JOBLEDGERHQ

Taking Square Payments

Record every Square sale in JobLedger for clean, audit-ready books

When to use Square

Use Square when you take a card on the jobsite with a Square Reader or Terminal, or send your customer a Square payment link. Use Stripe for the Pay Online button on JobLedger invoices. Both can be used side by side.

1. **Take the payment in Square**
   Charge the card on your Square Reader, Terminal or app, or send a payment link.
2. **Copy the receipt number**
   In Square, open the sale and copy the receipt # or transaction ID.
3. **Open the invoice in JobLedger**
   Go to Invoices and tap the invoice the customer paid.
4. **Tap Record payment**
   Enter the amount and the date you were paid.
5. **Choose Square**
   Pick Square from the payment method list.
6. **Paste the reference**
   Paste the Square receipt # so it matches your Square report.
7. **Save**
   Balance and status update automatically; the job timeline shows the payment.

Square vs. Stripe in JobLedger

	Square	Stripe
Where used	Jobsite reader, Square link	Pay Online on invoice
Recorded	You record it	Automatic
Best for	In-person card	Remote card / bank

Tips

- Partial payment? Record just the amount you received. The rest stays due.
- Square fees are taken by Square. Record the full amount the customer paid.
- Reconcile monthly: match Square receipt numbers to JobLedger payment history.
- Never type full card numbers into JobLedger notes.