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How to Connect Your AI Assistant to Square

Step-by-step onboarding guide for business owners

Time: approximately 5 minutes

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-XXXXXXXXX

2. Personal Access Token

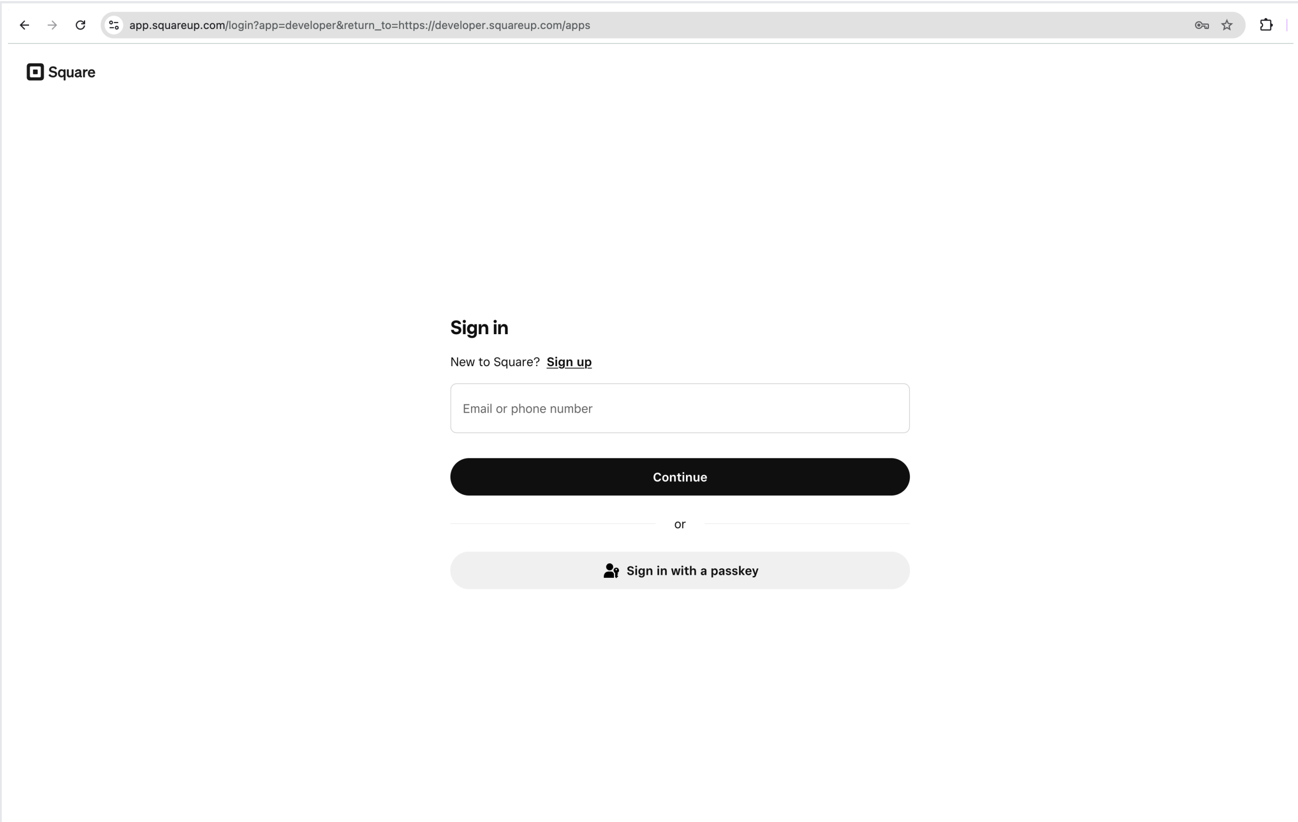
A secure access key - looks like: EAAAl2XXXXXXXXX...

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).

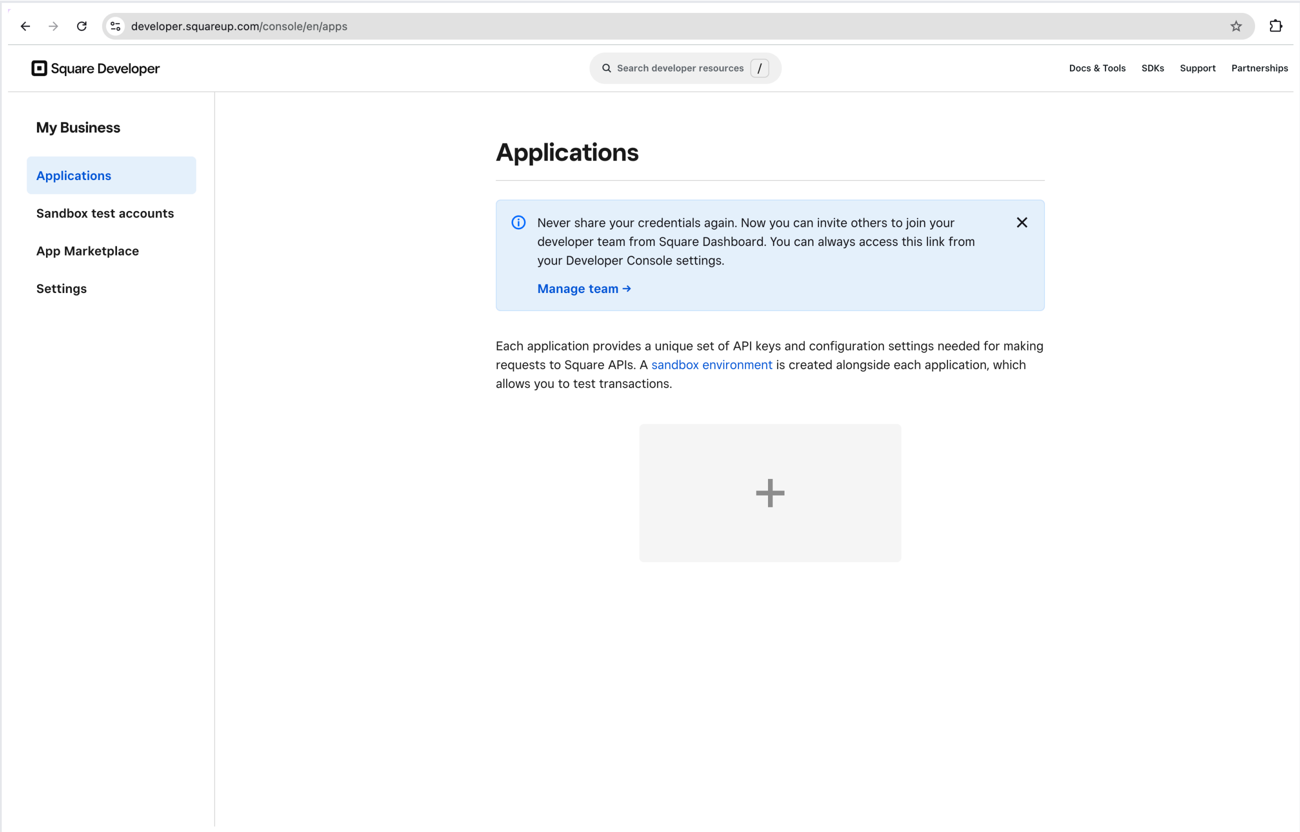


Square sign-in page - use your business account credentials

Step 2. Create a New Application

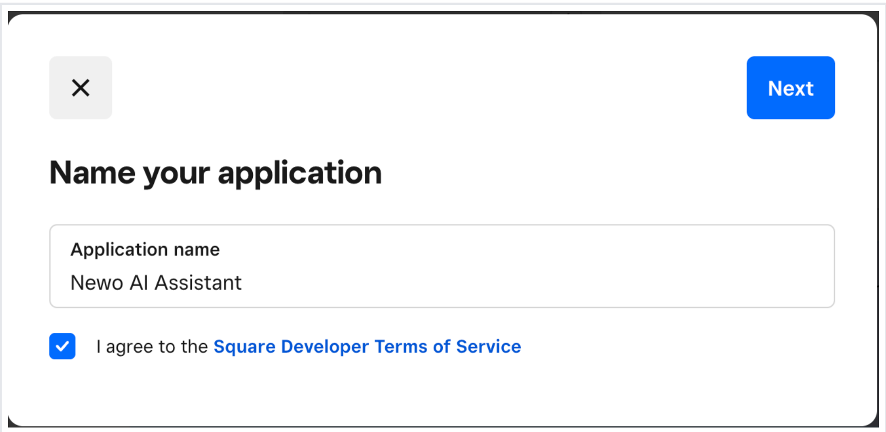
After signing in, you'll see the "Applications" page.

1. Click the "+ New Application" button



Applications page with the "+ New Application" button

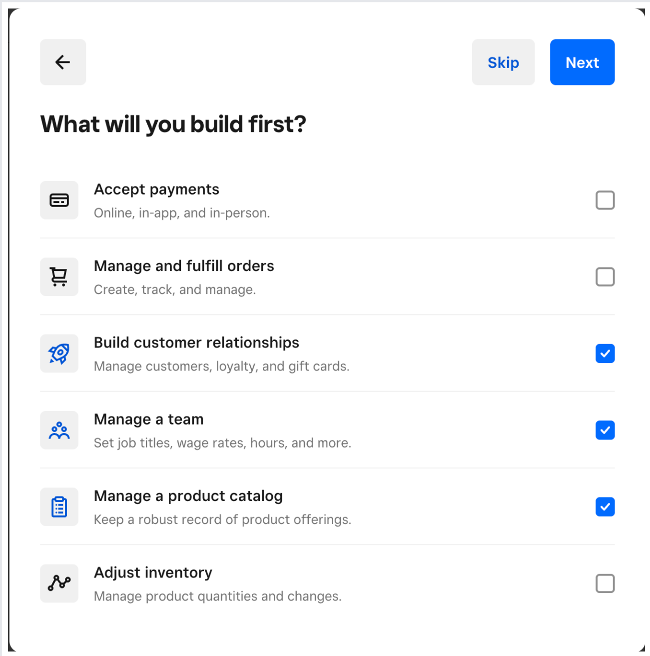
2. Type a name for your application (e.g. "Newo AI Assistant")
3. Check "I agree to the Square Developer Terms of Service"
4. Click "Save"



Application creation dialog

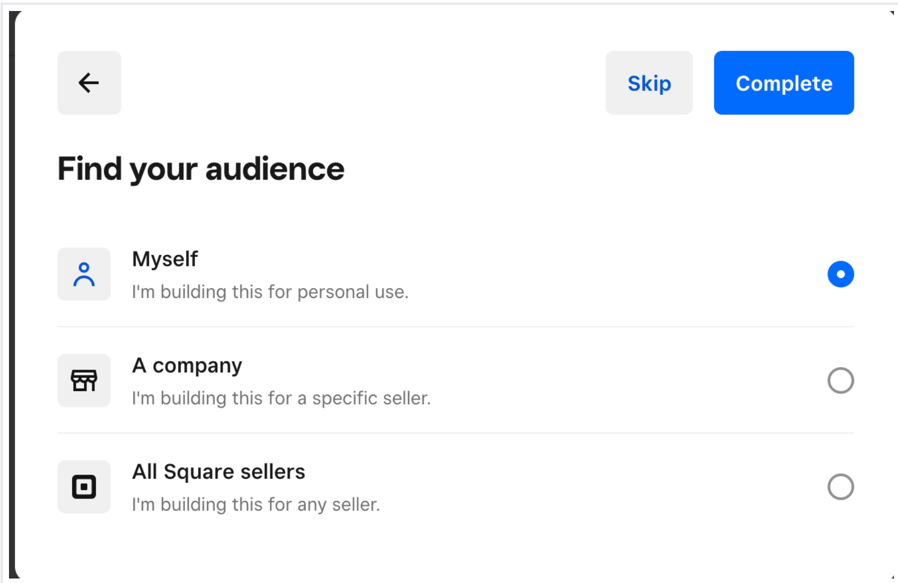
5 On the "What will you build first?" screen, select these three:

[x] Build customer relationships
[x] Manage a team
[x] Manage a product catalog
Then click "Next".



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

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



"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).

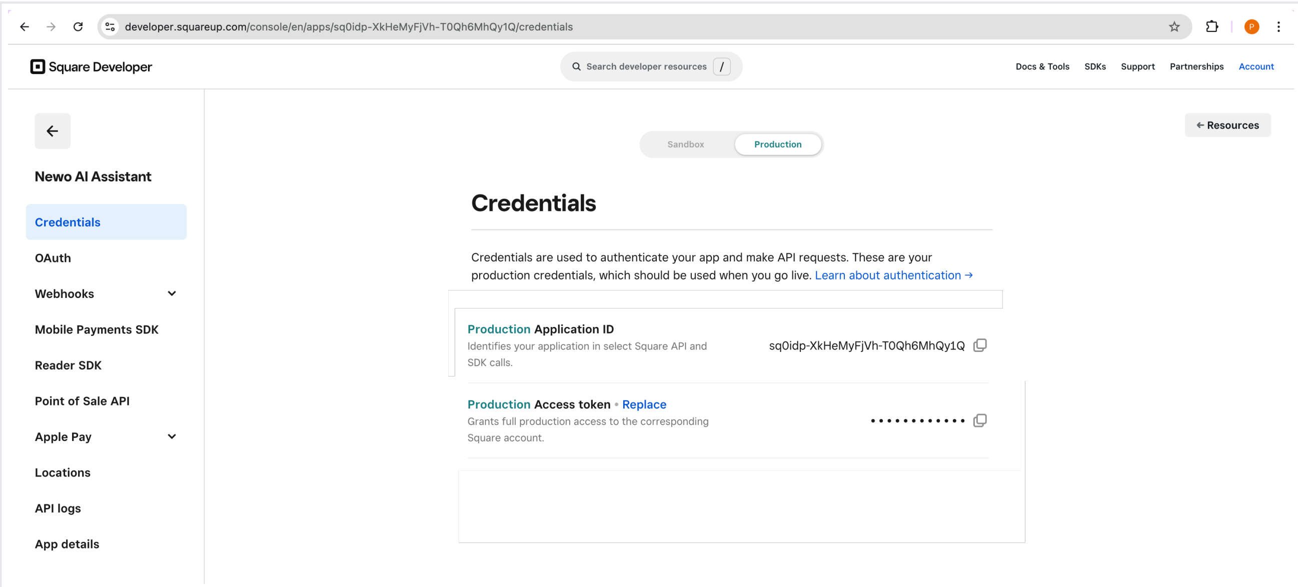
1. Click the "Production" tab

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	`EAAAl2JhCnoa5cp4Dlgb7uy...`

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

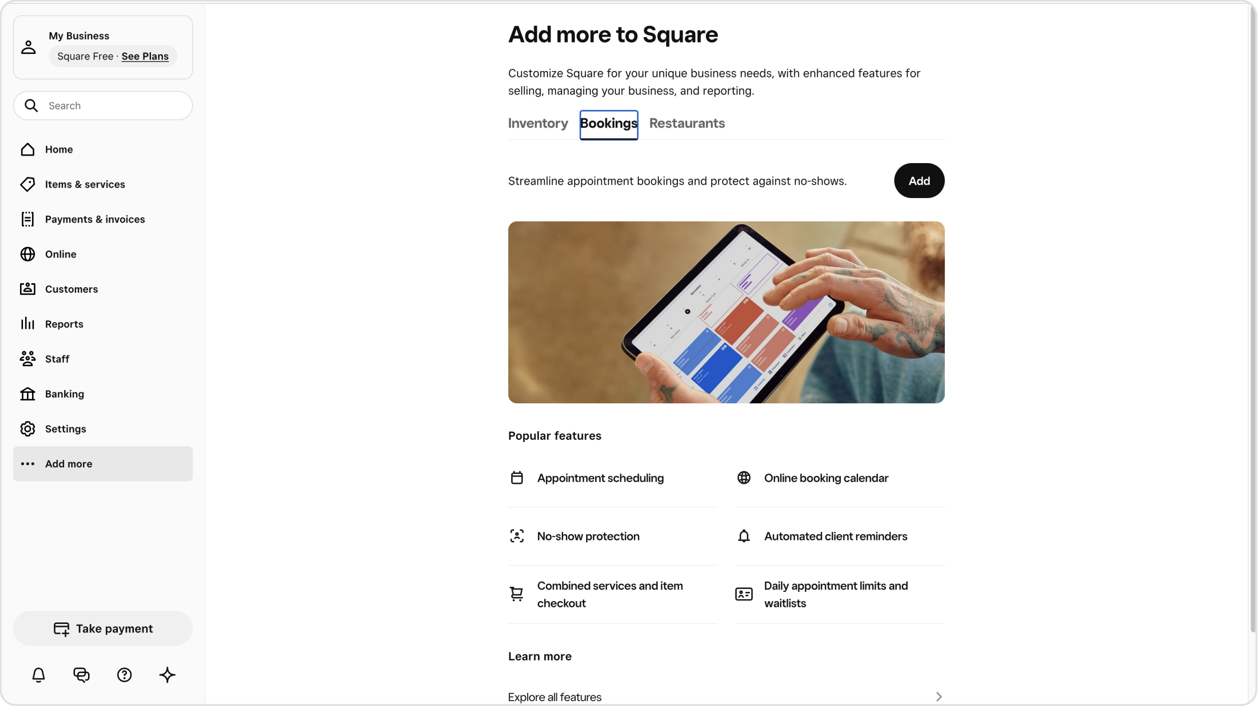
Before the AI assistant can book appointments, your Square account needs:

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)

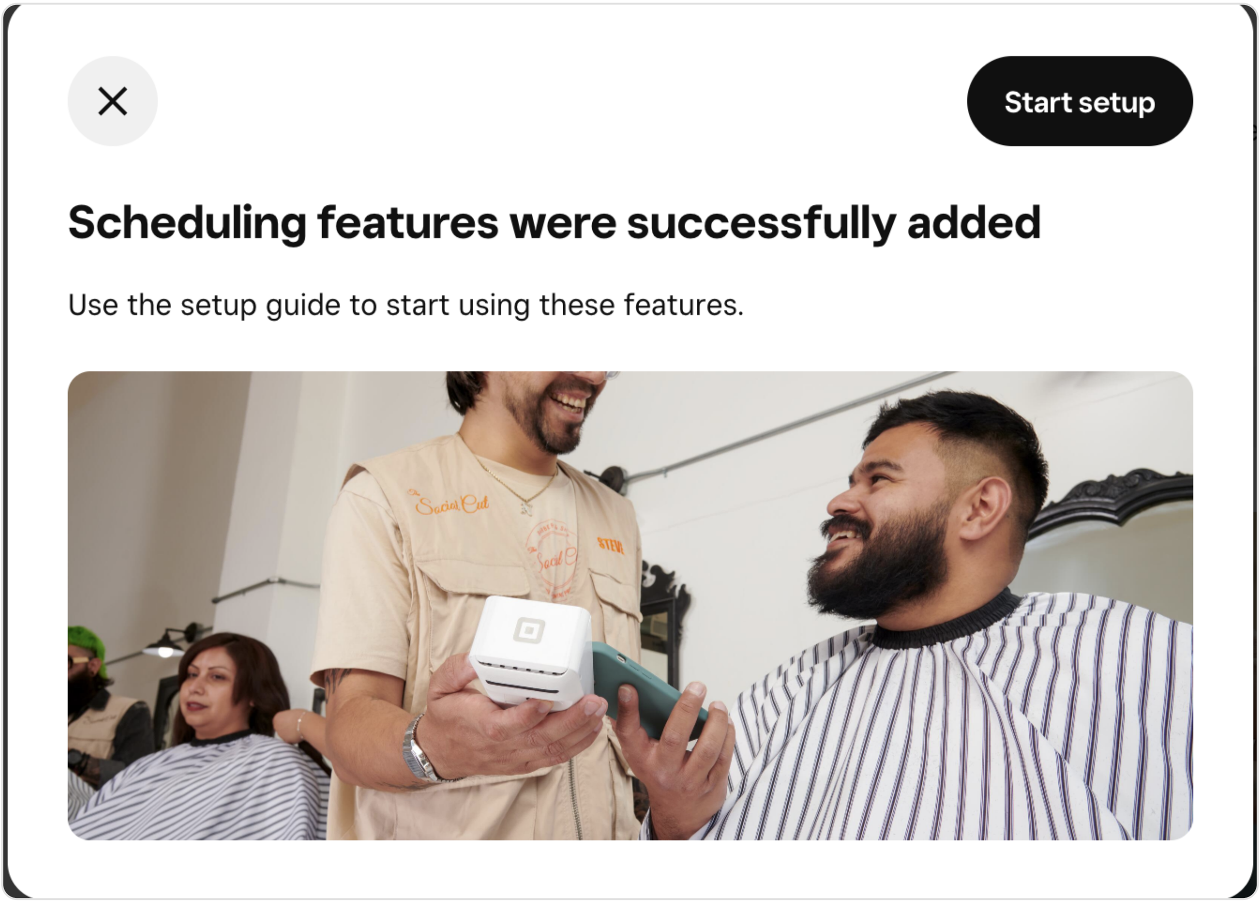
Step 1. Enable Square Appointments

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

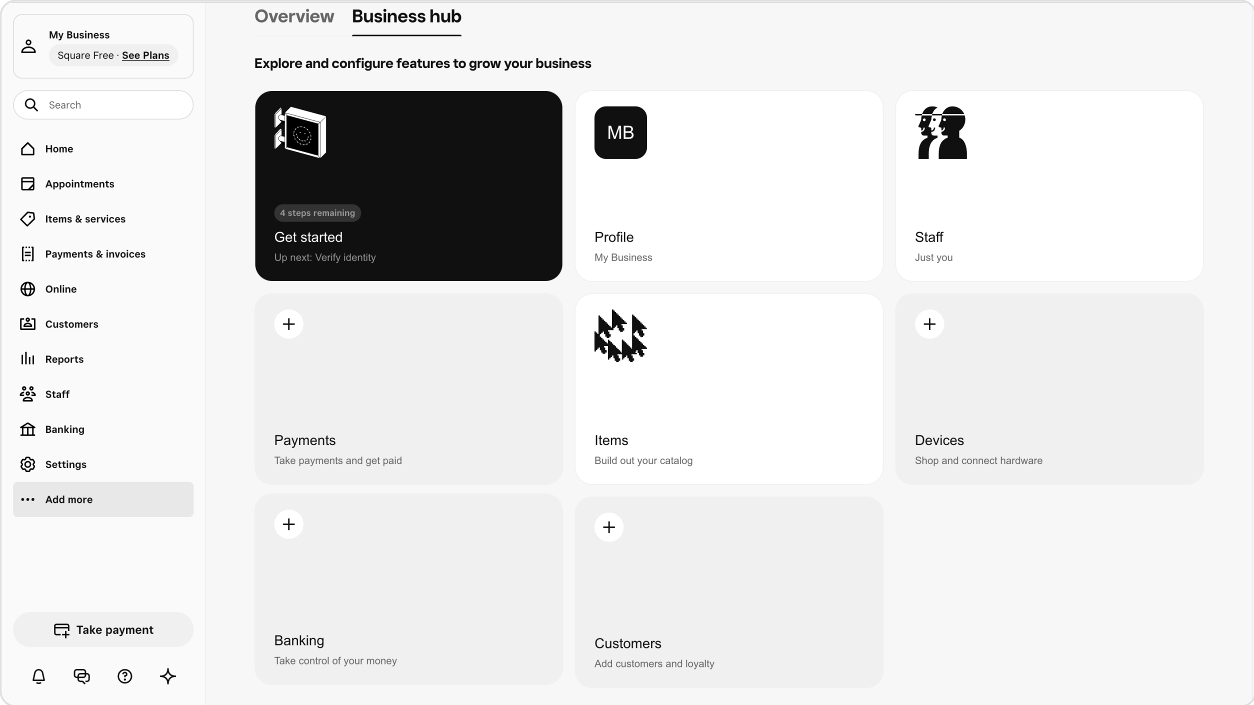
1. Log in to your Square Dashboard at **https://squareup.com/dashboard**
2. In the left sidebar, click **... Add more**
3. Select the **Bookings** tab at the top
4. Click the **Add** button



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



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

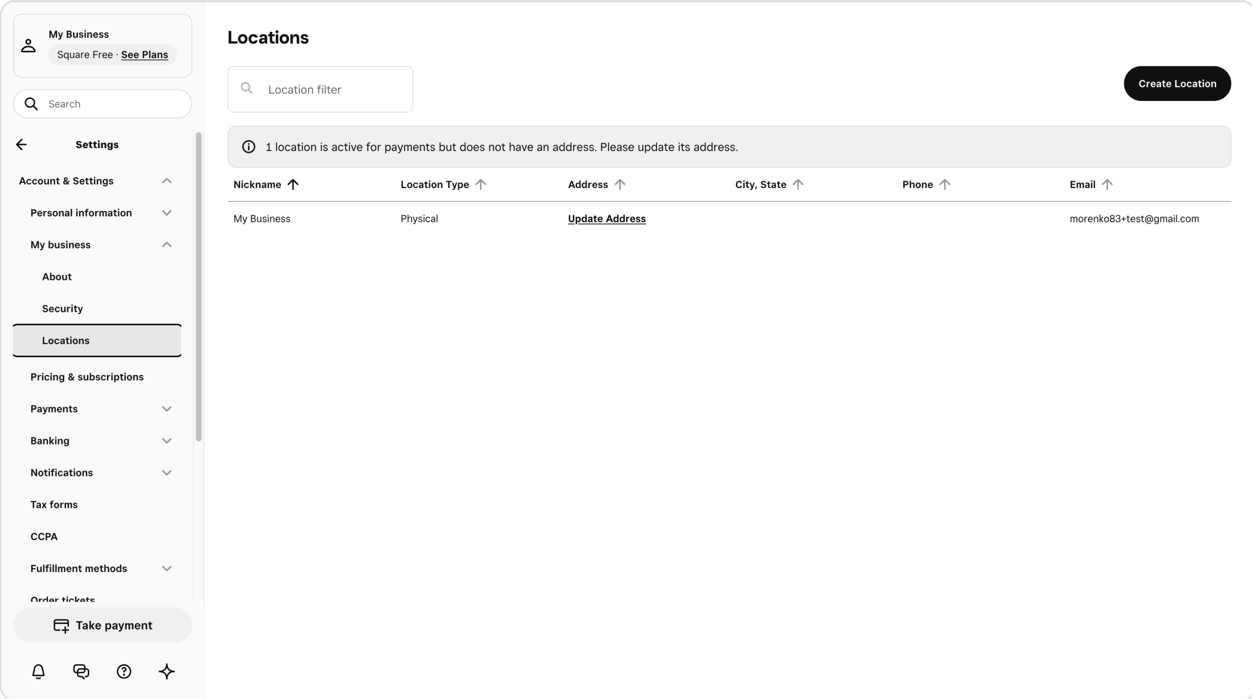


> If you already see "Appointments" in the left sidebar, skip this step — it's already enabled.

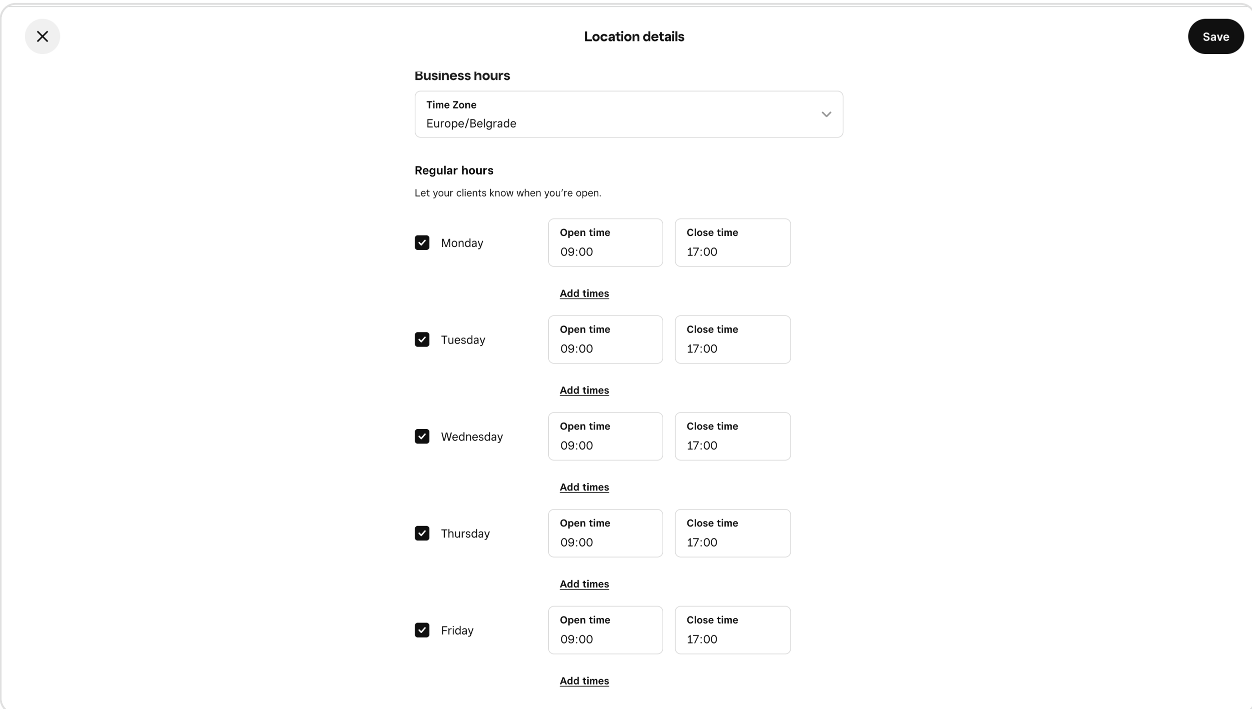
Step 2. Configure Your Business Location

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



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



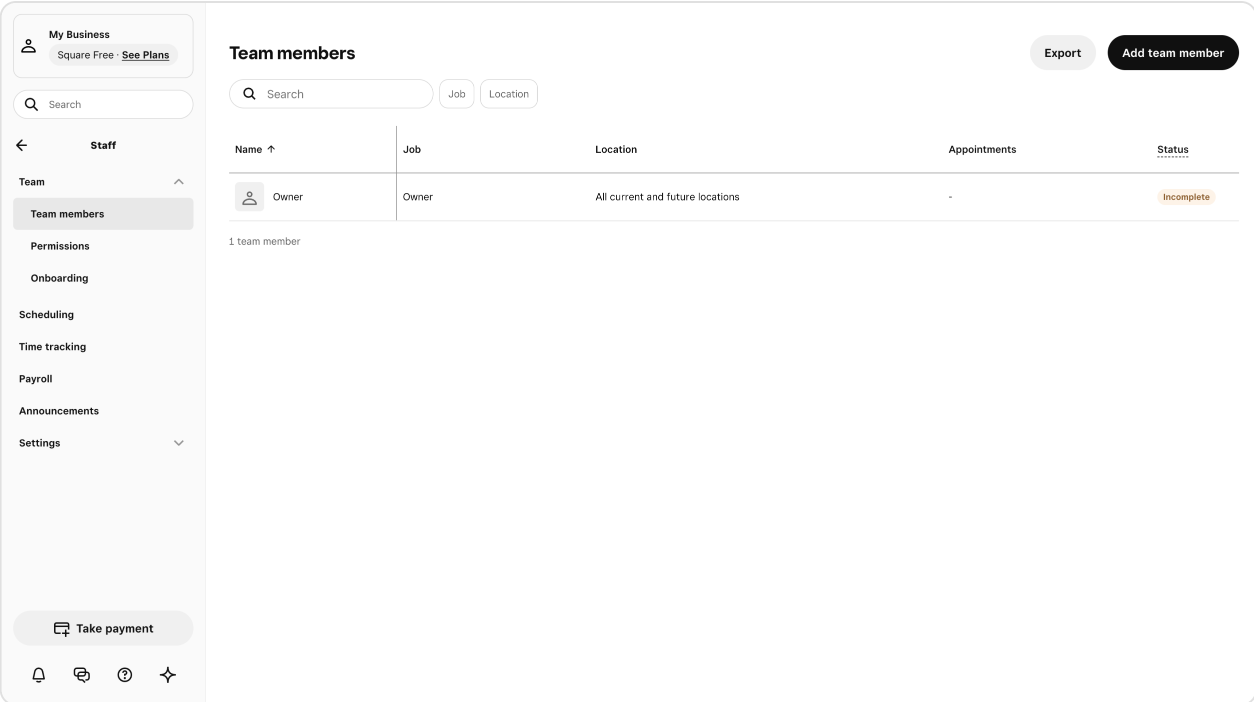
1. Click **Save**

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

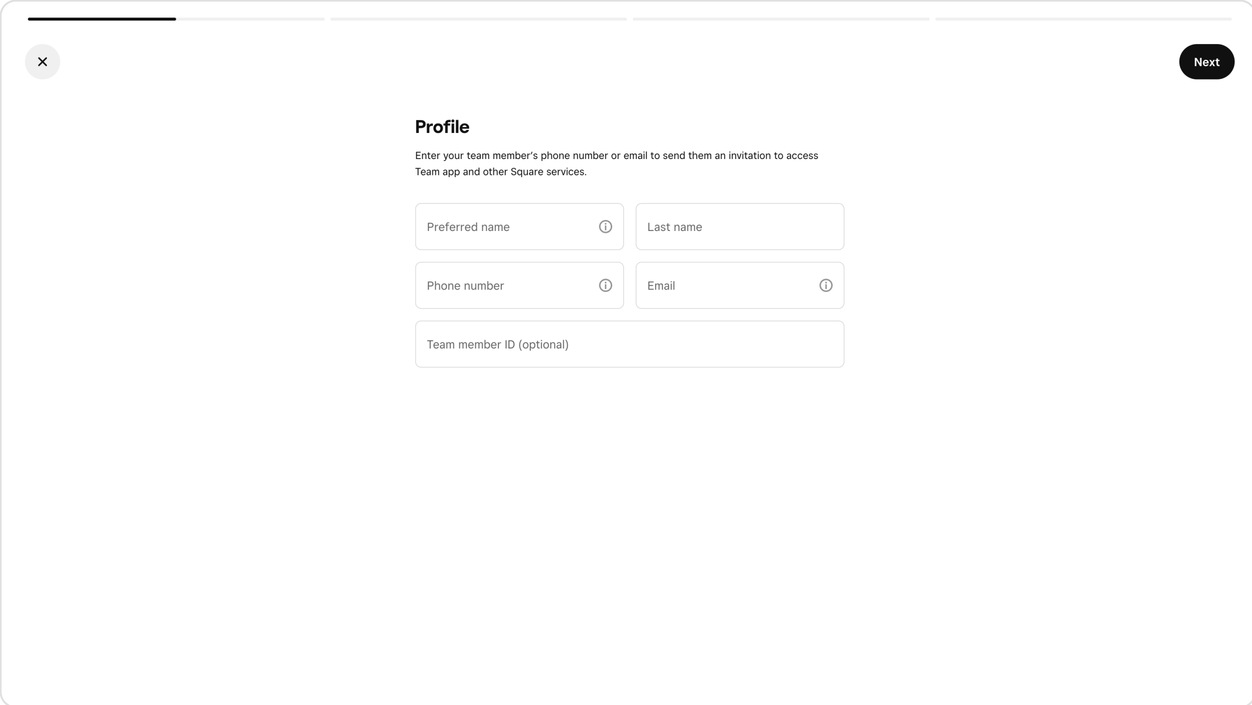
Step 3. Add Team Members

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

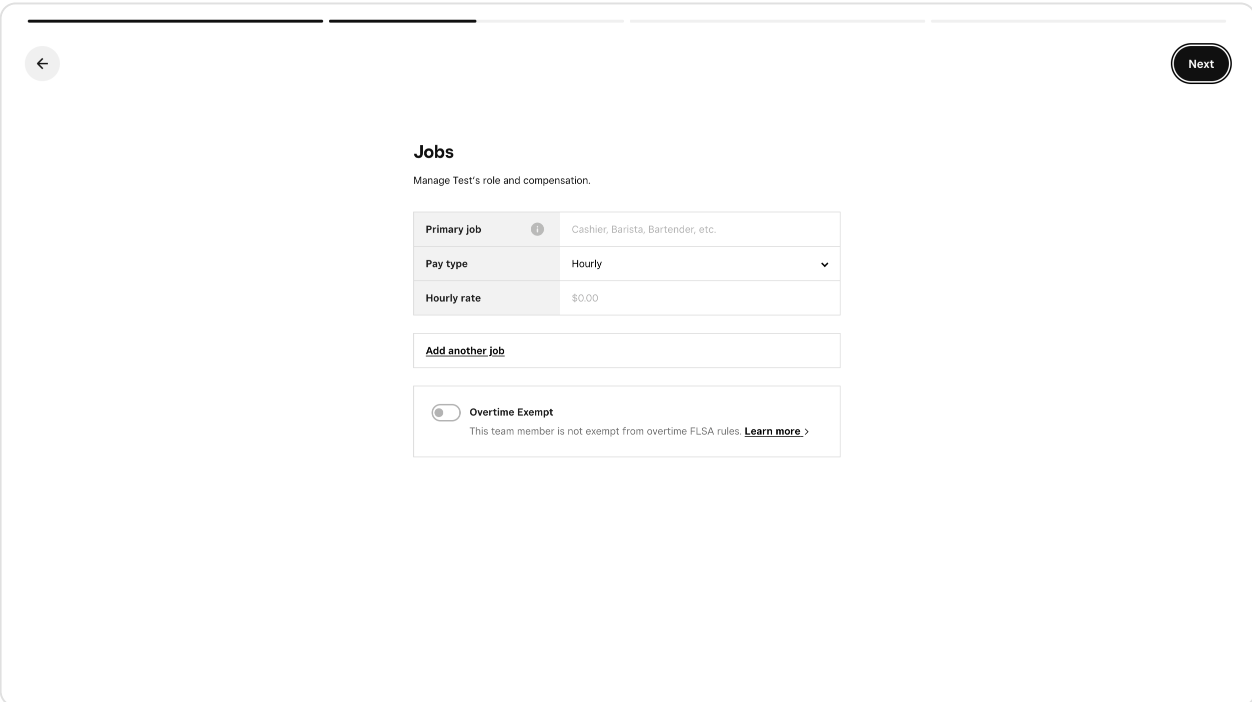
1. Go to **Staff → Team → Team members**



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



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

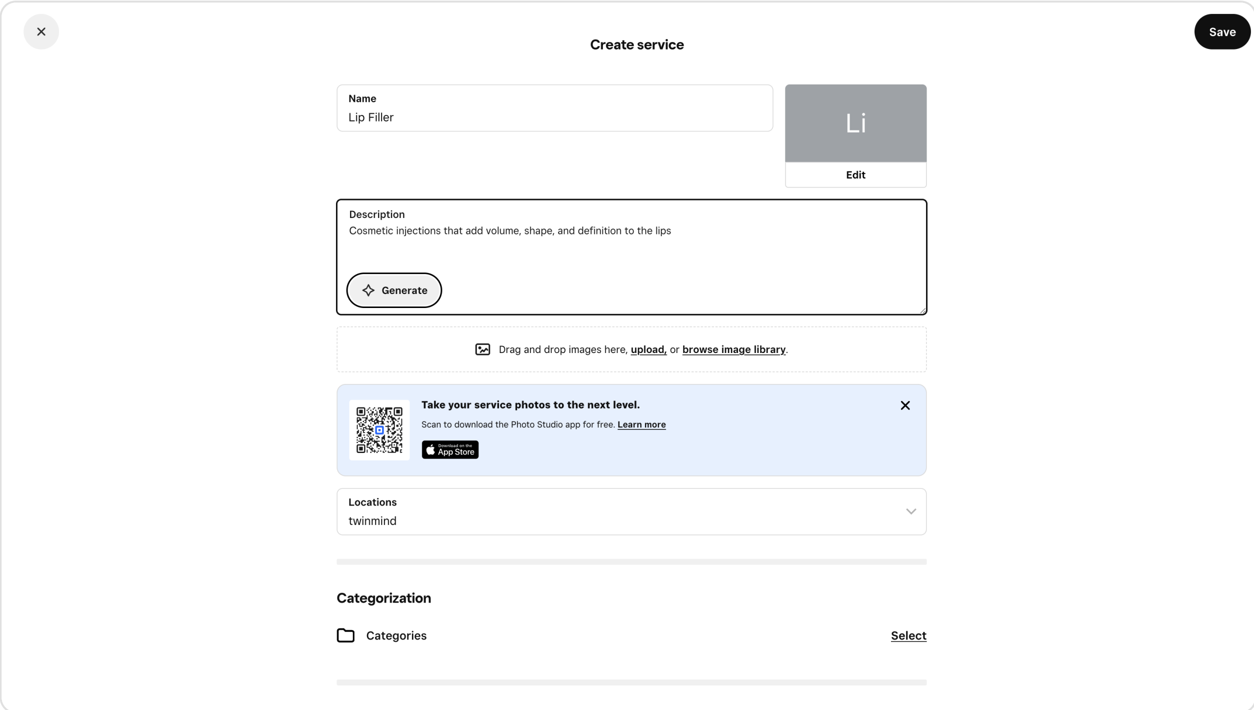


1. Click **Next** → Set permissions → Click **Done**
2. Repeat for each staff member who should accept bookings

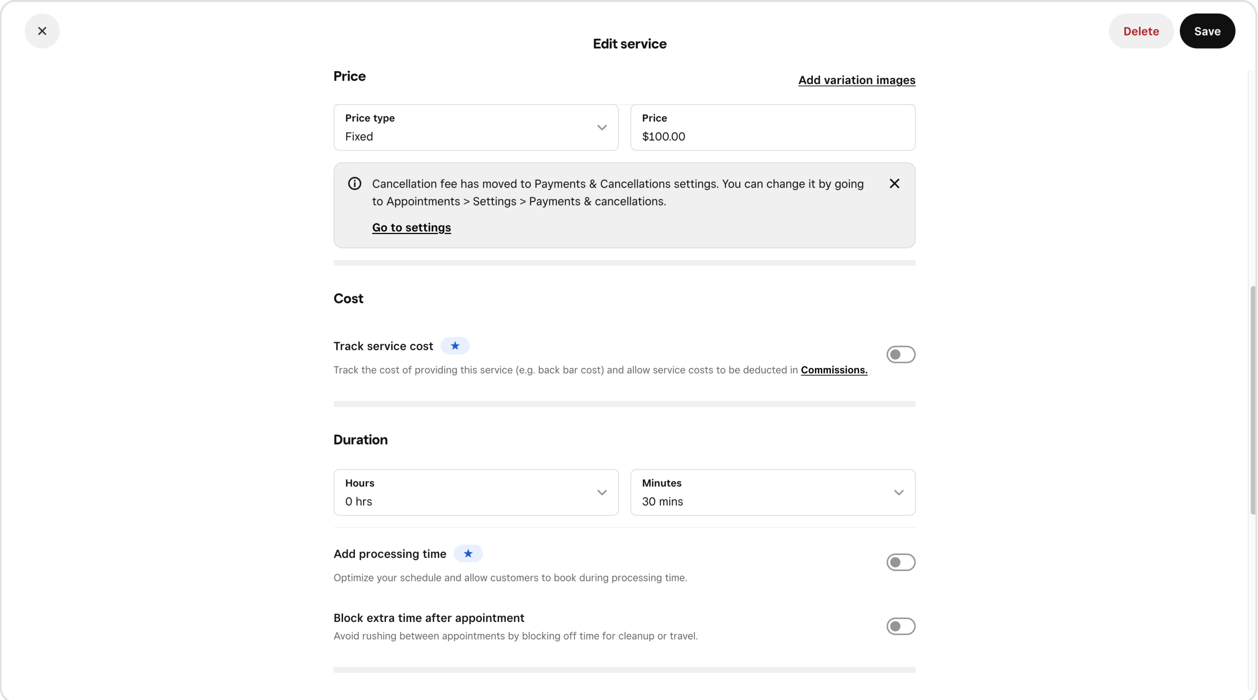
Step 4. Create Services

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

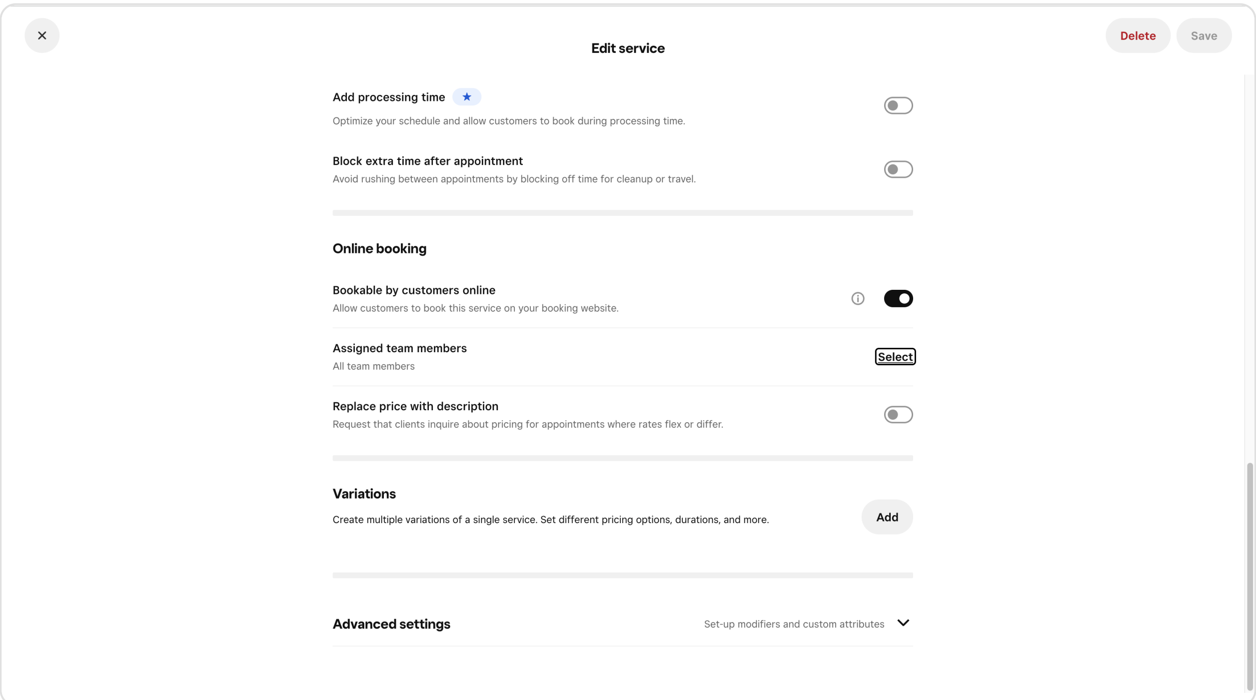
1. Go to **Items & services** → **Items** → **Service library**
2. Click **Create service**
3. Fill in:
4. **Name** — what clients will see (e.g., "Lip Filler")
5. **Description** — describe the service in detail (the AI uses this to understand what clients are asking for)
6. **Locations** — select your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



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)



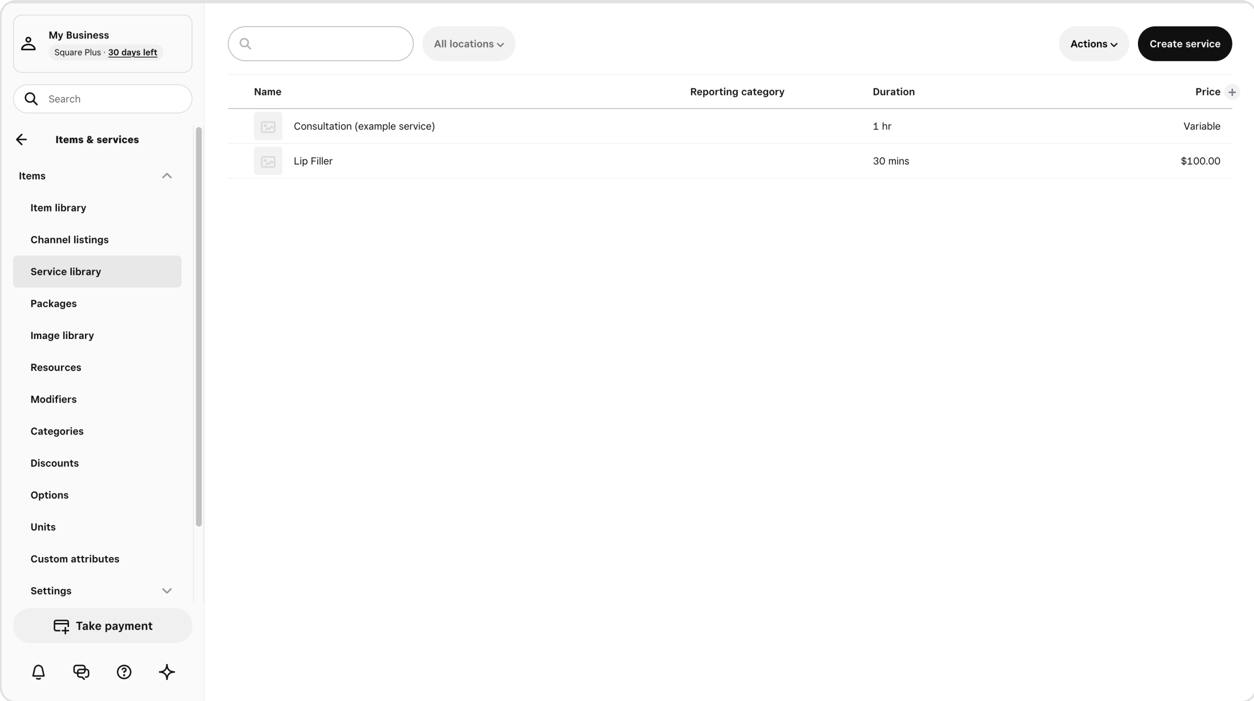
1. Scroll down to the **Online booking** section and verify:
2. **Bookable by customers online** — must be **ON** (enabled)
3. **Assigned team members** — by default set to "All team members". Click **Select** if you need to limit which staff can perform this service.



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:

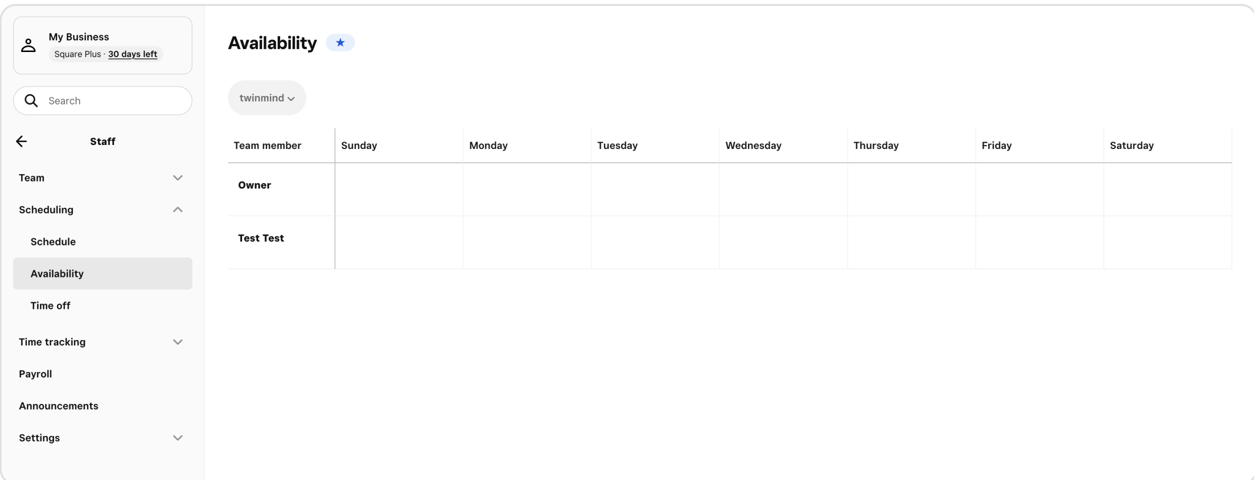


> **Tip:** Write detailed descriptions! The AI matches what clients say (e.g., "I want fuller lips") to your services by reading these descriptions.

Step 5. Set Team Member Availability

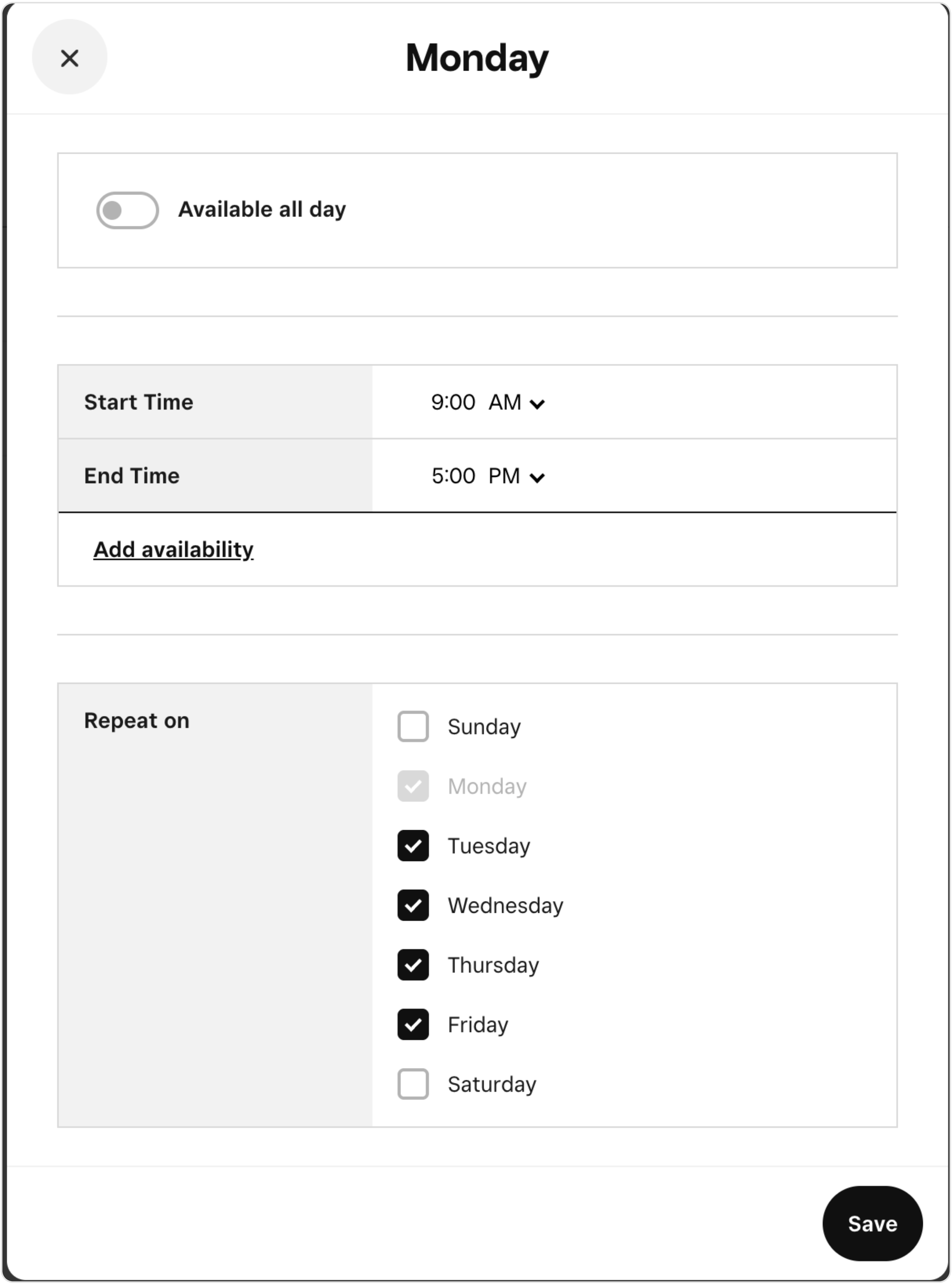
This is the most important step! Without availability, the AI assistant won't find any open slots.

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

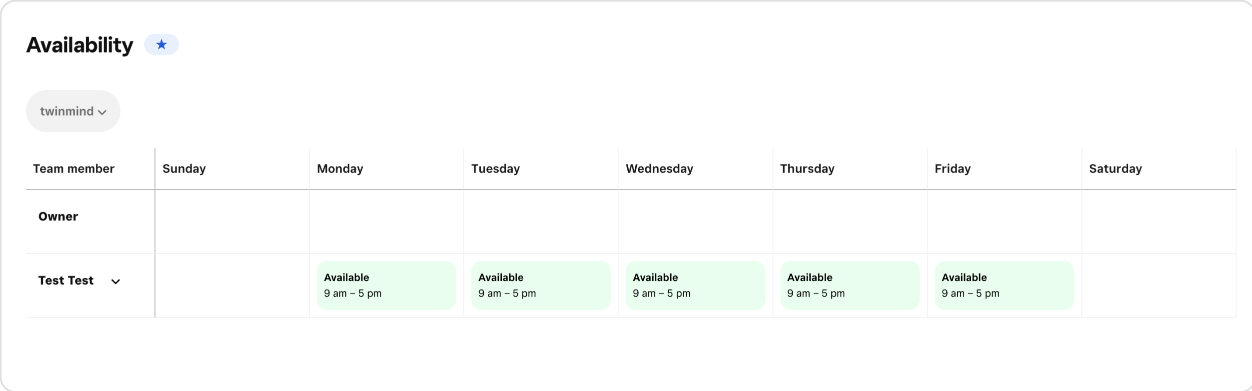


1. Click on a day cell for a team member (e.g., click Monday for "Test Test")
2. Set:
3. **Start Time** — e.g., 9:00 AM
4. **End Time** — e.g., 5:00 PM

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



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



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

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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.