The Minnesota Streetcar Museum's new POS ("Point of Sale") System is SQUARE. Like its predecessor, it's a touch screen device. There are no physical keys -- just touch the "buttons" displayed on the screen. There's no need to jab or press hard, a light touch is all it takes.

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1. Here are SQUARE's five components:

The TOUCH SCREEN and the CASH DRAWER

The BARCODE READER

The PRINTER

The CARD READER

Located in the station basement is a PC mainframe, our internet connection and battery backup.

**ATTENTION!**

Never attempt to clean the touch screen with water or cleaning liquids or sprays. If you must dust the screen, use spray air or a very soft cloth or brush. Do not clean with paper towel.
2. THE TOUCH SCREEN

We leave SQUARE powered on all the time—you won’t need to shut it off at the end of a shift or turn it on at the start of a shift. When idle, the screen is black. It goes into the idle state if the screen isn’t touched for a couple minutes. To activate the screen, just touch it anywhere. THERE IS NO NEED TO LOG IN.

There are buttons for regular fares and special events (Holly Trolley, etc.) across the top of the screen. Touching the fare button once rings up the $2.50 fare. Touch the button again to add an additional fare.

There are also buttons for the each of the different kinds of Candy and some other merchandise.

In some cases, a group of items are included in one button (i.e., Pencils/Pens/Stickers). Touching that button produces a drop-down menu; just touch the item you want to sell. If the customer wants more than one of a particular item, just repeat that process.
3. SELLING FARES

Ring up fares first!
Touching the fare button once rings up the $2.50 fare. Touch the button repeatedly to add more fares.

You'll notice a small container of tokens on top of the cash drawer. Once the sale is complete, you will not be able to see the list of items sold. It’s been the author’s experience, especially on busy shifts, that it’s easy to forget how many tokens were purchased. As you ring up the fares, take the appropriate number of tokens out of that container and have them ready to hand to the customer.

The purchase will appear in the column at the right side of the screen, with the total at the bottom. The words at the top of the column change from "No Sale" to "Current Sale" and the Charge button at the bottom turns blue and shows the total sale. The sale is completed by touching the blue Charge button.

USEFUL INFO: Anytime a button on a screen turns BLUE, that's your clue that button is the one that will take you to the next screen/step.

BEFORE YOU TOUCH THE BLUE CHARGE BUTTON, ALWAYS LOOK AT THE ITEMS AND THE TOTAL.
Have you rung up the correct number of fares? Is the total charge a reasonable number? If you find an error, STOP AND FIX IT.
You'll find two ways to do that in the CORRECTIONS section of this manual (pages 5.1 - 5.2).

After you touch the blue Charge button, the payment screen appears:
CREDIT/DEBIT CARD SALES: If the customer is paying with a credit/debit card, direct them to the credit card reader on the counter. Notice that the screen on the reader shows the amount due with the words "Swipe, Insert, or Tap" below the amount.

If the customer's card has a chip, they must insert the card; if not, they can swipe it through the long slot just below the chip-insert slot. The card reader also accepts smart watch devices and payments with smart phone technology. These tech-savvy customers will no doubt be familiar with “tapping” to use those devices.

Credit/debit cards are inserted with the CHIP DOWN, FRONT OF THE CARD FACING THE CUSTOMER. If the customer seems to be having trouble getting the card to fit into the slot, they've inserted it upside down or backwards. This happens with some frequency. If a customer looks at the card reader and doesn't immediately know what to do, say to them, "Chip down, card facing you."
No signatures are required for purchases under $50. The card reader asks the customer if they want a receipt. If they select Yes, the receipt is automatically printed by the printer. Customers can also type in their email address or phone number to receive the receipt by email or text.

When the credit sale is complete, this screen appears on the POS. Many customers just take their card out of the reader and don't bother with the receipt. Touch New Sale and you're returned to the Home screen and ready for your next transaction.

**CASH SALES:** The payment screen (photo on p. 3.1) offers various choices of cash amounts tendered, tailored to the amount of the sale. Simply touch the amount tendered. The "Custom" button allows the cashier to enter the amount tendered manually (if, for example the charge is $16.00 and the customer gives you a $20 bill and a $1 bill--then just enter "$21). The cash drawer automatically opens when you select either Cash or Check.

**PAYMENT BY CHECK:** Checks are accepted for the amount of the purchase only. Just touch "Check" and you'll be directed to this screen:

This screen offers you the opportunity to enter an OPTIONAL NOTE. There's no need to do that. Just touch the blue RECORD PAYMENT button. The cash drawer will open and you can place the check in the drawer.

**MANUAL CREDIT CARD ENTRY:** Occasionally a card is damaged and the reader can't read it. The Manual entry allows the operator to enter the card number manually. Just follow the prompts on the screen. The customer will have to confirm a couple things, such as their billing zip code and the 3-digit security number on the back of their card.
4. SELLING MERCHANDISE

Almost all merchandise is barcoded. Just use the barcode reader to scan the barcode on the item, and the item is added to the list of items sold. Complete the sale the same as with fares.

CANDY--Our second most frequent sale after fares: You'll see a separate button on the screen for each non-barcoded candy we sell. (PEZ, mints, Trolley Treat bags have barcodes.) Touch the appropriate button to add the candy item to the Current Sale. For two pieces, touch the button twice, etc.

WHAT IF THERE'S NO BARCODE ON THE MERCHANDISE? Occasionally a barcode will fall off or just be unreadable. You can grab another of the same item and scan that one.

WHAT IF THE BARCODE READER WON'T READ THE BARCODE? Trying taking the reader out of its cradle, aiming it at the barcode and squeezing the yellow trigger.

Some items have no barcode (usually because they're too small; i.e. pencils and Winona 10 key chains). You'll find a button on the Home Screen for some of these items. If there is no button, you can easily look up the price, like this:

Touch the ALL ITEMS button on the left side of the screen:

A keyboard will appear. Start typing in some description of the item, such as "Ornament" or "Bandana" or "Hat." The system will offer a list of suggested items from which to choose. Scroll down the list (with your finger) to find your item, touch the name and it will be added to the Current Sale.

On the next page is an example of the Search All Items feature.
Searching All Items:

If you're having trouble describing the item for your search, you can go to the CATEGORIES screen. Here you'll find a list of all categories; scroll down to the category that seems to fit your item, touch that category and you'll see a list of items in that category. Simply touch your item and it will be added to the Current Sale.

Please be aware that some items come in more than one size (like T-shirts) and/or color (like bandanas and wood toys). Be sure you select the correct size/color for what you're selling.

**Increasing or decreasing quantity of fares/merchandise.**
Customers frequently decide they want more or fewer of items. With candy and fares, you can just touch the appropriate button to add more.

To increase the quantity of "no button" merchandise and to decrease the quantity of any item, touch the item in the Current Sale column. The "quantity" screen appears; touch the plus (+) to add quantity or minus (-) to decrease quantity. At the bottom of that screen you can touch "Remove Item" to eliminate it completely from the sale. Then, touch the blue Save button in the upper right corner of the screen. DO NOT TOUCH ANY OF THE SALES TAX SETTINGS! See photo on the next page.
Chnaging quantity (increasing/decreasing) of fares and merchandise.

REMEMBER: IF YOU GET CONFUSED or LOST or AREN'T SURE YOUR TRANSACTION IS CORRECTLY ENTERED, BEFORE YOU TOUCH THE BLUE CHARGE BUTTON, go to the top of the Current Sale Column, touch Current Sale and a drop-down will appear, so you can touch CLEAR ITEMS, which removes all items from the Current Sale, allowing you to start over.

Touch minus (-) to decrease quantity; touch plus (+) to increase quantity.

You can remove the item completely by touching the Remove Item at the bottom of the screen.

DO NOT TOUCH ANY OF THE TAXES SETTINGS

Touch here ➔ to return to the Home screen.

Touch minus (-) to decrease quantity; touch plus (+) to increase quantity.

You can remove the item completely by touching the Remove Item at the bottom of the screen.

DO NOT TOUCH ANY OF THE TAXES SETTINGS

Touch here ➔ to get the drop-down

Touch CLEAR ITEMS and you get to start over!
5. CORRECTIONS

DELETING ITEMS FROM THE SALE BEFORE THE SALE IS COMPLETED (before you touch the blue CHARGE button). Sometimes customers decide at the last minute that they don’t really want six Tootsie Pops, or they realize they miscounted their riders and need to increase or decrease the fares. There are a couple ways to fix this.

1. The CLEAR ITEMS option. Touch the Current Sale button in the sale column on the right side of the screen. You’ll get a drop down menu which includes “Add customer” and “Clear Items.” Touching Clear Items removes all items from the Current Sale, cancels the entire transaction, and allows you to simply start over. This is illustrated on page 3.3. of this manual.

2. Changing the number of fares/items sold.

Adding/deleting an item: This is simple.
- To add a barcoded item, just scan the additional barcode
- To add fares or candy, touch the Fare or Candy button. The added Fare/Candy does not appear as a new item on the Current Sale, it’s added to the Fare/Candy that are already there.
- To change the quantity of or delete any item, touch that item in the Current Sale column. The quantity screen will appear and you can change the quantity or delete the item completely.

To add additional sales of the item, touch the plus (+) button. Touch the minus (-) sign to lower the number. Then touch the blue SAVE button. The Current Sale column will show the new amount.
DO NOT TOUCH ANY OF THE TAX ITEMS BELOW.

Touch here to delete the item from the sale.
When **deleting an item or decreasing the quantity**, sometimes it's just easier to use the Clear Items option and start over. But, if you have a sale with numerous items, it's more efficient to change the quantity on an individual item or the number of fares.

**DELETING OR REDUCING QUANTITY OF MERCHANDISE/FARES AFTER THE SALE IS COMPLETE.** Well, this calls for a REFUND of the entire sale.

![ALWAYS take a moment -- BEFORE YOU TOUCH THE BLUE CHARGE BUTTON -- to look at the Current Sale to be sure you've rung up the correct number of fares and merchandise. If you find an error, this is the time to stop and fix it. Refunding a credit card purchase means MSM is charged an extra fee by the credit card processing company, and having to stand around and wait for the refund to be processed surely will irritate customers.]

**RETURNED ITEMS.** Perhaps that T-shirt grandma bought for little Tommy isn't the right size, or a passenger waiting for the next trolley suffers an allergic reaction to the Laffy Taffy they ate and is too sick to ride, etc. Again, this requires a REFUND.

If it's a small defective item (a crumbled trolley pole candy, for example), just replace it with a non-defective one.
6. REFUNDS

Processing a refund involves several steps, which are illustrated below. To maintain the accuracy of our inventory, sales tax payments, and cash drawer contents, a transaction must be COMPLETELY REFUNDED; that is, all items in the sale are refunded, not just one or two on the sale. After the refund is complete, the non-returned items must be rung up in a new sale.

Briefly, the Steps are:

STEP 1. Go to the TRANSACTIONS screen
STEP 2. Locate the transaction you're refunding (different methods for Credit and Cash/Check sales, discussed below), then PRINT NEW RECEIPT.
STEP 3. Touch ISSUE REFUND
STEP 4. SELECT ALL ITEMS
STEP 5. Select REASON FOR REFUND, and Refund is Complete.
STEP 6. Return to the Home Screen
STEP 7. Using the receipt you printed, re-ring up the parts of the sale that the customer did not want refunded.

**STEP 1. GO TO THE TRANSACTION SCREEN to process the refund.**

Have a look at the middle of the very top of the screen. You'll see a little V.

Touch the V and you'll move to this screen. Touch Transactions to arrive at the Transactions screen (shown on the next page).
Here’s the TRANSACTIONS screen. You’ll see a list of all the transactions for the day, and you’re ready to start the actual refund process.

**STEP 2. LOCATE THE TRANSACTION and PRINT RECEIPT.**

**CREDIT CARD REFUNDS:** Have the customer insert/swipe/tap their card on the card reader just like when making a payment with the card. The POS will find the credit transaction. The card reader prompts the customer to remove their card from the reader. **DON’T LET THE CUSTOMER LEAVE THE STATION UNTIL THE REFUND IS COMPLETED!** If more than one transaction comes up for that card, ask the customer how much the charge was, confirm with the customer it’s the correct one (by reading the items to him/her) and then touch the transaction on the screen (it will turn black).

**CASH/CHECK REFUNDS:** Discuss with the customer what he/she purchased and the amount of purchase. Then, scroll down until you find the transaction. Be careful to select the correct transaction. Do two things to be sure it’s the right one: (1) Look to be sure it was a CASH sale and (2) confirm with the customer that the amount and items are correct. Then, Touch the transaction (it will turn black).
Now, you’re ready to **PRINT NEW RECEIPT**. (Keep the receipt nearby; you’ll need it later.)

**STEP 3. ISSUE REFUND.** Now you’re back to the Transactions screen. Touch Issue Refund to continue to Step 4.
STEP 4. SELECT ALL ITEMS. Even if the customer wants only a partial refund (i.e., he ate the candy and wants to keep the merchandise he bought, but he has to leave before he can ride so wants a fare refund), you must touch SELECT ALL ITEMS so the entire transaction is refunded to maintain the accuracy of our inventory, sales tax payments, and cash drawer contents.

STEP 5. REASON FOR REFUND. Select the reason for the refund by touching the appropriate circle. Then touch REFUND—the blue box in the upper right corner of the screen. The CASH DRAWER OPENS so you can refund the customer's cash or return their check, and the REFUND COMPLETE SCREEN APPEARS. Touch the blue DONE button and you'll be returned to the Transactions screen.
STEP 6. RETURN TO THE HOME SCREEN. Here you are back on the Transactions page. Touch the little V at the top of the screen.

Now, you’re back to this screen. Touch Checkout to return to the Home Screen.

YOU'RE ALMOST DONE, but there’s still STEP 7.

STEP 7. RE-RING UP THE NON-REFUNDED MERCHANDISE. If the sale contained only one item, you’re done and can send the customer on his/her way. BUT, if more than one type of items were sold in the transaction (i.e., fares and merchandise), you now have to re-ring up the part of the sale the customer didn’t want refunded.

Because you printed the receipt back at Step 2 of the Refund process, it's easy to see the items and quantities that were originally sold.

So, take that receipt you printed and re-ring up the items those items. The customer may want to put those items back on his credit card, or may want to pay cash. Ring up this sale just as you would any other.

This is the only way we can assure our inventory, sales tax, and cash drawer are accurate.
7. FOREMEN'S INSTRUCTIONS

REPORTS.
Guess what--no need to run any reports! All the data from the shift is automatically transmitted to the accountant!

START OF SHIFT
Be sure all the lights are turned on at the start of the shift--including the light in the display case (the switch is in the cubby below the POS).

HOUSEKEEPING
See Miscellany, page 9.3
Give Bill Arends a call or text message or email if you see something in the depot during your shift that looks like it needs attention.
Bill Arends: cell 612.419.4930
motormanbill@gmail.com

END OF SHIFT:
Put the money in the cash bag
LEAVE THE CASH DRAWER OPEN
Close the windows,
Turn off all the lights and fans
Close up shop.
8. CHANGING THE PRINTER PAPER

Rolls of printer paper are stored in the cubby area below the cash drawer or in the cabinet below the display case (depending on where there's room to store them).

Open the printer by pressing on the button with the arrow and SIMULTANEOUSLY pushing the lid up and back. (Unlike the previous printer, pressing the button does not make the lid pop open; you have to actually lift it.)

Remove the old roll of paper (or the empty spool) and drop in the new one as shown below, pulling the end up beyond the front of the lid. Close the lid and you're done.
A. PRINTING A RECEIPT AFTER TRANSACTION IS COMPLETE.
Occasionally customers who need a receipt for their transaction (like nannies or escorts of folks with disabilities) forget to ask for the receipt at the time of the transaction. They'll generally remember shortly after the sale was completed. Printing a receipt in this situation isn't difficult.

First, go to the Transactions screen; see p. 6.1, Step 1 of REFUNDS.
Scroll down as necessary to locate the transaction in the Transactions list, then touch PRINT NEW RECEIPT.

You'll then find yourself at this screen. Touch Paper Receipt at the bottom of the screen; the receipt will print and you'll be returned to the Transactions screen.

Go back to the Home screen as shown on p. 6.5 (Refunds, Step 6, Return to Home Screen).
B. OPENING THE DRAWER WITH NO SALE TO REPLENISH TOKEN SUPPLY
Make sure there's no sale pending on the home screen; the words "No Sale" are at the top of the column on the right of the screen. Touch "Charge $0.00" at the bottom of that column. The Charge area turns to blue and the words "Confirm $0.00" appear. Touch there and the cash drawer will open.

C. SELLING MOTORMAN GIFT CERTIFICATES
These are in a folder in the wall pocket, along with instructions for selling one. Notice the Certificate has a barcode.

D. SELLING MEMBERSHIPS
We can sell memberships in the station, but we cannot renew memberships. Membership application forms and instructions for selling them are in a folder in the wall pocket. The membership forms do not have barcodes; there's a Membership button on the home screen (near the bottom). Touching it will give you the option of selling Household or Individual Memberships for 1 year or 2 years or even a Lifetime Membership. Be sure to have the new member complete the bottom portion of the application, then cut that part off the page and put it in the cash bag; that's the ONLY way we know to whom we've sold memberships.
E. MEMBER DISCOUNTS
You will recall that Members receive discounts on three items—all of them part of the uniform. They are:

- MSM Patch
- TCL Patch
- Motorman Hat Badge

The patches are in small plastic boxes in the area under the display case; the badges are in the fishing tackle box in the same area. These items are barcoded, or you can touch the Patch button on the home screen. That button produces a drop-down menu listing the patches and hat badge. Touch the patch/badge you're selling and you'll be given the option of selling it to a Member for $4 or to an ordinary person for $5 (member price for hat badge is $15; $20 for non-members). There's no member discount for the Junior Motorman patch.

Here's what the screen looks like if you select "TCL Patch" from the drop down menu.

F. LOCATION OF VARIOUS ITEMS

- **PASSES**—season, day, etc.
  - In the drawer under the cash drawer. BARCODE is on the back of the Pass. Be sure to sign and date the Pass as you sell it.
- **TICKETS TO SPECIAL EVENTS:** Murder Mystery, Late Show
  - No longer available in the station; purchase online at trolleyride.org
- **PINS, HAT BADGES** displayed in the display case
  - All located in the fishing equipment case under the display case.
- **POSTERS** (framed samples hanging above shelving)
  - In the shelves on the south wall near the southwest corner
MERCHANDISE ON THE DISPLAY SHELVES in southeast corner
(Including metal pencil sharpeners, wood trolleys, whistles, etc.)
These are on the shelves below the display shelves.
Pencil sharpeners are in little boxes. **Pencil sharpener bar codes are on the boxes; don't sell the display ones off the shelf unless they're the last one.**

TROLLEY VILLAGE cut outs (displayed in the display shelves and on top of tall shelves)
On the shelves below the display shelves.

CLEANING PRODUCTS, PAPER TOWELS, BROOM.
In the corner behind the shelving in the southwest corner of the depot. Don't be shy about using these items throughout the shift.

EMERGENCY CONTACT INFO.
In the wall pocket

G. HOUSEKEEPING
- Make use of the broom throughout the shift, especially on fall days when leaves tend to blow in.
- Use the Windex and paper towels to clean fingerprints off the top and front of the display case throughout the shift as necessary.
- Use the wood floor cleaner and paper towels to wipe up any spills throughout the shift.
- Empty the wastebasket at the end of the shift. BUT, please don't toss the entire plastic bag in the trash, just dump the contents into the barrel. Unless, of course, there's something sticky or gross in there. Don't let people put liquid-filled cups in the waste basket! Direct them to the bins by the sidewalk.
- See that any merchandise that's been misplaced (generally toys) gets back to its proper location.
- Give Bill Arends a call or text message or email if you see something in the depot during your shift that looks like it needs attention.
  Bill Arends:  cell  612.419.4930
  motormanbill@gmail.com

H. LEAVING EXPLANATORY NOTES. Over the years, the cashiers (the volunteers who count the money and take it to the bank) have noticed operators/station agents will occasionally leave explanatory notes in the cash bag in an attempt to explain errors/confusion during their shift. While the cashiers appreciate these efforts, often the notes are illegible or the explanation just isn't clear. If you do leave such a note, PLEASE include your name and phone number so the cashier can chat with you about it.