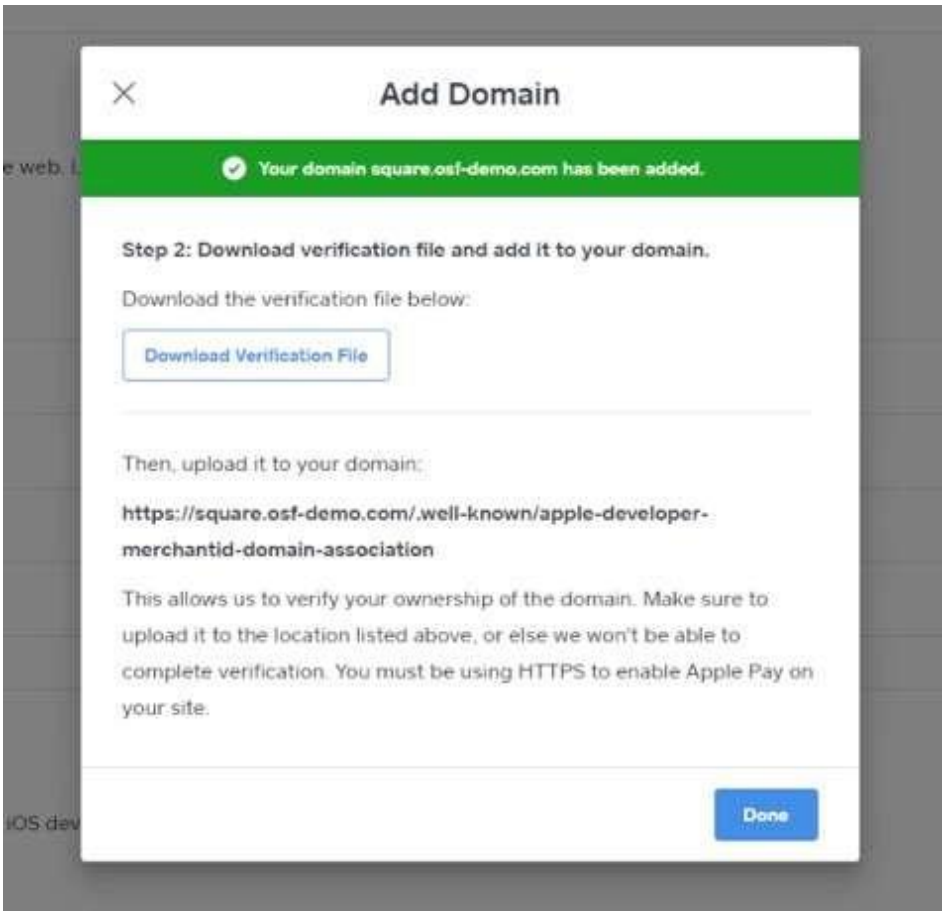
- Open the Application Dashboard, select the application associated with your SqPaymentForm implementation,
- Click on the Apple Pay tab for the selected application, then click on the "Add a new domain" link:



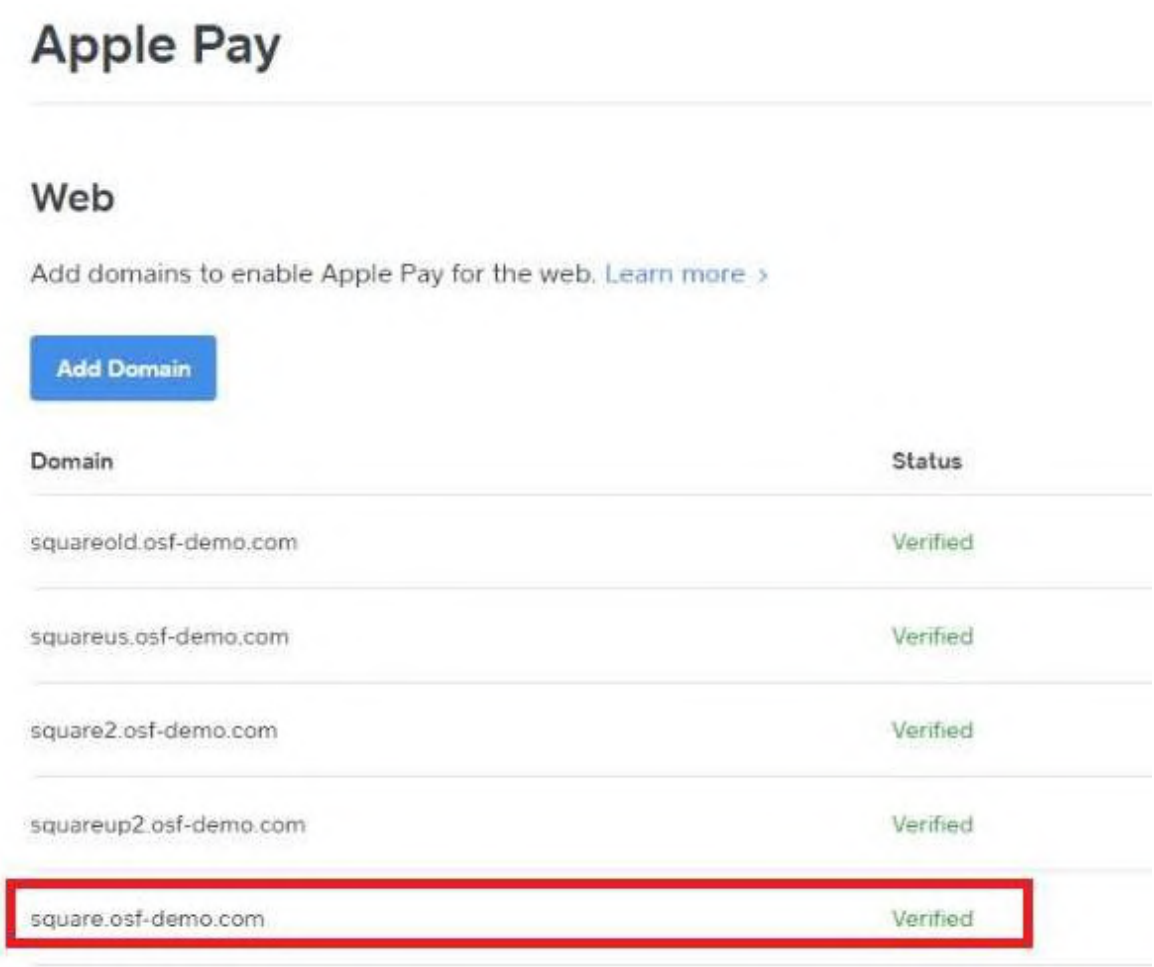
5. Type the domain name to your store:



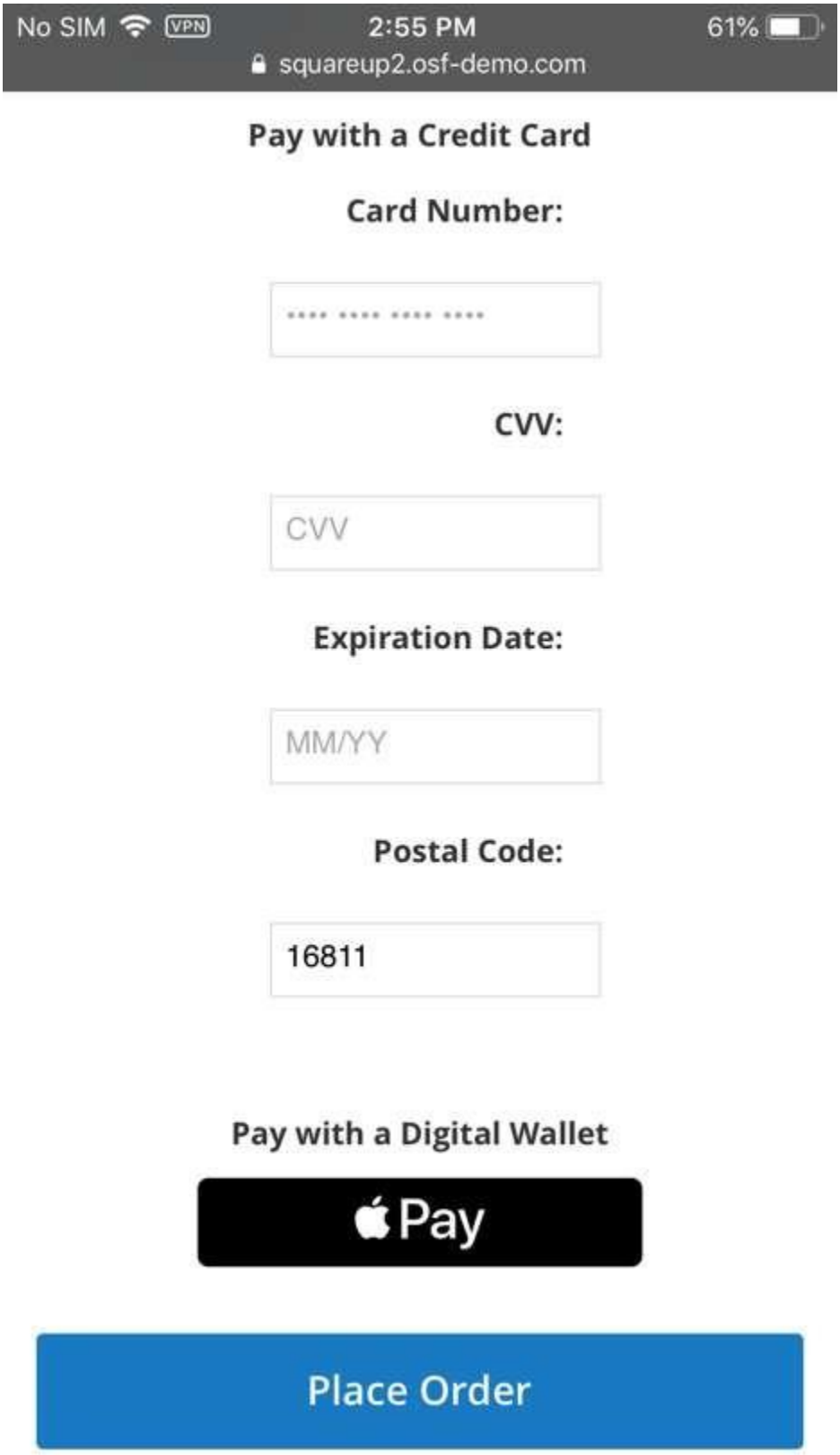
6. A success message will be displayed:



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:



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

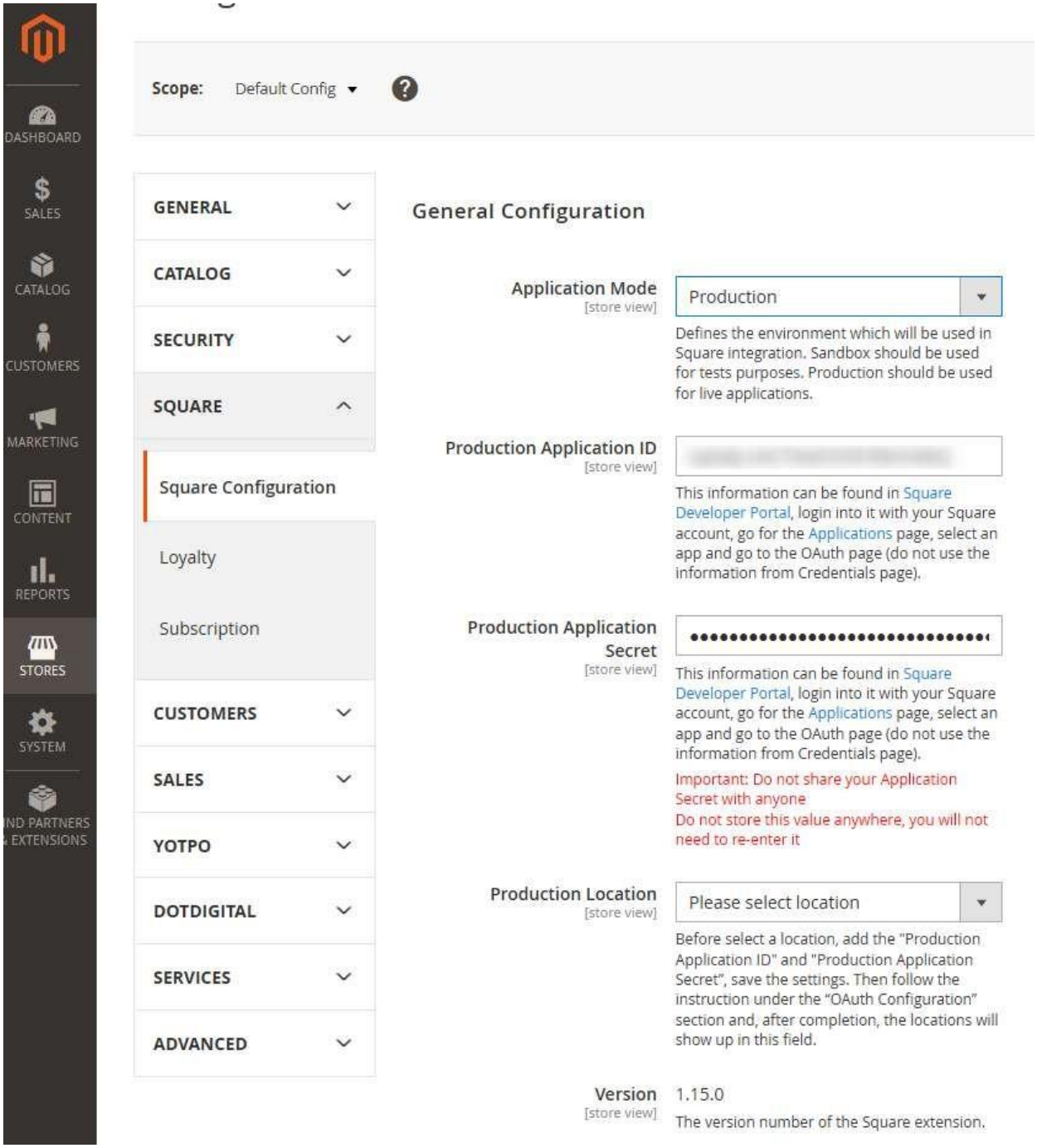


2.4 - In-Store Pickup Functionality

2.4.1 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:
    - The credentials are set and a location is selected.



    - The Get OAuth Token process was completed.

Oauth Configuration

Instructions
[store view]

Before starting the OAuth flow make sure that you have added and saved the credentials ("Production Application ID" and "Production Application Secret") on the General Configuration tab.

Then setup the "Production Redirect URL" on Square end, using the URL on the next field.

Finally, click on the "Get OAuth Token" button, a popup window will show up (make sure it's not blocked), then follow the instructions.

Redirect Url
[store view]

https://square-andrew.onbi.com.br/default/squareupomni/index/callback/default/0/

Go to Square Developer Portal, then to on Applications page select an app, go to the OAuth page and copy this URL into the "Production Redirect URL" field and save.

Get OAuth Token
[store view]

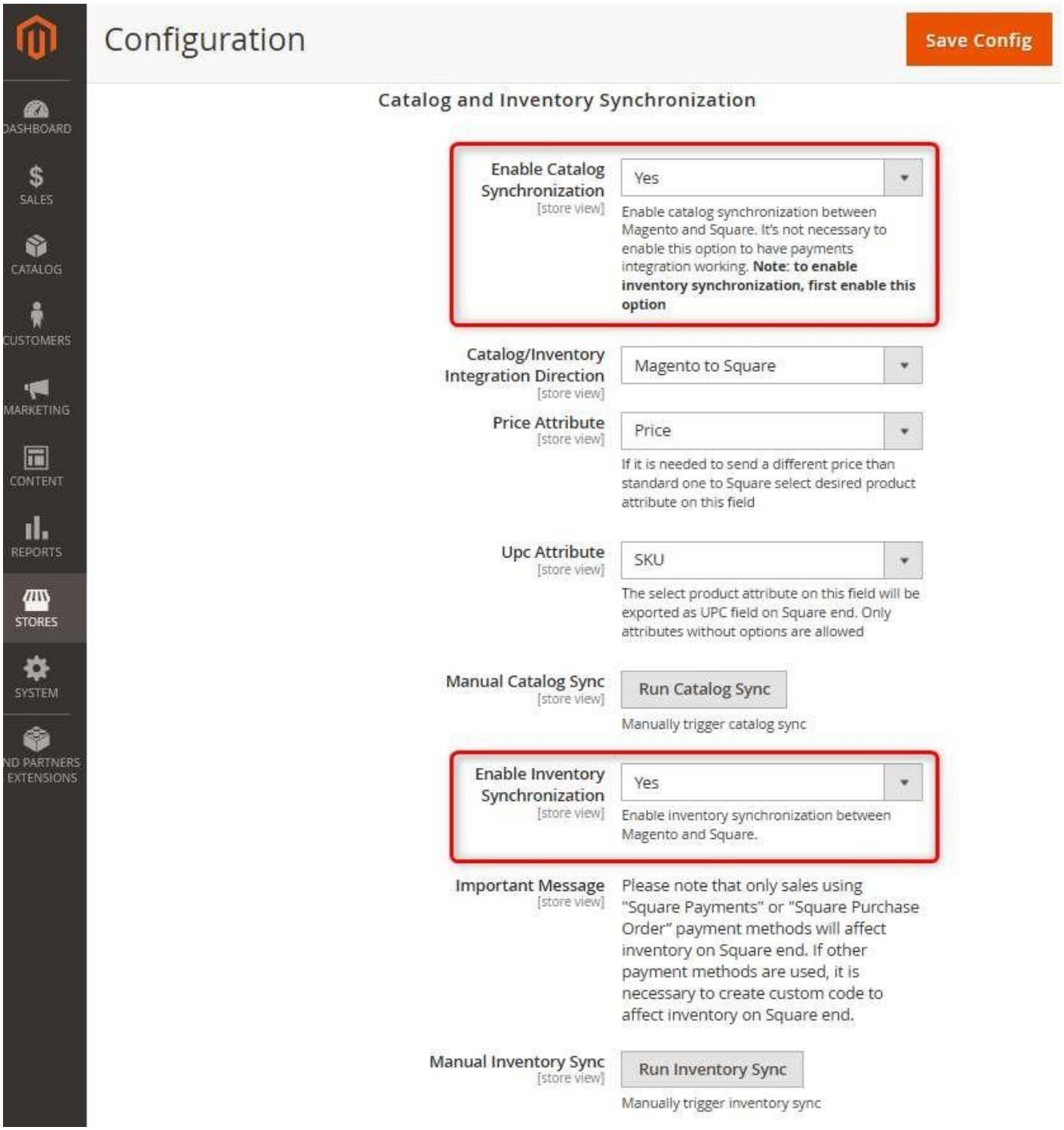
Get OAuth Token

Revoke OAuth Token
[store view]

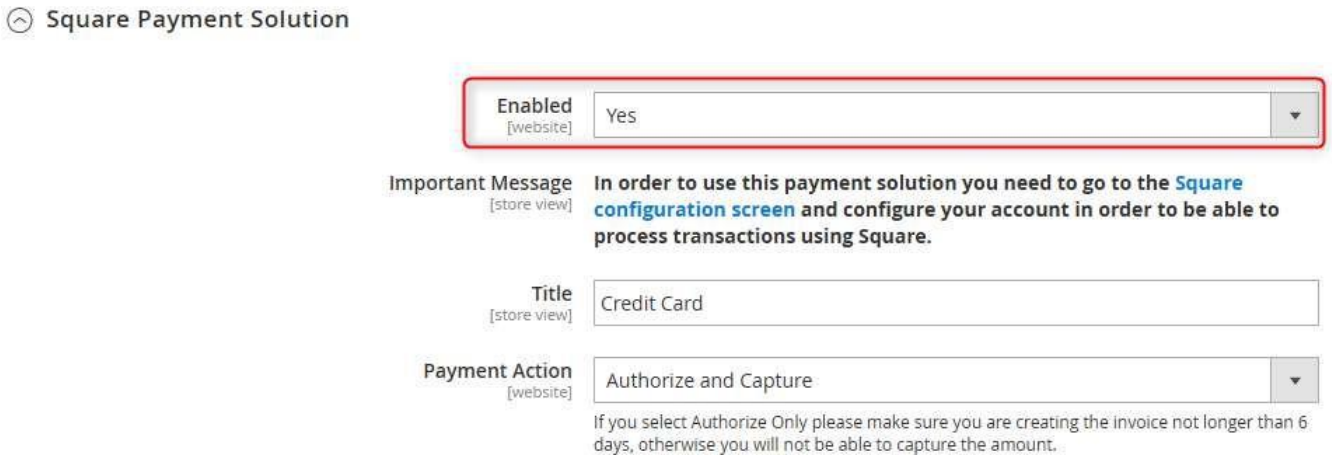
Revoke OAuth Token

Revoke all OAuth tokens for the current merchant. After the token is revoked you need to refresh the cache to enact the change.

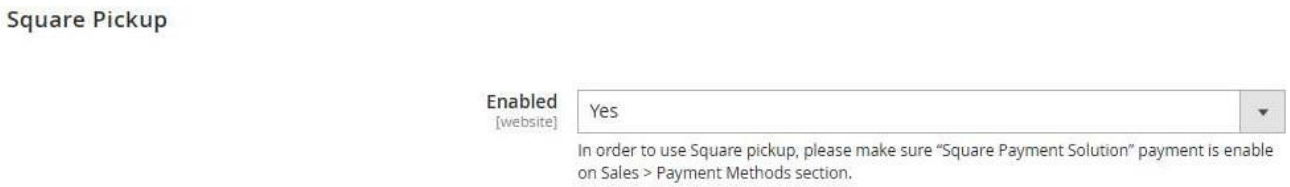
- The Catalog Inventory Synchronization must be enabled and the catalog items and inventory synced (the extension checks for locations inventory before showing them as a pickup option to customer during checkout).



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.

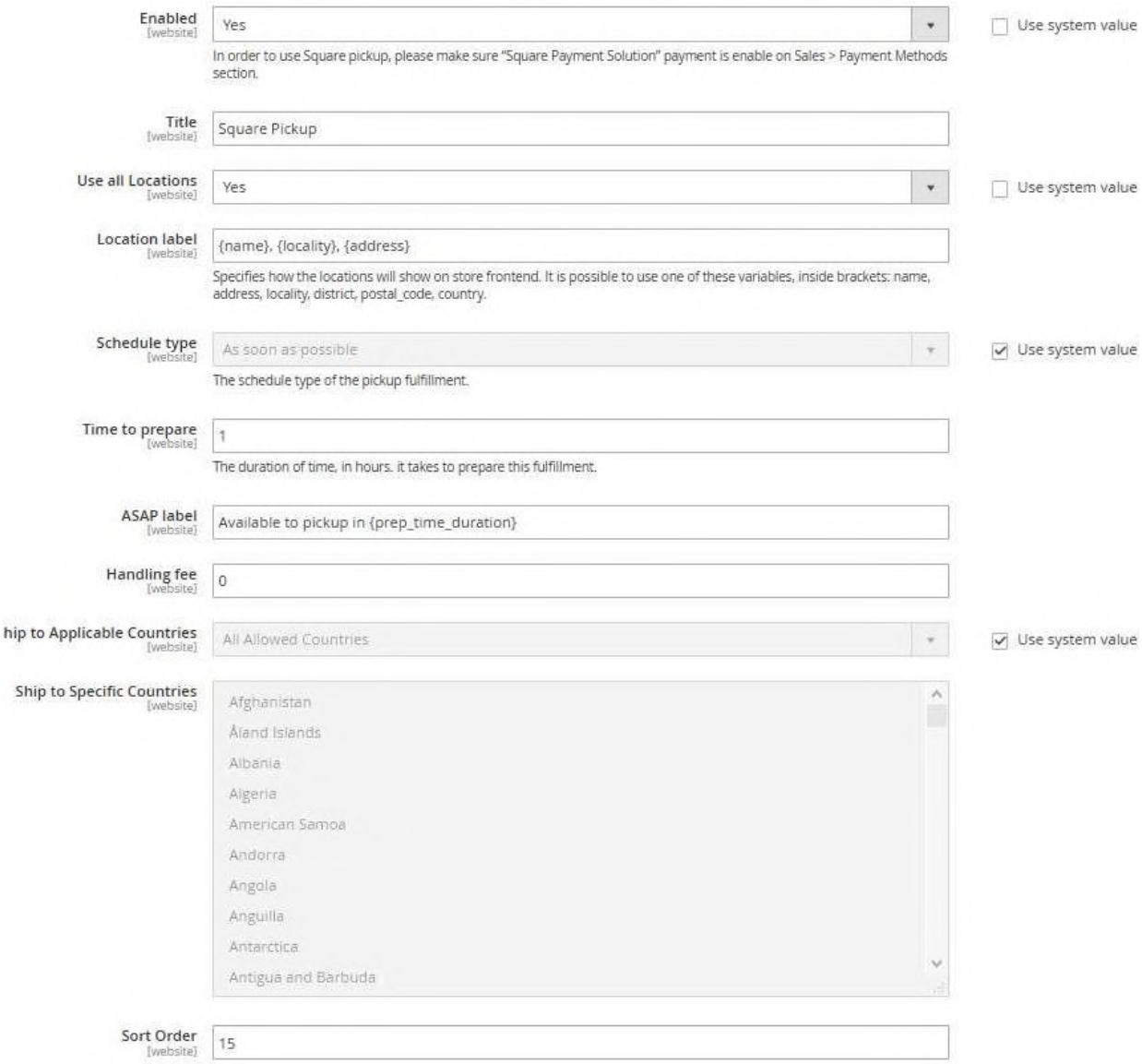


3. In Admin > Stores > Configuration > Sales > Shipping Methods, the Square Pickup delivery method must be enabled.



2.4.2 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: 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

2.4.3 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.

2.5 - Subscriptions Functionality

2.5.1 What Does the Square Subscriptions Functionality Do?

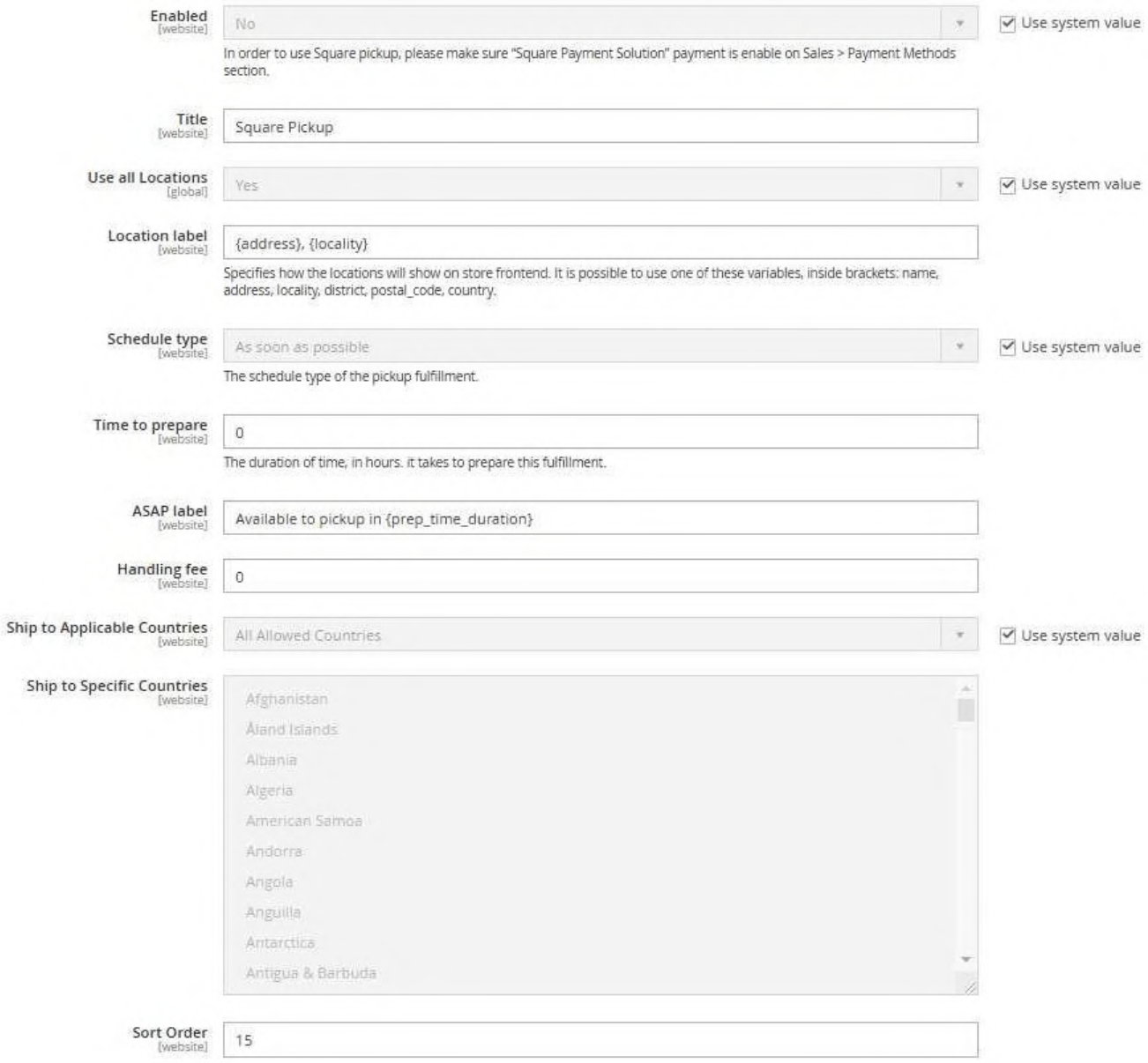
- Merchants can create as many subscription-plans as needed
- A product can have one or more subscription plans attached to it
- Customers can select a plan on the product's details page and purchase a subscription
- Subscriptions are created on Square side, which handles payment and recurring invoicing
- 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

2.5.2 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).

6.9.2 Configuring the In-Store Pickup functionality

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



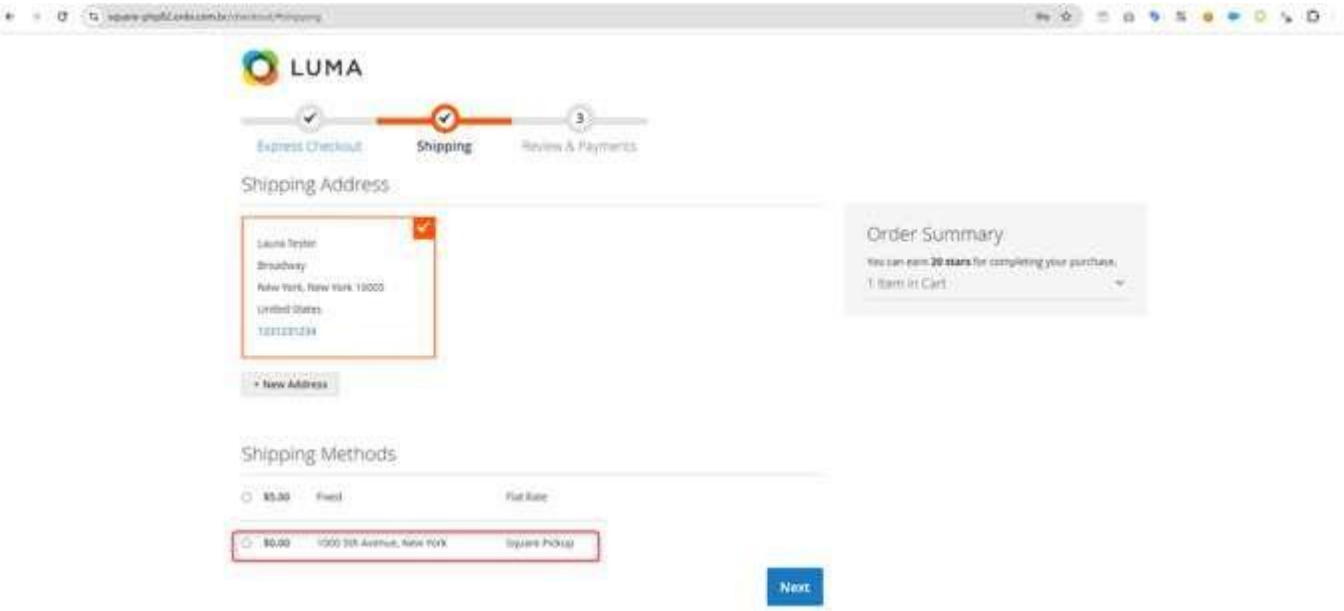
- Enabled: enable/disable functionality
- Title: the name of the shipping method, as it will be displayed to the customer on frontend
- Use all locations: yes/no field, if "no" option is selected then "Locations to exclude" field shows up and allow the merchant to select locations that will not show 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

MSI Pickup:

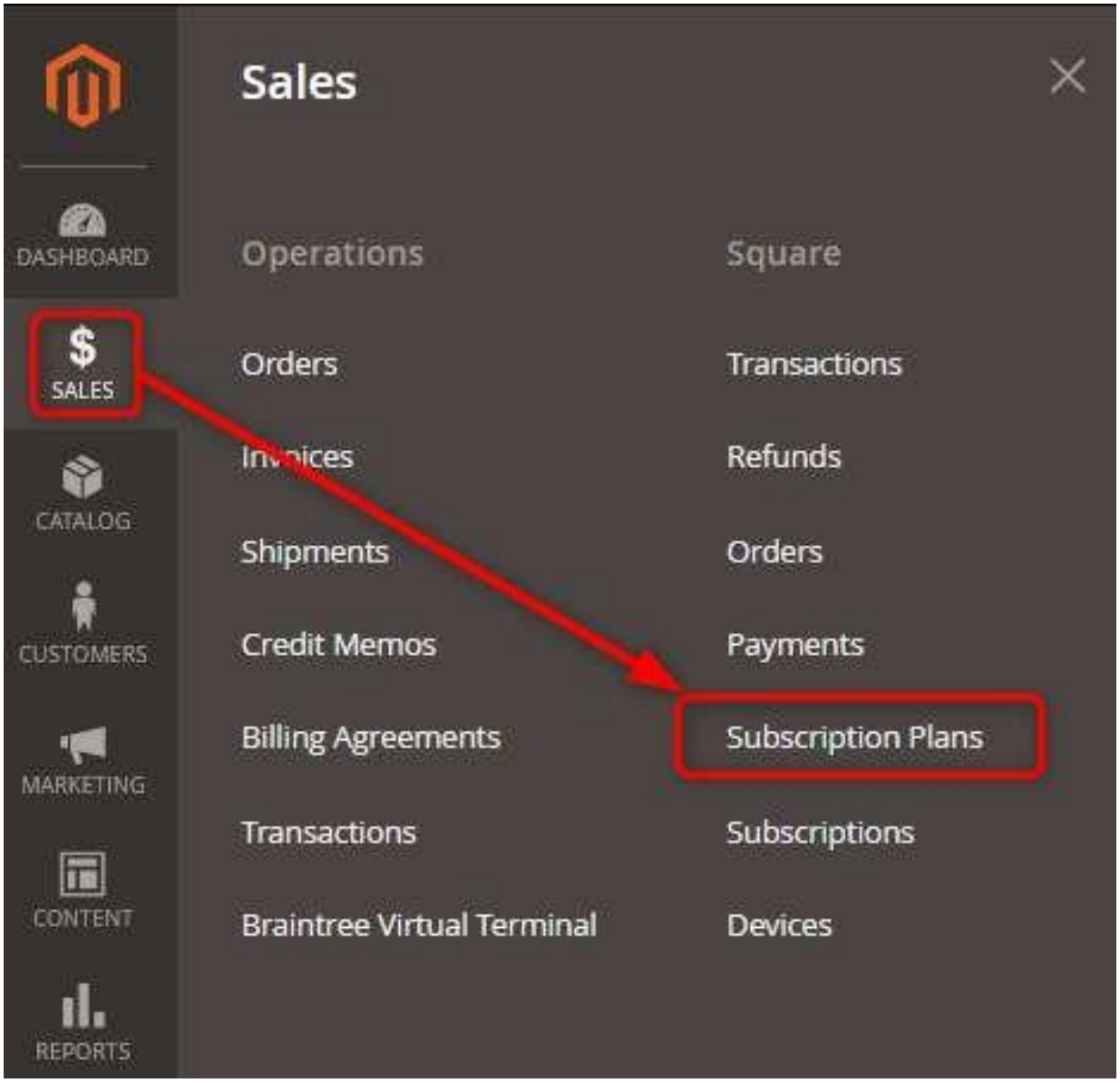
MSI Pickup will only work for the selected location. To set up in-store pickup for a specific source in Magento using Multi-Source Inventory (MSI), you'll need to configure both the source and the shipping method settings.

Enable Pickup for a source: Go to Stores > Inventory > Source , Select or add a new source and edit it. Toggle on the **'Use as Pickup Location'** option and fill in the required data fields, then save the changes.



2.5.3 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:

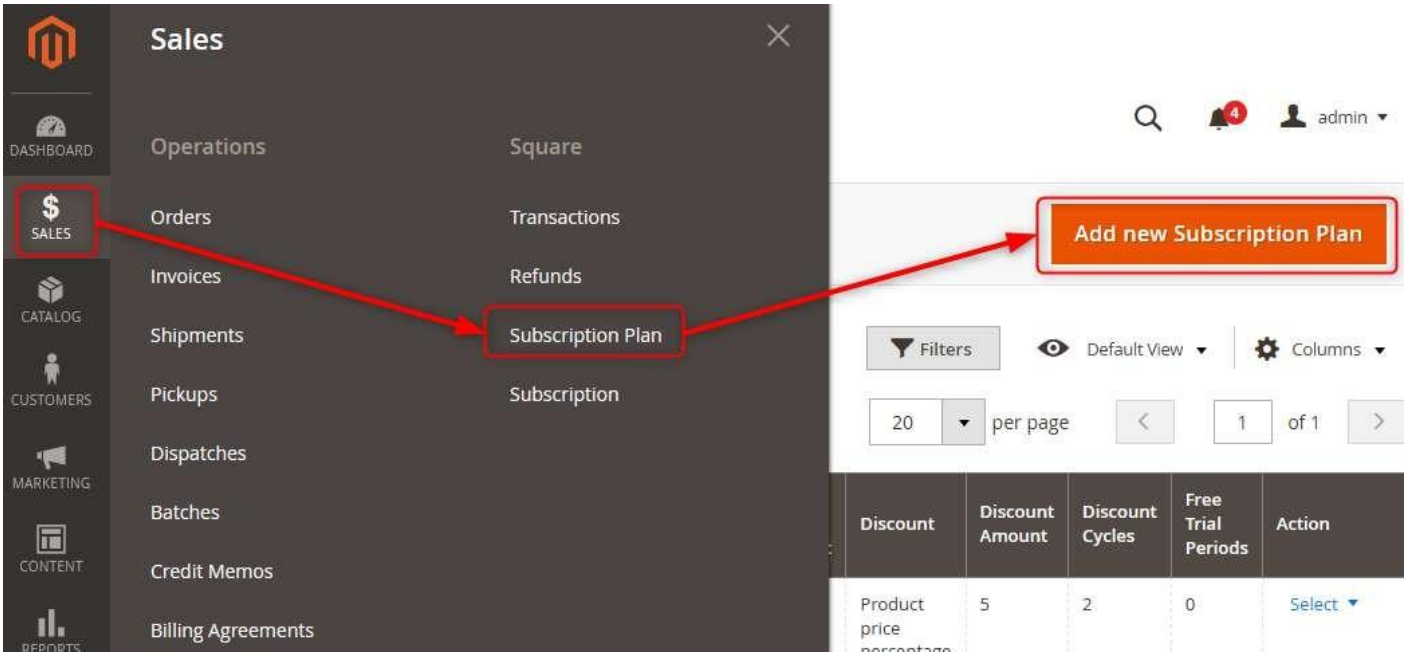


For each plan, the admin can see the status, the billing frequency, total number of Periods (cycles), the initial fee type (percentage or fixed amount), the initial fee value, the discount type (fixed amount or percentage), the discount value, the number of cycles over which the discount is applied (if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

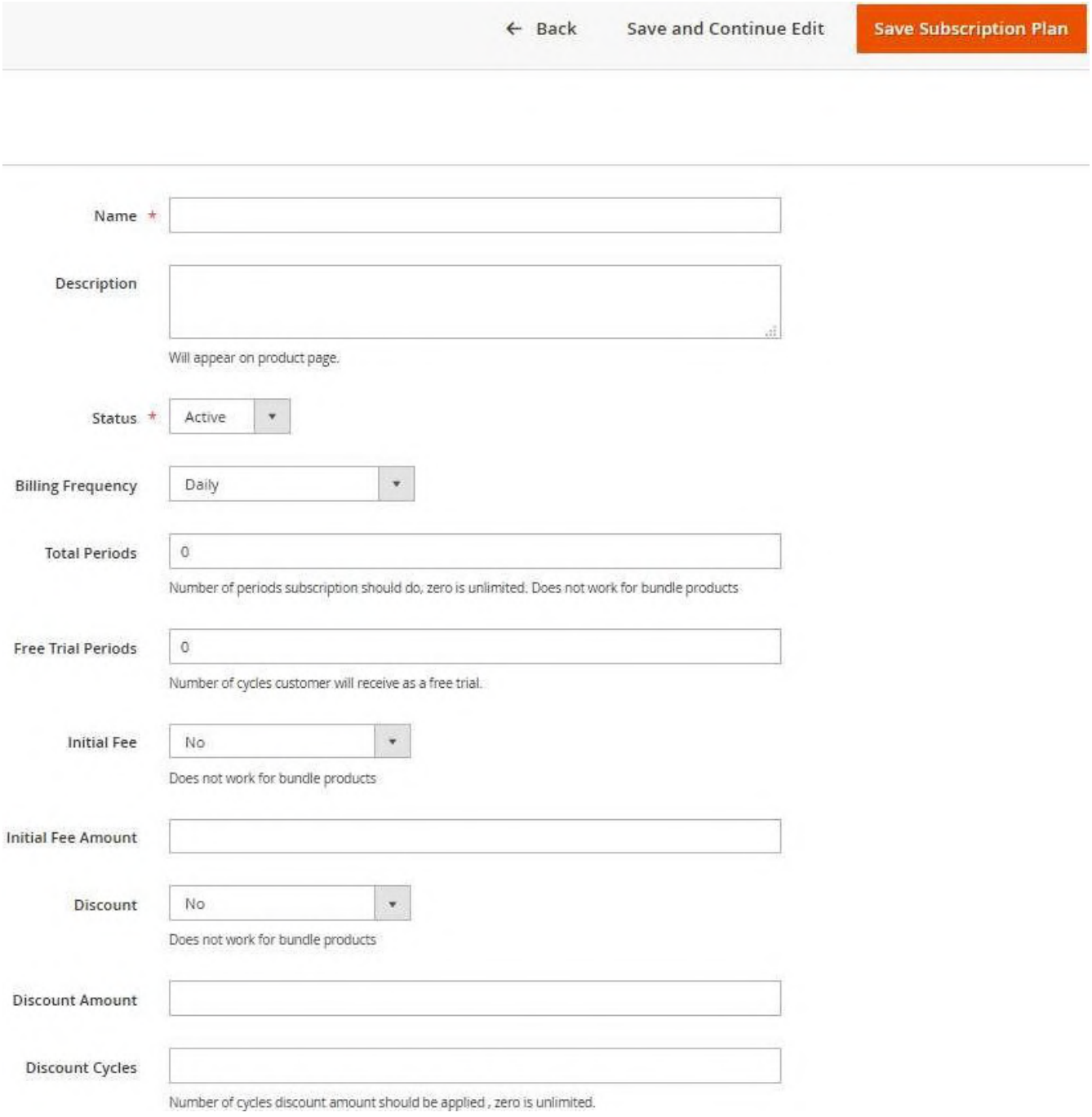
	ID ↓	Name	Status	Total Periods	Initial Fee	Initial Fee Amount	Discount	Discount Amount	Discount Cycles	Free Trial Periods	Action
☐	4	Two week plan	active	0	fixed	7	no	10	0	0	Select ▾
☐	5	Monthly plan	active	15	percentage	10	no	0	5	5	Select ▾
☐	6	Anual plan	active	20	no	0	percentage	10	5	0	Select ▾
☐	7	Daily plan	active	30	no	0	no	0	0	0	Select ▾

2.5.4 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”:

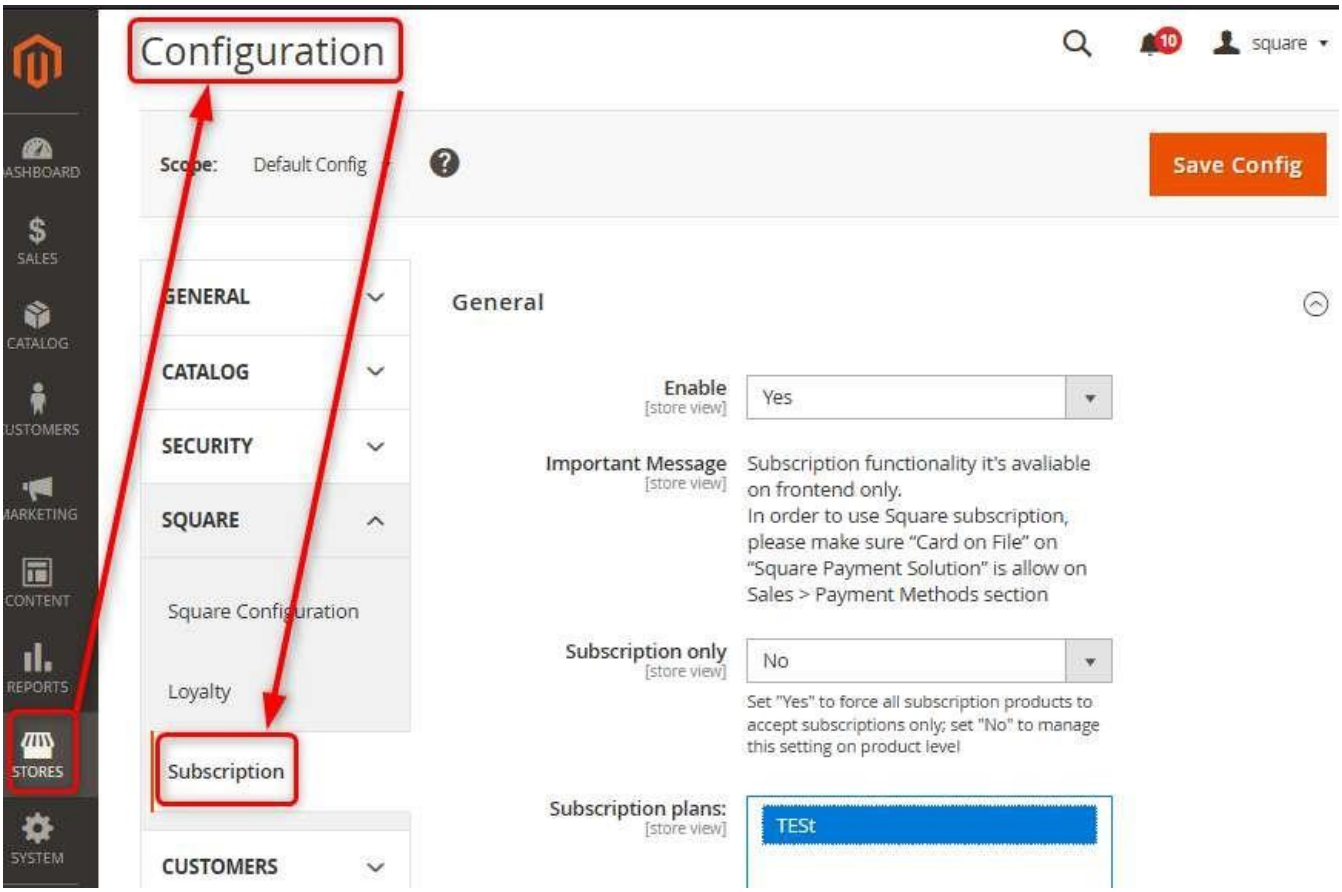


From here, the admin will be able to name the plan, add a description, set the billing frequency, total number of Periods (cycles), the initial fee type (percentage or fixed amount), the initial fee value, the discount type (fixed amount or percentage), the discount value, the number of cycles over which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

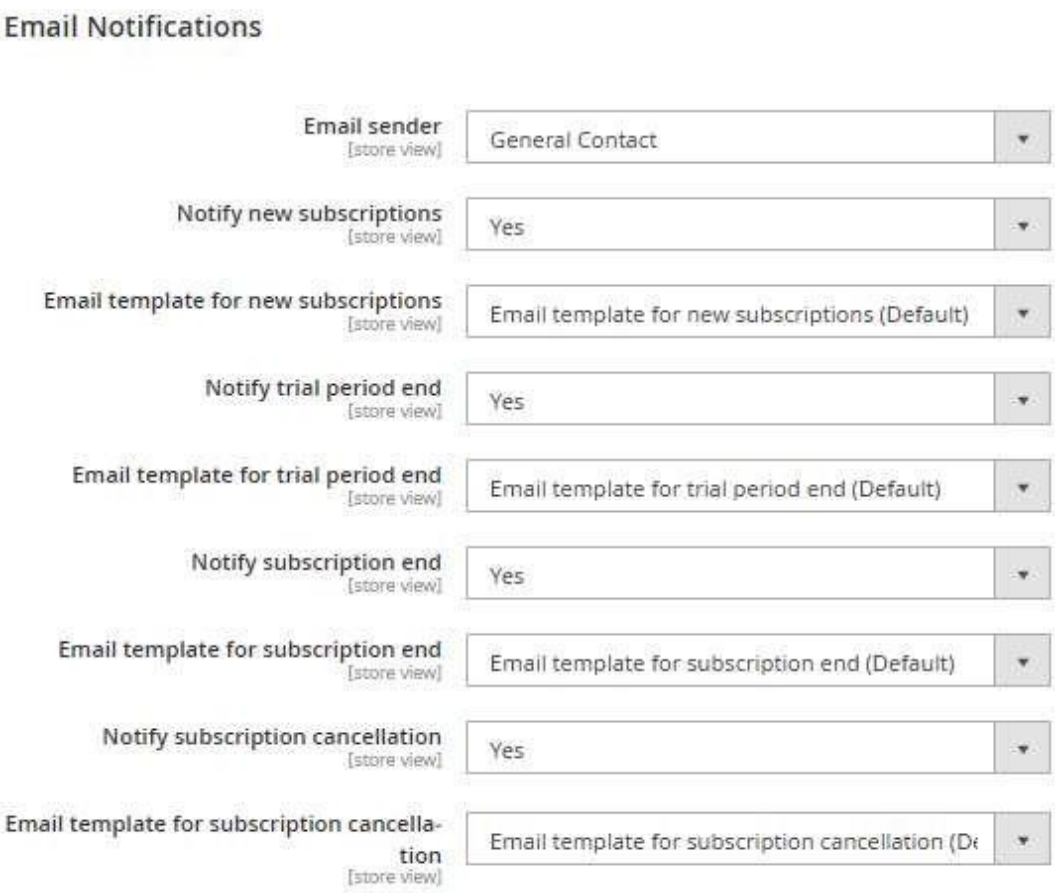


2.5.5 Subscriptions Extension Settings

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:



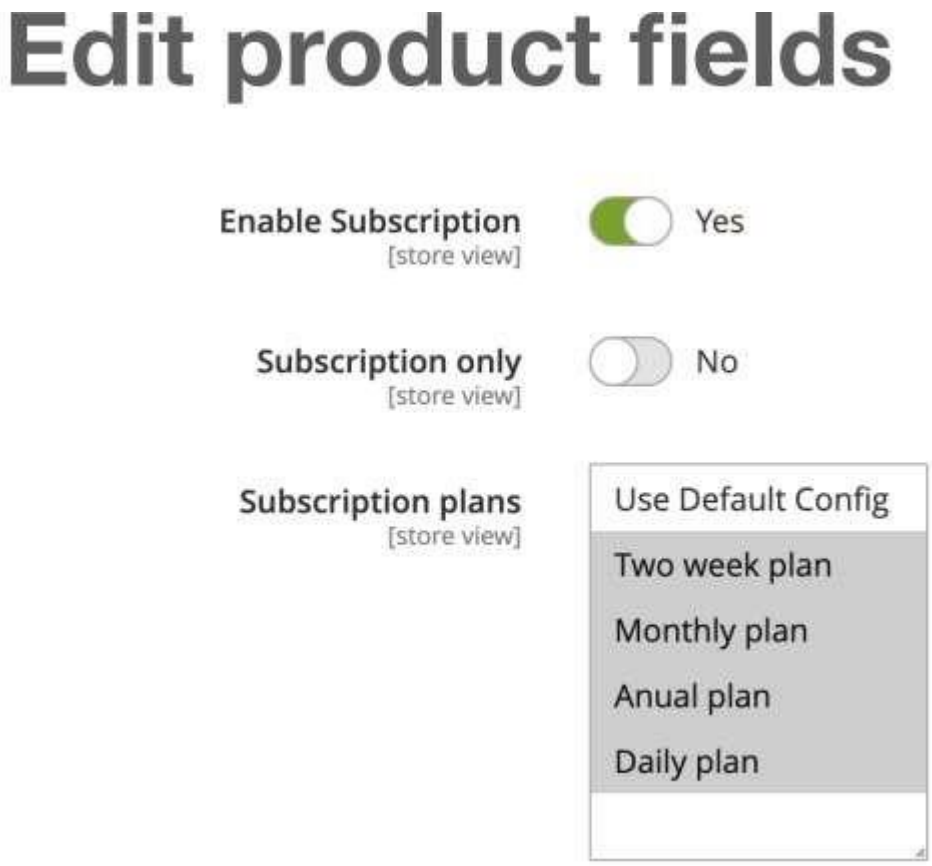
From the same location, several email notifications can be configured:



2.5.6 Attach Subscription Plans to Products

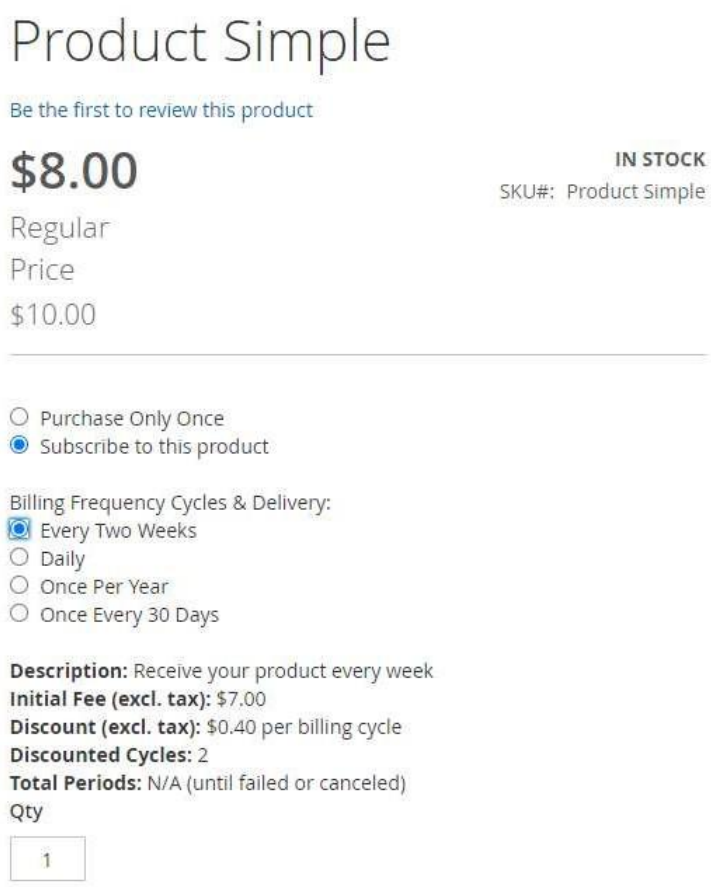
From the Product Edit section in admin, you can:

- 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

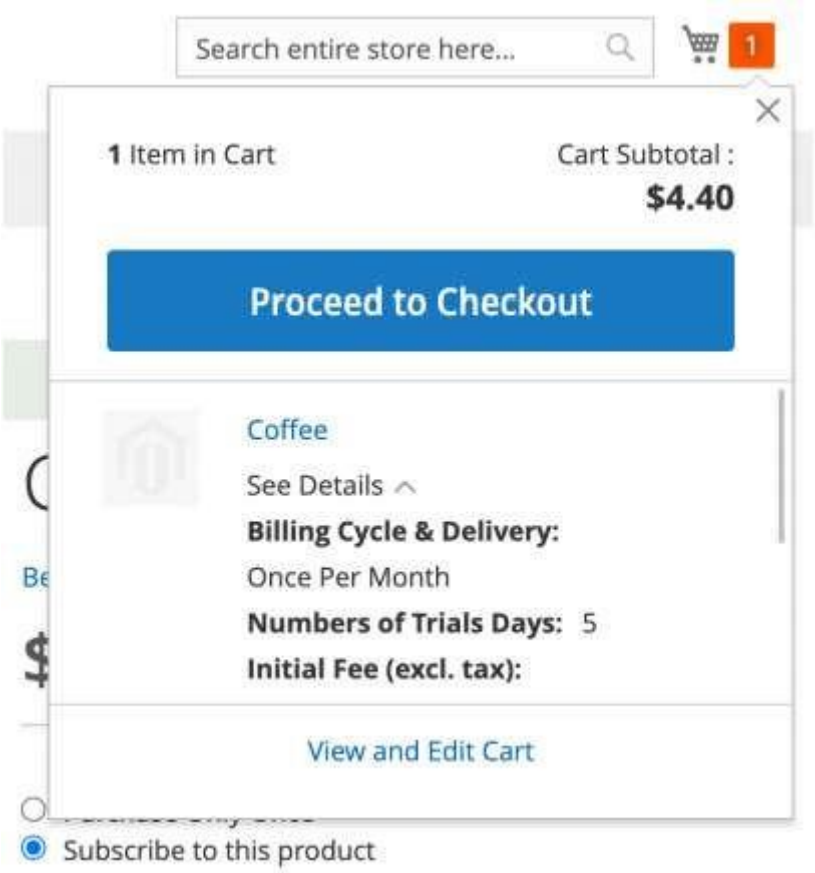


2.5.7 Frontend Journey

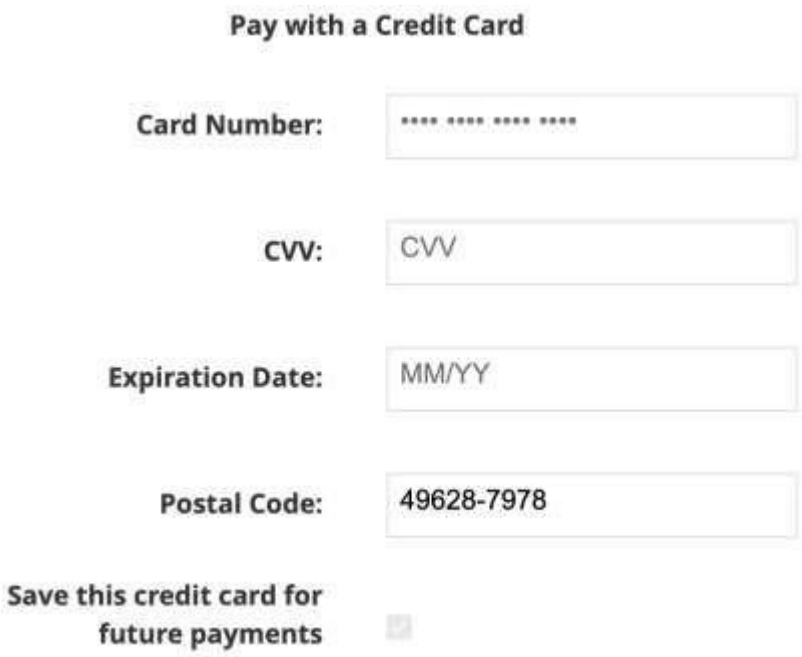
If a product has a subscription plan associated, the customer will be able to select it while in the PDP (in case the product is purchasable only via a subscription, they will not be able to choose “Purchase only once”):



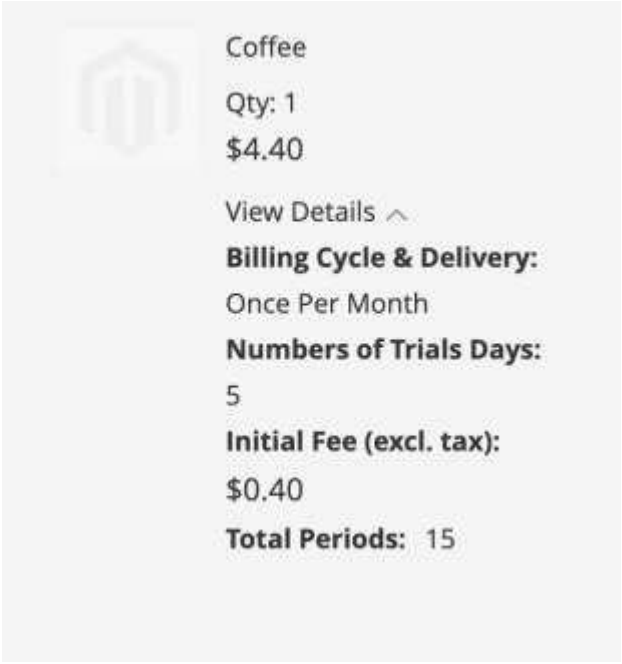
Once the subscription is selected and the product added to cart, the billing cycle and the financial details are visible in both the minicart and the cart:



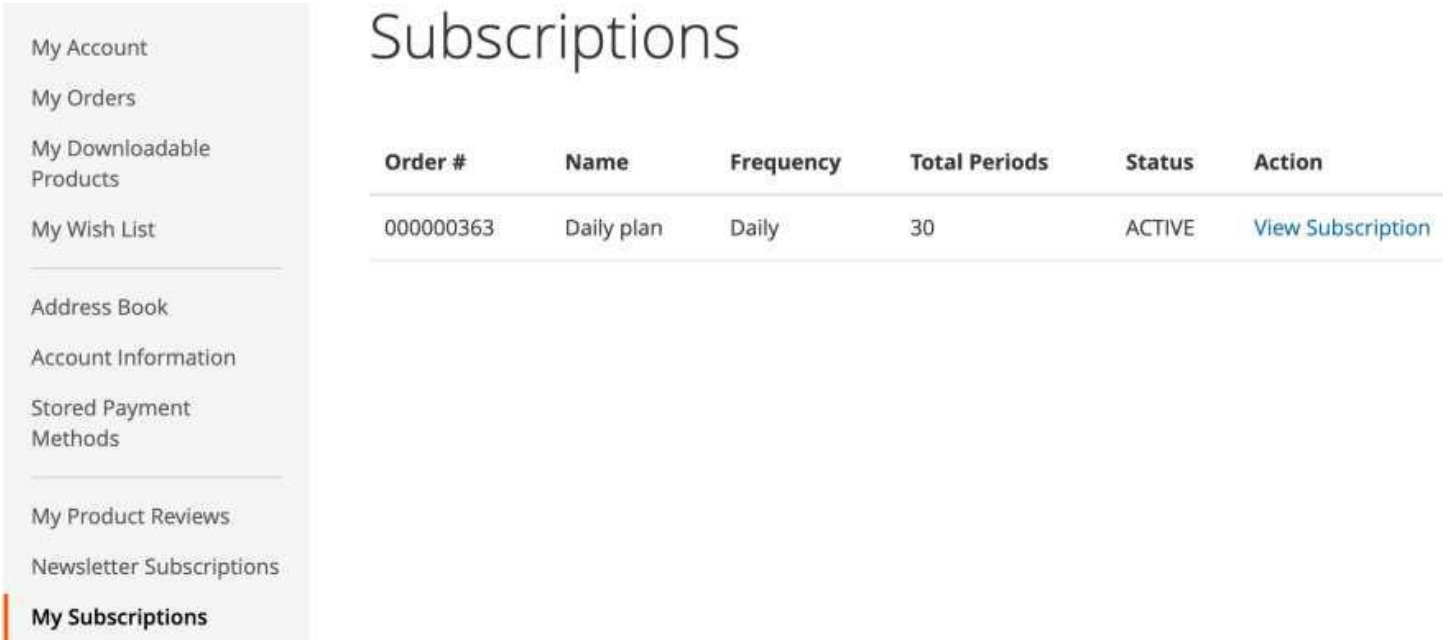
On the checkout, the customer will have to provide a credit card that will be stored:



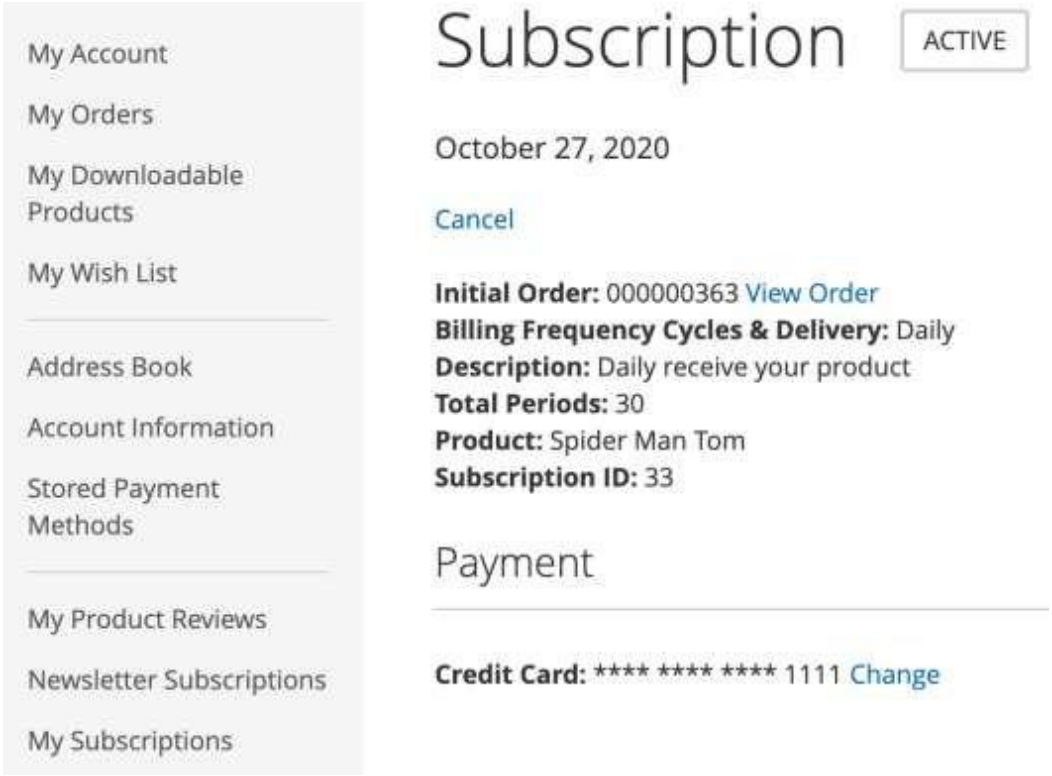
The details of the subscription will be readable in the order summary as well:



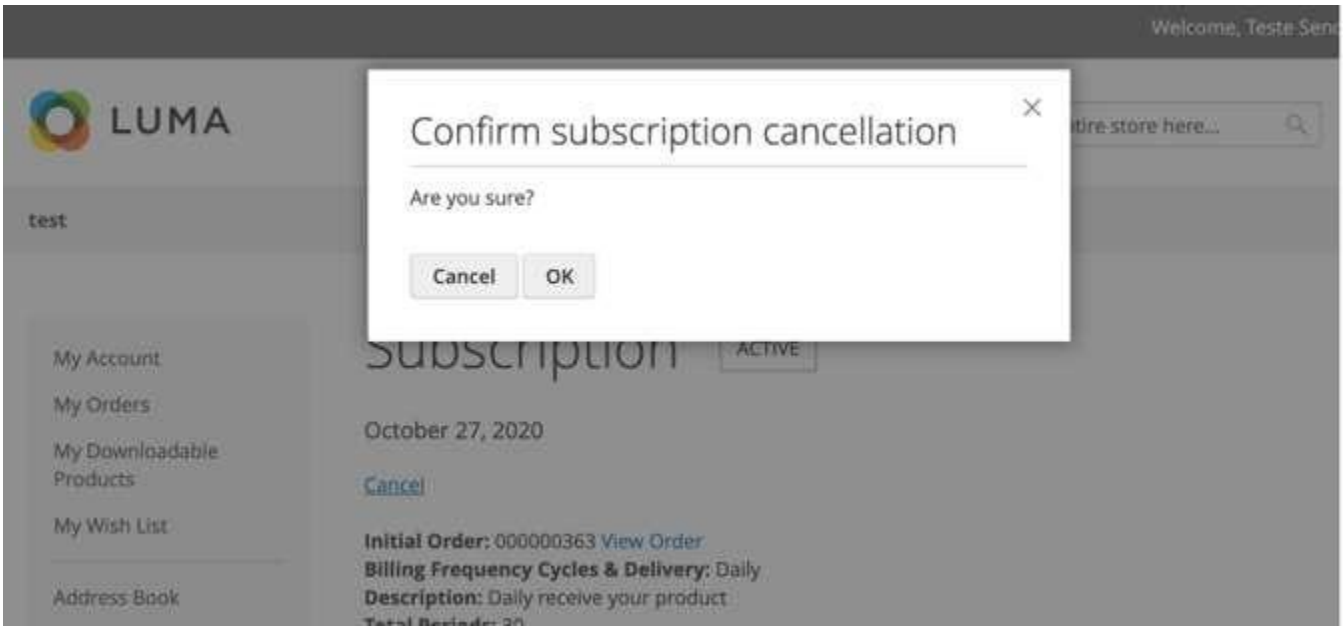
Once the order is placed, the customer can view their subscriptions by going to their Account and selecting “My Subscriptions”:



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



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:

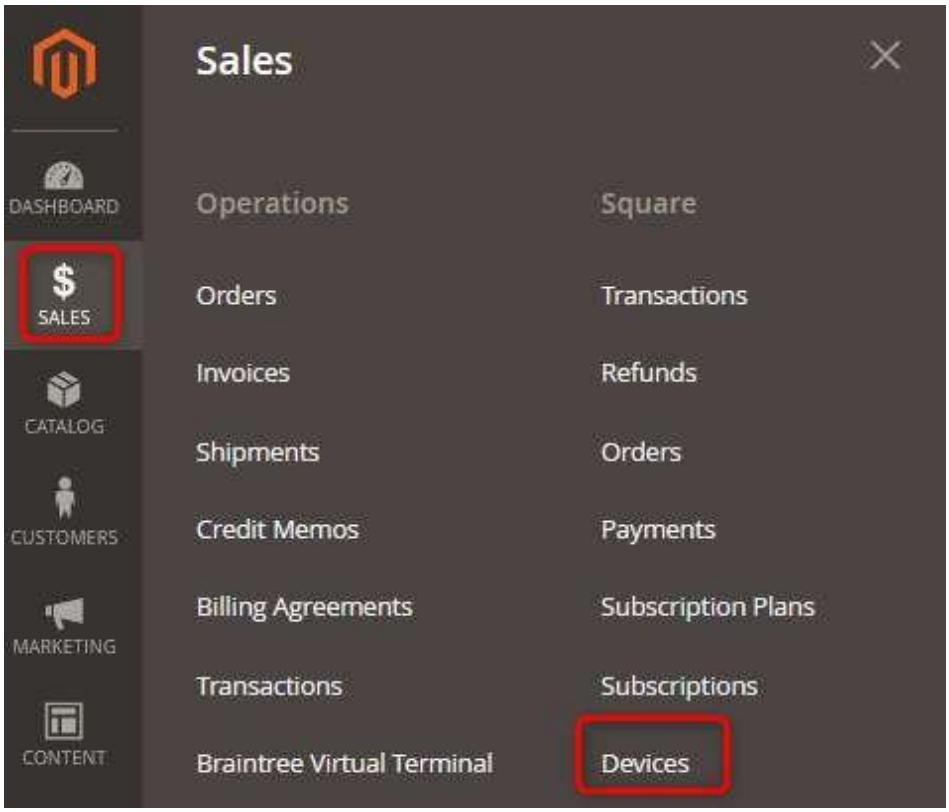
In the Invoices section of their account, Customers can see generated Square invoices and related Magento orders.

• 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

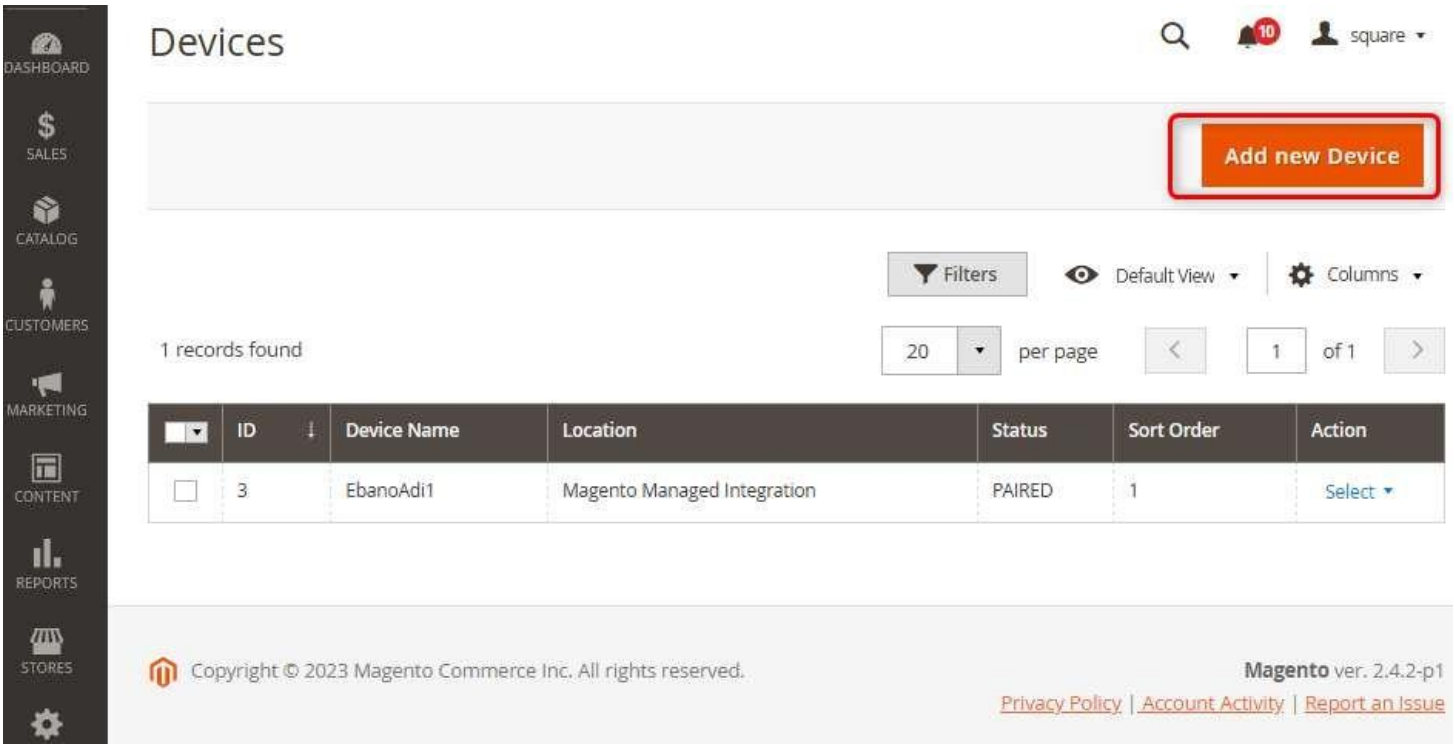
2.6 - Square Terminal API

2.6.1 Register new device

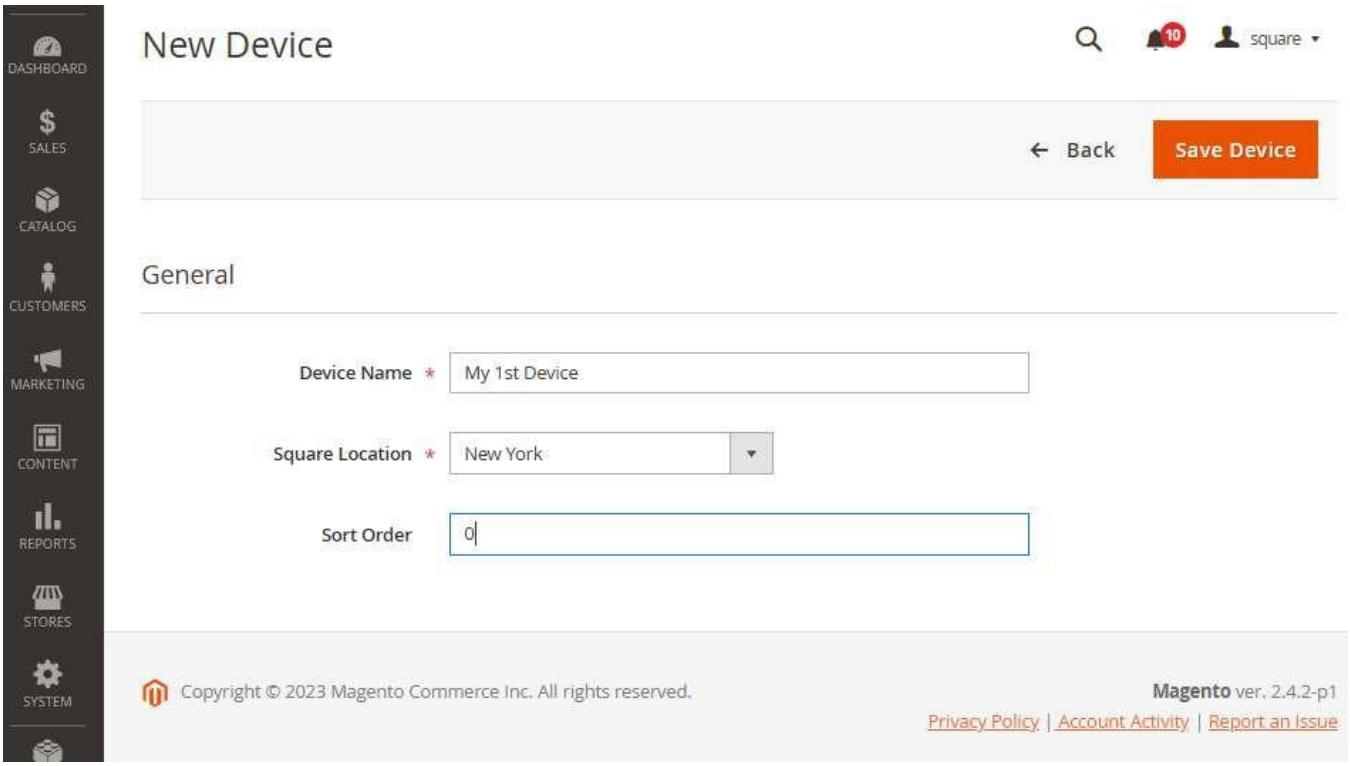
You must have at least a registered terminal in order to use terminal payments. Once you are in the physical possession of a terminal, navigate in the Admin area to Sales > Square > Devices:



This opens a grid with the list of already registered devices. To register a new device, click Add new Device:



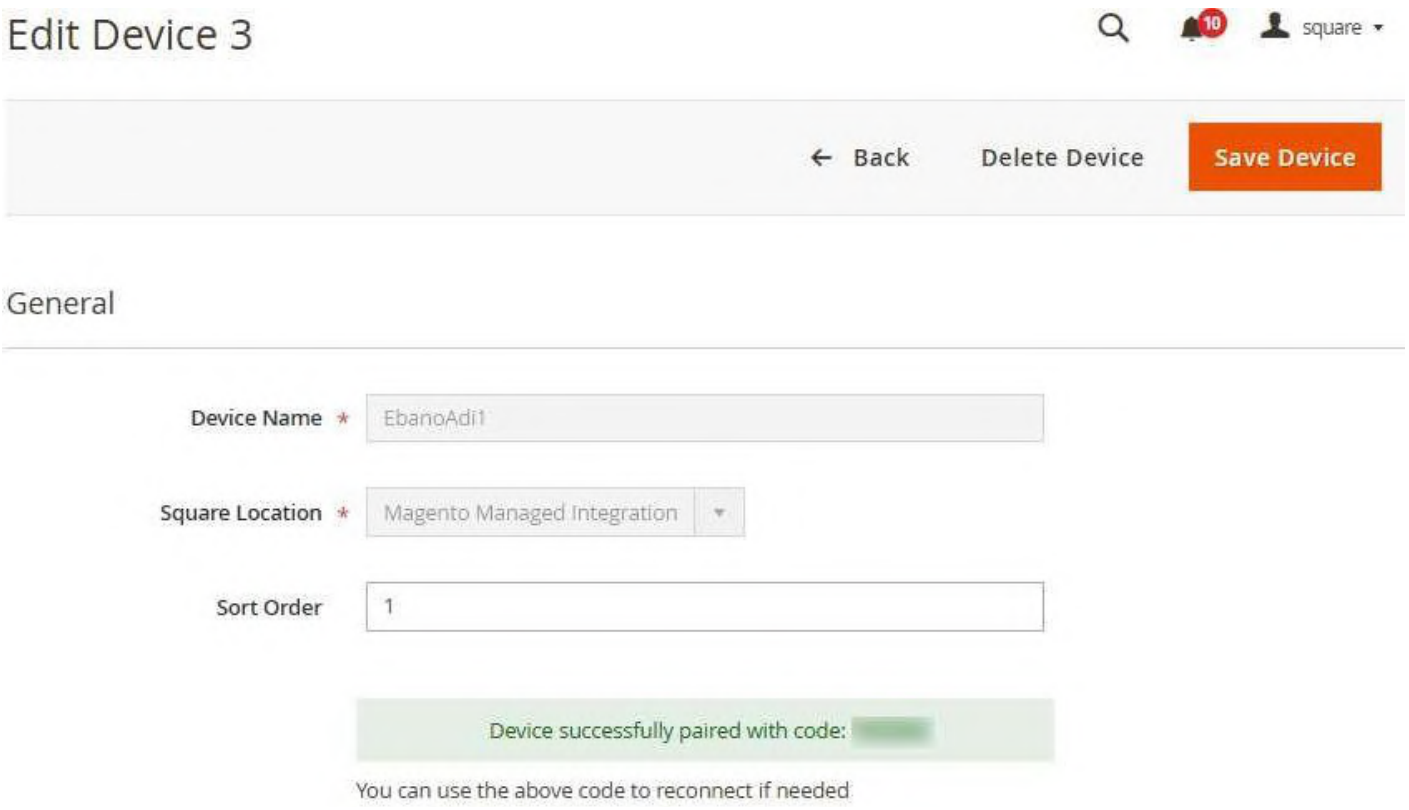
Provide an arbitrary name to the terminal. Select the location where the terminal will be active. If you have more than one device, provide a sort order index that will be used to order the devices in the payment method during admin checkout, then Save:



2.6.2 Pair the newly registered device

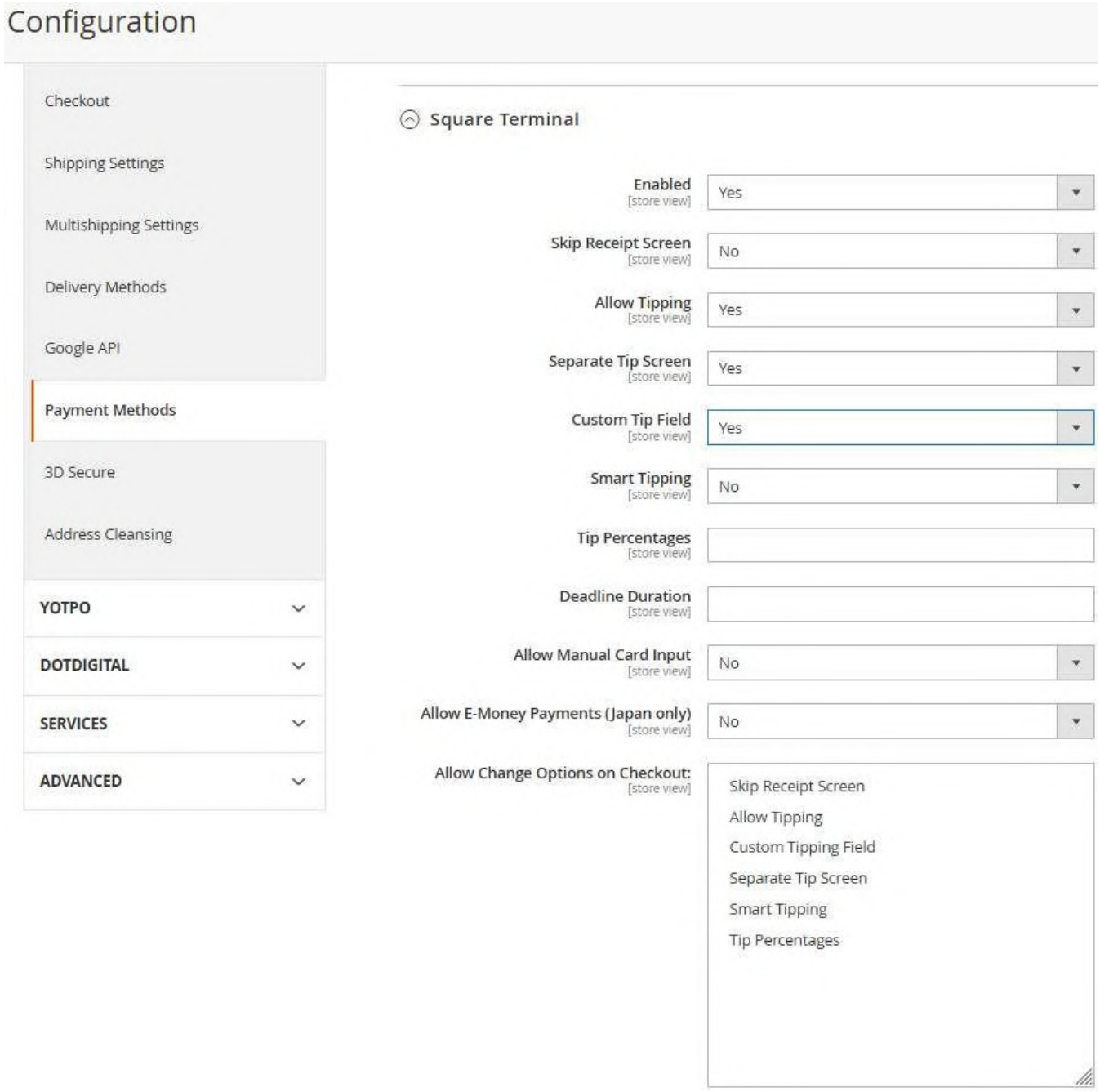
Once the device was added to the list, click to Edit its details. Start the pairing process and follow the steps displayed on the physical device. Please note that if there are two different Square accounts and the intention is to use the terminal on the account which the Magento catalog is not being synchronized to, then in order for the pairing to be successful you will have to cancel the catalog sync. Otherwise, if you only use a single Square account, the catalog and inventory syncs can be used with no issues.

Once the steps on the terminal have been followed through, the device details page in Magento automatically reloads to display the successfully paired status:



2.6.3 Square Terminal Payment Settings

Terminal payment settings can be found by navigating to Stores > Configuration > Sales > Payment Methods > Square Terminal:



The Square Terminal payment method will be available for admin orders if “Enabled” is set to Yes.

The fields below give you the opportunity to configure the screens displayed on the terminal.

- The receipt screen can be displayed or skipped
- Allow tipping, if set to yes, provides the function to capture tips.
- If tipping is enabled, then a dedicated screen for the tip can be displayed
- Custom tip field allows manual input of tips
- Smart tipping automatically calculates tips based on percentages

- Manual card input allows the user to input card details manually, when the card is not available for swipe.

2.6.4 Checkout Process using a Terminal

The merchant can use the terminal to place an order directly in Magento Admin area. The merchant can use the standard flow for creating an Admin order and Choose Square terminal as payment method. On the terminal, the merchant will be able to either swipe the credit/debit card or enter its details manually, if Manual card input was set.

6. When the Square Terminal payment method is selected, the merchant will have the following options:
   - Value: by default, will be populated with the order total amount
   - Device: list of devices available to the selected store view, ordered by the sort order
   - Skip Receipt Screen (if allowed on "Allow change options on checkout" setting)
   - Allow Tipping (if allowed on "Allow change options on checkout" setting)
   - Custom Tipping Field (if allowed on "Allow change options on checkout" setting)
   - Separate Tip Screen (if allowed on "Allow change options on checkout" setting)
   - Smart Tipping (if allowed on "Allow change options on checkout" setting)
   - Tip Percentages (if allowed on "Allow change options on checkout" setting)
   - Payment type: with the below options:
     - Credit card or debit card payments via tap, dip or swipe
     - Manual credit or debit card (if allowed on "Allow Manual Card input" setting)
     - iD checkout (if allowed on "Allow E-Money Payments" setting)
     - QUICPay (if allowed on "Allow E-Money Payments" setting)
     - Transportation Group (if allowed on "Allow E-Money Payments" setting)
     - FeliCa (if allowed on "Allow E-Money Payments" setting)

7. The merchant can modify the value field if splitting the payments on multiple transactions is needed, allowing the customer to pay with different credit cards or to use a Square gift card to cover part of the payment. It is not possible to add a value greater than the total amount to pay on this field.

8. After setting the desired options, the merchant must submit the payment to the Square Terminal. Magento will submit the terminal checkout request to the Square Terminal API and the merchant must collect payment when requested on the Square Terminal.

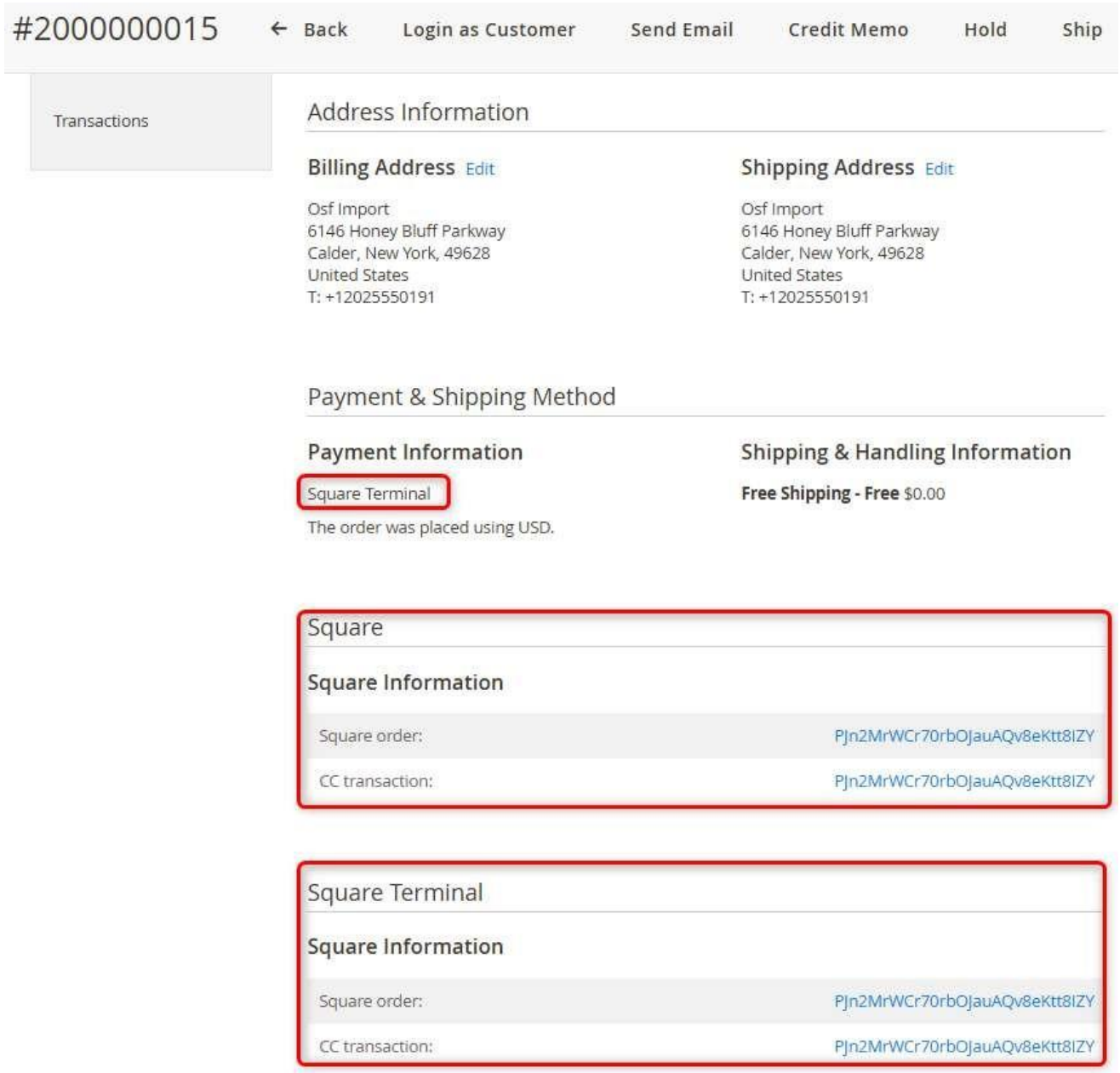
9. Magento will listen for webhooks and also check periodically (e.g. every 10 seconds) the terminal API for updates to the checkout process. While the payment is being processed on the

terminal, the screen will be blocked and the option to cancel the checkout request exists. If the merchant requests a cancellation, the request will be sent to the Terminal API.

- If the payment is canceled, the process completes without a payment and the merchant can restart the process.
- If the payment request was partial and there is an amount to be covered, the value field will be populated with the total remaining and the merchant can submit new checkout request.
- After each checkout request is completed on the Square Terminal, Magento will show the payment ID to the merchant.

10. After all the order amount is covered, by one or more payments, then the merchant can submit the order. Orders created with Square Terminal Payment will be automatically invoiced.

An order placed using the Square Terminal will display the payment method and assign an ID for the order and its corresponding transaction for both Square and Square terminal:



If a tip was included, it will also be displayed in the Order Totals section, below Taxes:

#2000000015 ← Back | Login as Customer | Send Email | Credit Memo | Hold | Ship

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Disc Amo
Terminal product SKU: terminal-product	Invoiced	$1.00	$1.00	Ordered 1 Invoiced 1	$1.00	$0.08	8.375%	$0.0

Order Total

Notes for this Order

Status

Processing

Comment

Notify Customer by Email

Visible on Storefront

Submit Comment

Feb 26, 2023 11:25:33 AM | Processing |
Customer **Not Notified**
Order Placed by yago bertolino using Admin Panel

Feb 26, 2023 11:25:33 AM | Processing |
Customer **Not Notified**
Order Placed by Store Administrator

Feb 26, 2023 11:25:33 AM | Processing |
Customer **Not Notified**
Captured amount of $1.08 online. Transaction ID: "PJn2MrWCr70rbOJauAQv8eKtt8IZY"

Order Totals

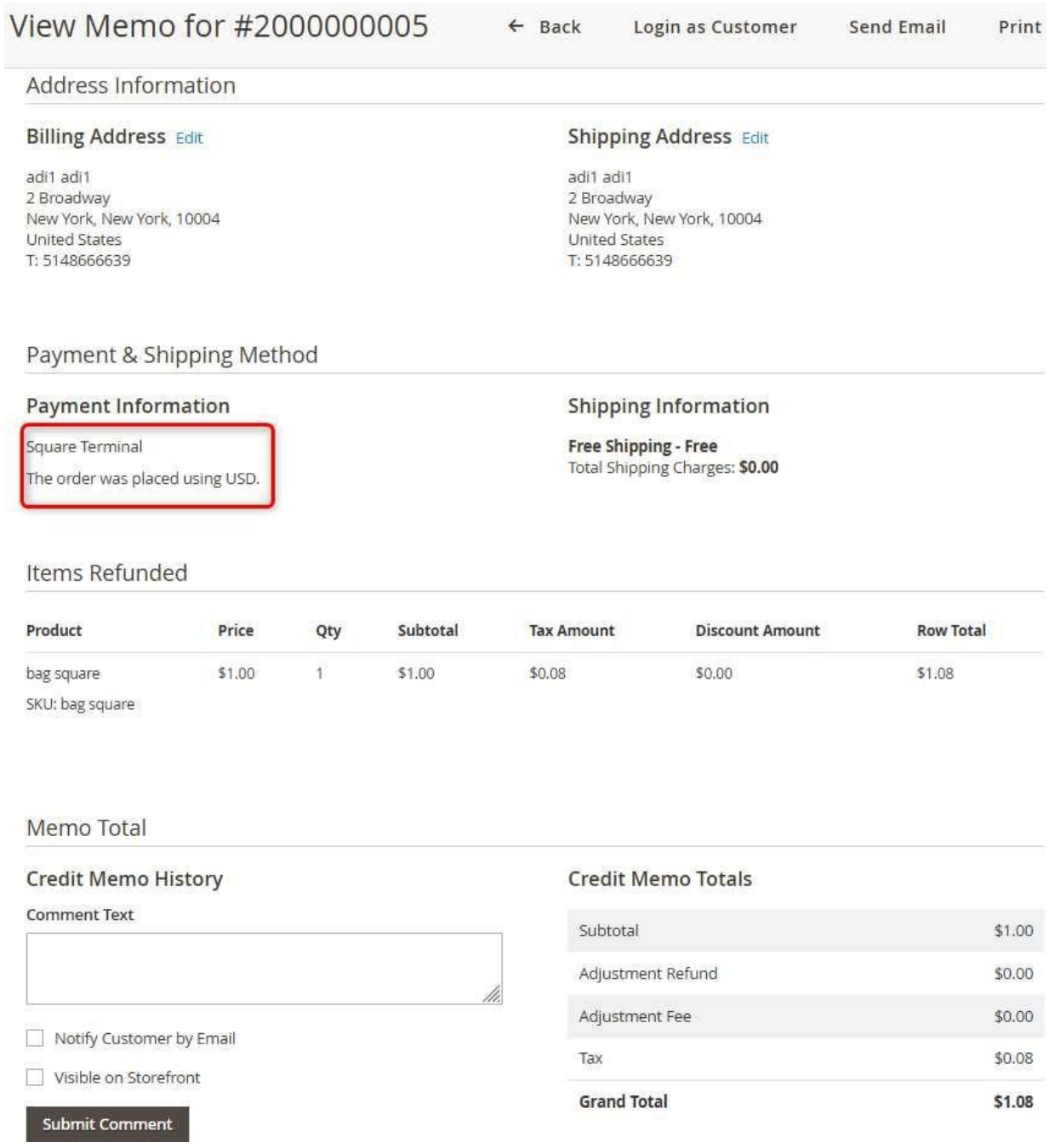
Subtotal	$1.00
Shipping & Handling	$0.00
Tax	$0.08
Tip Amount	$0.16
Grand Total	**$1.24**
Total Paid	**$1.08**
Total Refunded	**$0.00**
Total Due	**$0.16**

2.6.5 Refunding an order placed with a Square Terminal

Refunding an order placed with a Square Terminal can be done by following the standard procedure for refunding orders with online-captured payments.

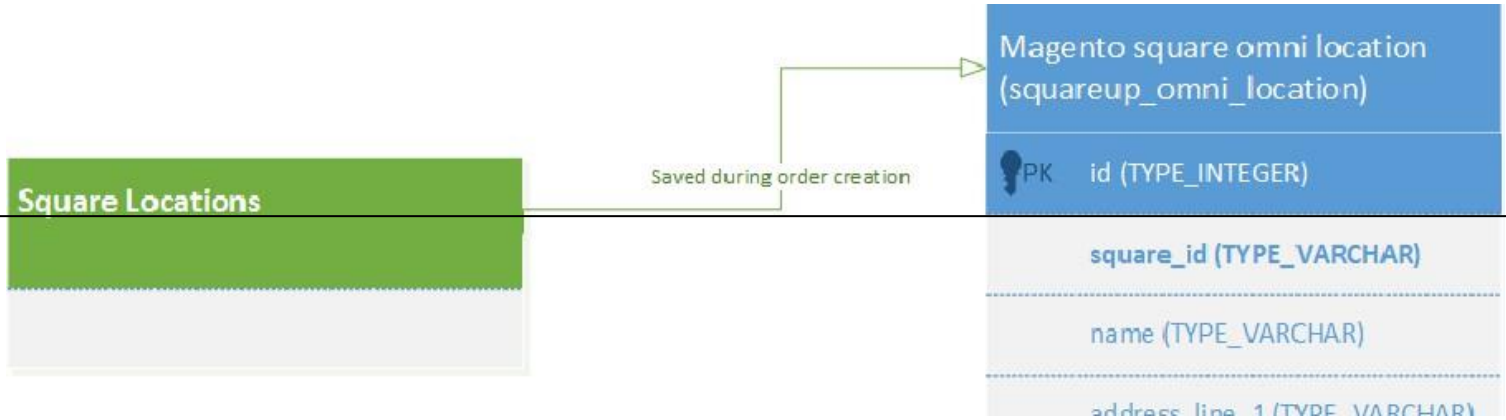
Since all orders paid for using a Square terminal have their invoices automatically created, the store owner will navigate to the Order, switch to Invoice, create a Credit Memo and choose Refund. They can choose to refund the tip or not, if it was included.

Once the credit memo is submitted, the order is canceled and the credit memo is displayed as standard Magento:

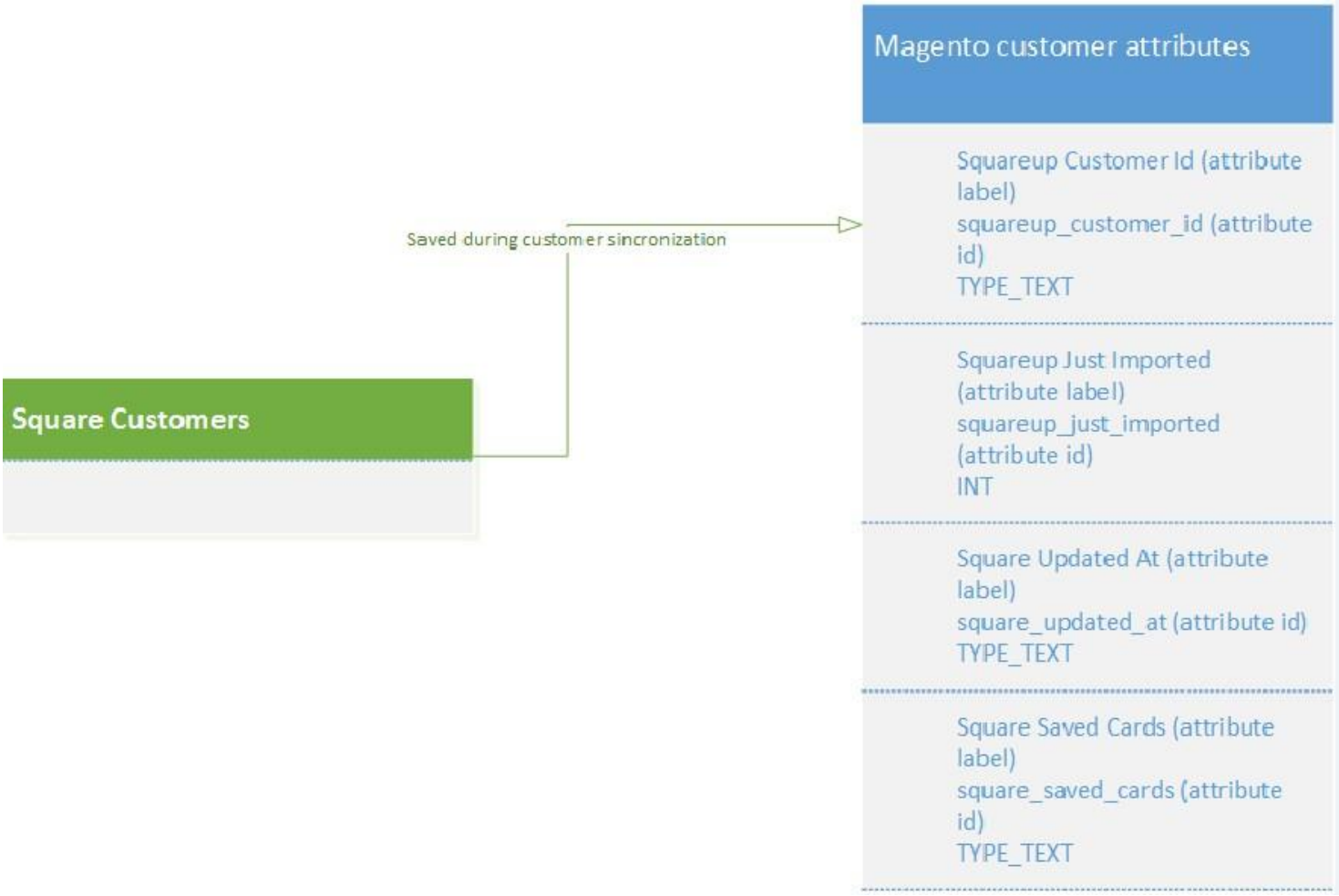

View Memo for #2000000005
Back
Login as Customer
Send Email
Print
Address Information
Billing Address Edit
adi1 adi1
2 Broadway
New York, New York, 10004
United States
T: 5148666639
Shipping Address Edit
adi1 adi1
2 Broadway
New York, New York, 10004
United States
T: 5148666639
Payment & Shipping Method
Payment Information
Square Terminal
The order was placed using USD.
Shipping Information
Free Shipping - Free
Total Shipping Charges: $0.00
Items Refunded
Product
Price
Qty
Subtotal
Tax Amount
Discount Amount
Row Total
bag square
SKU: bag square
$1.00
1
$1.00
$0.08
$0.00
$1.08
Memo Total
Credit Memo History
Comment Text
Notify Customer by Email
Visible on Storefront
Submit Comment
Credit Memo Totals
Subtotal $1.00
Adjustment Refund $0.00
Adjustment Fee $0.00
Tax $0.08
Grand Total $1.08

Appendix-1 Entities mapping between Magento and Square

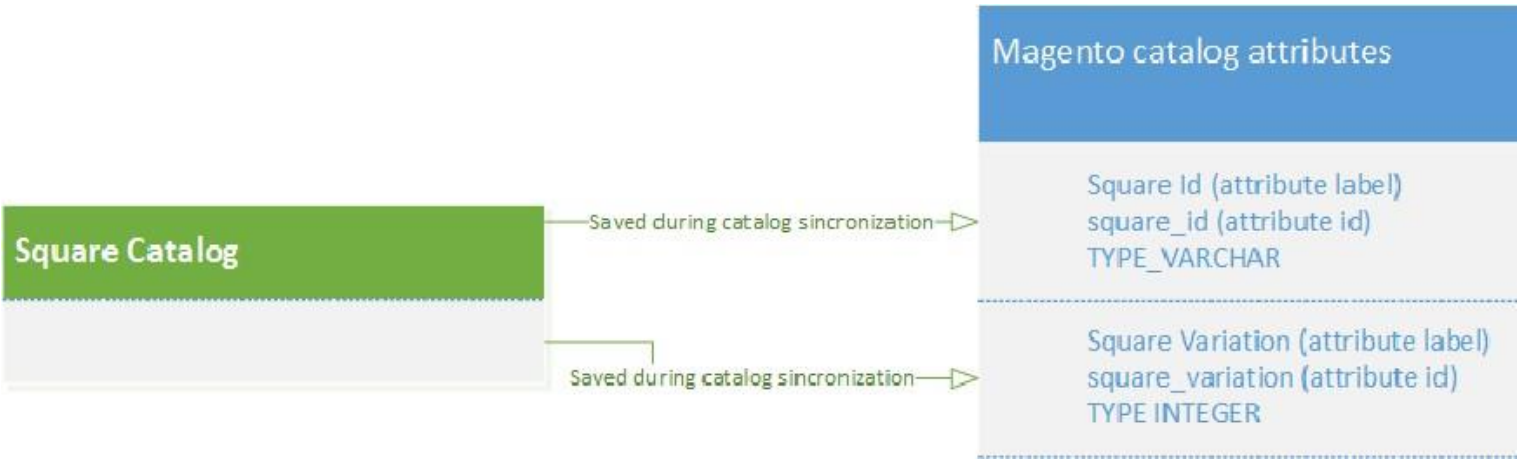
A-1.1 Square Locations



A-1.2 Square Customers

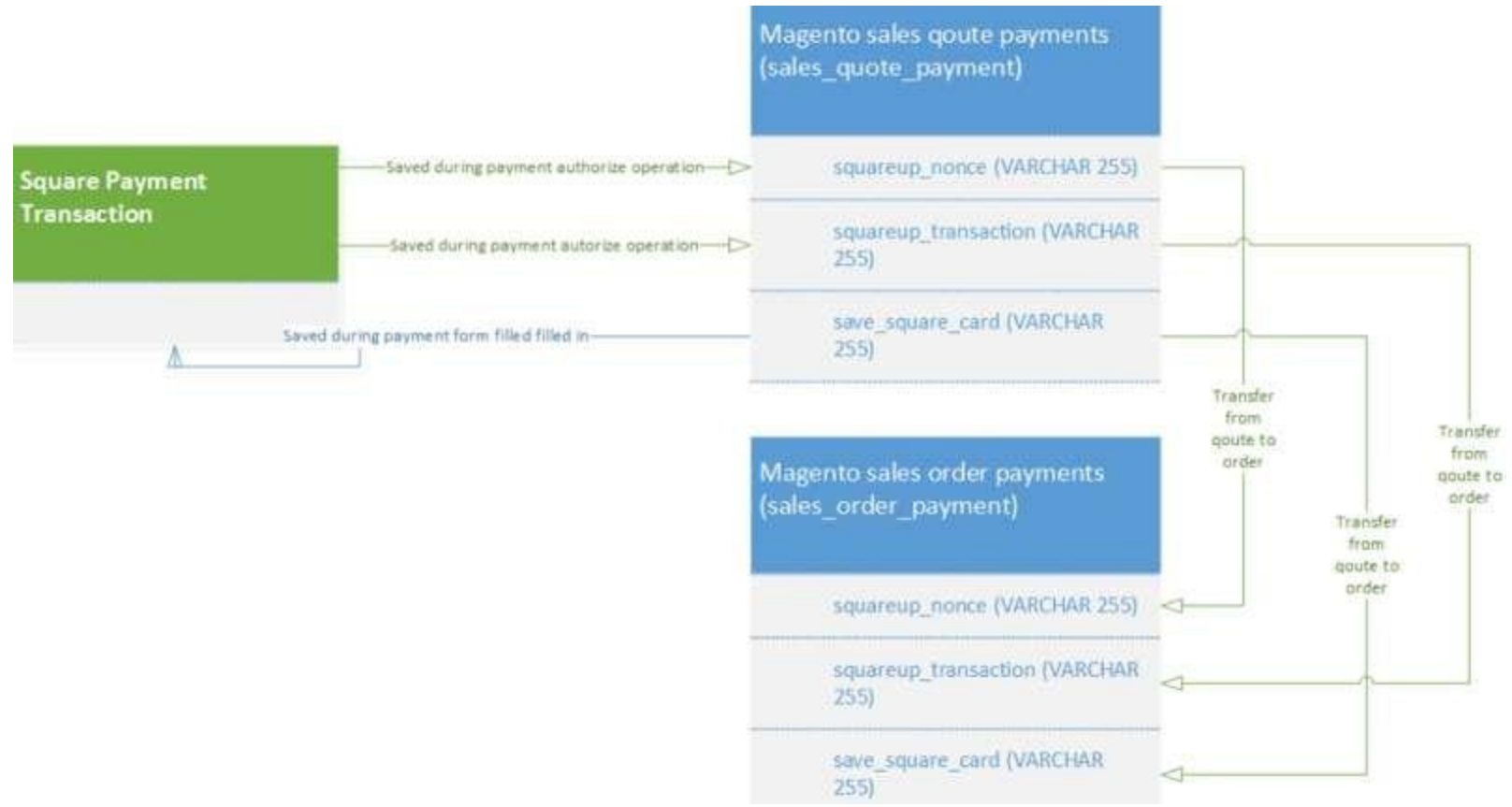


A-1.3 Square Catalog

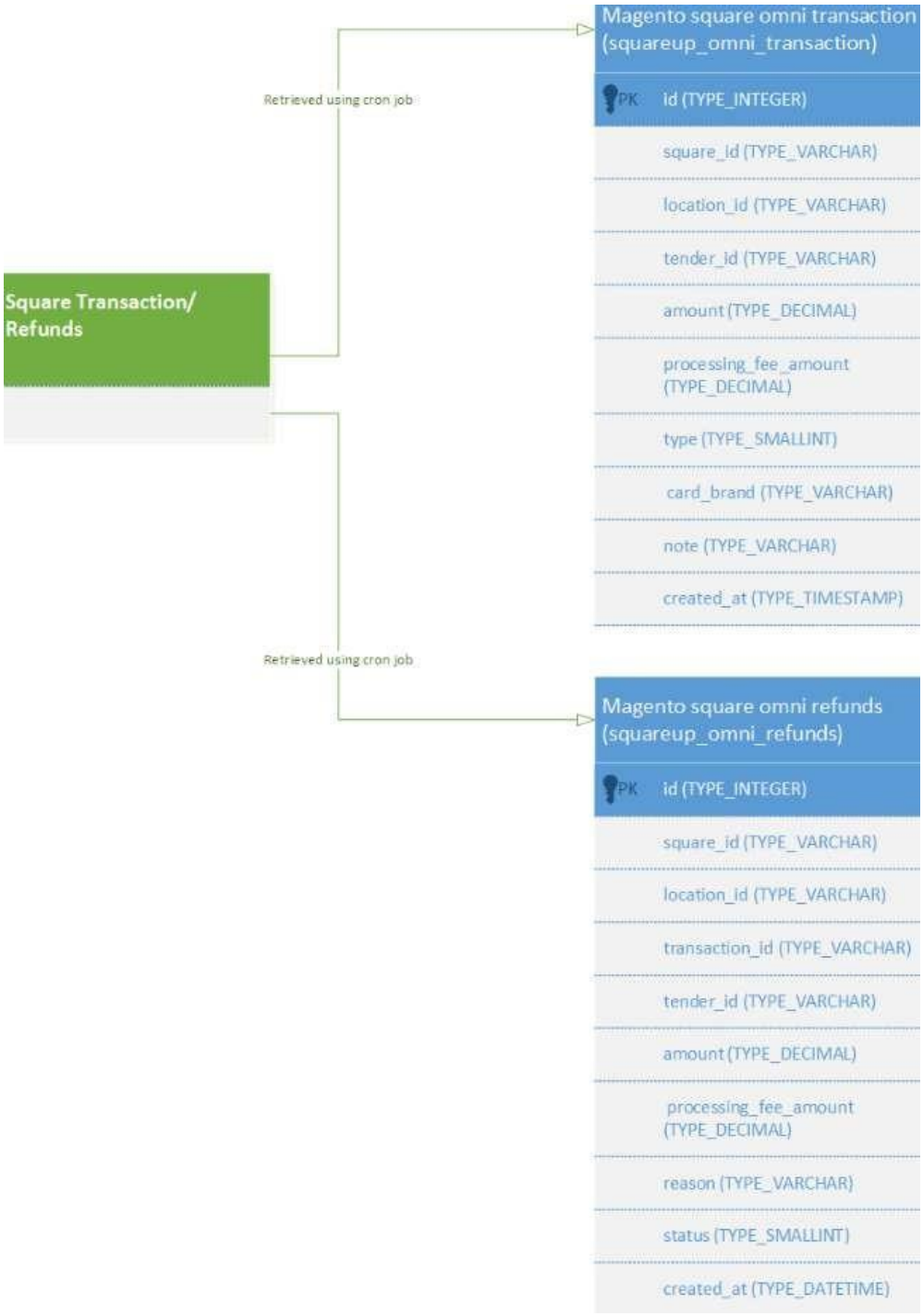


A-1.4 Square Inventory

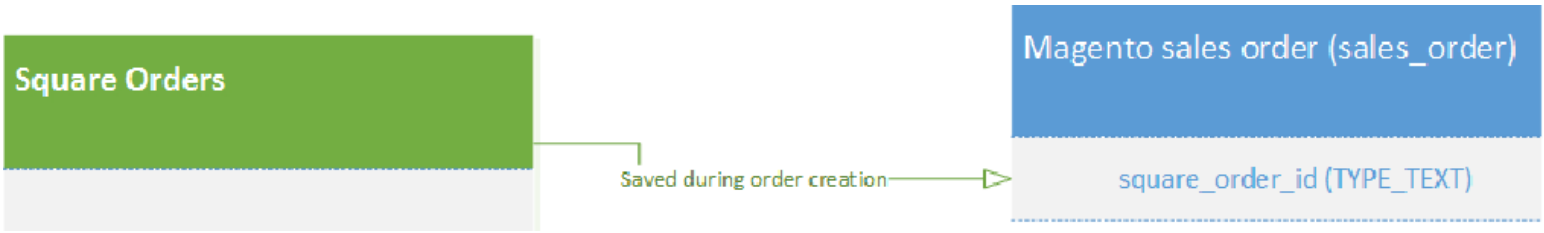
A-1.5 Square Payment Transaction



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

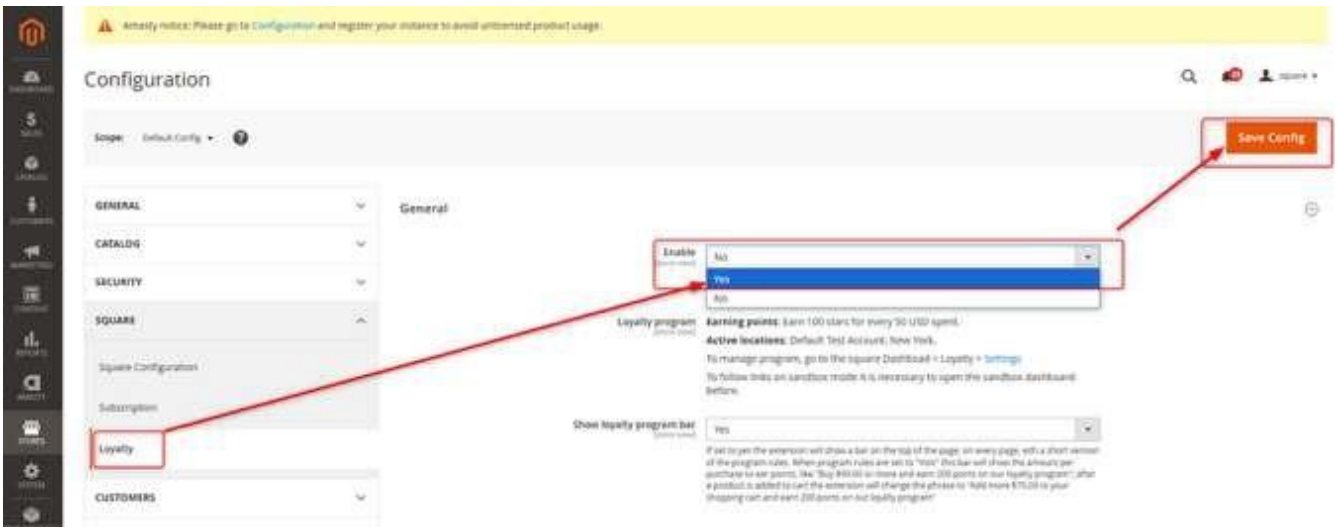
3 - Loyalty

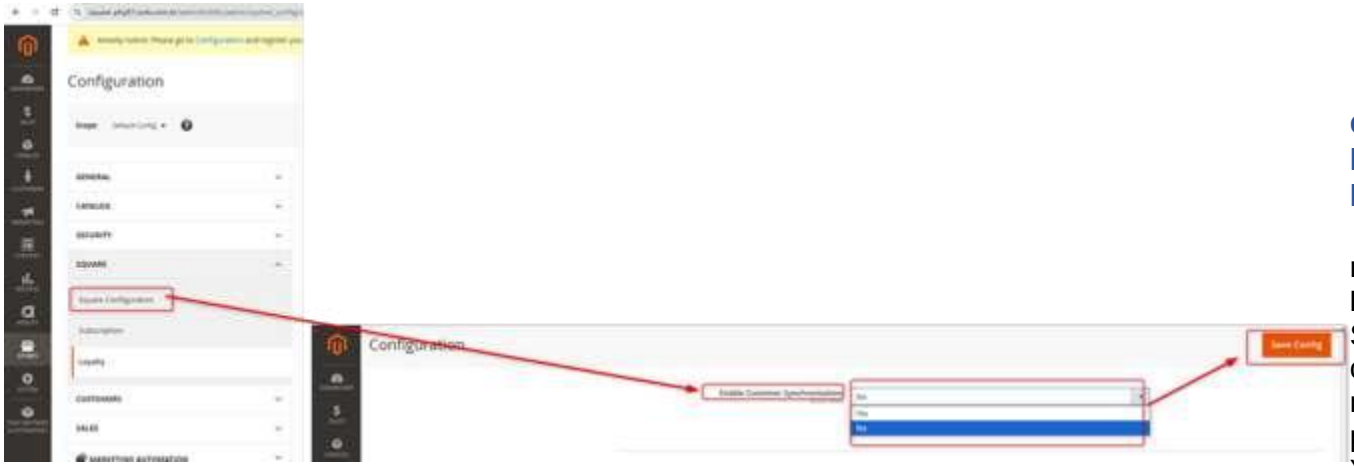
Square's Loyalty program allows businesses to create and manage customer loyalty programs directly through the Square Dashboard. Here's a general overview of how you can configure and manage Square Loyalty:

3.1 Accessing Square Loyalty: Stores > Configurations > Square > Loyalty

3.2 Enable Square Loyalty:

In order to use Square loyalty program, please make sure “Enable Customer Synchronization” on “Square Configuration” is enabled on Square > Square Configuration > Customer Synchronization

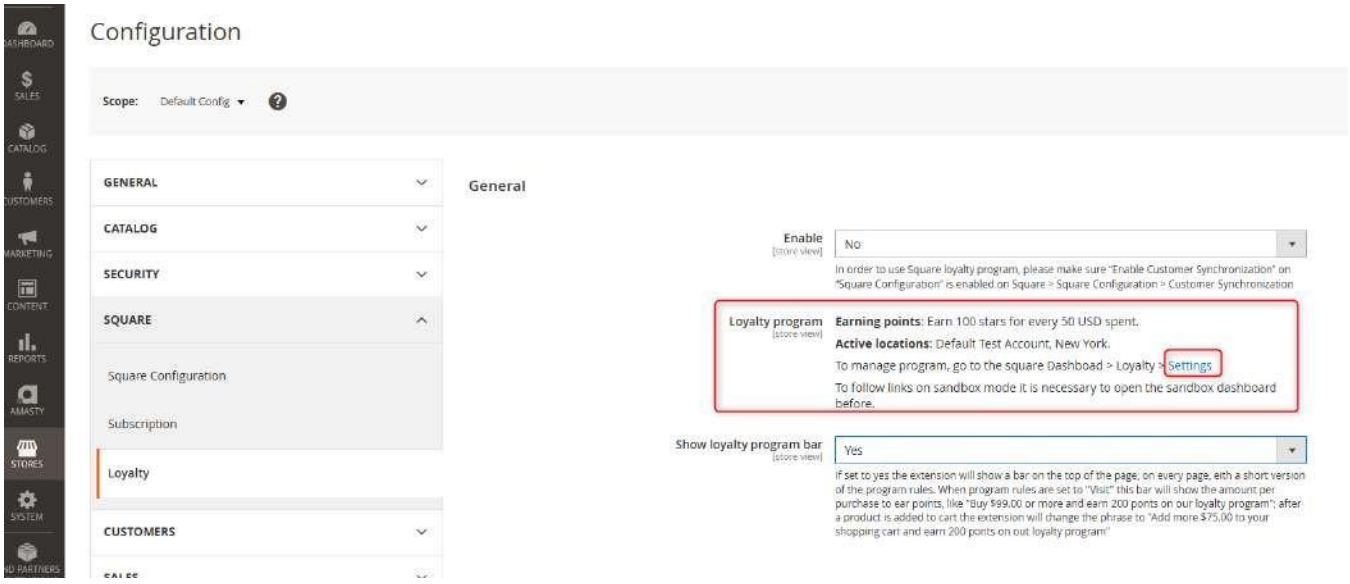




3 etting Up a Loyalty Program:

reate a Program: Start by creating a new loyalty program. You can define how customers earn points, such as per dollar spent, per visit, or based on specific items purchased.

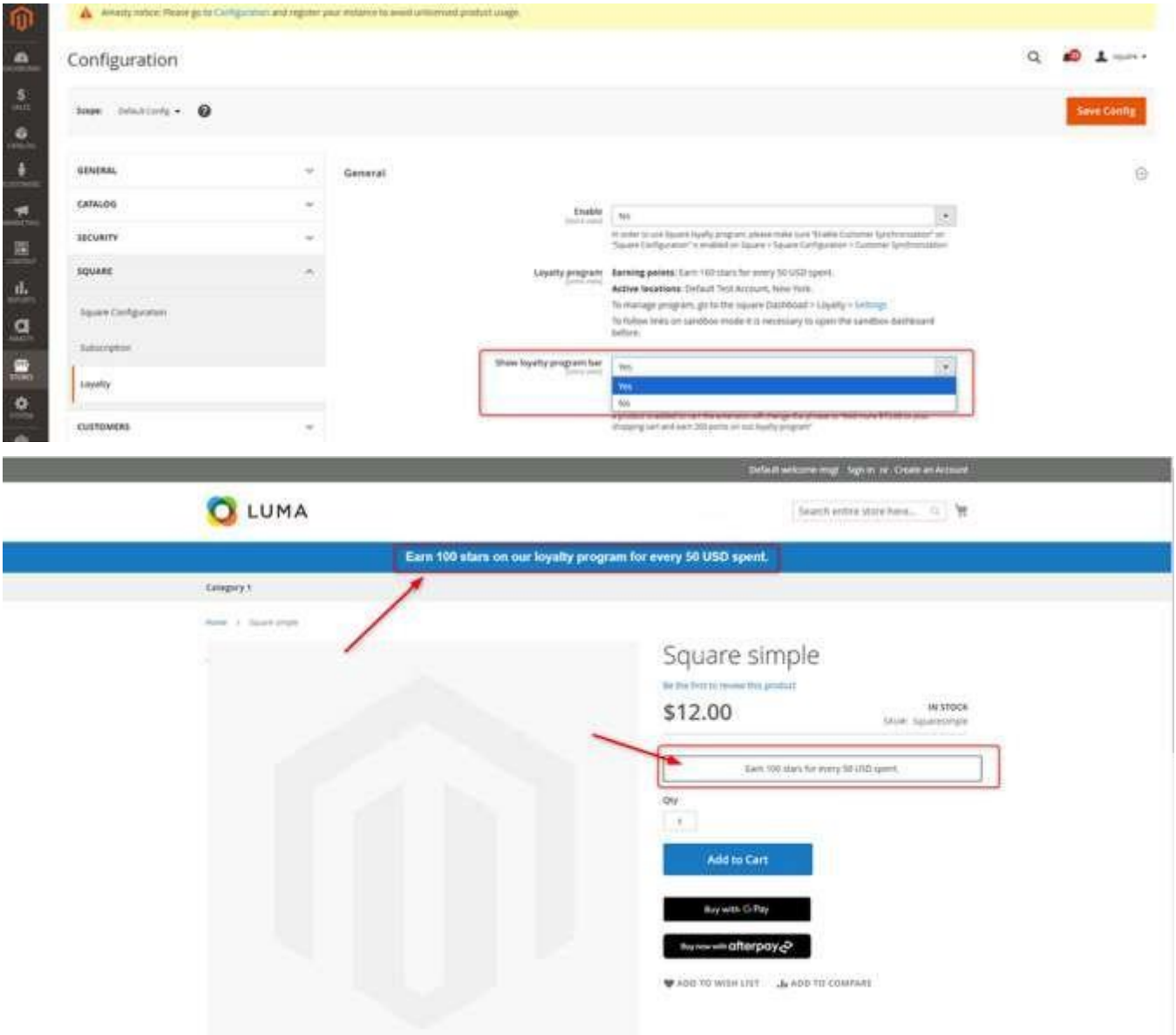
- **Define Rewards:** Set up rewards that customers can redeem with their points. This could
- be discounts, free items, or other incentives.
- **Customize Rules:** Tailor the program rules to fit your business needs, such as setting expiration dates for points or rewards.



3.4 Show loyalty program bar:

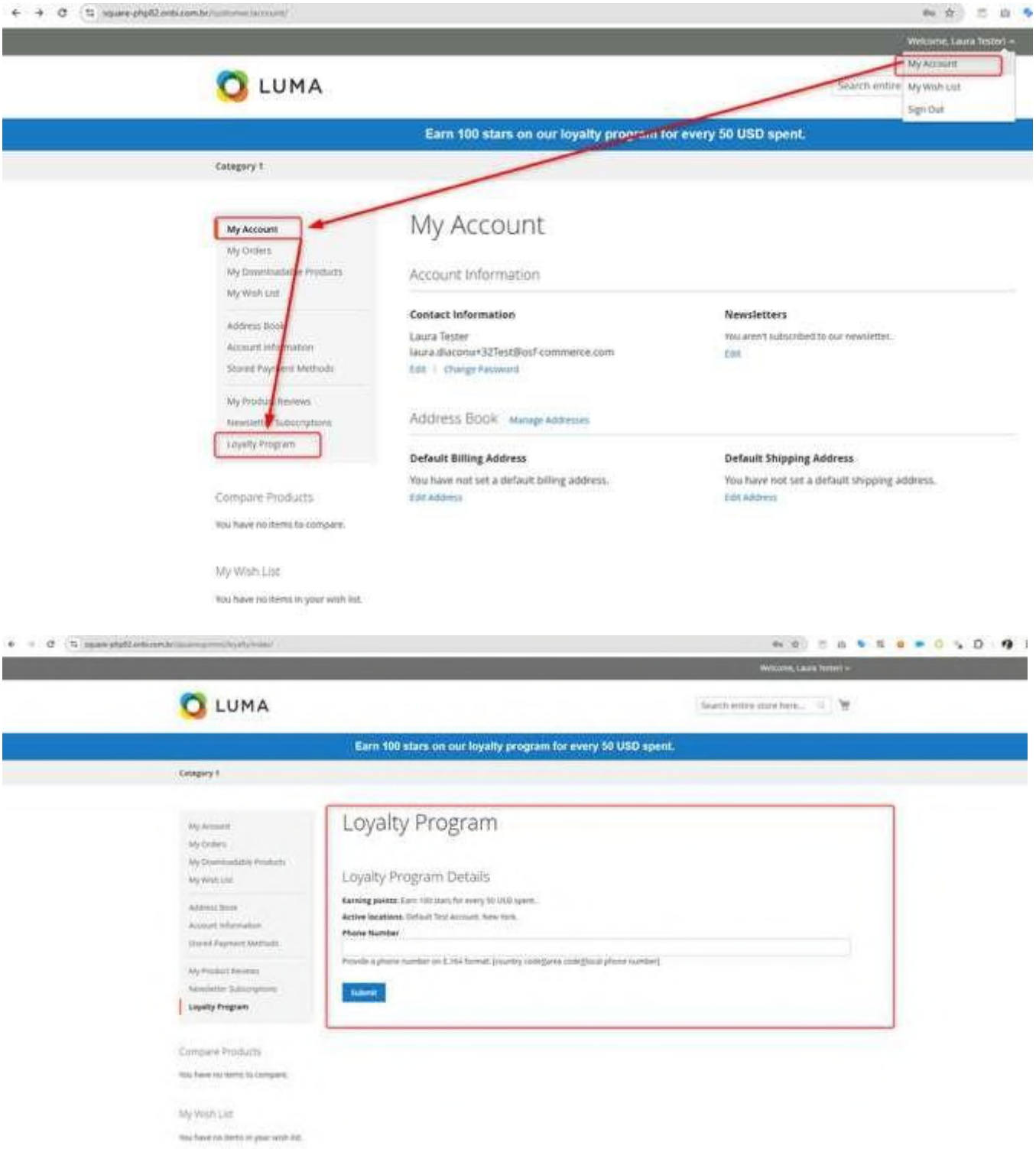
If " Show loyalty program bar" set to yes the extension will show a bar on the top of the page, on every page, eith a short version of the program rules. When program rules are set to "Visit" this bar will show

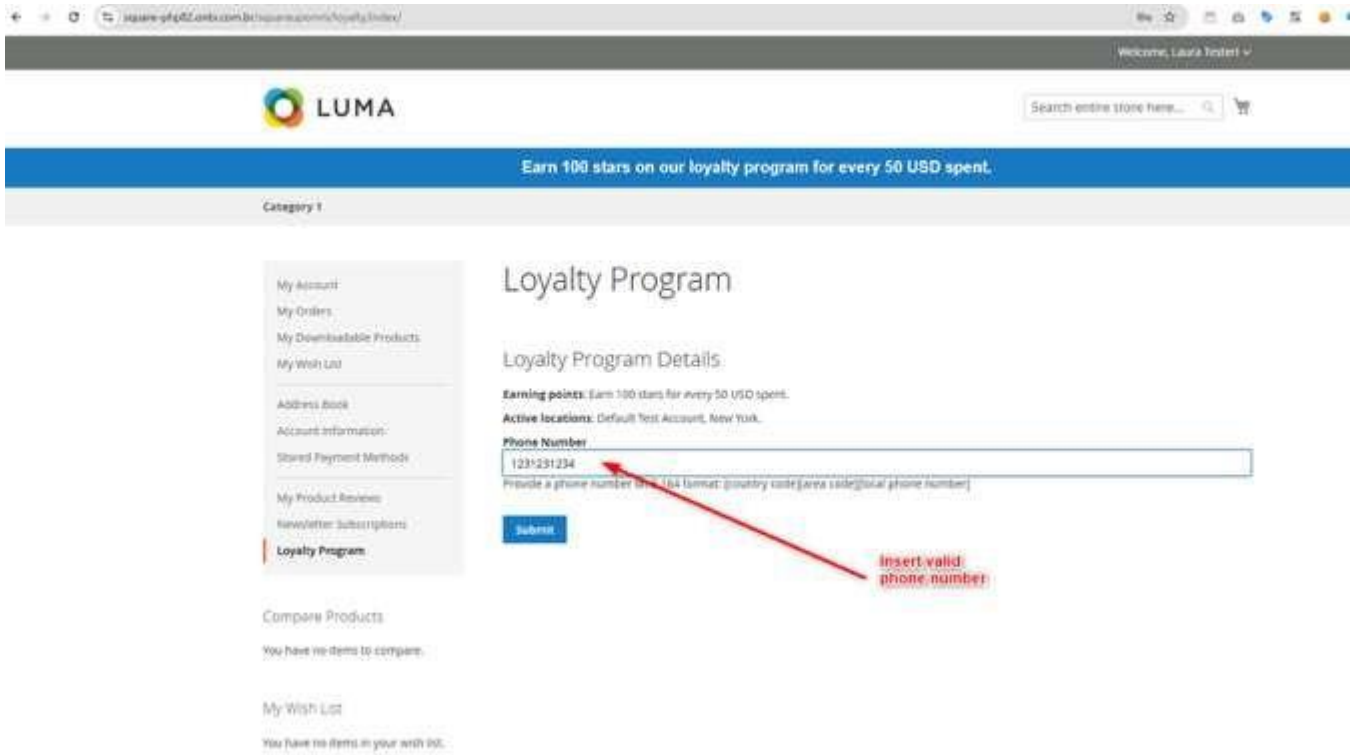
the amount per purchase to ear points, like "Buy $99.00 or more and earn 200 ponts on our loyalty program"; after a product is added to cart the extension will change the phrase to "Add more $75.00 to your shopping cart and earn 200 ponts on out loyalty program"

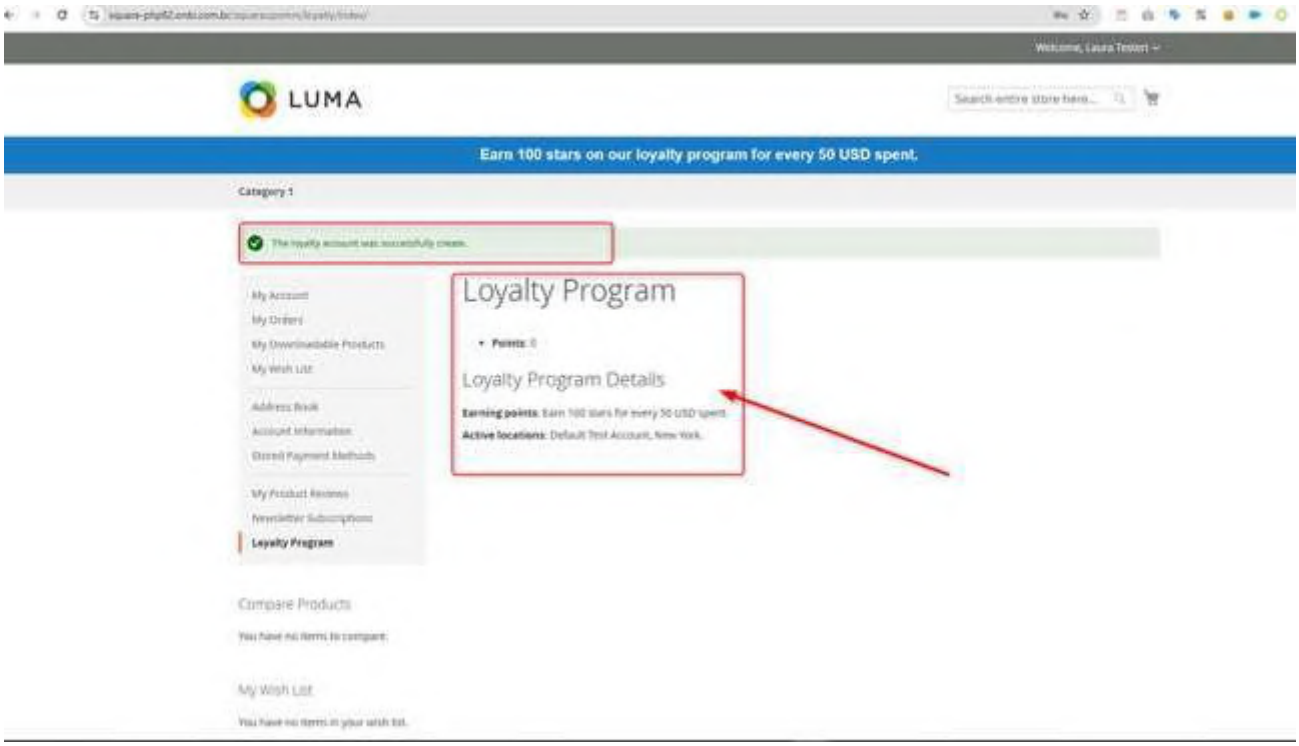


3.5 Loyalty Program on Frontend:

- Log In to Your Account
- Navigate to "My Account" section
- Find the Loyalty Program
- Insert valid phone number
- Submit to sign up in Loyalty program


LUMA
My Account
My Wish List
Sign Out
Earn 100 stars on our loyalty program for every 50 USD spent.
Category 1
My Account
My Orders
My Wish List
Address Book
Account Information
Loyalty Program
My Account
Account Information
Contact Information
Laura Tester
Edit | Change Password
Newsletters
You aren't subscribed to our newsletter.
Edit
Address Book Manage Addresses
Default Billing Address
You have not set a default billing address.
Edit Address
Default Shipping Address
You have not set a default shipping address.
Edit Address
Compare Products
You have no items to compare.
My Wish List
You have no items in your wish list.
LUMA
Earn 100 stars on our loyalty program for every 50 USD spent.
Loyalty Program
Loyalty Program Details
Phone Number
Submit
Compare Products
My Wish List

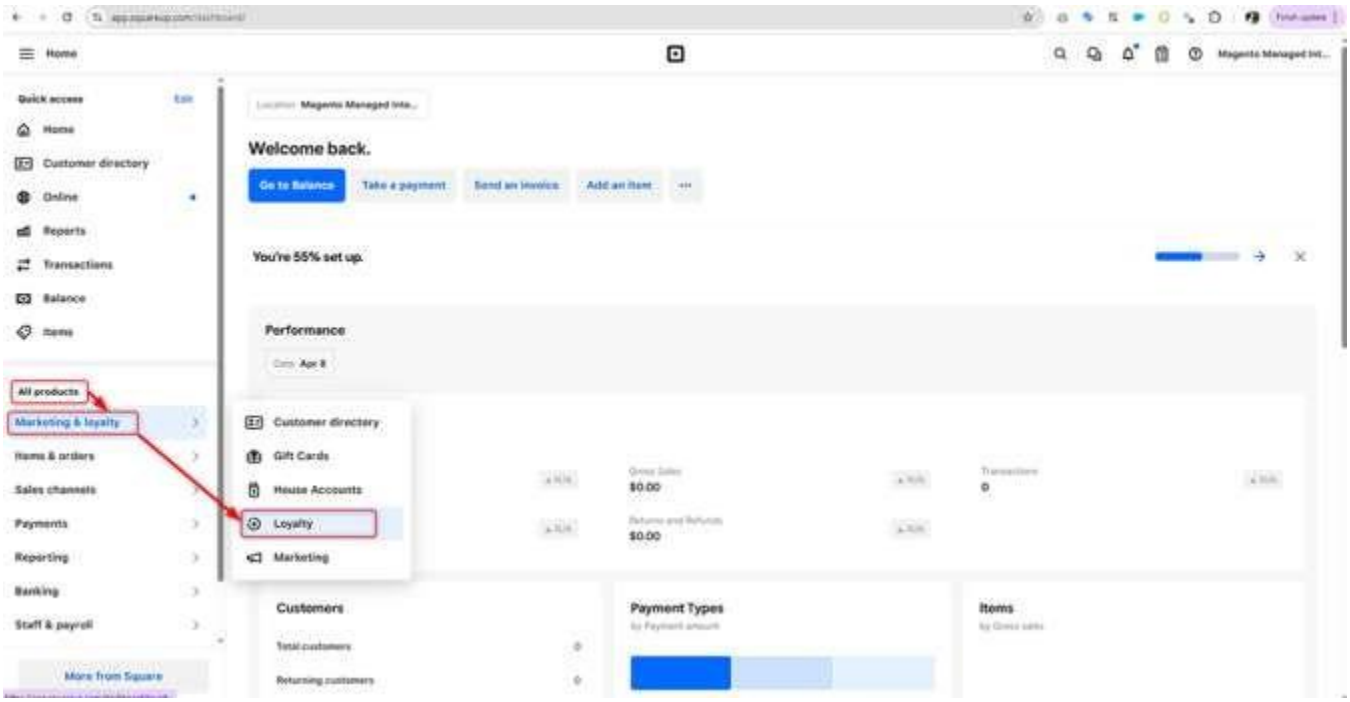




3.6 Loyalty Program in SQUARE:

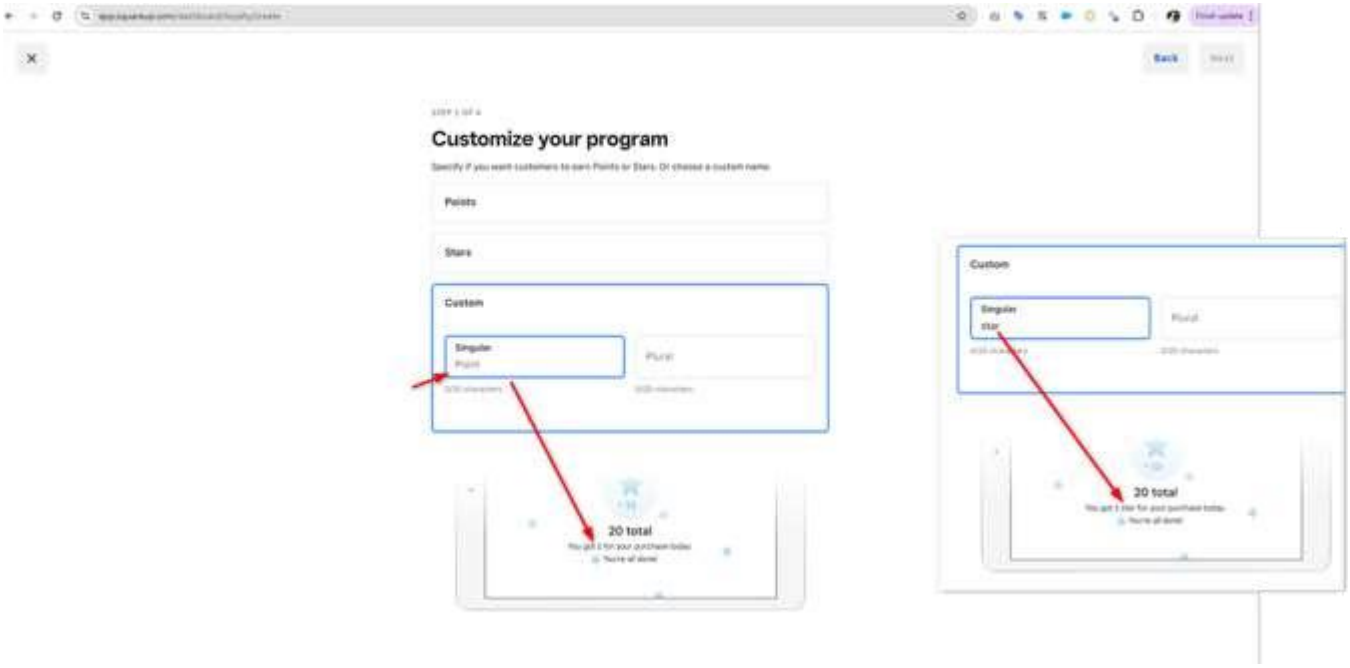
To get started with Square's Loyalty Program, follow these steps:

- Log in to your Square Dashboard
- Navigate to "All products" menu
- Find the Loyalty Program

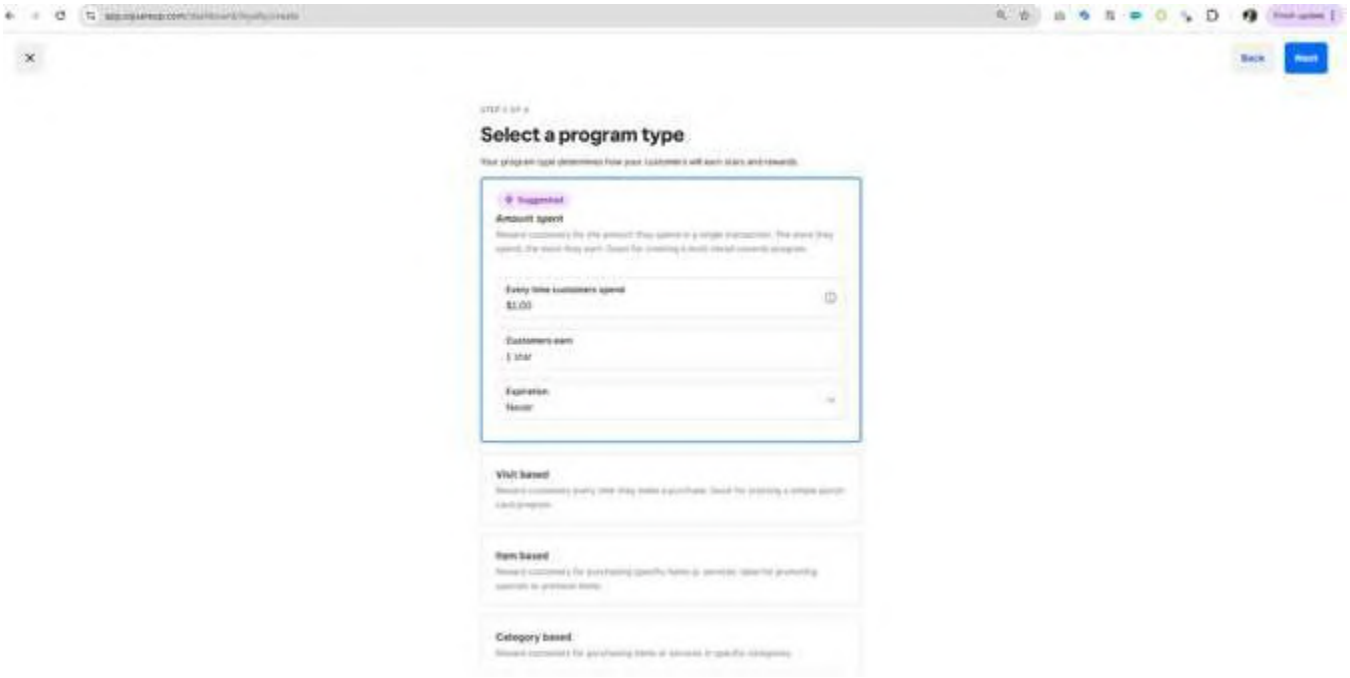


Setting Up the Loyalty Program:

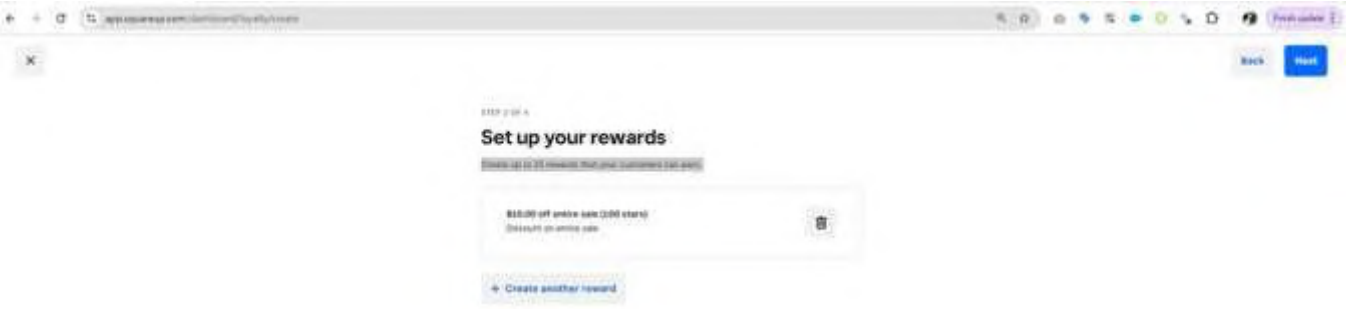
- **Create a Program**: Click on "Get Started" to start the setup process.
- **Customize your program** Specify if you want customers to earn Points or Stars. Or choose a custom



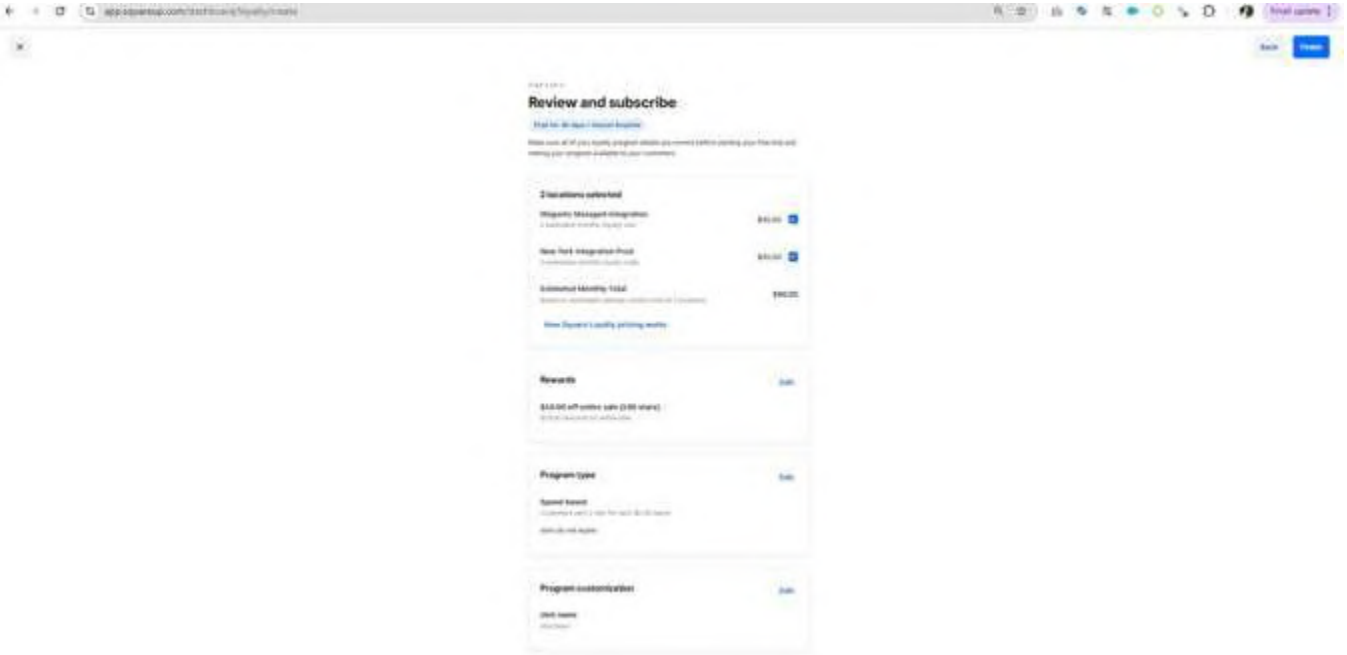
- **Select a program type** : Your program type determines how your customers will earn stars and rewards.



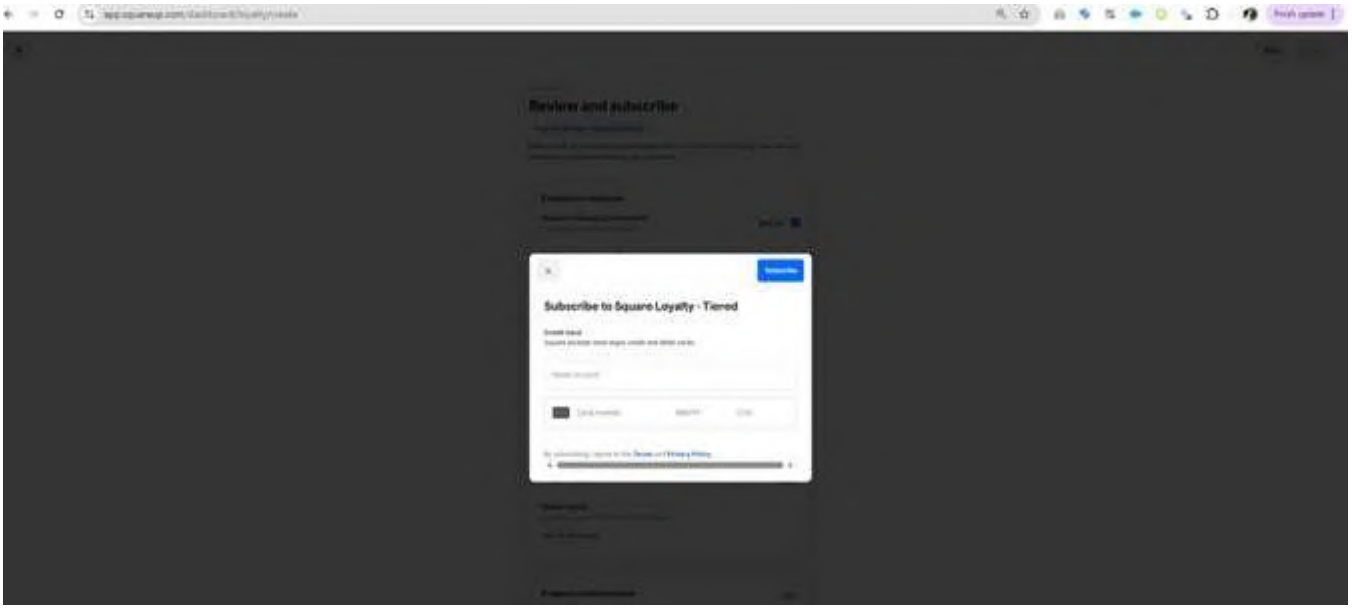
- **Set up your rewards**: Create up to 15 rewards that your customers can earn.



- **Review and subscribe**: Make sure all of your loyalty program details are correct before starting your program available to your customers.



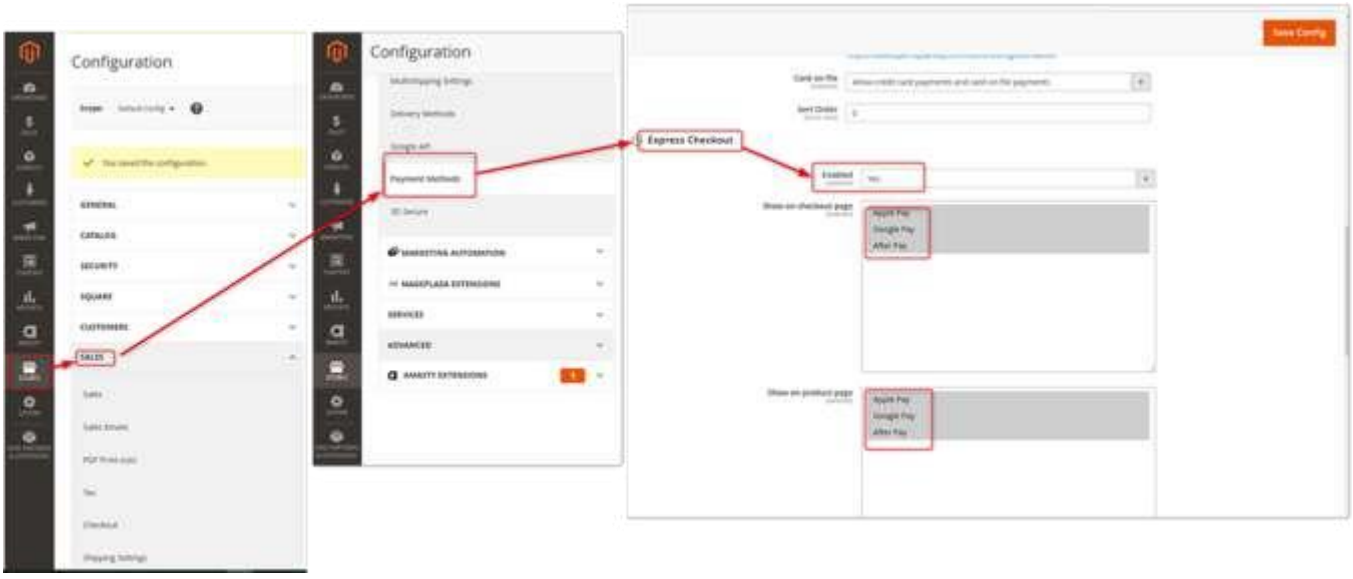
- **Payment**: Complete payment information before starting your program available to your customers.



4 - Express Checkout

Express Checkout" generally refers to features or configurations that streamline the checkout process, making it faster and more convenient for customers to complete their purchases.

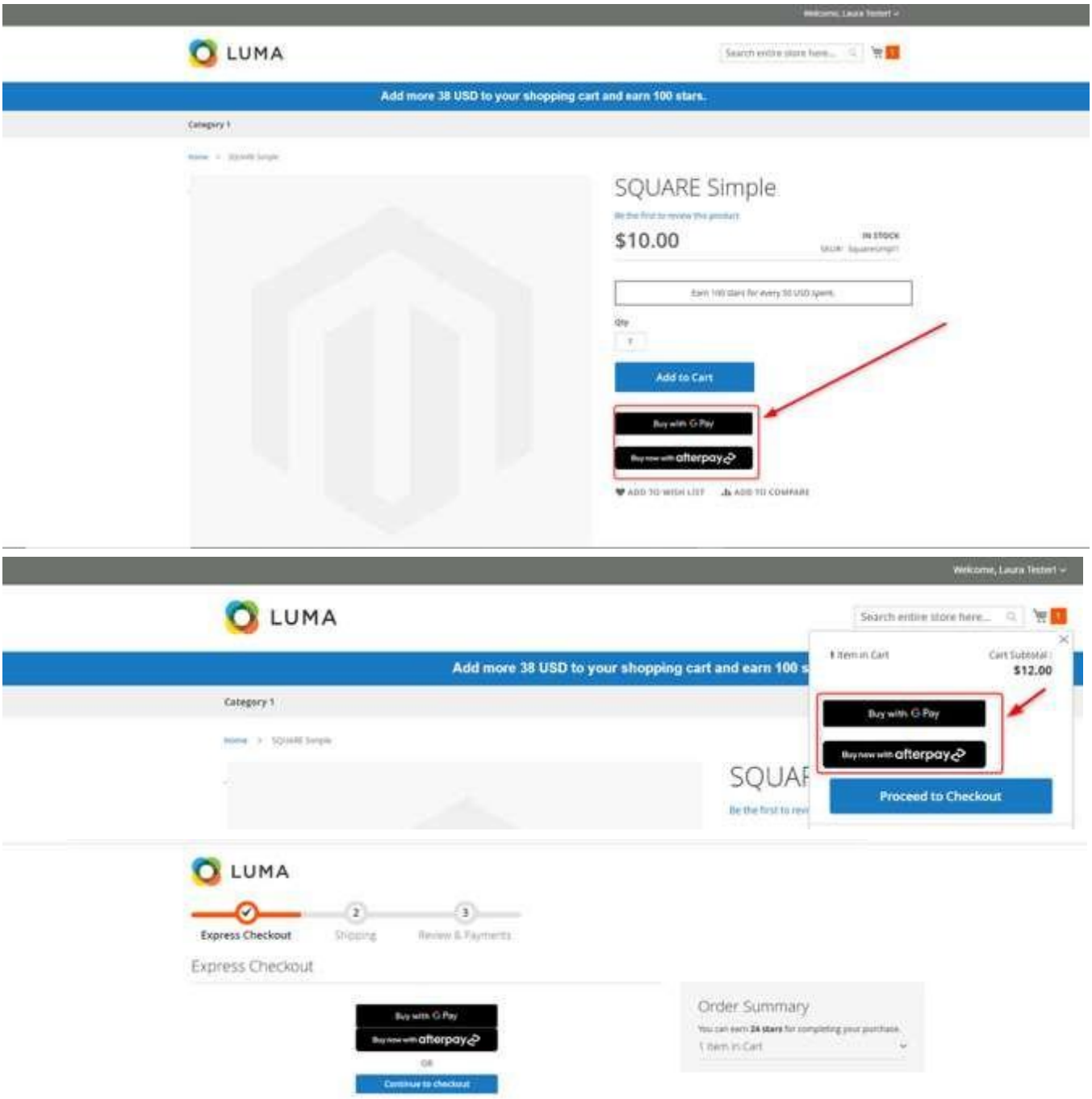
In order to **Enable** "**Express Checkout**" go to **Stores > Configurations > Sales > Payment Methods > Express Checkout >** Enable and select the preferred payment method/s for express checkout:

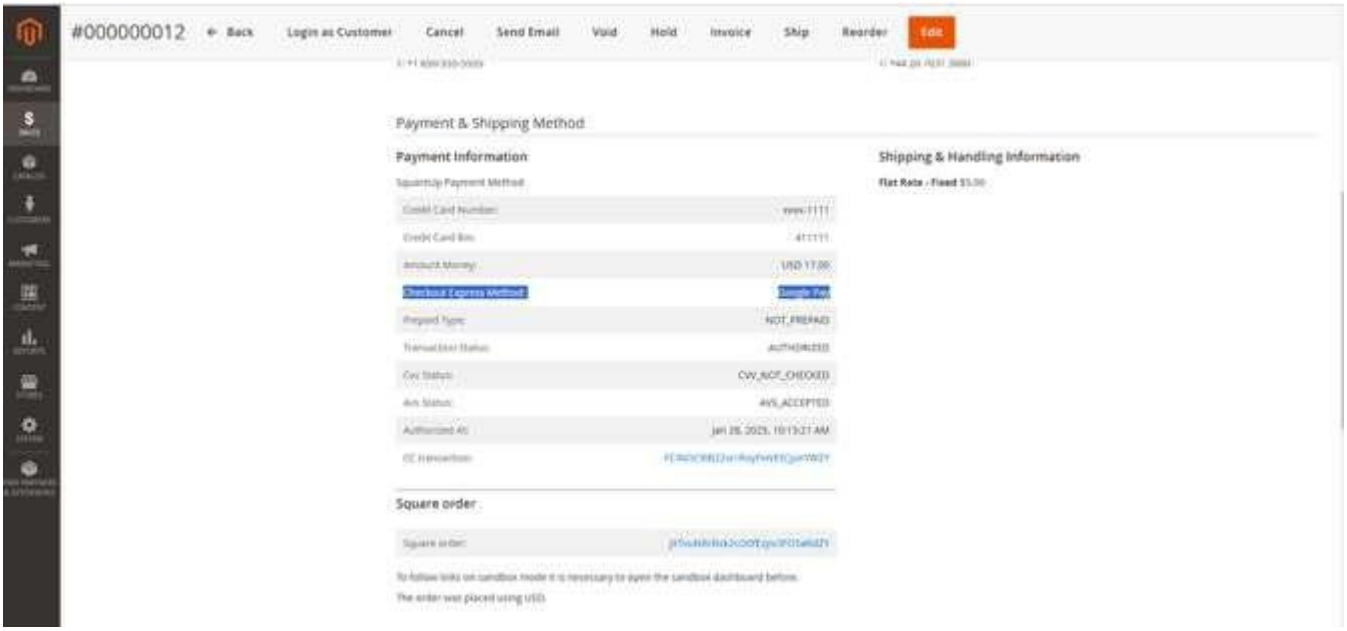


Express Checkout payment methods can be set as below:

- **Show on checkout page**
- **Show on product page**
- **Show on mini cart**

- **Show on shopping cart**


LUMA
Add more 38 USD to your shopping cart and earn 100 stars.
SQUARE Simple
$10.00
Add to Cart
Buy with G Pay
Buy now with afterpay
ADD TO WISH LIST
ADD TO COMPARE
LUMA
Add more 38 USD to your shopping cart and earn 100 s
1 Item in Cart
Cart Subtotal:
$12.00
Buy with G Pay
Buy now with afterpay
Proceed to Checkout
Category 1
LUMA
Express Checkout
Shipping
Review & Payments
Express Checkout
Buy with G Pay
Buy now with afterpay
OR
Continue to checkout
Order Summary
1 Item in Cart

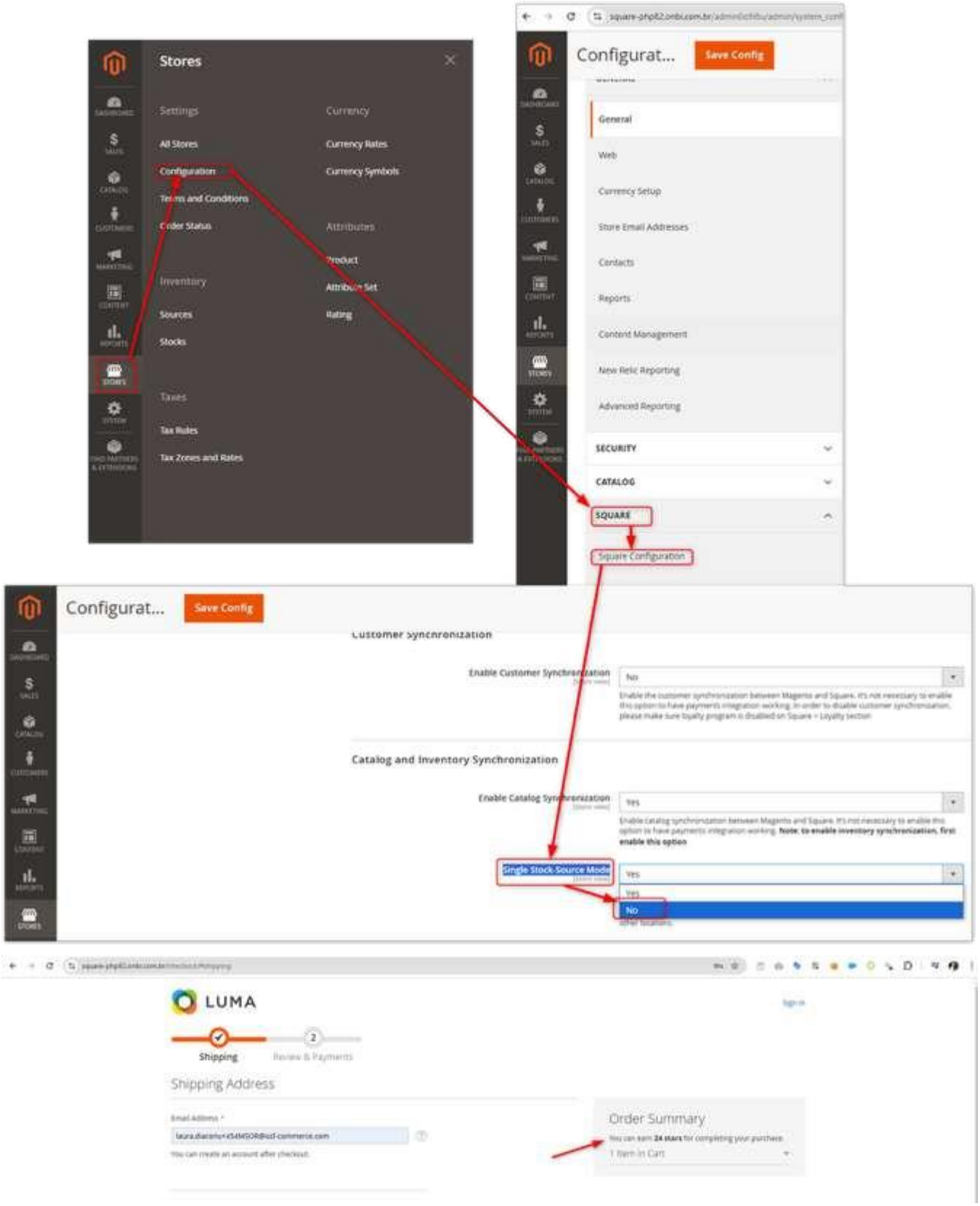


5 - Multi stock source Mode

Magento MSI (Multi-Source Inventory) is a feature that enhances inventory management capabilities by allowing merchants to manage inventory across multiple locations.

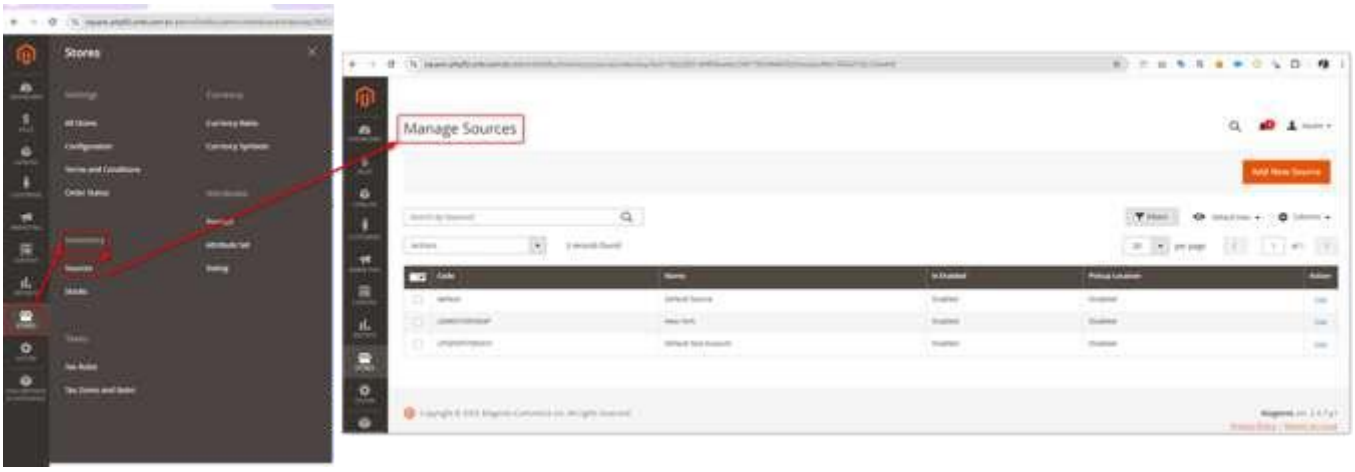
5.1 Enable Multi stock source Mode:

- Stores > Configurations > Square > Square Configurations > Set "**Single Stock-Source Mode**" to **"No".**


Stores
Settings
All Stores
Configuration
Terms and Conditions
Order Status
Currency
Currency Rates
Currency Symbols
Attributes
Product
Attribute Set
Rating
Inventory
Sources
Stocks
Taxes
Tax Rules
Tax Zones and Rates
Configurat...
Save Config
General
Web
Currency Setup
Store Email Addresses
Contacts
Reports
Content Management
New Relic Reporting
Advanced Reporting
SECURITY
CATALOG
SQUARE
Square Configuration
Configurat...
Save Config
Customer Synchronization
Enable Customer Synchronization
No
Enable the customer synchronization between Magento and Square. It's not necessary to enable this option to have payments integration working. In order to disable customer synchronization, please make sure loyalty program is disabled on Square > Loyalty section
Catalog and Inventory Synchronization
Enable Catalog Synchronization
Yes
Enable catalog synchronization between Magento and Square. It's not necessary to enable this option to have payments integration working. Note: to enable inventory synchronization, first enable this option
Single Stock-Source Mode
Yes
Yes
No
LUMA
Shipping
2
Review & Payments
Shipping Address
Order Summary
1 Item in Cart

5.2 Configuration of Sources

Log in to your Magento Admin panel. Navigate to **Stores > Inventory > Sources > Manage Sources**:

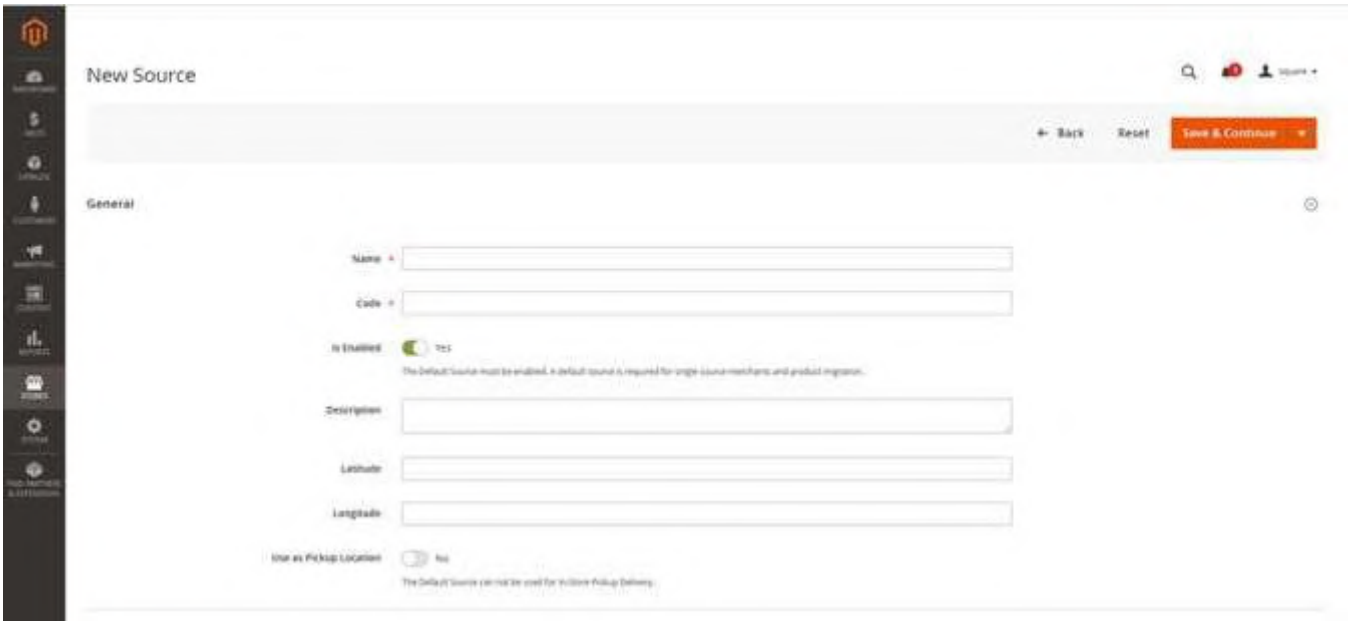


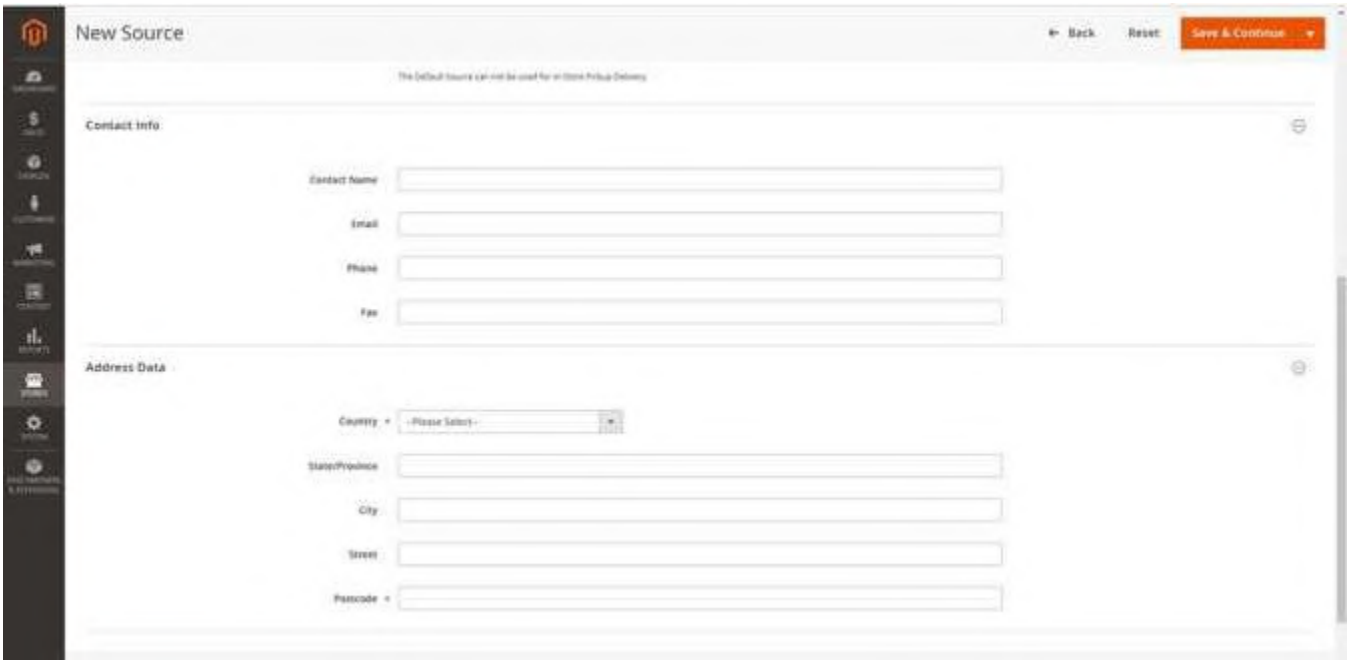
Here, you will see a list of existing sources. You can add a new source by clicking the Add New Source button.

5.3 Manage Sources:

When adding or editing a source, you will need to fill in various details:

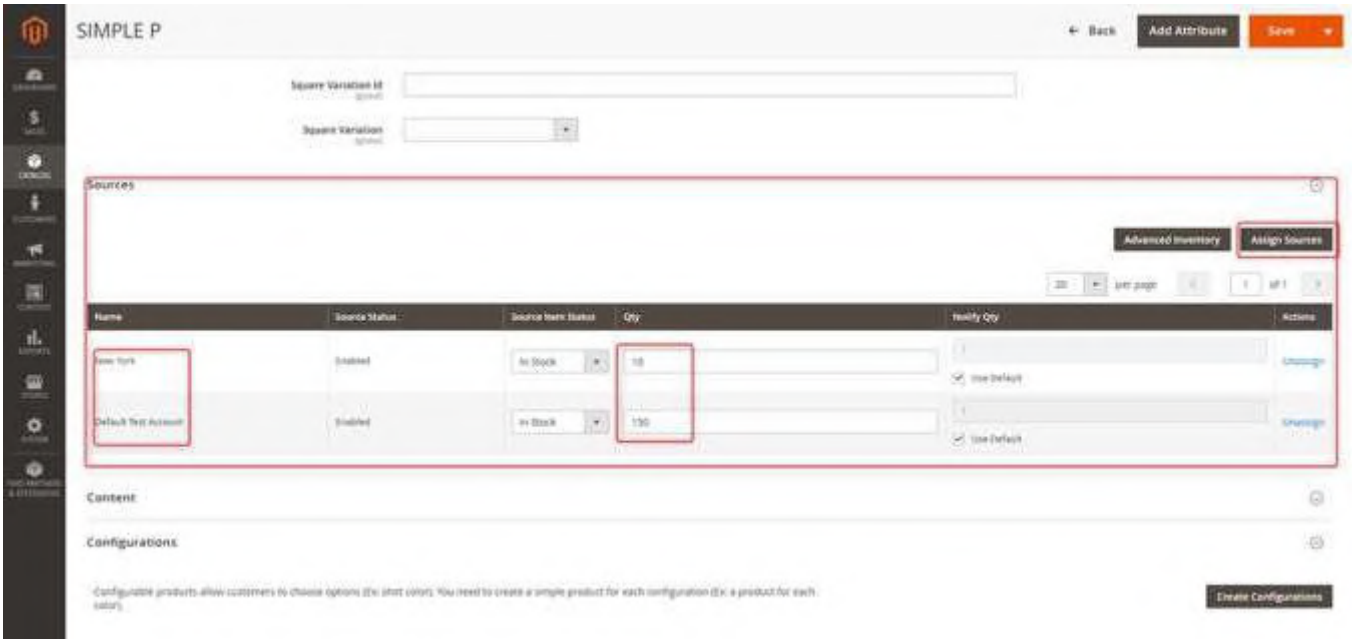
- Name: The name of the source (e.g., Warehouse A).
- Code: A unique identifier for the source.
- “Is Enabled” status
- Description: A brief description of the source.
- Contact Information: Details like email, phone number, and address.
- Latitude and Longitude: For geolocation purposes, if needed.
- Source Status: Enable or disable the source.
- “Use as Pickup Location” preference
- Contact info section
- Address data


New Source
Back
Reset
Save & Continue
General
Name
Code
Is Enabled
Description
Latitude
Longitude
Use as Pickup Location


New Source
Back
Reset
Save & Continue
Contact Info
Contact Name
Email
Phone
Fax
Address Data
Country
State/Province
City
Street
Postcode

5.4 Assign Products to Sources:

After creating a source, you can assign products to it and manage their stock levels. This is done under **Catalog > Products** , where you can edit each product and specify the quantity available at each source.



By configuring sources in this way, you can effectively manage inventory across multiple locations, ensuring accurate stock levels and efficient order fulfillment.