Integrate Square with Crunchtime

Setup Guide

Document Details

Document #: 160_SQSG_250307

Overview

The purpose of this document is to provide the information you need to integrate the Square POS system with the Crunchtime platform.

Download the latest version of this document here:
https://links.crunchtime.com/SG-IntegrateSquareWithCT

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SETUP GUIDE

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Introduction

Square is a cloud-based system that integrates with Crunchtime via API. This integration allows customers to pull sales and time clock information from your POS into Crunchtime, as well as push employees from Crunchtime down to your POS system.

Sales		Labor		
Sales Mix	Menu Mix	Time Clock	Emp to POS (v3)	Schedule (Not supported by vendor)
COMPLETE	COMPLETE	COMPLETE	COMPLETE	Not Available

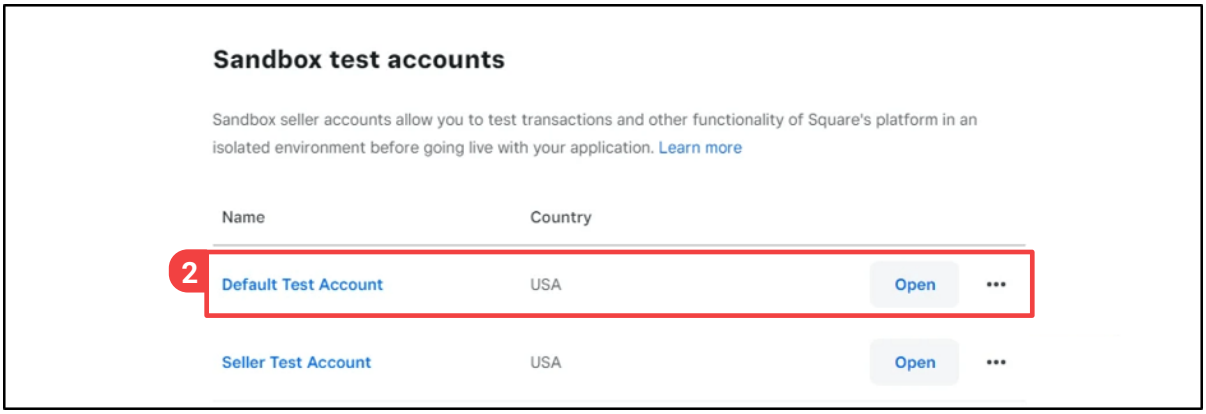
Let's get Connected

The steps below must be followed in order for Crunchtime to access Square data via the Square API. Any user with 'full access' permissions in Square has the capability to authorize an integration. The process below needs to be completed during on boarding or if the tokens are revoked at any point. The *OAuth* token provides access to the entire merchant account and works across all locations.

Square Sandbox Steps:

During onboarding, it may be necessary for Crunchtime to create or update data in Square. These updates should be tested in the Square sandbox environment. The customer will need to provide the Sandbox API token by following these steps:

1. Go to: https://developer.squareup.com/apps
2. Under **Sandbox test accounts**, select the test account associated with Crunchtime, the *Default Test Account* in this example.



3. Send the Access token to the Crunchtime team.
4. If the sandbox test account doesn't exist then add one with "Automatically create authorizations for all my current apps" checked.

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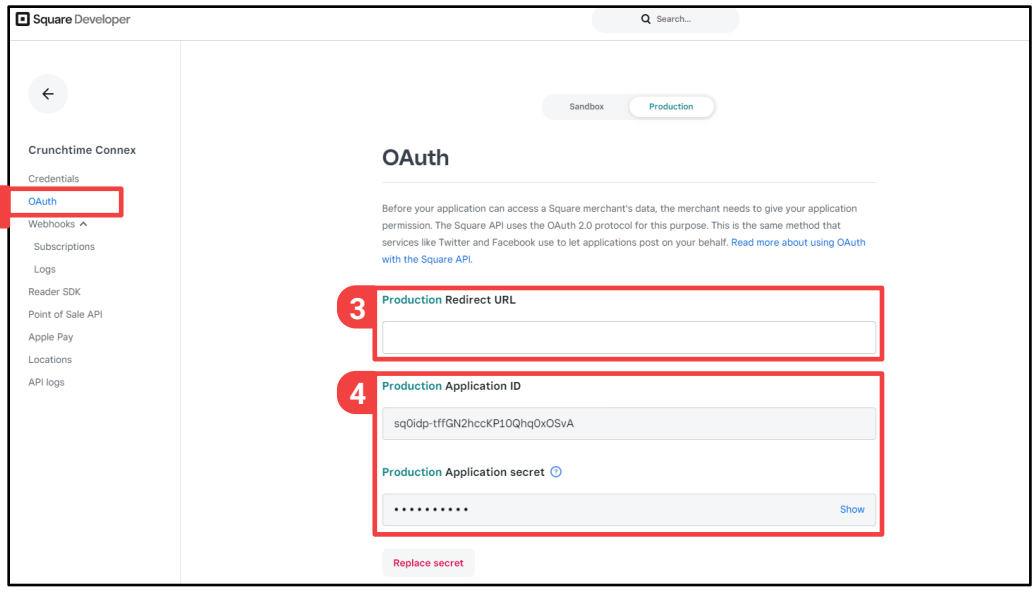
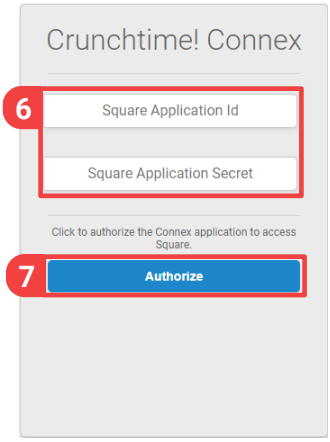
Square Authorization Steps:

1. Log in to the Square Dev Dashboard: https://developer.squareup.com/apps.



2. Navigate to *OAuth* section.
3. Enter the following *Production Redirect URL*: **'https://connexoauth.um1se6c49evm6.us-east-1.cs.amazonlightsail.com/callback'**.
4. Make note of the *Production Application ID* and *Production Application secret* values.
5. Go to the OAuth tool site: https://connexoauth.um1se6c49evm6.us-east-1.cs.amazonlightsail.com/



6. Enter *Square Application ID* and *Square Application Secret* values found on OAuth page in the Square Dev Dashboard (from Step 4 above).
7. Select *Authorize*.

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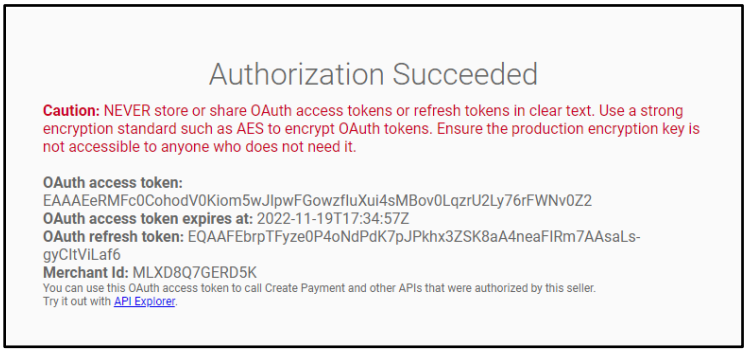
8. You will be redirected to the Square Sign In page where you should enter your *Email address* and *Password* and click *Sign In*.



9. If this is the first time permissions are being granted for Crunchtime Connex, you will see them listed. Click *Allow* to approve access.



10. Copy the full response containing the access token and send it to Crunchtime (text file preferred).



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Location Activation

To enable a location with Connex, an activation request must be sent to the Crunchtime Support team (support@crunchtime.com) containing the following information:

- *Location Code* – The location code exactly as it appears in Enterprise Manager.
- *Location Name* – The name of the location (we recommend using the same name as it appears in Enterprise Manager).
- *Go-Live Date* – The date Connex will begin pulling data into Net-Chef.
- *Location Time Zone* – The time zone the location is in.
- *Job/File Types* – The type of integration that this location will be using (Sales Mix, Menu Mix, Time Clock).
- *Observes Daylight Savings Time* (DST) – Enter either 'Y' or 'N'.
- *Net-Chef URL* – The Net-Chef URL for this particular location.
- *Square location_id* – The unique Square POS code used for API Calls.

Example Request:

- *Location Code*: 123ABC
- *Location Name*: ABC Store
- *Go-Live Date*: 03/11/2025
- *Location Time Zone*: EST
- *Jobs/File Types*: Sales Mix, Menu Mix, Time Clock
- *Observes Daylight Savings Time*: Y
- *Net-Chef URL*: https://crunchcafe.net-chef.com
- *Square location_id*: : LN4FYS5K0KJPJ

Tip: Square considers a mobile/online location to be a separate POS. If you choose to combine these sales into one Crunchtime location, please notate this on the support ticket request.

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Considerations for Menu Mix Integration

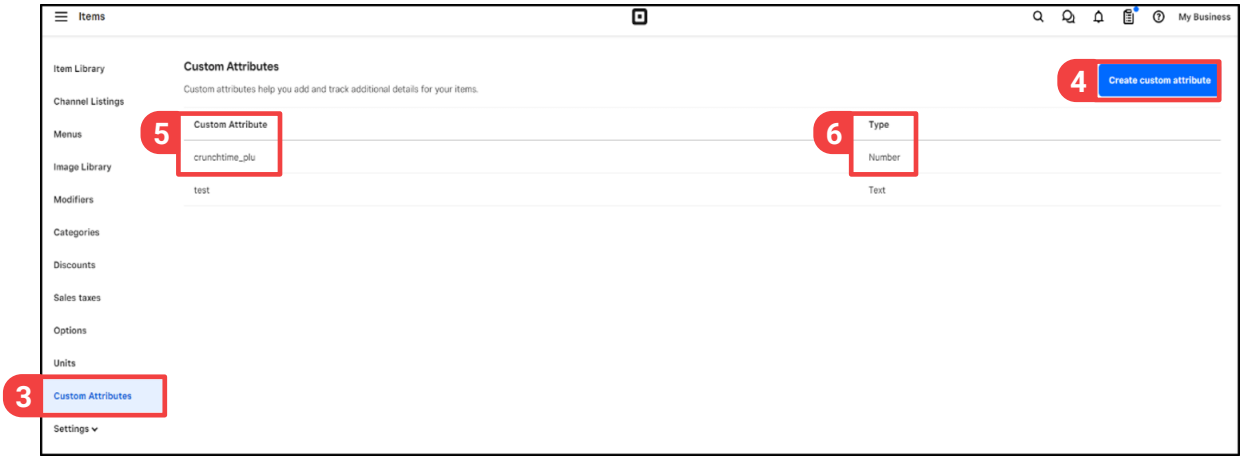
PLU: Crunchtime recognizes menu items for reporting and to drive stock depletion by referencing a PLU code (12 digits or less) from the POS. Currently, Square only has a 24-character “id” field or “name” field that does not align with the Crunchtime system requirements.

In order to leverage a menu mix integration between Crunchtime and Square, customers must populate an item and variable specific custom attribute field in Square to represent a 12-digit or less PLU.

Note: The Square API version must be ‘2023-04-19’ or above to leverage the custom attribute solution for both menu items and modifiers. The API Version can be updated in Square by navigating to the *Credentials* screen.

For the creation of the Custom Attribute field follow these steps.

1. Log in to Square: https://squareup.com/
2. Navigate to the Items section: https://squareup.com/dashboard/items/library



3. Select *Custom Attributes* from the left panel.
4. Click *Create Custom Attribute*.
5. Enter the *Custom Attribute* name: ‘Crunchtime_plu’.
6. Enter the attribute *Type:* ‘Number’.
7. Set *Precision* = ‘1’.

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Initial Updates:

The Custom Attribute field for all items, variations, and modifiers can be updated manually or via API. An extract from Square containing the following can be used for populating the custom attribute field:

- `Item.item_data.name`
- `Item.item_data.variations.item_variation_data.name`
- `Item.item_data.variations.id(Token)`

The customer will then populate the workbook with a new column containing the Custom Attribute that will align with the PLU assigned to Recipes in Crunchtime Enterprise Manager.



Tip: It is best practice to configure the Custom Attribute PLUs using 3 or 4 digits in case concatenation requirements are needed to result in proper stock depletion.

Customer Maintenance:

For any new menu items created in Square, the customer will be responsible for updating the Custom Attribute field directly in Square.

Modifiers:

Square does not support assigning the custom attribute field to Modifiers. As such, for customers to track menu mix sales and depletion from modifiers, we must maintain a mapping table outside of Square that links the Modifier Name to a PLU Number that is configured on the Modifier Recipe in Crunchtime.

Considerations for Employee Integration

- Employees are configured at the Enterprise Level due to square setup restrictions regarding positions and locations as they are associated to employees.
- Before integration is enabled, every existing employee should have the Employee's Net-Chef POS ID in the *Square reference_id* field. Without completing this setup, duplicate employees may be created.
- Employees will import to all Locations by default.
  - Only after the Location rollout has been completed, should a customer configure assigning explicit locations to employees to ensure Crunchtime does not accidentally remove an employees access from a store
- Square "Team Plus" must be enabled for positions to integrate successfully.

Considerations for Time Clock Integration

- The Square Wage Title should match the Employee Position Code for a Time Clock file to successfully feed into Crunchtime.

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