



newo.ai

How to Connect Your AI Assistant to Square

Step-by-step onboarding guide for business owners

Time: approximately 5 minutes

Confidential - For client use only

What You'll Need

- Your Square account (the one you use to manage appointments and clients)
- A computer with a web browser (Chrome, Safari, Firefox)

What We'll Ask You to Send Us

Two values that you'll copy from your Square account:

1. Application ID

Your app identifier - looks like: sq0idp-XXXXXXXXXX

2. Personal Access Token

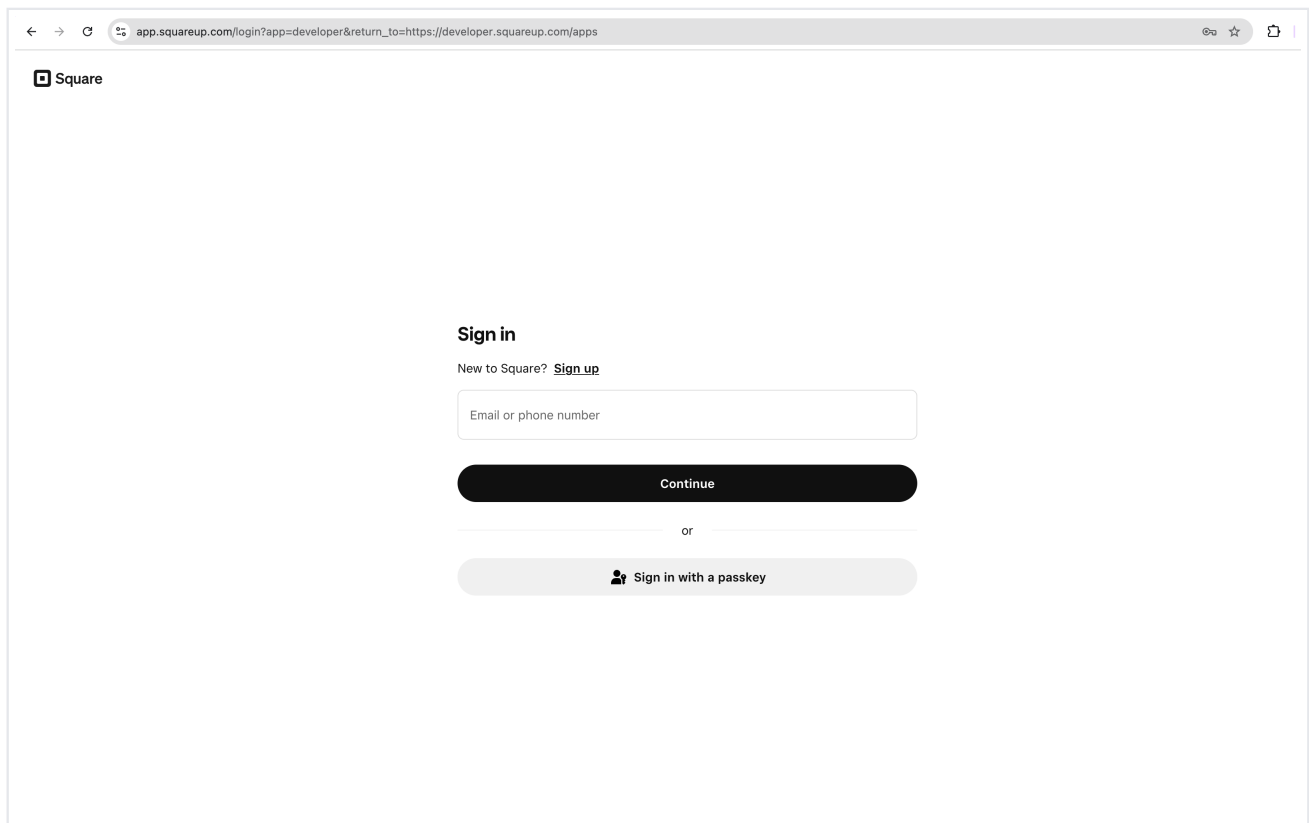
A secure access key - looks like: EAAAI2XXXXXXXXXX...

Step 1. Open the Square Developer Dashboard

Open this link in your browser:

<https://developer.squareup.com/apps>

If you're not logged in, Square will ask you to sign in. Use the same email and password you normally use for your Square business account (where your clients, appointments, and service catalog are).

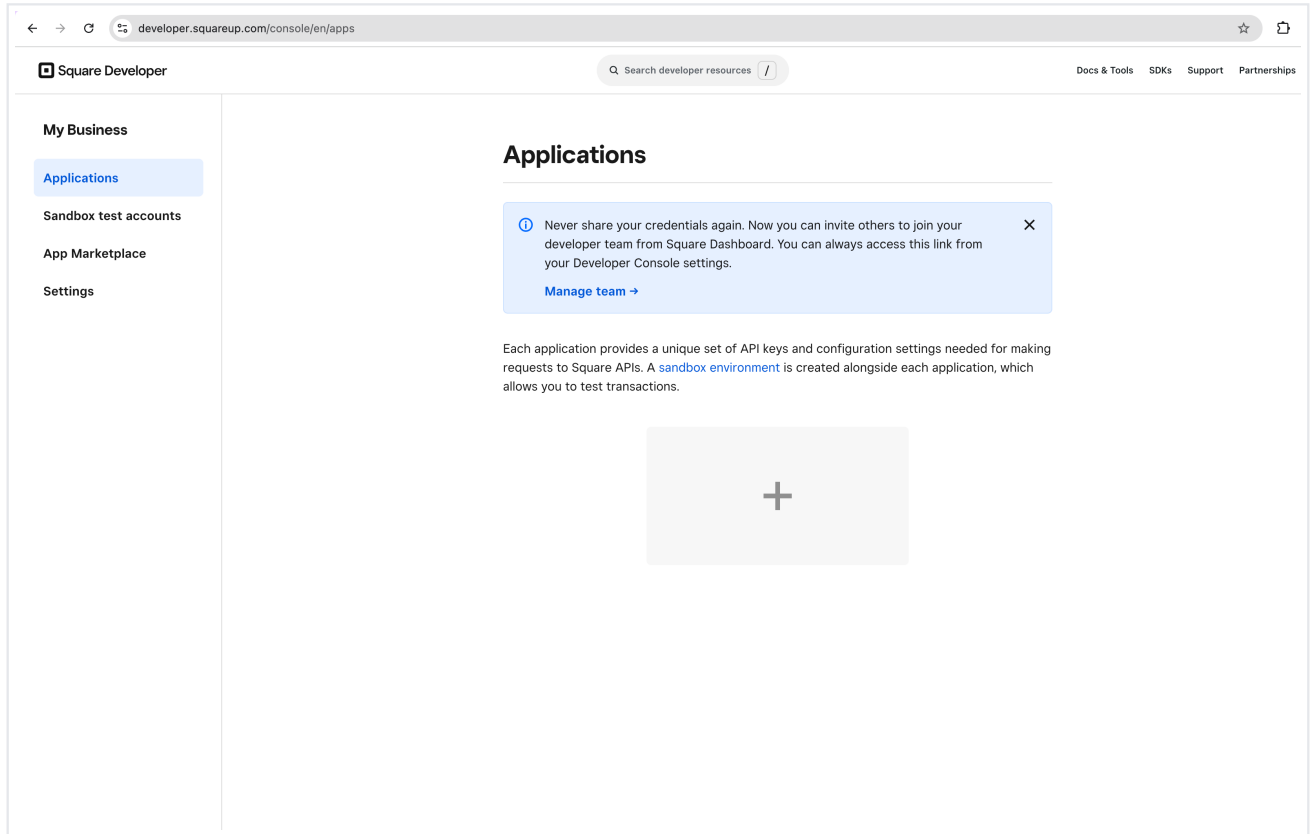
A screenshot of a web browser showing the Square sign-in page. The browser's address bar displays the URL: app.squareup.com/login?app=developer&return_to=https://developer.squareup.com/apps. The page features the Square logo in the top left corner. The main content area is titled "Sign in" and includes a link for "New to Square? Sign up". Below this is a text input field labeled "Email or phone number". A prominent black "Continue" button is positioned below the input field. Underneath the button is a horizontal line with the word "or" centered. At the bottom, there is a light gray button labeled "Sign in with a passkey" accompanied by a small user icon.

Square sign-in page - use your business account credentials

Step 2. Create a New Application

After signing in, you'll see the "Applications" page.

1 Click the "+ New Application" button



Applications page with the "+ New Application" button

2 Type a name for your application (e.g. "Newo AI Assistant")

3 Check "I agree to the Square Developer Terms of Service"

4 Click "Save"

A screenshot of a modal dialog for creating a new application. It has a close button (X) in the top left and a 'Next' button in the top right. The title is 'Name your application'. Below it is a text input field labeled 'Application name' containing the text 'Newo AI Assistant'. At the bottom, there is a checked checkbox followed by the text 'I agree to the Square Developer Terms of Service'.

Application creation dialog

5 On the "What will you build first?" screen, select these three:

- [x] Build customer relationships
- [x] Manage a team
- [x] Manage a product catalog

Then click "Next".

← Skip Next

What will you build first?

	Accept payments Online, in-app, and in-person.	☐
	Manage and fulfill orders Create, track, and manage.	☐
	Build customer relationships Manage customers, loyalty, and gift cards.	☒
	Manage a team Set job titles, wage rates, hours, and more.	☒
	Manage a product catalog Keep a robust record of product offerings.	☒
	Adjust inventory Manage product quantities and changes.	☐

"What will you build first?" - select the three options above

6 On "Find your audience", select "Myself" and click "Next".

← Skip Complete

Find your audience

	Myself I'm building this for personal use.	☒
	A company I'm building this for a specific seller.	☐
	All Square sellers I'm building this for any seller.	☐

"Find your audience" - select "Myself"

Step 3. Copy Application ID and Token

After creating the application, you'll land on its settings page. In the left-hand menu, click "Credentials". At the top of the page, you'll see two tabs: Sandbox (test) and Production (live).

1 Click the "Production" tab

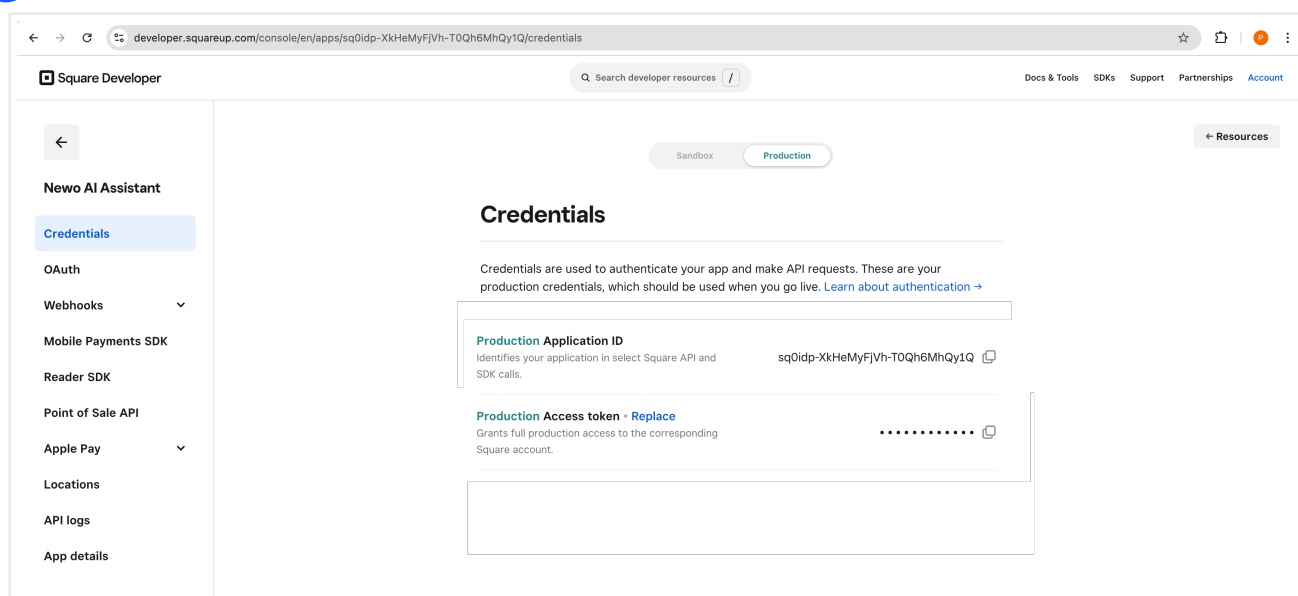
Important:

Make sure you're on the Production tab, not Sandbox!

2 Find "Application ID" and click the copy icon next to it:

```
sq0idp-XXXXXXXXXXXXXXXXXXXX
```

3 Find "Personal Access Token" and click the copy icon



Credentials page - Production tab. Copy both values.

Important:

This token gives full access to your Square account.

Do not share it with anyone except us.

Do not post it in public chats or social media.

You can regenerate it at any time if compromised.

Step 4. Send the Details to Us

Send us the two values you copied:

What	Example
Application ID	sq0idp-WKweFVtxQitSnvAS7rSvMA
Access Token	EAAA12JhCnoa5cp4D1gb7uy...

You can send them via chat, email, or any secure channel we've provided.

What Happens Next

Once we receive your details, we will:

- 1 Connect the AI assistant to your Square account
- 2 The assistant will access your service catalog and schedule
- 3 It will be able to book, cancel, and reschedule appointments for your clients

Your data is safe

The token is only used to connect the assistant to your Square account.

Troubleshooting

I don't see the "+ New Application" button

You may have signed into the regular Square Dashboard instead of the Developer Dashboard. Make sure the URL is developer.squareup.com, not squareup.com/dashboard.

I don't see the Production tab

If your Square account is brand new, the Production tab may not be available until your account is verified. Contact us and we'll help.

I'm nervous about sharing the token

That's completely understandable! You can revoke the token at any time on the same Credentials page. If you ever want to disconnect the assistant, simply delete or regenerate the token and access will be cut off immediately.

I use Square on my phone

The Developer Dashboard only works in a browser on a computer. Please open developer.squareup.com/apps from your computer.

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How to Set Up Square for Appointment Booking

Step-by-step guide to configure your Square account
so the AI assistant can book appointments

Time: approximately 10 minutes

Confidential - For client use only

How to Set Up Square for Appointment Booking

Step-by-step guide to configure your Square account so the AI assistant can book appointments via the API.

Time: approximately 10 minutes

What You'll Need

- Your Square account (the one you use to manage your business)
- A computer with a web browser

What This Guide Covers

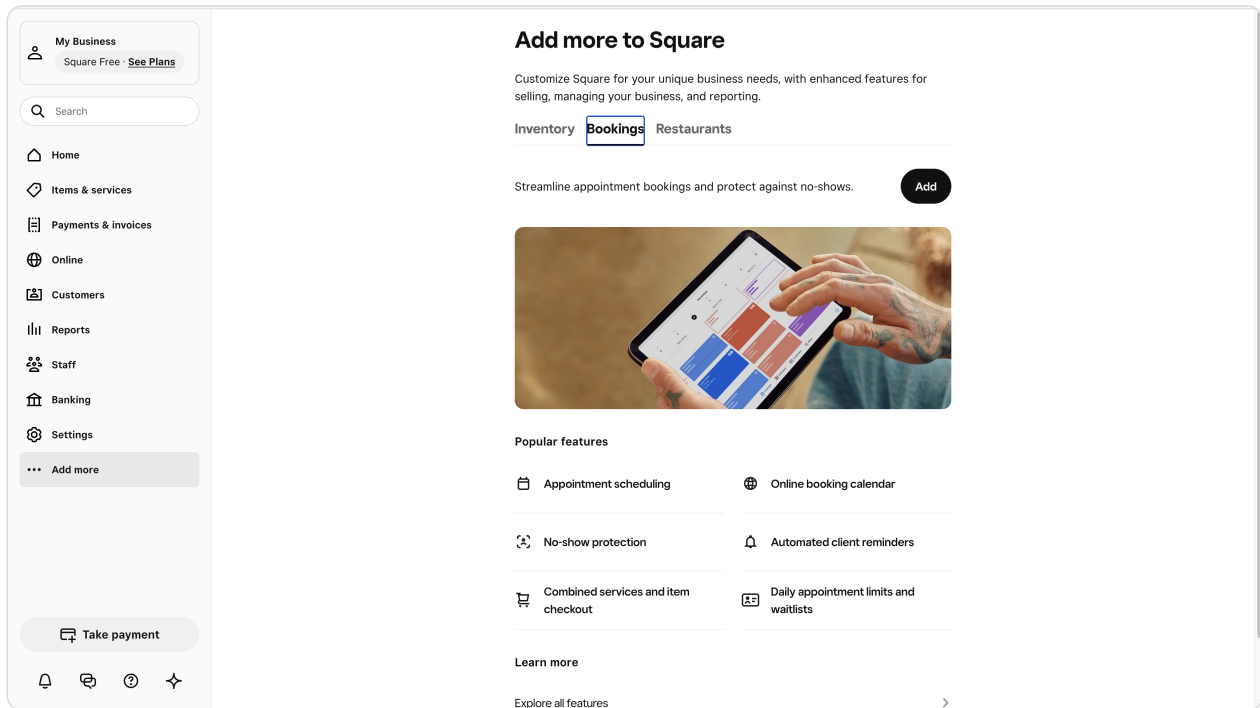
Before the AI assistant can book appointments, your Square account needs:

1. **Square Appointments** feature enabled
 2. A **Business Location** with timezone and business hours
 3. At least one **Team Member** (staff who performs services)
 4. At least one **Service** in the Service Library (what clients can book)
 5. **Team Member Availability** (working hours for each staff member)
-

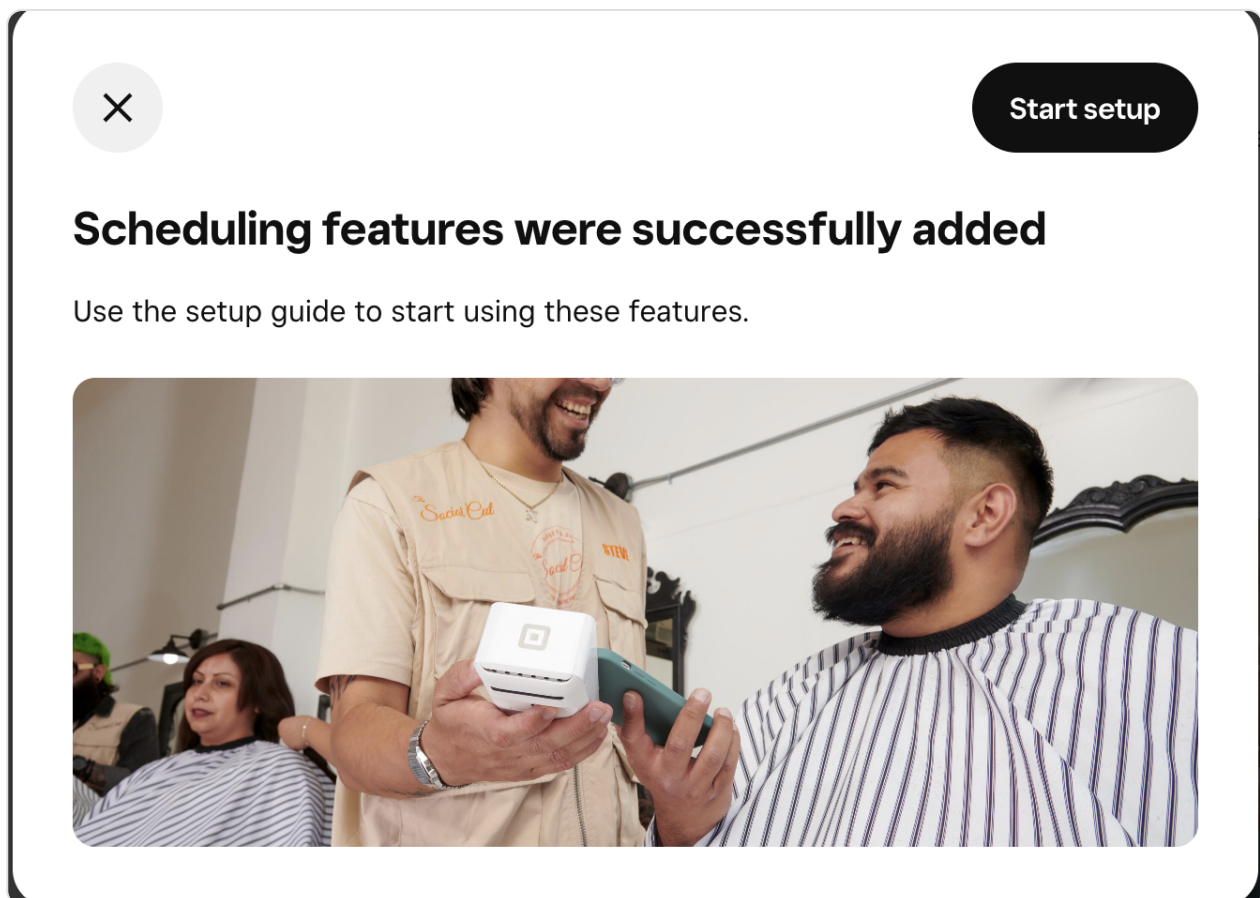
Step 1. Enable Square Appointments

Square Appointments is a separate feature that must be added to your account.

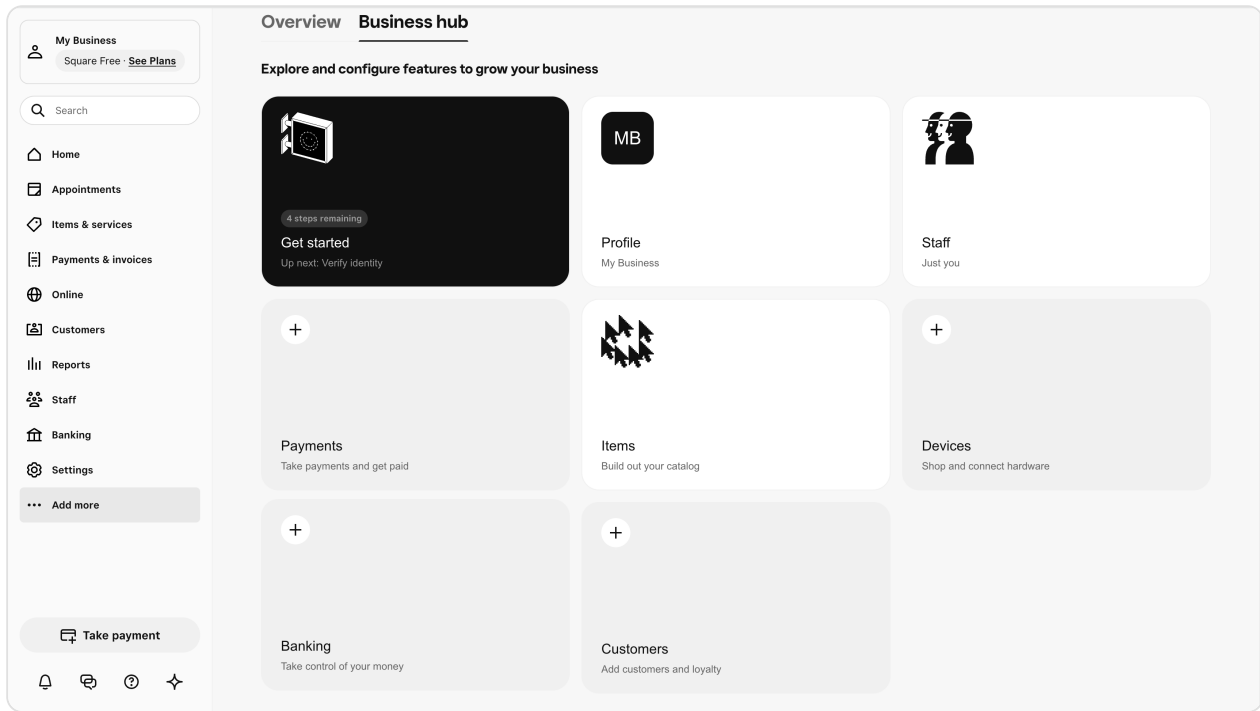
1. Log in to your Square Dashboard at <https://squareup.com/dashboard>
2. In the left sidebar, click ... **Add more**
3. Select the **Bookings** tab at the top
4. Click the **Add** button



1. You'll see: **"Scheduling features were successfully added"**
2. Click **Start setup**



1. Verify that **Appointments** now appears in your left sidebar



If you already see "Appointments" in the left sidebar, skip this step — it's already enabled.

Step 2. Configure Your Business Location

The AI assistant needs to know your location, timezone, and business hours.

1. Go to **Settings** → **Account & Settings** → **My business** → **Locations**
2. If you don't have a location yet, click **Create Location**
3. If you already have one, click on it to edit

My Business
Square Free · [See Plans](#)

Search

Settings

- Account & Settings
- Personal information
- My business
- About
- Security
- Locations**
- Pricing & subscriptions
- Payments
- Banking
- Notifications
- Tax forms
- CCPA
- Fulfillment methods

Order tickets

Take payment

Locations

Location filter

Create Location

1 location is active for payments but does not have an address. Please update its address.

Nickname ↑	Location Type ↑	Address ↑	City, State ↑	Phone ↑	Email ↑
My Business	Physical	Update Address			morenko83+test@gmail.com

1. In the **Location details** form, make sure to set:
2. **Time Zone** — this is critical for correct appointment times
3. **Regular hours** — set open and close times for each day

Location details

Save

Business hours

Time Zone
Europe/Belgrade

Regular hours
Let your clients know when you're open.

☒ Monday

[Add times](#)

☒ Tuesday

[Add times](#)

☒ Wednesday

[Add times](#)

☒ Thursday

[Add times](#)

☒ Friday

[Add times](#)

1. Click **Save**

Important: The timezone must match where your business operates. The AI assistant converts appointment times based on this setting.

Step 3. Add Team Members

Team members are the people who perform services (e.g., stylists, therapists, doctors). Each appointment is assigned to a team member.

1. Go to **Staff** → **Team** → **Team members**

The screenshot shows the 'Team members' page in the Square Appointments interface. On the left is a sidebar with a 'My Business' header (Square Free, See Plans), a search bar, and a 'Staff' section containing links for Team, Team members (selected), Permissions, Onboarding, Scheduling, Time tracking, Payroll, Announcements, and Settings. At the bottom of the sidebar is a 'Take payment' button and a row of icons (bell, speech bubble, question mark, star). The main content area is titled 'Team members' and includes an 'Export' button and an 'Add team member' button. Below this is a search bar and filters for 'Job' and 'Location'. A table lists team members with columns: Name (with an upward arrow), Job, Location, Appointments, and Status. One member is listed: 'Owner' with the job 'Owner' and location 'All current and future locations'. The 'Appointments' column shows a dash, and the 'Status' column shows 'Incomplete' in an orange box. Below the table, it says '1 team member'.

Name ↑	Job	Location	Appointments	Status
Owner	Owner	All current and future locations	-	Incomplete

1. Click **Add team member**
2. Fill in:
3. **Preferred name** and **Last name**
4. **Phone number** or **Email** (to send them an invitation)

X

Next

Profile

Enter your team member's phone number or email to send them an invitation to access Team app and other Square services.

Preferred name ⓘ

Last name

Phone number ⓘ

Email ⓘ

Team member ID (optional)

1. Click **Next**
2. Set their **Primary job** title and pay details

←

Next

Jobs

Manage Test's role and compensation.

Primary job ⓘ	Cashier, Barista, Bartender, etc.
Pay type	Hourly ▼
Hourly rate	\$0.00

Add another job

☐ **Overtime Exempt**
 This team member is not exempt from overtime FLSA rules. [Learn more >](#)

1. Click **Next** → Set permissions → Click **Done**
2. Repeat for each staff member who should accept bookings

Step 4. Create Services

Services define what your clients can book (e.g., "Haircut", "Massage", "Consultation").

1. Go to **Items & services** → **Items** → **Service library**
2. Click **Create service**
3. Fill in:
4. **Name** — what clients will see (e.g., "Lip Filler")
5. **Description** — describe the service in detail (the AI uses this to understand what clients are asking for)
6. **Locations** — select your business location

×

Create service

Save

Name

Lip Filler

Li

Edit

Description

Cosmetic injections that add volume, shape, and definition to the lips

Generate

📁 Drag and drop images here, [upload](#), or [browse image library](#).

Take your service photos to the next level.

Scan to download the Photo Studio app for free. [Learn more](#)

Locations

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Categorization

Categories

Select

1. Scroll down and set:
2. **Price type** — Fixed or Variable
3. **Price** — e.g., \$100.00
4. **Duration** — how long the service takes (e.g., 30 minutes)

X

Edit service

Delete Save

Price

Add variation images

Price type

Fixed

Price

\$100.00

1

Cancellation fee has moved to Payments & Cancellations settings. You can change it by going to Appointments > Settings > Payments & cancellations.

X

Go to settings

Cost

Track service cost

Track the cost of providing this service (e.g. back bar cost) and allow service costs to be deducted in **Commissions**.

Duration

Hours

0 hrs

Minutes

30 mins

Add processing time

Optimize your schedule and allow customers to book during processing time.

Block extra time after appointment

Avoid rushing between appointments by blocking off time for cleanup or travel.

1. Scroll down to the **Online booking** section and verify:
2. **Bookable by customers online** — must be **ON** (enabled)
3. **Assigned team members** — by default set to "All team members". Click **Select** if you need to limit which staff can perform this service.

X

Edit service

Delete Save

Add processing time

Optimize your schedule and allow customers to book during processing time.

Block extra time after appointment

Avoid rushing between appointments by blocking off time for cleanup or travel.

Online booking

Bookable by customers online

Allow customers to book this service on your booking website.

i

ON

Assigned team members

All team members

Select

Replace price with description

Request that clients inquire about pricing for appointments where rates flex or differ.

Variations

Create multiple variations of a single service. Set different pricing options, durations, and more.

Add

Advanced settings

Set-up modifiers and custom attributes

▼

Critical: If "Bookable by customers online" is OFF, the API will not return this service in availability results and the AI assistant won't be able to book it.

1. Click **Save**
2. Repeat for each service you offer

After adding, your Service library should show all your services:

My Business
Square Plus 30 days left

Search

Items & services

Items

Item library

Channel listings

Service library

Packages

Image library

Resources

Modifiers

Categories

Discounts

Options

Units

Custom attributes

Settings

Take payment

Search

All locations

Actions

Create service

Name	Reporting category	Duration	Price
Consultation (example service)		1 hr	Variable
Lip Filler		30 mins	\$100.00

Tip: Write detailed descriptions! The AI matches what clients say (e.g., "I want fuller lips") to your services by reading these descriptions.

Step 5. Set Team Member Availability

This is the most important step! Without availability, the AI assistant won't find any open slots.

1. Go to **Staff** → **Scheduling** → **Availability**

My Business
Square Plus 30 days left

Search

Staff

Team

Scheduling

Schedule

Availability

Time off

Time tracking

Payroll

Announcements

Settings

Availability

twinmind

Team member	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Owner							
Test Test							

1. Click on a day cell for a team member (e.g., click Monday for "Test Test")
2. Set:
3. **Start Time** — e.g., 9:00 AM
4. **End Time** — e.g., 5:00 PM

5. Use **Repeat on** to apply to multiple days (e.g., Monday through Friday)

6. Click **Save**

×

Monday

Available all day

Start Time

9:00 AM ▾

End Time

5:00 PM ▾

Add availability.

Repeat on

☐ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☐ Saturday

Save

1. After saving, you'll see green blocks showing the configured hours:

Availability ★

twinmind ▾

Team member	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Owner							
Test Test ▾		Available 9 am – 5 pm	Available 9 am – 5 pm	Available 9 am – 5 pm	Available 9 am – 5 pm	Available 9 am – 5 pm	

1. Repeat for each team member

Critical: If a team member has no green blocks in the Availability table, they will never appear in appointment slots. The API reads directly from this schedule.

Checklist

Before telling us you're ready, verify:

- ☐ **Appointments** feature is active (visible in left sidebar)
- ☐ **Location** has timezone and business hours set
- ☐ At least one **Team Member** added
- ☐ At least one **Service** created with name, description, duration, and price
- ☐ Team member **Availability** shows green blocks for working days

Once everything is set up, the AI assistant will be able to: - Show clients available appointment slots - Book appointments automatically - Cancel appointments when requested

Troubleshooting

I don't see "Appointments" in my sidebar Click "... Add more" at the bottom of the left sidebar, go to the "Bookings" tab, and click "Add".

The AI says there are no available slots Check that your team members have availability set in Staff → Scheduling → Availability. No green blocks = no slots.

My services don't show up Make sure services were created in **Items & services** → **Service library** (not as regular items). They must be of type "Service" and available at your selected location.

I added a team member but they don't appear in bookings The team member needs working hours configured in the Availability table. Just adding them to the team is not enough.