

Oracle® Retail Xstore Point of Service Self Checkout User Guide



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Oracle Retail Xstore Point of Service Self Checkout User Guide, Release 25.0

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Oracle Retail Xstore Point of Service Self Checkout Guide, Release 25.0.

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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Preface

Oracle Retail Xstore is point of sale (POS) software. This guide describes the activities supported by Oracle Retail Xstore Self Checkout.

Audience

This guide is intended for retailers that want to implement the Xstore Self Checkout system.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Retail Xstore Suite Release 25.0 documentation set:

- *Oracle Retail Xstore Suite Release Notes*
- *Oracle Retail Xstore Suite Implementation and Security Guide*
- *Oracle Retail Xstore Suite Deal Pricing Guide*
- *Oracle Retail Xstore Point of Service User Guide*
- *Oracle Retail Xstore Point of Service Classic User Guide*
- *Oracle Retail Xstore Point of Service Classic Manager's Guide*
- *Oracle Retail Xstore Point of Service Classic Shipping, Receiving, and Inventory Guide*
- *Oracle Retail Xstore Point of Service Reports Guide*
- *Oracle Retail Xstore Point of Service Frameworks and Technologies Guide*
- *Oracle Retail Xstore Point of Service Services Guide*
- *Oracle Retail Xstore Point of Service Technical Guide*
- *Oracle Retail Xstore Point of Service Host Interface Guide*
- *Oracle Retail Xstore Point of Service POS Log Files*
- *Oracle Retail Xstore Point of Service Database Dictionary Guide*

- *Oracle Retail Xenvironment User Guide*
- *Oracle Retail Xstore Suite Country Accelerator User Guide*
- *Oracle Retail Xstore Suite Country Accelerator Technical Guide*

Customer Support

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<https://support.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 25.0) or a later patch release (for example, 25.0.1). If you are installing the base release or additional patches, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced at the Oracle Help Center (OHC) website, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available at the Oracle Help Center at the following URL:

<https://docs.oracle.com/en/industries/retail/index.html>

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number F123456-02 is an updated version of a document with part number F123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Retail Documentation at the Oracle Help Center

Oracle Retail product documentation is available on the following website:

<https://docs.oracle.com/en/industries/retail/index.html>

(Data Model documents are not available through Oracle Help Center. You can obtain them through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Self Checkout Register

To avoid queues at a manned register, Xstore has a fixed Self Checkout register. The Xstore Self Checkout register allows the customer to scan items and pay without the need for an associate to be present. The Self Checkout will accept Credit cards, Debit cards, Oracle Retail Customer Engagement Gift Cards, Oracle Retail EFTLink Gift cards, and Digital wallets as Tender types. Self Checkout is available for retailers using register accountability mode in their stores.

These Xstore Self Checkout registers allow:

- Self-scanning of items by customers
- Non-barcoded items to be added to the sale via lookup
- Manual entry/keying of barcodes and SKUs
- Coupon scanning
- Loyalty card scanning
- Payment by debit, credit, Oracle Retail Customer Engagement gift card, Oracle Retail EFTLink gift cards, and digital wallet
- Receipt printing and/or email receipt
- Prompt for the number of carrier bags used to include in purchase
- Prompt for charity round up
- Airside

For more information, see the *Oracle Retail Xstore Suite Country Accelerator User Guide* and *Oracle Retail Xstore Country Accelerator Technical Guide*

- 24/7 Trading
- Joining Loyalty
- [Self Checkout Console](#)

The Self Checkout User Interface is available for:

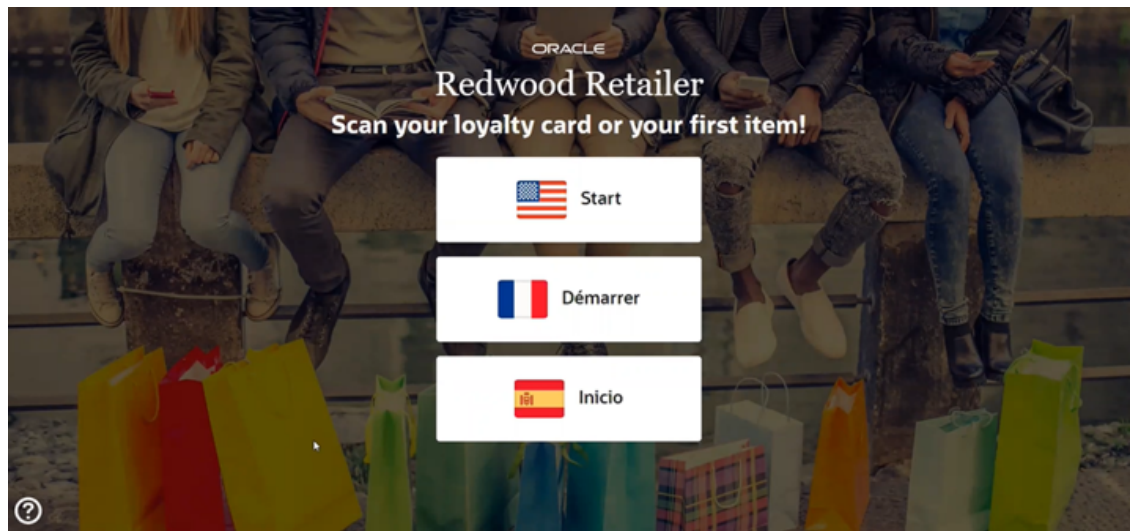
- Canada
- United Kingdom
- Mexico
- Spain
- Portugal
- Australia
- China
- South Africa
- Switzerland
- Belgium
- Netherlands

- Ireland
- New Zealand
- Austria
- Brazil
- Sweden
- Chile

The Self Checkout supports a standard sale and the associate functions for the standard sale.

To accommodate self checkout in tourist areas, the system language in the Self Checkout home screen can be changed to another pre-set language by selecting the appropriate language. Up to nine languages may be shown on the Self Checkout home screen. Please see [Change Language](#) for more information.

Figure 1-1 Self Checkout Home Screen



The home screen is the screen that is displayed before a customer has begun a transaction.

Occasionally a customer issue needs resolving at the register during a sale. This may be to verify the sale of age restricted items, change price to match a competitor, to cancel an item or sale, or to suspend a transaction. Please see [Associate Functions](#) for more information.

2

Customer Functions

The process of a sale on the Self Checkout is in two parts - the customer needs to scan their items, and secondly to pay for them. Loyalty members can swipe their loyalty card or enter their email or phone number to associate the transaction. Depending on configuration, the number of carrier bags used, and round up for charity may be prompted for. From the home screen the customer language may be changed.

The section describes the following topics that a customer can perform:

- [Assistance](#)
- [Basic Sale](#)
- [Change Language](#)
- [Alternate Methods to Add Items](#)
- [Remove Last Item](#)
- [Coupons](#)
- [Loyalty](#)
- [Add Award Discounts](#)
- [Serial Number Items](#)
- [Tendering](#)

Assistance

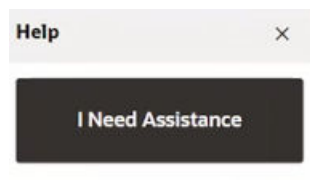
Assistance can be called at the start of a transaction or at any time during a transaction.

On the home screen select

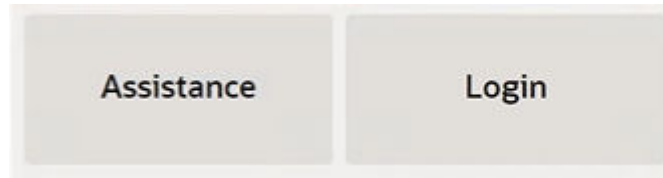


to bring up access to the assistance button. You can then select **I Need Assistance** button and wait for an associate.

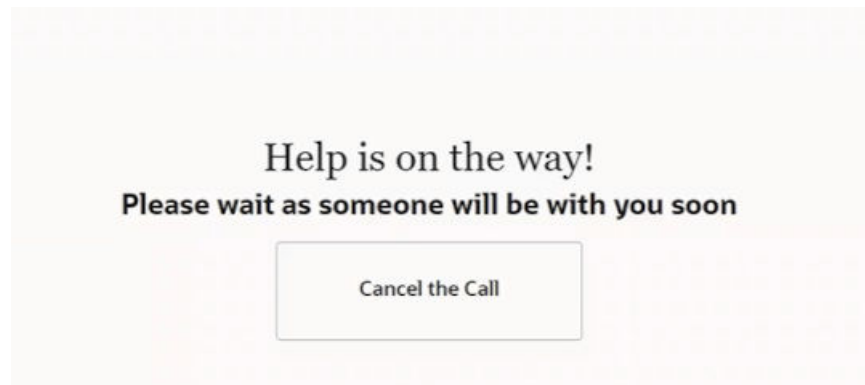
Figure 2-1 Assistance Button from Home Screen



At any time in the transaction if help is needed, select **Assistance** and wait for an associate.

Figure 2-2 Assistance Button During Transaction

If the help is no longer required, select **Cancel the Call** to cancel the alert.

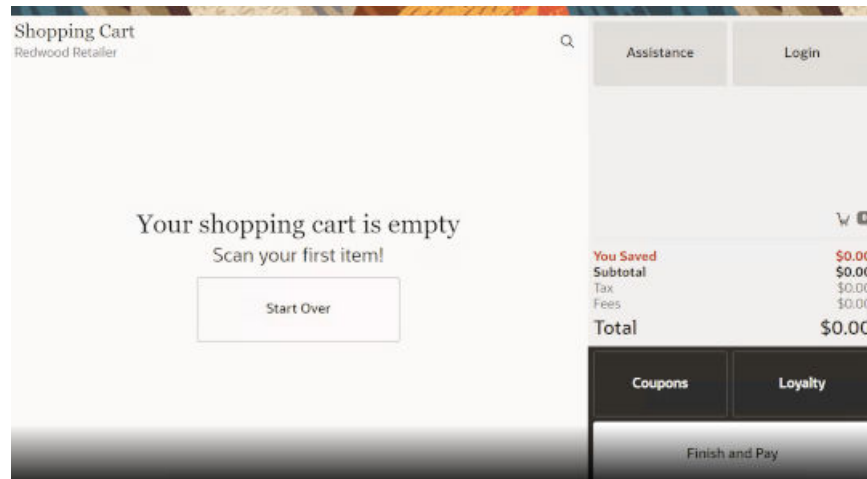
Figure 2-3 Associate Alerted

Occasionally a customer issue needs resolving at the register during a sale. This may be to verify the sale of age restricted items, change price to match a competitor, to cancel an item or sale, or to suspend a transaction. Please see [Associate Functions](#) for more information.

Basic Sale

To perform a self checkout sale:

1. From the [home screen](#), scan the first item, or scan loyalty card, or select **Start** to begin the sale.

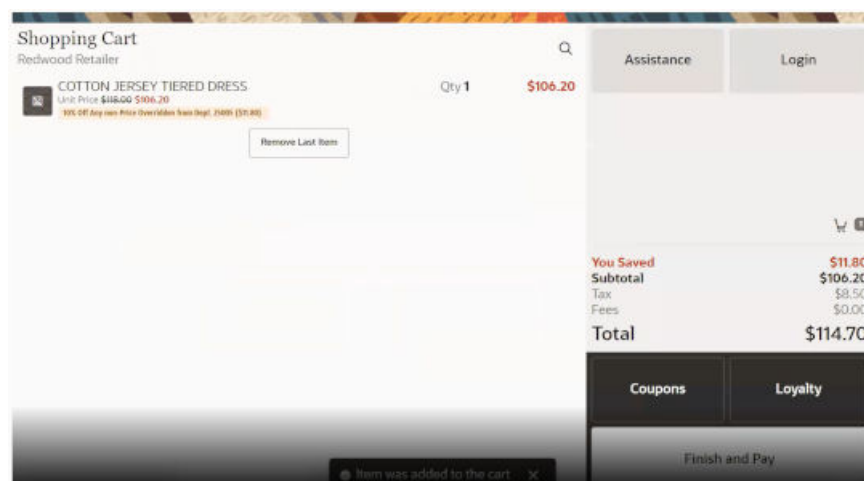
Figure 2-4 Customer View of Shopping Cart Before Item Scanned

If the store has a loyalty program, the customer can scan their loyalty or customer card to begin their transaction. After scanning the loyalty or customer card, a loyalty symbol displays to the left of the shopping cart and the loyalty button removed from view.

Note

If a previous customer has started a sale but has walked away and left the Self Checkout with maybe a loyalty card scanned, select **Start Over** to begin a transaction.

2. With a fixed or handheld scanner a customer can scan items to add to their shopping cart.

Figure 2-5 Self Checkout Item Added

The item is added to the shopping cart. Details of the item added such as, description, unit price, quantity, discounts, and total price are displayed in the view port.

3. Repeat scanning items to add more items to the shopping cart.

If a second item is scanned, a second line is shown. Each item scanned results in a new line showing in the view port with the newest item shown on top.

Kits

Note

If an item is part of a Kit then all the items are added automatically as a list under the Kit Name.

CE Gift Cards / EFTLink Gift Cards

A gift card is displayed as a line item in the shopping cart. The gift card is activated and ready to use after the customer tenders the transaction.

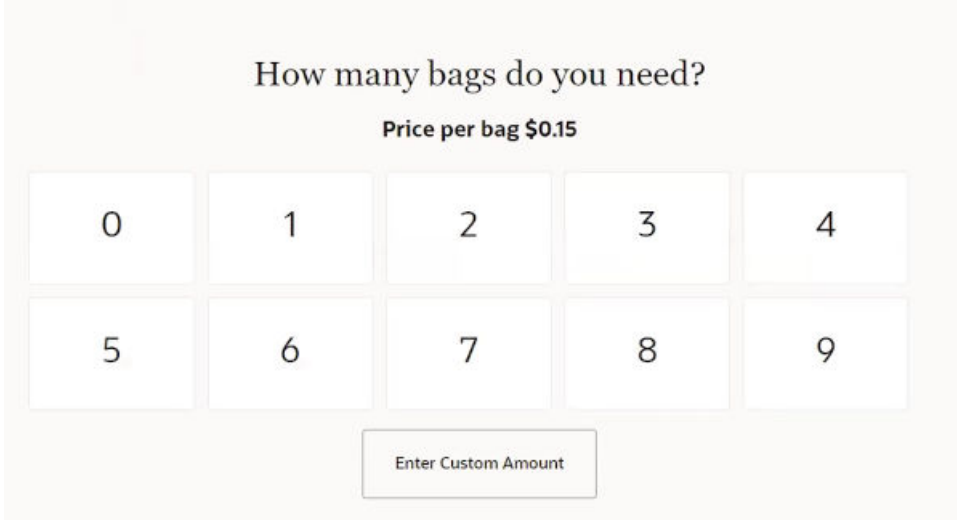
4. Scan any coupons. The discount is recorded, and the transaction total amount is updated if there are applicable items on the cart or when the applicable items are added to the cart.

Please see [Coupons](#) for more information.

5. When all items have been scanned and loyalty and coupons recorded, select **Finish and Pay** to start the tendering process.

Retailers can configure bags to be purchased at the Self Checkout. The customer can select the number of bags they will purchase or they can enter a custom number of bags they will purchase.

Figure 2-6 Bags Used Prompt



The image shows a digital prompt for selecting the number of bags. At the top, it asks "How many bags do you need?". Below this, it states "Price per bag \$0.15". There are two rows of buttons: the first row contains buttons for 0, 1, 2, 3, and 4; the second row contains buttons for 5, 6, 7, 8, and 9. At the bottom center, there is a button labeled "Enter Custom Amount".

The cost of each bag is displayed on the prompt. A preset list of number of bags is presented for the customer to select from or a customer can select the button labeled **Enter Custom Amount** where they can enter a number value if they need.

Figure 2-7 Enter Number of Bags you need

Enter the number of bags you need

Bag Quantity

1 2 3

4 5 6

7 8 9

0

Backspace icon

Left Arrow icon

6. If prompted, select whether to donate and round up for charity.

This will round up their total purchase to the next whole dollar by donating the amount which would always be less than one dollar. The donation could be from .01 to .99 cents - whatever amount is needed to make the next whole number.

Figure 2-8 Round up for Charity Prompt

Would you like to round up for charity?

Donate \$0.50 to Charity?

No

Yes

If **Yes**, the donation is shown and the transaction total updated.

7. Self Checkout displays the tender selection screen. Select the tender type to pay with. The Self Checkout will accept Credit cards, Debit cards, Oracle Retail Customer Engagement Gift cards, Oracle Retail EFTLink Gift cards, and Digital wallets as Tender types.

See [Tendering](#) for more information.

8. The Self Checkout displays a message to follow the prompts on the pin pad.
9. The payment terminal (PED) displays the transaction amount due and instructs the customer to insert or tap their payment card.

Once the payment process is complete the "Receipt Required?" message appears.

Note

Your retailer sets the receipt options for the store. Options include:

- Gift Receipts
- Print
- Email
- Print & Email
- No Receipt

Figure 2-9 Receipt Required?

The screenshot shows a screen titled "Payment Complete" with a checkmark icon. Below the title is the question "How would you like your receipt?". Underneath this is a toggle switch labeled "Also Issue Gift Receipts" which is currently turned off. At the bottom, there are four buttons arranged in a 2x2 grid: "Print", "Email", "Print & Email", and "No Receipt".

- Optional:** Click the Also Issue Gift Receipts **toggle** to activate the feature.
 - If Also Issue Gift Receipts Toggle is set to **ON** proceed to Step 11.
 - If Also Issue Gift Receipts is set to **OFF** proceed to Step 12.
 -
- Click one of the following receipt delivery methods then proceed to [Step 13](#):
 - Print
 - Email
 - Print & Email
 - No Receipt - No receipt is printed and the [Thank You Message](#) displays.
- Complete the following steps if the Also Issue Gift Receipts toggle is **OFF**.
 - Print - Proceed to [Thank You Message](#).
 - Email - Proceed to [Step 15](#).

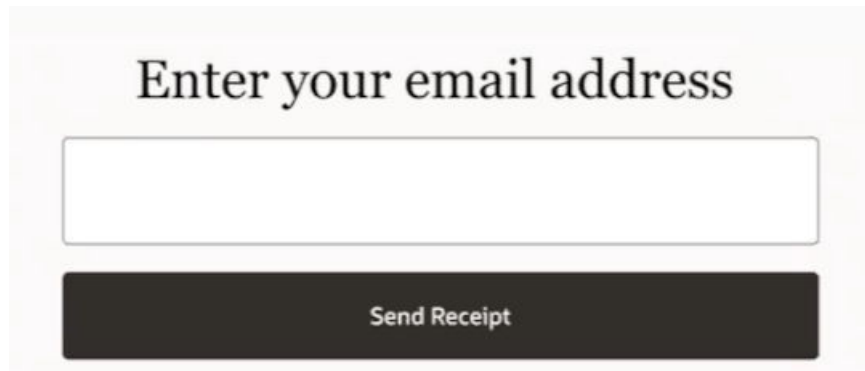
- Print & Email - Proceed to [Step 15](#).
13. Select the Items that require a gift receipt.
- One or More Items - Select the check box in each row that requires a gift receipt.
 - All Items - Select the check box in the header column and proceed to the next step or Click **Issue All** and proceed to [Figure 2-11](#).

Note

If no items are selected you are presented with a message indicating you must select an item or select Skip after clearing the message. If you select Skip no gift item receipts are printed and the transaction completes based on your choice in [Step 11](#)

14. To confirm the choices click **Issue Selected**.
15. If Email or Print & Email is selected, the customer is prompted to enter their email address and to select **Send Receipt**.

Figure 2-10 Email Address Prompt



The image shows a user interface prompt titled "Enter your email address". Below the title is a rectangular text input field. At the bottom of the prompt is a dark rectangular button with the text "Send Receipt" in white.

If the email address is different to that what is on file, the customer may be prompted to save the email address to their customer record for future use. The customer's email address will prepopulate with this new email address at their next shop.

Figure 2-11 Update Account

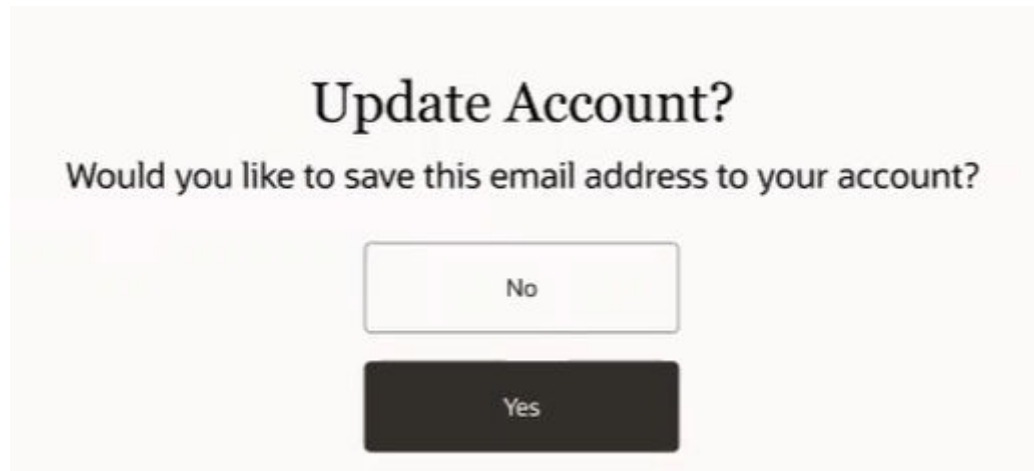
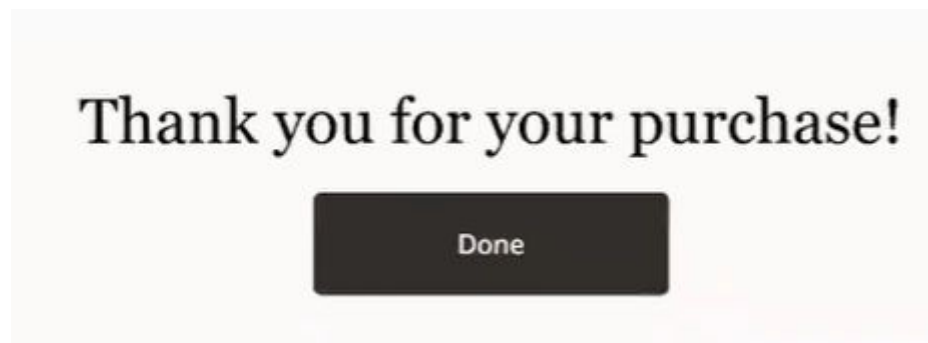


Figure 2-12 Thank You Message

**Note**

The self checkout register will print to the printer configured on the mobile server. The transaction is cleared from the screen and the Self Checkout is ready for the next transaction.

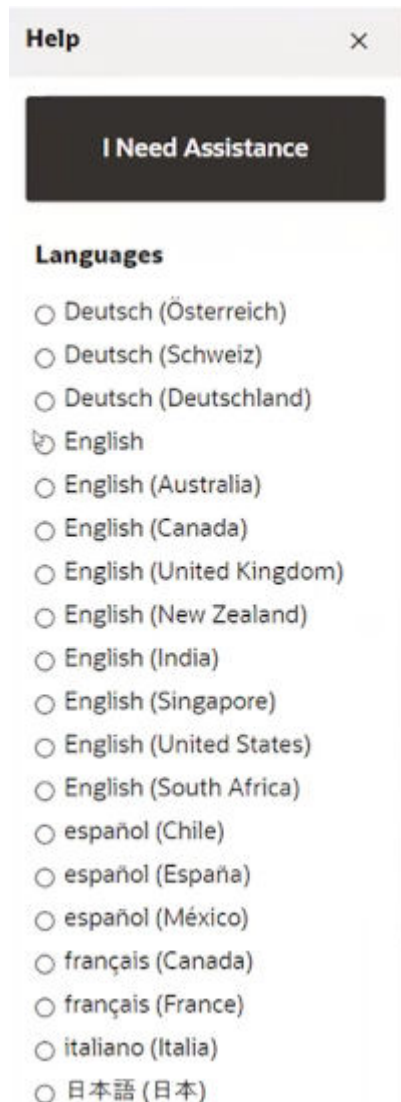
Change Language

To accommodate self checkout in areas with multiple languages, the system language in the Self Checkout home screen can be changed to another pre-set language by selecting the appropriate language. Up to nine languages may be shown on the Self Checkout screen as buttons.

On the home screen select



to bring up access to the assistance button and a list of languages. Select a language.



The next screen/ the shopping cart screen will be in the new language. The language chosen by the customer remains throughout the rest of the sales transaction. If an associate needs to login, the language will default to the language of the associate.

Alternate Methods to Add Items

If items cannot be scanned in because there is no barcode on the item, or the barcode is damaged, the identification of the item can be added by an alternative method:

- [Lookup Item](#)

Once the item has been added, continue the sale (see Step [3](#) above), or complete the sale by selecting **Finish and Pay**.

Lookup Item

To find items that do not have a barcode, such as bakery items, for example, croissants, or self service hot drinks:

1. Select the **Magnifier** icon.

Figure 2-13 Find Items



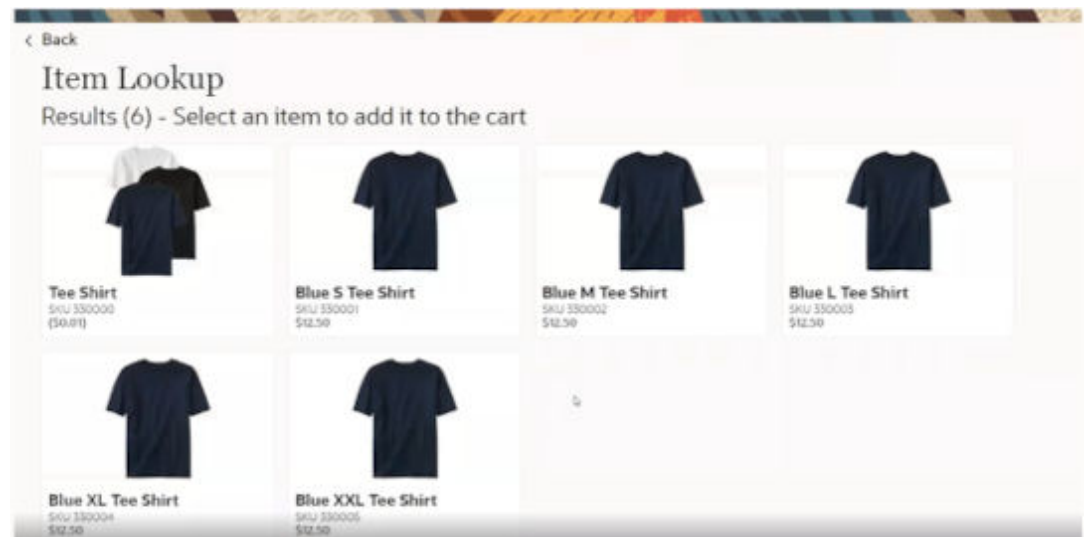
What item would you like to find?

Item ID

Process

2. Enter SKU or item ID and select **Process**.

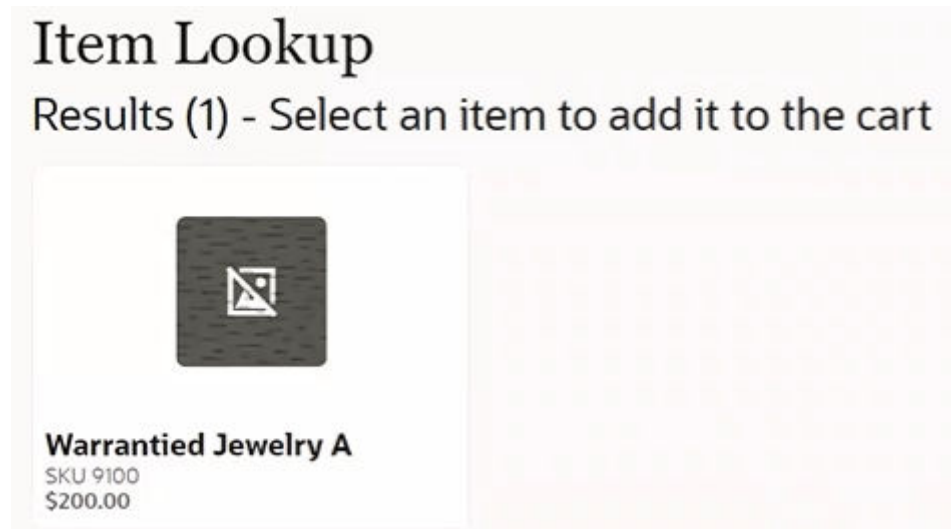
Figure 2-14 Item Lookup Result



Note

Product images are supported.

Figure 2-15 Item Lookup Result — No Product Image



3. Select an image icon to add the item to your shopping cart.

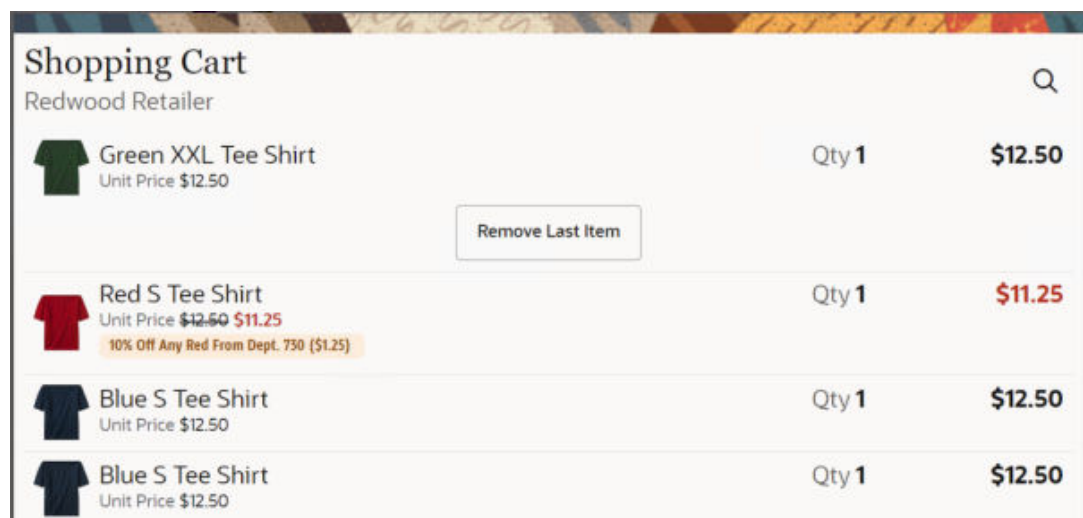
Remove Last Item

If an item has been double scanned or the customer has changed their mind after scanning the item, and if configured, the customer can remove just the last item from their shopping cart.

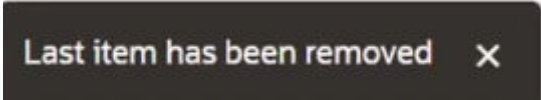
To remove the last item from the transaction before payment:

1. Select **Remove Last Item**.

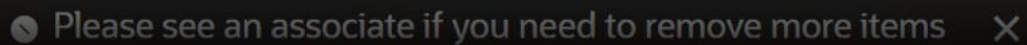
Figure 2-16 Remove Last Item



The item is removed from the transaction and the last item has been removed message is displayed.

Figure 2-17 Last Item Removed Message

If you select **Remove Last Item** again, the following message is shown:

Figure 2-18 Remove More Items

2. Continue scanning items or select **Finish and Pay**.

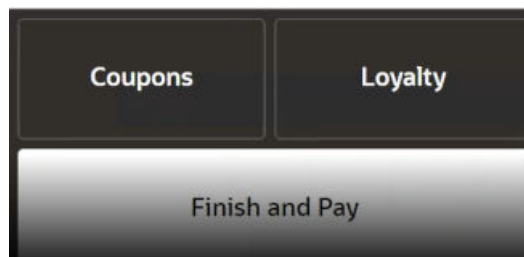
Coupons

After scanning items the customer can scan coupons that they may have and apply them to their transaction. A coupon can be scanned directly and applied to the transaction without hitting the **Coupons** button and can also be scanned/entered before the item has been scanned.

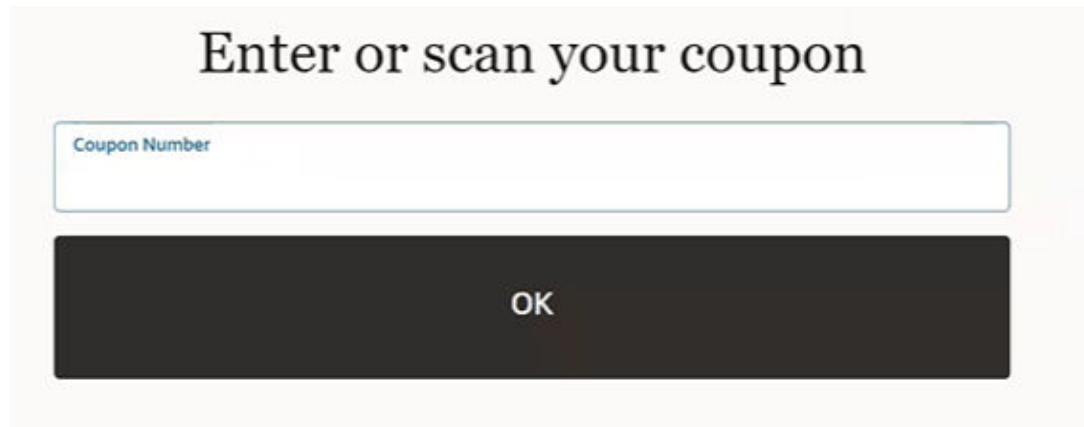
A message is shown to acknowledge the coupon has been scanned.

Figure 2-19 Coupon Scanned Message

1. Alternatively, a customer can select **Coupons** from the transaction screen to start the process.

Figure 2-20 Coupons Button

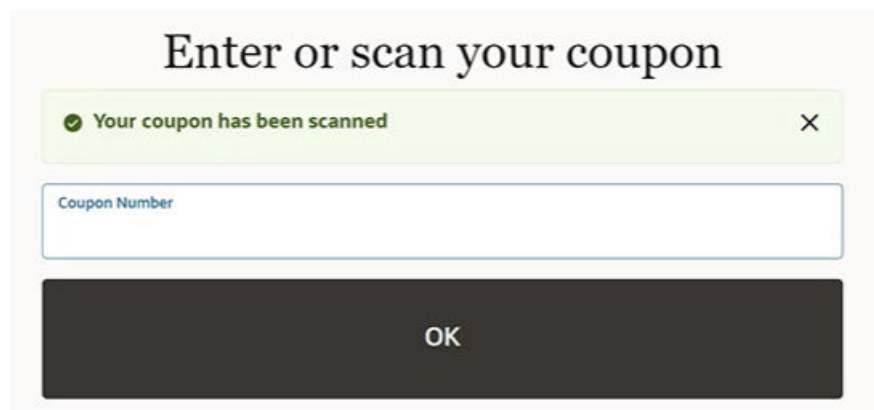
Self Checkout displays a message to the customer to enter or scan their coupons.

Figure 2-21 Enter or Scan your Coupon Prompt

At the scan of a successful coupon a message will display "Your coupon has been scanned."

Note

It does not mean that the coupon has been applied.

Figure 2-22 Successful Coupon Scan

2. Continue scanning coupons as required. You can scan coupons prior to scanning the product.

Also, a coupon can only be used once in the promotion.

Figure 2-23 Coupon Validation

Enter or scan your coupon

⛔ A coupon for this promotion is already present. Only one coupon of this type may be added to a transaction. ✕

Coupon Number

OK

3. After the customer has scanned all their coupons, they will need to select **Back**.
4. The system returns to the transaction screen with the coupon discounts displayed in the line items. The price of the item is reduced in the transaction list by valid coupon(s).

Figure 2-24 Coupons Applied

Shopping Cart
Redwood Retailer

Item	Qty	Price
Green XXL Tee Shirt Unit Price \$12.50	1	\$12.50
Red S Tee Shirt Unit Price \$12.50 \$11.25 10% Off Any Red From Sept. 7-30 (\$1.25)	1	\$11.25
Blue S Tee Shirt Unit Price \$12.50	1	\$12.50
Blue S Tee Shirt Unit Price \$12.50	1	\$12.50

You Saved **\$1.25**

Subtotal **\$48.75**

Tax \$3.90

Fees \$0.00

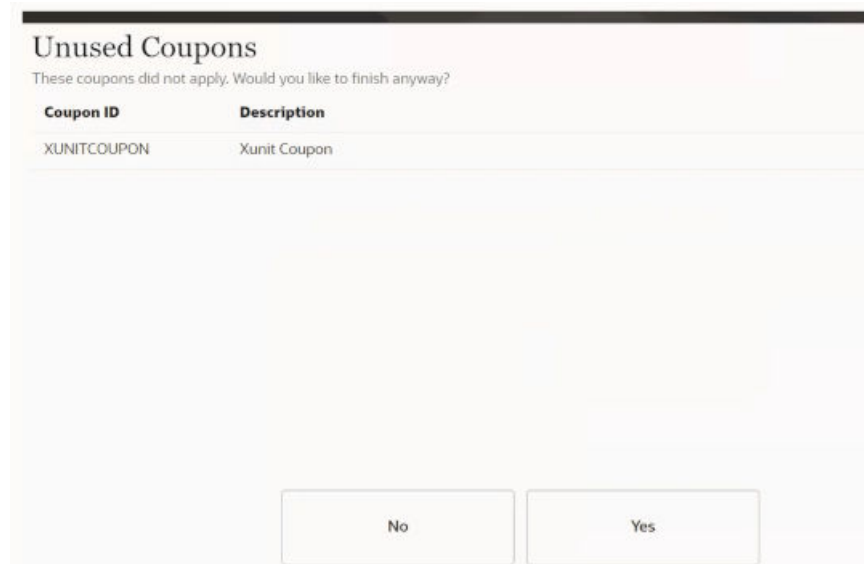
Total **\$52.65**

Coupons Loyalty

Finish and Pay

5. Continue to tendering.

Any unused coupons are displayed before the end of a transaction to give the customer a chance to use the coupon.

Figure 2-25 Unused Coupons

Loyalty

If your store has a loyalty program, the customer can scan their loyalty or customer card to begin their transaction. The loyalty card can also be scanned when the customer is in the shopping cart.

Alternatively, a customer can select **Loyalty** from the transaction screen to scan or lookup their loyalty information.

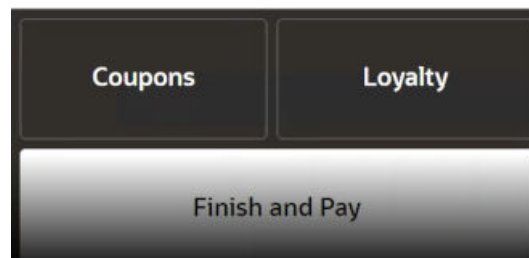
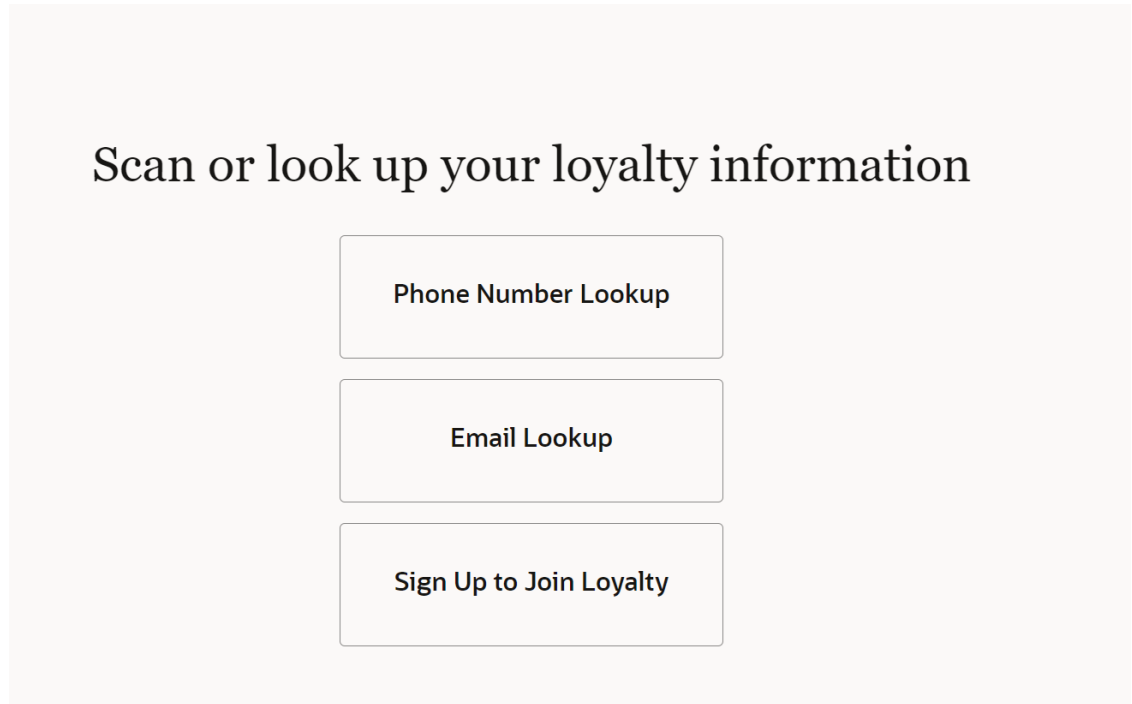
Figure 2-26 Loyalty Button

Figure 2-27 Scan or look up your Loyalty Information

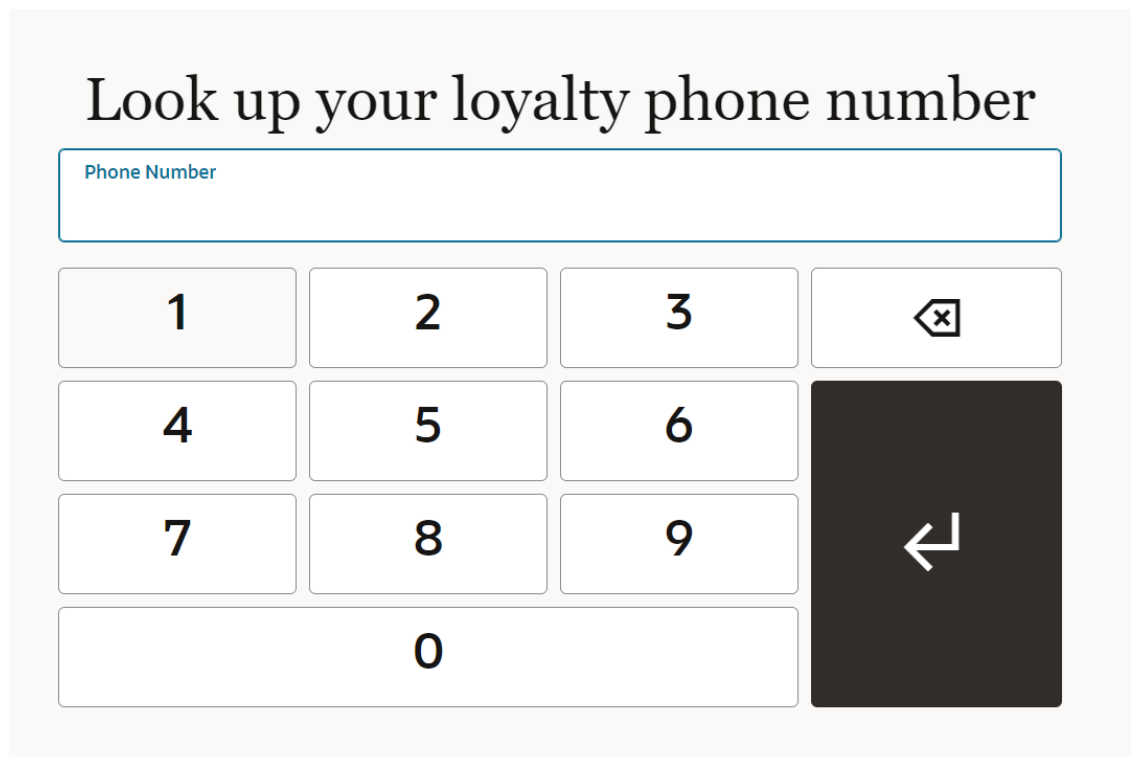
Scan or look up your loyalty information

Phone Number Lookup

Email Lookup

Sign Up to Join Loyalty

A customer can enter their email or phone number linked to their loyalty card to request association to the transaction.

Figure 2-28 Look up your Loyalty Phone Number

Look up your loyalty phone number

Phone Number

1 2 3

4 5 6

7 8 9

0

⬅️

⬅️

Figure 2-29 Look up your Loyalty Email

Look up your loyalty email

Email

Enter

After scanning the loyalty or customer card, or entering the details from the lookup, the transaction screen shows that the customer is Loyalty Member. Once a customer has attached their loyalty to the transaction the **Loyalty** button is removed from display on the Self Checkout screen.

Figure 2-30 Shopping Cart - Loyalty Member

Shopping Cart

Redwood Retailer

Your shopping cart is empty

Scan your first item!

Start Over

Assistance

Login

Loyalty Member

0

Total Saved

\$0.00

Subtotal

\$0.00

Tax

\$0.00

Fees

\$0.00

Total

\$0.00

Coupons

Finish and Pay

Sign Up to Join Loyalty

- Customers can join the loyalty program at a Self Checkout register.
- Xstore offers card centric and customer centric loyalty on Self Checkout registers.
- Card Centric Loyalty - Your store provides a physical card with a loyalty account number to the customer. The card's loyalty number may be entered manually or scanned on a device.

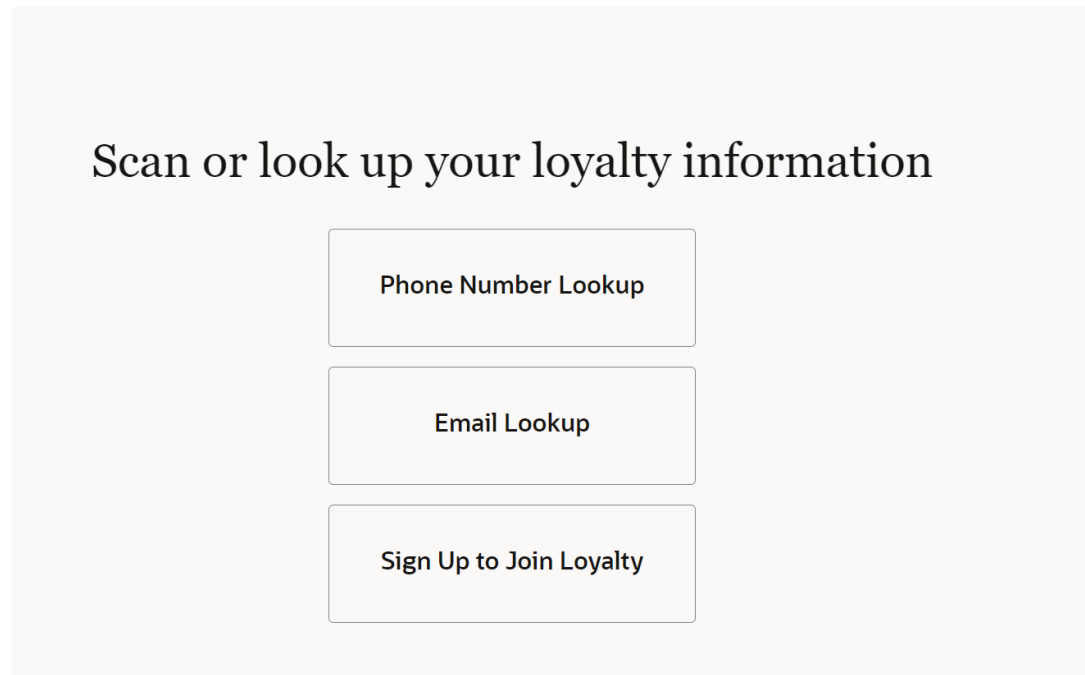
- Customer Centric Loyalty - Your store does not provide a physical card to the customer. The loyalty number is automatically assigned by the system and associated with the customer record.

If your store offers Card Centric Loyalty, the associate must scan or manually enter the loyalty number for the customer to join the program.

To sign up to join the loyalty program, follow the steps below.

1. From the home screen, select **Loyalty**. The Loyalty Lookup screen displays.
2. Select **Sign Up to Join Loyalty**.

Figure 2-31 Sign UP to Join Loyalty



- a. Enter your name for the loyalty account and select **Next**.

Figure 2-32 Enter Name for Loyalty Account

Enter your name for the new loyalty account

Step 1/3

First Name

Last Name *

Next

- b. Enter your phone number and then select **Next**.

Figure 2-33 Enter Phone Number

Enter your phone number

Step 2/3

Phone Number

1 2 3

4 5 6

7 8 9

0

⌫

➡

- c. Enter your email. This is optional. Then select **Join**. The system validates your entries.

Figure 2-34 Enter your Email (Optional)

Enter your email (optional)

Step 3/3

Email

Join

- If you already have an account, you will be notified by the system. Select **OK** to go back to the Loyalty Lookup screen.
3. If configured the Customer Information Consent Form is displayed.

Figure 2-35 Customer Information Consent

Use of Customer Information Consent

SCO - Agree to terms and conditions Agree to terms and conditions verify that text wraps on the customer consent form

SCO - Agree to sign terms and conditions receipt Agree to sign terms and conditions receipt Agree to sign terms and conditions receipt verify text wraps

☐ SCO - Agree to receive emails

☐ SCO - Agree to receive phone calls

Decline Accept

- a. Select the available options and then confirm with **Accept**.
- Select **Decline** to decline the Customer Information Consent. The system returns to the shopping cart without loyalty.
- b. A prompt is displayed to capture your signature.

Figure 2-36 Sign Customer Information Consent

The screenshot shows a digital consent form titled "Please Sign Below". Below the title is a subtext: "Signing below indicates that you agree to the specified terms and conditions." There is a large, empty rectangular box for a signature. Below this box, a line of text states: "The customer agrees to the terms and conditions regarding the use of any personal information that is provided to the retailer." At the bottom of the form are two buttons: a light gray "Clear" button and a dark gray "Accept" button.

- c. After signing the Customer Information Consent Form you are informed that your consent selections have been updated.

Figure 2-37 Customer Consent Updated

The screenshot shows a confirmation message with the heading "Customer Consent Updated" in a large serif font. Below the heading, the text "Your consent selections have been updated." is displayed in a bold sans-serif font. At the bottom of the message is a large, dark gray button with the text "OK" in white.

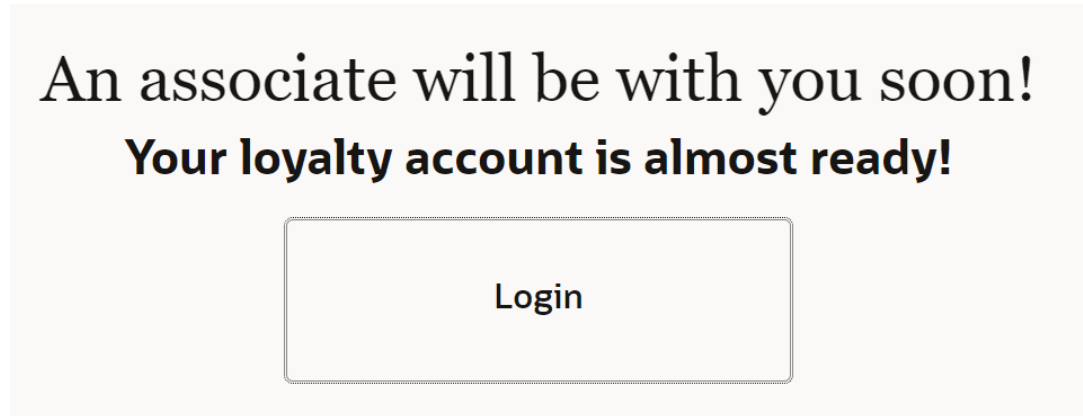
Note

For Customer Centric Loyalty this is the end of the Join Loyalty process. The customer successfully joined the Loyalty program and is returned to the shopping cart. The shopping cart displays the Loyalty icon and label.

4. For Card Centric Loyalty Only:

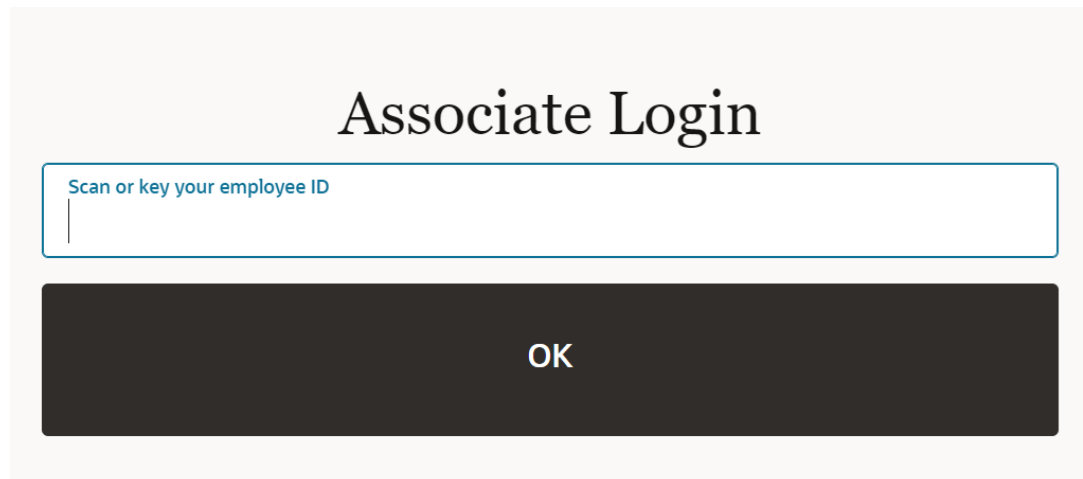
A message displays that an associate will assist you soon.

Figure 2-38 Loyalty Account Almost Ready - Login



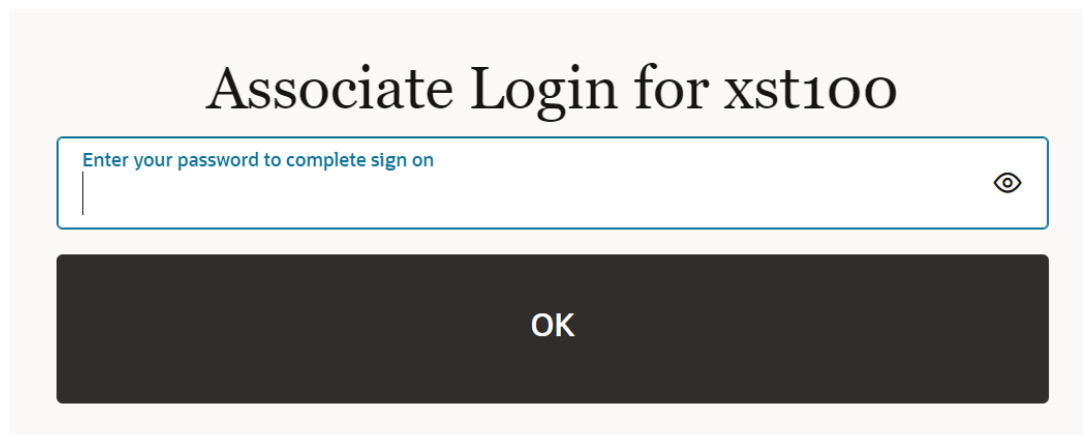
5. Log in as an associate. Enter your Employee ID.

Figure 2-39 Associate Login to Complete Loyalty Sing Up - Employee ID



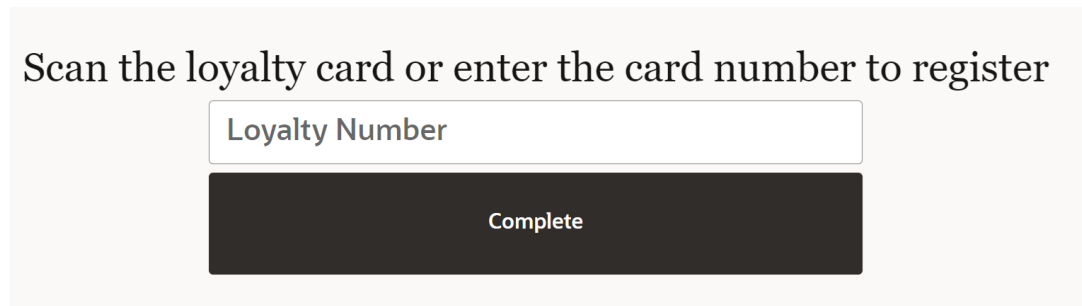
6. Enter your password to complete sign on.

Figure 2-40 Associate Login to Complete Loyalty Sing Up - Password



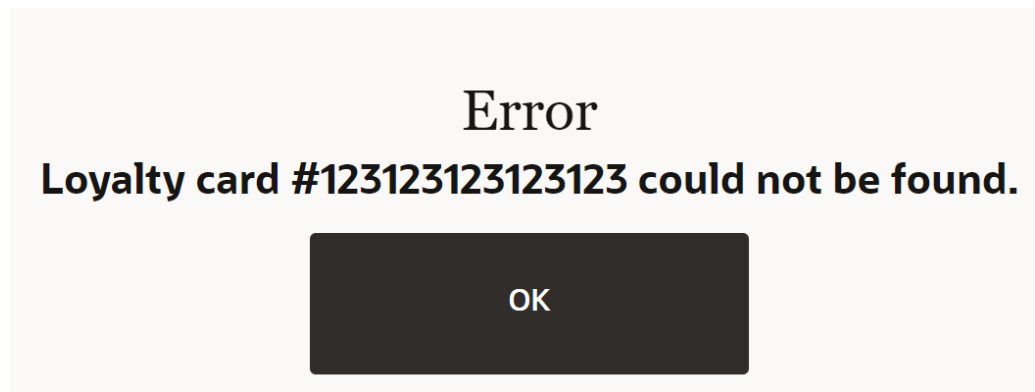
7. You are prompted to scan or enter the loyalty card number.

Figure 2-41 Scan the Loyalty Card or enter the Card Number to register

A screenshot of a mobile application screen for registering a loyalty card. The screen has a light beige background. At the top, the text "Scan the loyalty card or enter the card number to register" is displayed in a dark, serif font. Below this text is a white rectangular input field with the placeholder text "Loyalty Number" in a dark, sans-serif font. Underneath the input field is a dark gray rectangular button with the word "Complete" in white, sans-serif font.

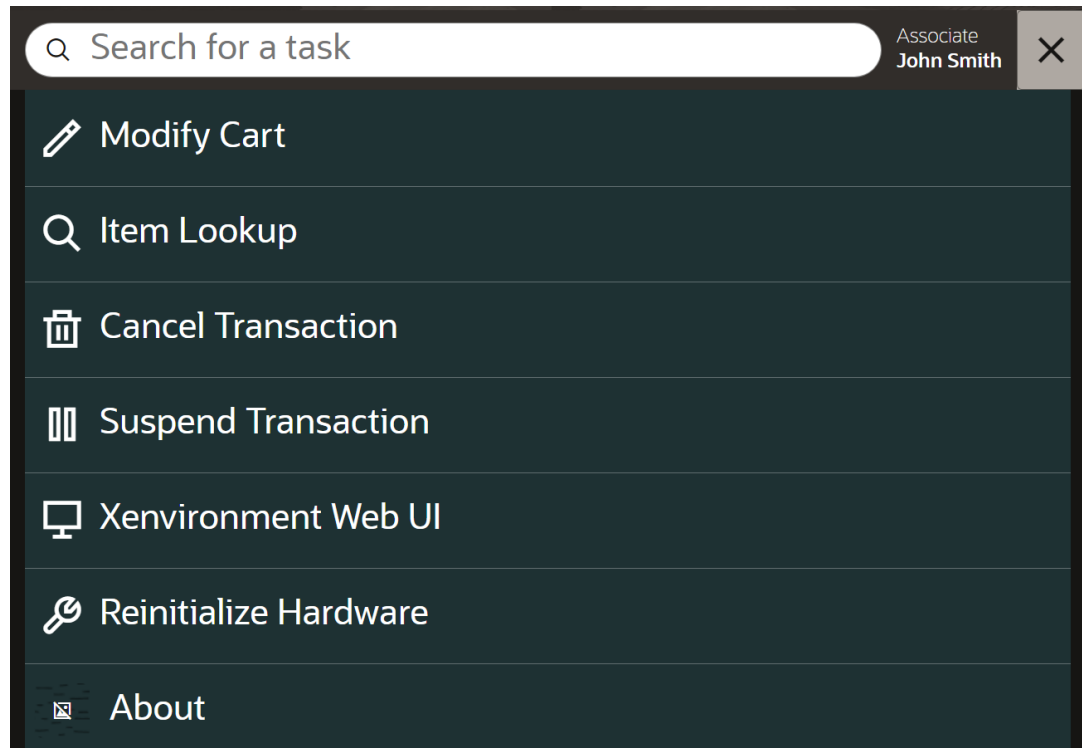
- If you entered the card number manually, select **Complete**.
- If you entered the wrong Loyalty card number, an error message is displayed.

Figure 2-42 Loyalty Card Number not found



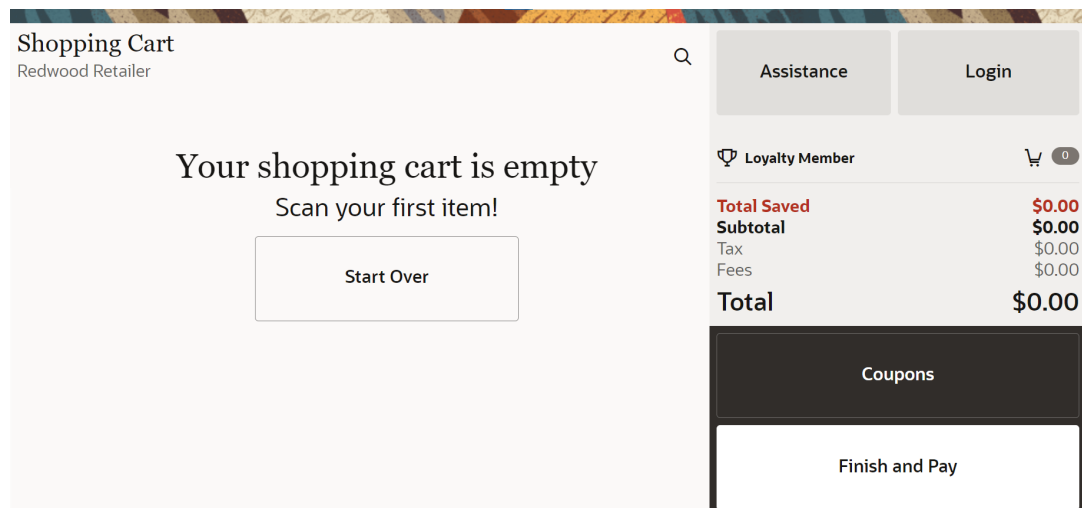
8. After a valid scan or entry you are taken the associate menu. Select the x in the upper right hand corner to return to the customer shopping cart.

Figure 2-43 Associate Menu



9. The card's loyalty number is now associated with the customer. The shopping cart displays the Loyalty icon and label.

Figure 2-44 Shopping Cart - Loyalty Member



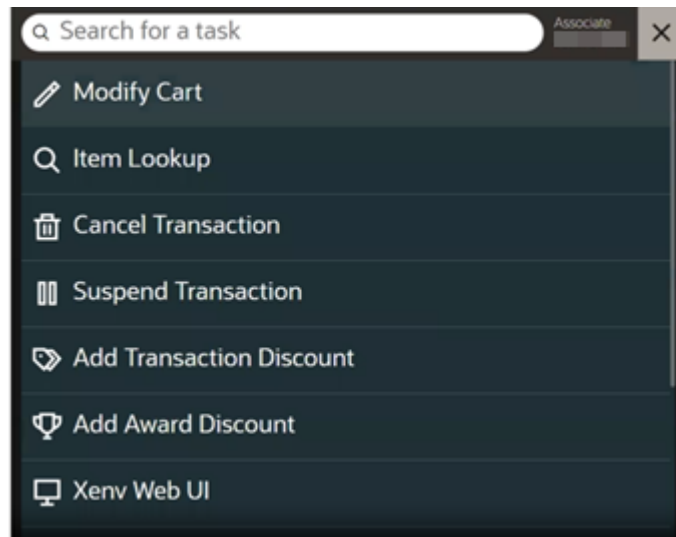
Add Award Discounts

To apply available Loyalty Awards to a transaction, complete the following:

1. Perform a **self checkout sale** and scan a **Loyalty Card**. See [Basic Sale](#) for more information.

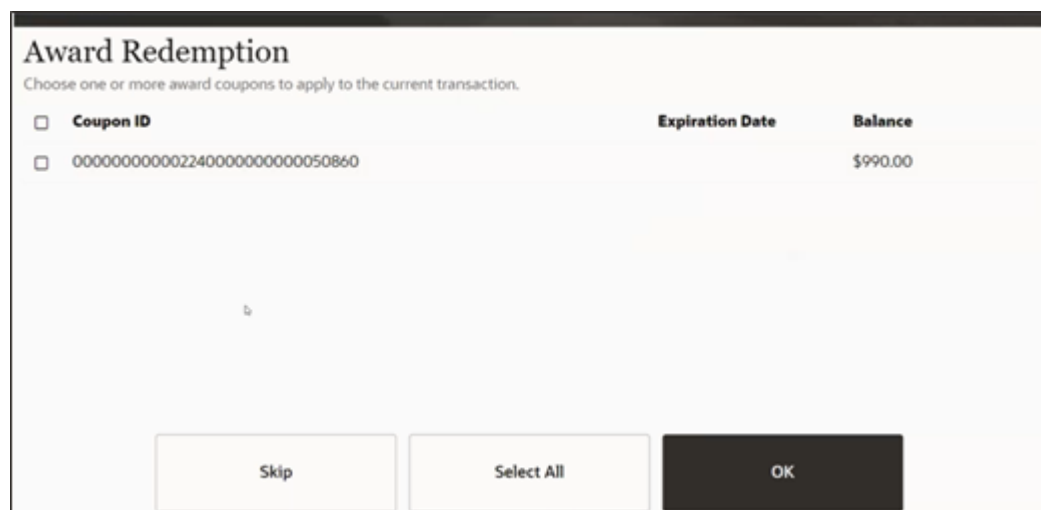
2. Select [Assistance](#) to ask for an associate for help.
3. The associate logs into the **System**.
4. The associate selects **Add Award Discount**.

Figure 2-45 Add Award Discount



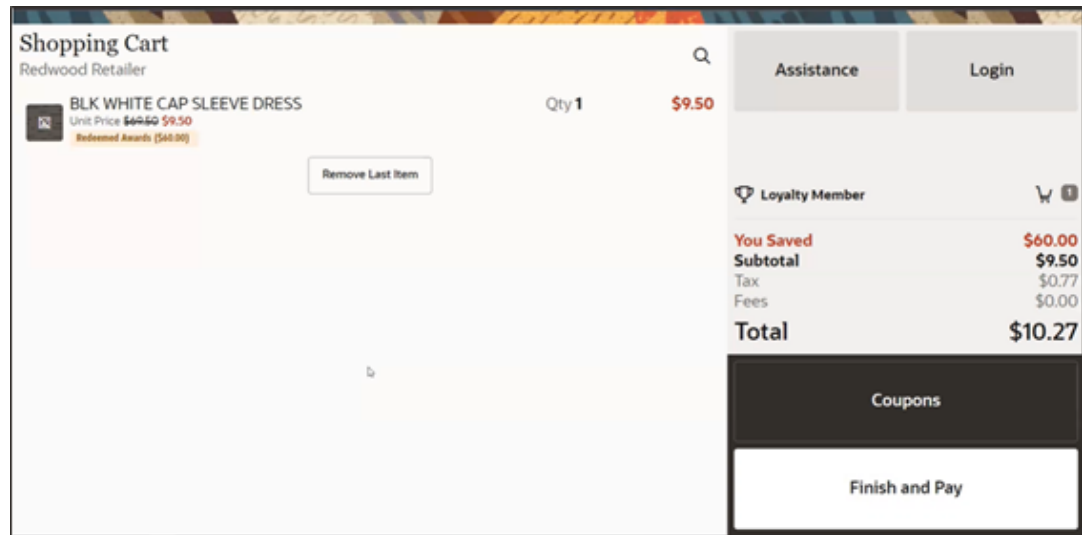
Result: Depending on the award, the dollar amount or list of coupons are presented for the associate to select from.

Figure 2-46 Award Redemption



5. The customer indicates which awards they want to use and the associate selects them.
6. The Self Checkout **returns** to the menu.
7. The associate **closes** the menu.

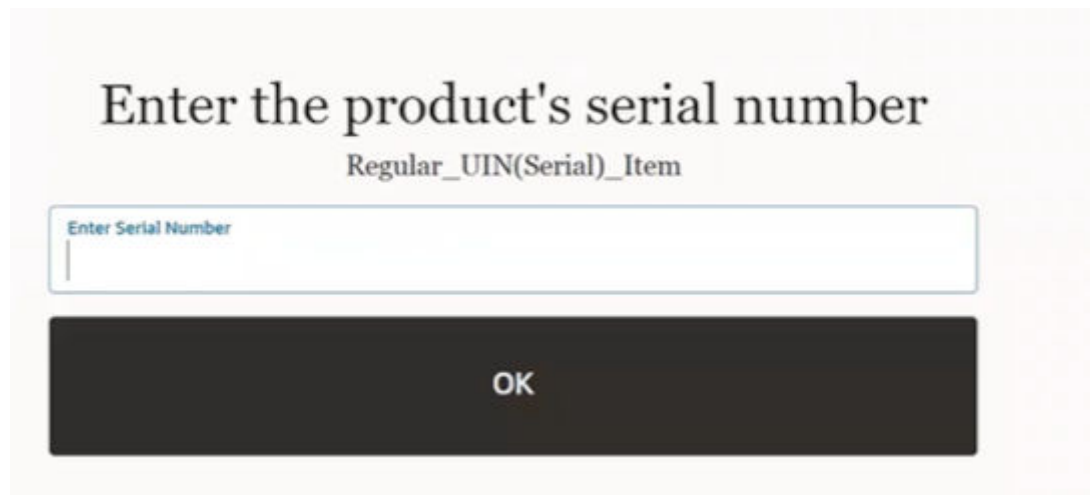
Result: The customer cart is displayed with the appropriate awards identified in the line items.

Figure 2-47 Shopping Cart: Award Redemption

8. The customer completes the sale. See [Basic Sale](#) for more information.

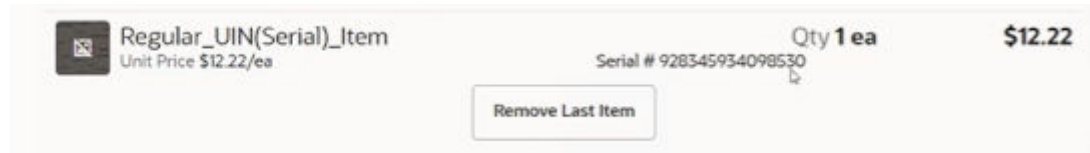
Serial Number Items

In Self Checkout, either the customer is required to enter a serial number when prompted or an associate is required to enter the serial number prior to the customer tendering. If the Self Checkout is configured such that the customer can enter a product serial number:

Figure 2-48 Enter Product Serial Number Prompt

Scan the serial number and select **OK**. The serial number is shown on the list of items in the shopping cart.

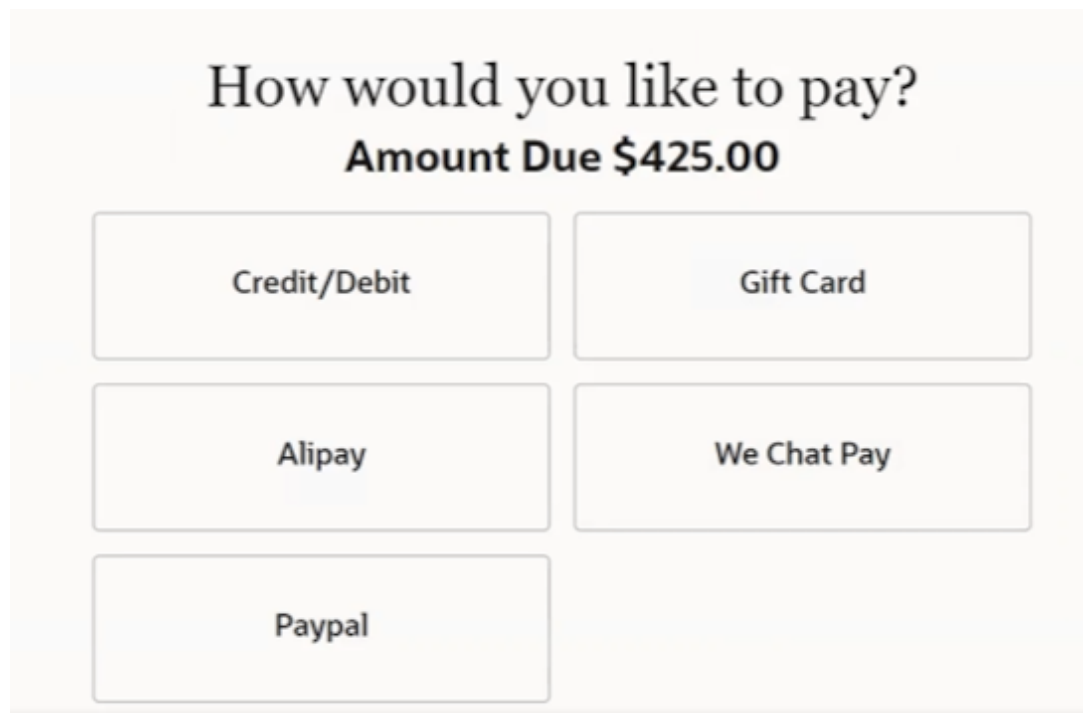
Figure 2-49 Serial Number Item



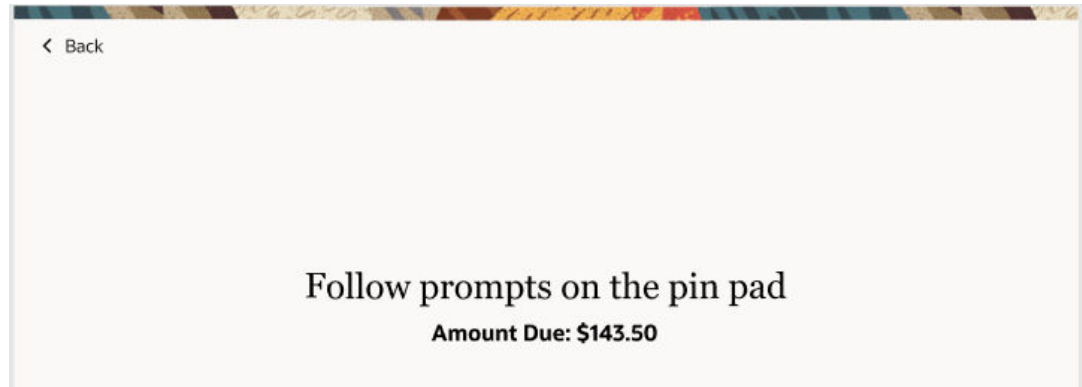
Tendering

1. When all items have been scanned and loyalty and coupons recorded, select **Finish and Pay** to start the tendering process.
2. Self Checkout displays the tender selection screen. Select the tender type to pay with. The Self Checkout will accept Credit cards, Debit cards, CE Gift Cards, EFTLink Gift cards, and Digital wallets as Tender types.

Figure 2-50 Tender Type



3. The Self Checkout displays a message to follow the prompts on the pin pad.

Figure 2-51 Pin Pad Prompt

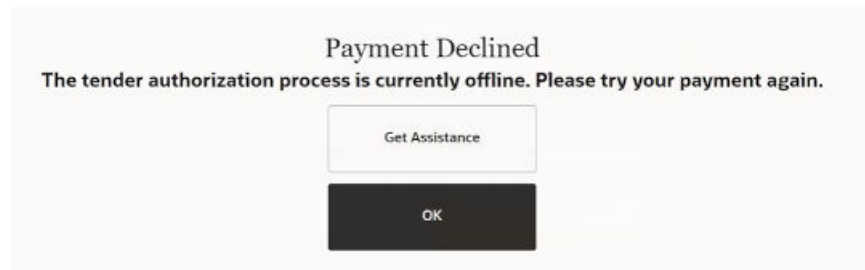
4. The payment terminal (PED) displays the transaction amount due and instructs the customer to insert or tap their payment card.

Upon successful payment, Self Checkout displays the Receipt options (Print, Email, Print & Email, or No Receipt).

If a customer payment card is declined for any reason, such as invalid PIN, card expired, insufficient funds on card, and so on, the following options are available:

- Back to Basket
- Try Another Card
- Request Assistance

If the system is offline, the following message is shown.

Figure 2-52 Payment Declined

Select **Get Assistance** to alert the associate.

3

Associate Functions

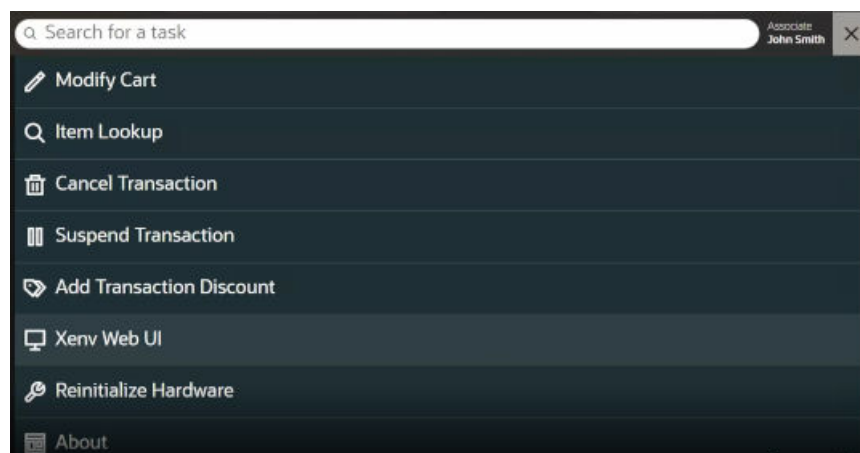
Occasionally a customer issue needs resolving at the register during a sale. This may be to verify the sale of age restricted items, change price to match a competitor, to cancel an item or sale, or to suspend a transaction.

The associate function is also required when reprinting a receipt, opening/closing and activating/deactivating the Self Checkout register.

The options displayed on the Associate menu, when logging on, depends on whether the Self Checkout is already in the middle of a transaction.

Scanning of items to add to cart are not supported from this menu - only upon performing an item lookup can an item be added by an associate.

Figure 3-1 Associate Menu During Transaction



Selecting the X in the top right corner, exits the associate menu and returns the Self Checkout to the customer view.

The following section describes the functions and options available with associate access:

- [Associate Login](#)
- [Age Restricted Items](#)
- [Warrantied Items](#)
- [Maximum Quantity Items](#)
- [Unrecognized Items](#)
- [Non Purchaseable Items](#)
- [Serial Number Items](#)
- [Modify Cart](#)
- [Item Lookup](#)

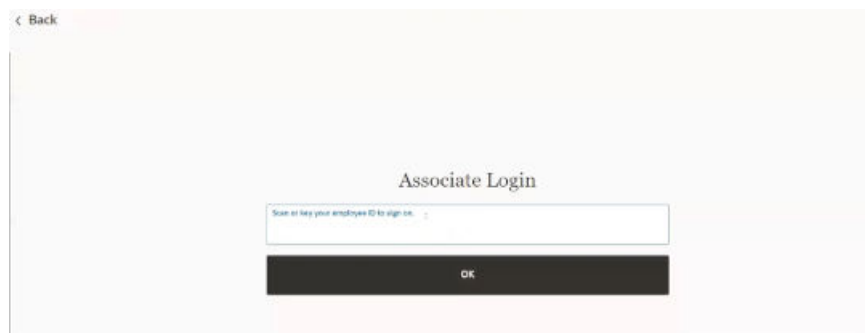
- [Cancel Transaction](#)
- [Suspend Transaction](#)
- [Resume Transaction](#)
- [Reprint Last Receipt](#)
- [Add Transaction Discount](#)
- [Open Register](#)
- [Activate Register](#)
- [Deactivate Register](#)
- [Close Register](#)
- [Xenv Web UI](#)
- [Reintialize Hardware](#)
- [About](#)

Associate Login

To gain access to the associate functions, login is required.

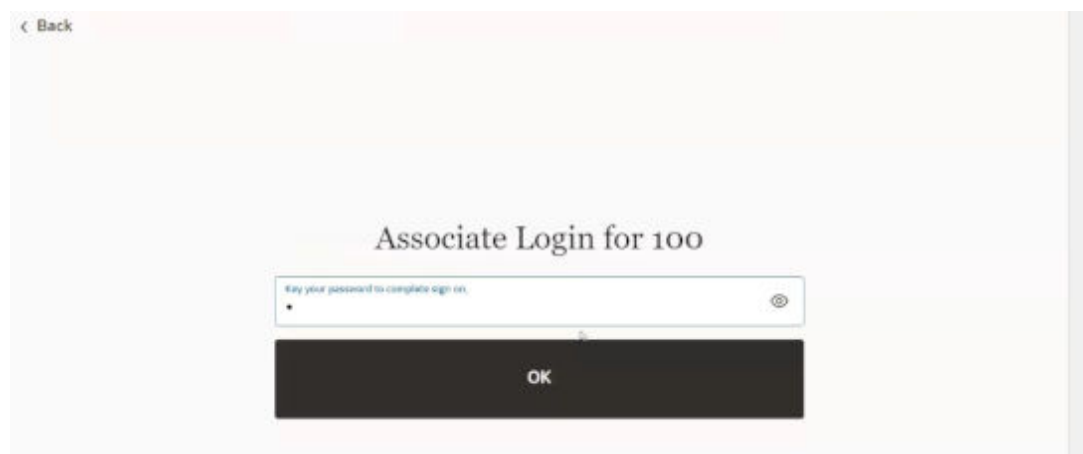
1. Select **Associate Login**.

Figure 3-2 Associate Login



2. Scan your badge or enter your **employee ID** and select **OK**.

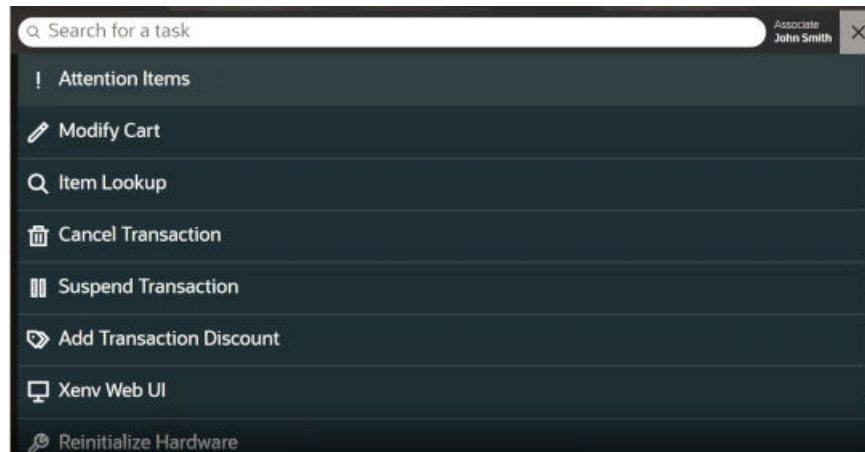
Figure 3-3 Associate Login Password



3. Enter your **Password**.
4. Select **Process**.

The Associate menu is displayed and the logged in associate's name displays in the upper right corner.

Figure 3-4 Associate Menu



Selecting the **X** in the upper right hand corner exits this menu to return to the customer shopping cart.

The menu options displayed depend on if you accessed these functions during a transaction and permissions of the logged in associate. Select an option from the menu or type in the search field to search for a task.

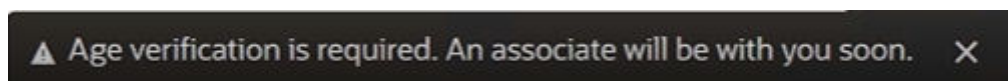
Attention Items are items requiring attention due to:

- [Age Restricted Items](#)
- [Warrantied Items](#)
- [Serial Number Items](#)

Age Restricted Items

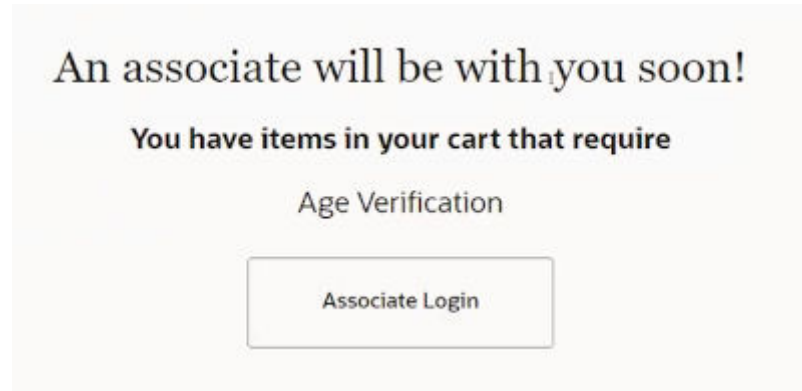
Certain items, such as alcohol, medicines, glues and solvents, and so on, that are age restricted cannot be purchased until the age of the customer is verified by an associate. When an age restricted item is scanned, a warning message is displayed, and the associate alerted.

Figure 3-5 Age Verification Prompt

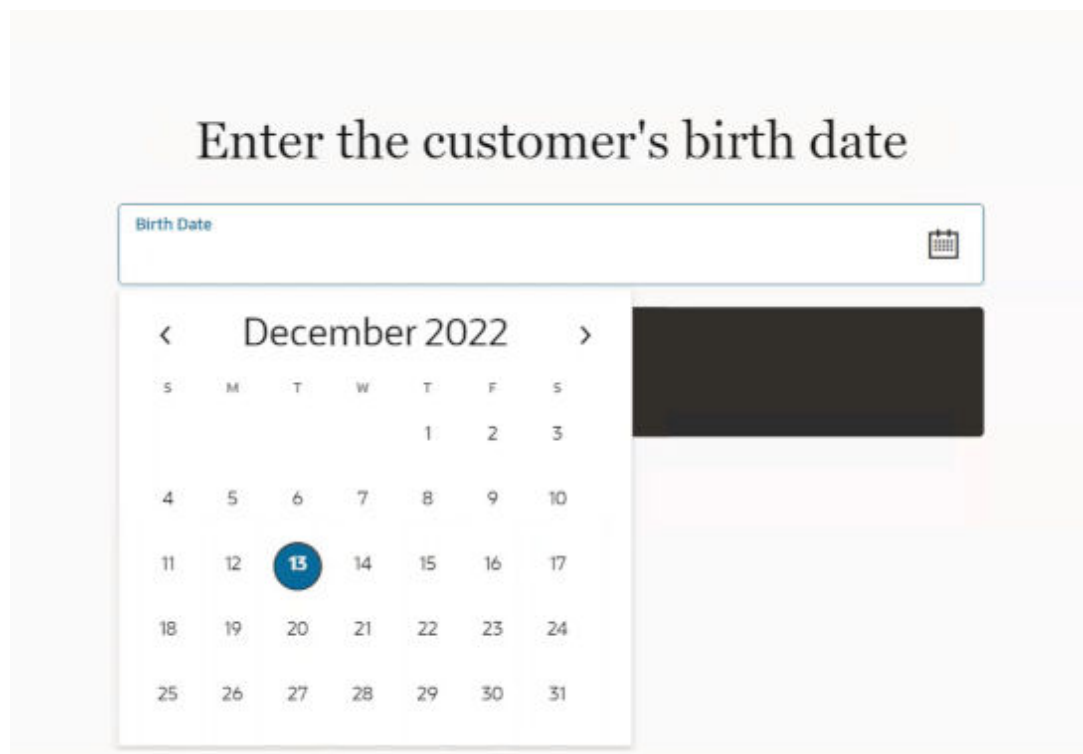


The associate must log in to verify the date of birth of the customer. The customer can keep scanning items but they will not be allowed to checkout until their age is verified.

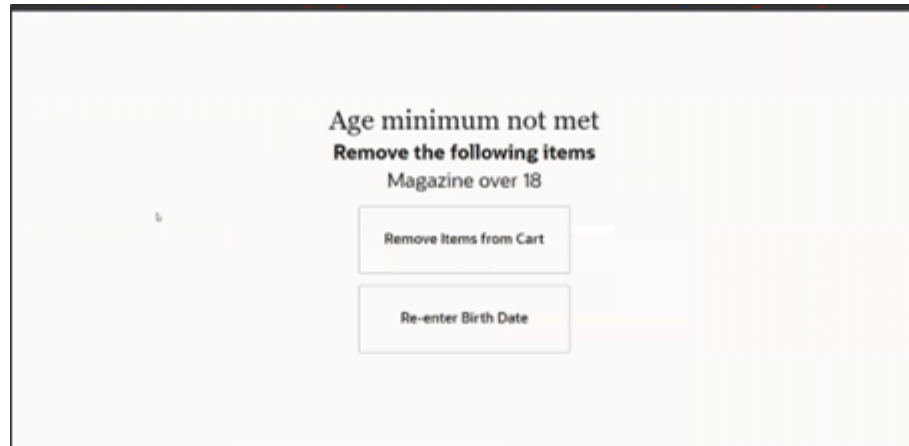
If the **Finish and Pay** button is pressed, the following message is shown:

Figure 3-6 Age Verification Prompt at Checkout

1. Log in as an associate. See [Associate Login](#).

Figure 3-7 Customer Age Verification

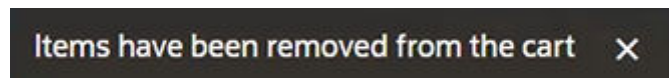
2. Enter the customer's birth date using the date picker and select **OK**.
If the age requirement is not met, a prompt appears with two choices:

Figure 3-8 Age Minimum Not Met

- **Re-Enter Birth Date** - Click to re-enter the birth date if an incorrect date is entered on the first attempt.
- **Remove Items from Cart** - Click Remove Items from Cart if the minimum age is not met, the items must be removed from the cart.

If the age requirement is met further age restricted items that require same age or less, are automatically added to the basket.

A warning message is displayed if the items are removed from the cart.

Figure 3-9 Items Removed Prompt

Warrantied Items

A warranty (also known as a service plan) is a promise made by a manufacturer or seller to support a product after its purchase. Typically, this involves the purchase of a contract that covers the costs of parts and service on an item beyond the manufacturer's original warranty period.

When you sell an item that is eligible for a warranty or service plan, the system requires an associate to intervene.

Warranties are available from a traditional register. The self checkout system will require an associate to confirm with the customer if they would like to purchase a warranty from a traditional register or continue on the Self Checkout without a warranty.

Figure 3-10 Warranty Item

A screenshot of a self-checkout screen with a light pink background. At the top, the word "Warranty" is centered in a large, dark font. Below it, the question "Does the customer want to purchase a warranty for any of the eligible items?" is centered in a bold, dark font. Underneath the question, the text "Warrantied Jewelry A" is centered. There are two rectangular buttons stacked vertically in the center: the top one is labeled "No" and the bottom one is labeled "Yes". Both buttons have a thin grey border and a light grey fill.

Warranty

Does the customer want to purchase a warranty for any of the eligible items?

Warrantied Jewelry A

No

Yes

Maximum Quantity Items

Certain items such as medicines are restricted in the quantity permitted to be sold. When a customer tries to exceed the maximum quantity for an item, the associate is alerted. The associate must log in to clear the message before the customer can continue with the sale without the additional items.

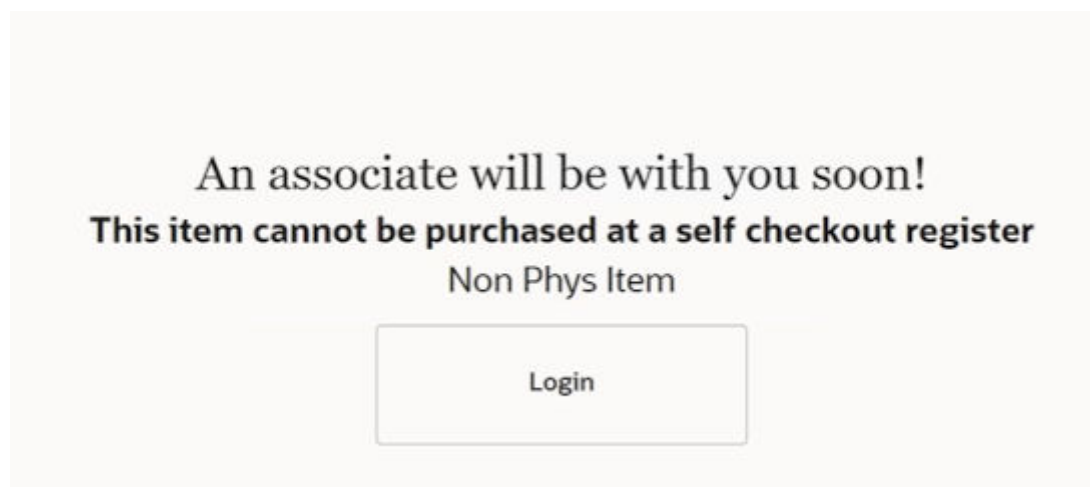
Unrecognized Items

If Self Checkout detects that the barcode scanned is invalid and does not exist, it displays an error message that the item cannot be found and alerts an associate. An associate may be able to add the item details (name and price) manually or cancel the item.

Non Purchaseable Items

A retailer may configure items that cannot be sold at a Self Checkout for example lottery tickets.

Figure 3-11 Non Purchaseable Item

A screenshot of a self-checkout screen with a light grey background. The text is centered. At the top, "An associate will be with you soon!" is in a large, dark font. Below it, "This item cannot be purchased at a self checkout register" is in a bold, dark font. Underneath, "Non Phys Item" is centered. At the bottom, there is a single rectangular button with a thin grey border and a light grey fill, labeled "Login".

An associate will be with you soon!

This item cannot be purchased at a self checkout register

Non Phys Item

Login

Log in as an associate. See [Associate Login](#).

Explain the reason why the item cannot be sold and remove the item from the shopping cart.

Serial Number Items

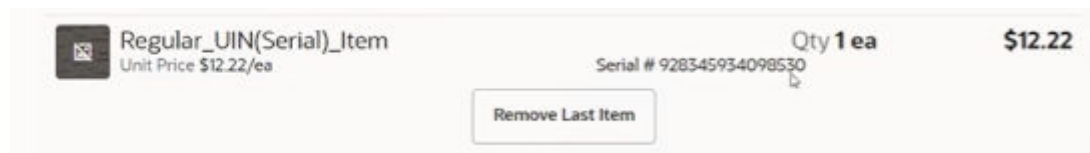
In Self Checkout, either the customer is required to enter a serial number when prompted or an associate is required to enter the serial number prior to the customer tendering. If the Self Checkout is configured such that the associate is required to enter a product serial number, when the customer selects **Finish and Pay** and the serial number has not been entered by the associate the system prompts the customer that help is on the way to enter a serial number. An associate does not need to wait for the customer to select **Finish and Pay** as the associate may see that the customer has an item that requires a serial number and they can select [Associate Login](#) and the system will prompt them to enter the serial number.

Log in as an associate. See [Associate Login](#).

Scan or manually enter the serial number and select **OK**.

Exit the associate menu and the serial number is shown on the list of items in the shopping cart.

Figure 3-12 Serial Number Item



Modify Cart

Associates can change certain elements about the items in a cart such as quantity or price or add a discount or void an item.

The associate view of the customer shopping cart allows an associate to modify the items in the cart. To scan more items into the customer cart or to tender the transaction the associate must return to the menu and exit the menu to return customer's view of the shopping cart where additional items can be scanned and tendering can take place.

To access the associate view of the shopping cart, from the Associate Menu select **Modify Cart**.

Figure 3-13 Associate Menu During Transaction

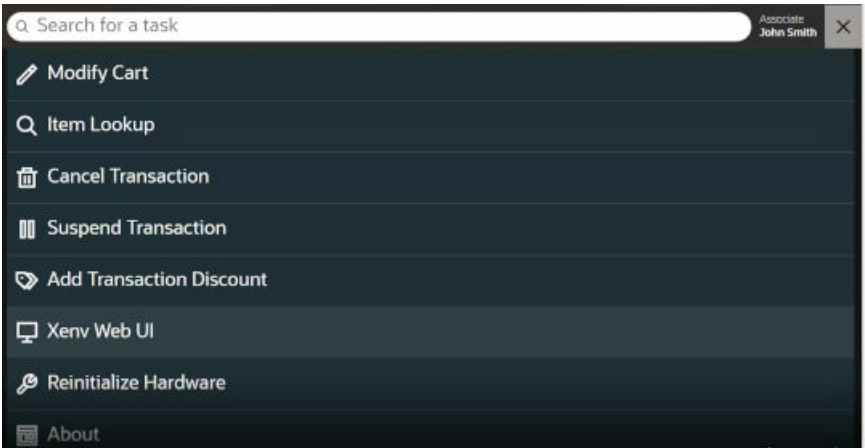
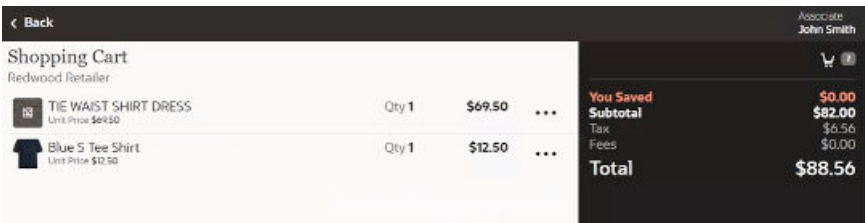


Figure 3-14 Associate View of Cart

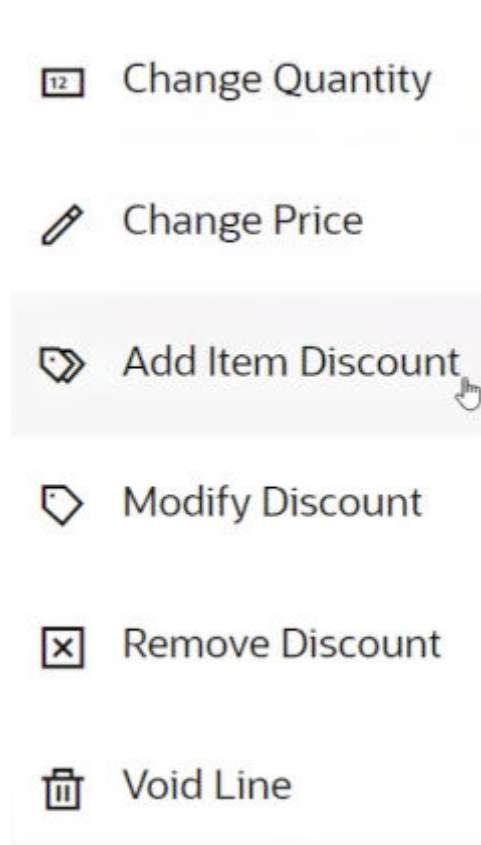


Click on



ellipsis (3 dots) to access the Modify Item menu.

Figure 3-15 Modify Item Menu



An associate cannot begin the tendering process whilst in the Associate mode.

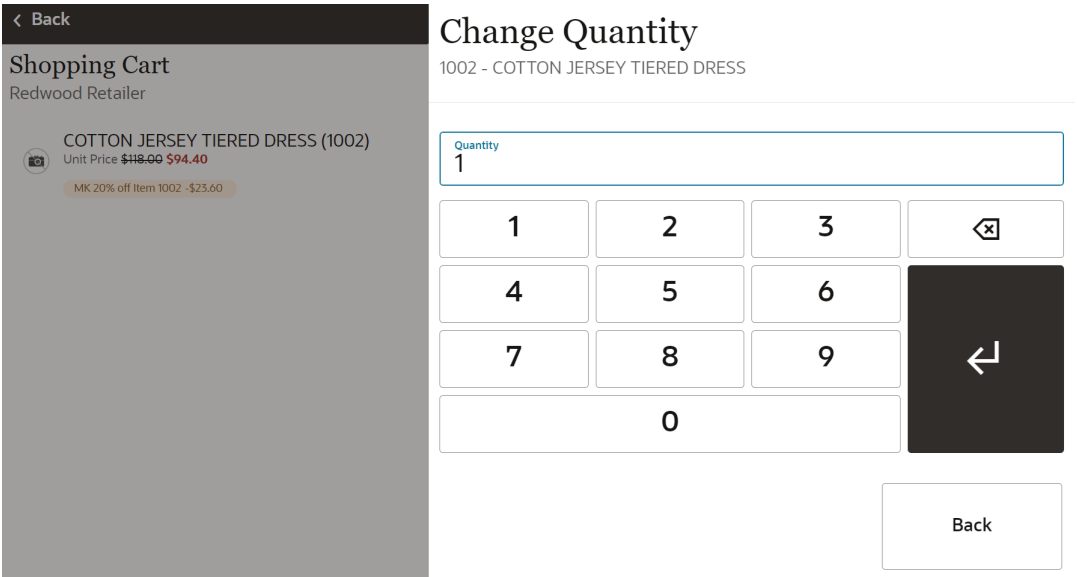
For tendering, select **Back** to return to the Associate menu. From the Associate menu, close it to get back to the customer's shopping cart.

- [Change Quantity](#)
- [Change Price](#)
- [Add Item Discount](#)
- [Modify Discount](#)
- [Remove Discount](#)
- [Void Line](#)

Change Quantity

1. From the **Line Item** menu, select **Change Quantity**.

Figure 3-16 Change Quantity



2. Use the numeric keypad to enter a new quantity and click **OK**.
The quantity and price fields are updated.

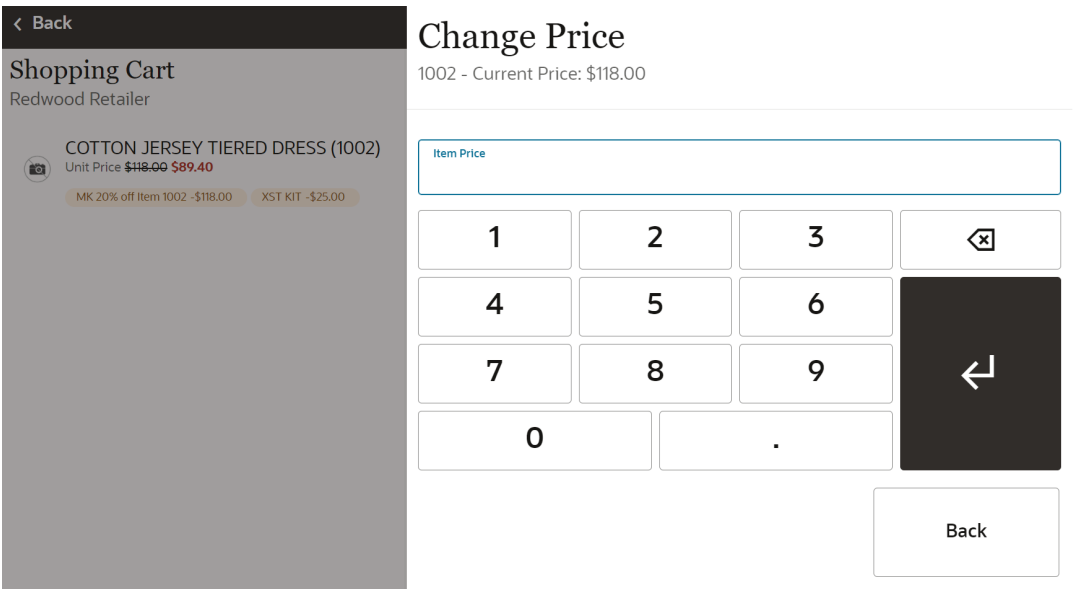
Note

Multiple items are shown on one line.

Change Price

1. From the **Modify Item** menu, select **Change Price**.

Figure 3-17 Change Price



2. Use the numeric keypad to enter a new price and click **OK**.

Figure 3-18 Change Price Reason Code

Reason Code
Red S Tee Shirt

Select an option

☐ Incorrect Label

☐ Competitive Price Match

☐ Damage Adjustment

☒ Supervisors Discretion

Back

3. Select a reason code for the price change.

Add Item Discount

An associate can apply a discount to a single line item or multiple line items. Discounts may be specified as either an amount (for example, \$5.00 off) or a percentage (for example, 10% off) for item discounts. If an associate wants to perform a transaction discount (on all items in the cart) they would need to go to the menu and select [Add Transaction Discount](#).

Note

An item discount will need to be done one item at a time not multiple lines at one time.

1. From the **Modify Item** menu for the desired item, select **Add Item Discount**.

Figure 3-19 Discount Type Options

Add Item Discount Type
Red S Tee Shirt

Select an option

- Xunit - Item Discount: 5%
- Item Discount: 15% Off
- Item Discount: \$15 Off
- Item Discount: % Off
- Item Discount: \$ Off
- Item Discount: 15% Off Competitor
- Item Discount: \$15 Off Competitor

Back

A list of discount types is shown.

Note

The discounts available depend upon the configuration of your system.

If necessary, enter the discount information:

- Percent Discount - Enter the percentage of the discount.
- Amount Discount - Enter the amount of the discount.

Figure 3-20 Enter Discount Amount

Enter Discount Amount

Discount Amount

1

2

3

⌫

4

5

6

7

8

9

0

.

↩

Figure 3-21 Discount Reason Code

Reason Code

Select an option

Incorrect Label

Price Guarantee

Damage Adjustment

Manager Discretion

Back

- 2. Select a reason.

3. The discount is applied to the item and badge showing the discount is shown underneath the unit price for the line item.

Modify Discount

1. From the **Line Item** menu, select **Modify Discount**.

Figure 3-22 Modify Discount

Modify Discount

Select an option

Item Discount: \$ Off

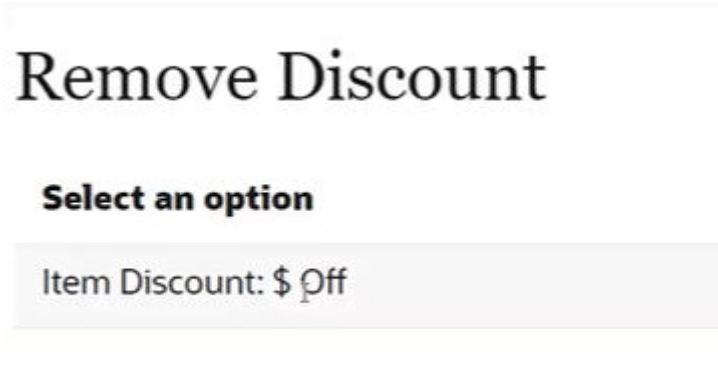
Back

2. Select the discount to modify.
3. Select an alternative discount type.
4. Select a reason code.
5. **Back** will take the associate to the associate view of the shopping cart.

Remove Discount

1. From the **Line Item** menu, select **Remove Discount**.

Figure 3-23 Remove Discount



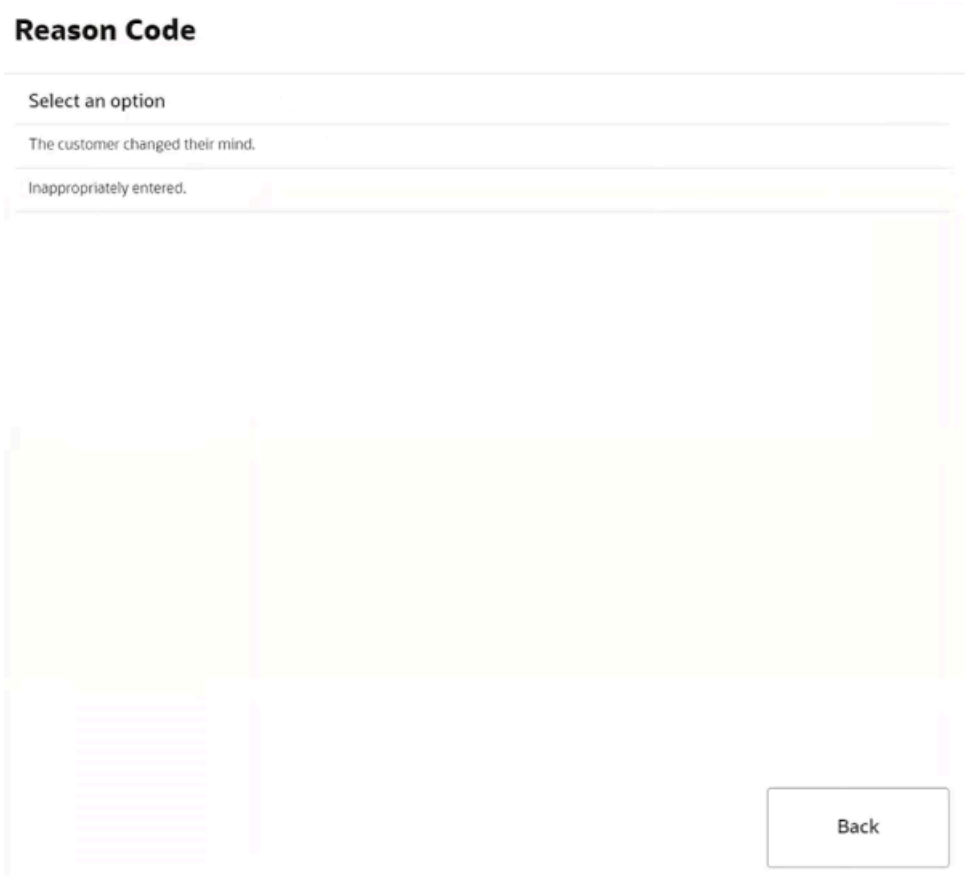
- 2. Select the discount to delete.
- 3. Select a reason code.

Void Line

An item may need to be canceled (voided) from a sale in cases of accidental double scanning or change of mind after scanning the item.

- 1. From the **Line Item** menu, select **Void Line**.

Figure 3-24 Void Line Reason Code



2. Select a reason code. The item is removed from the shopping cart.

Item Lookup

Item Lookup is available for logged in associates to quickly find an item that may be failing to scan, or the barcode is missing. Although the customer can perform an item lookup by an item ID, the associate has an additional description field to find the item.

1. Log in as an associate. See [Associate Login](#).
2. From the associate menu, select **Item Lookup**.

Figure 3-25 Associate Item Lookup



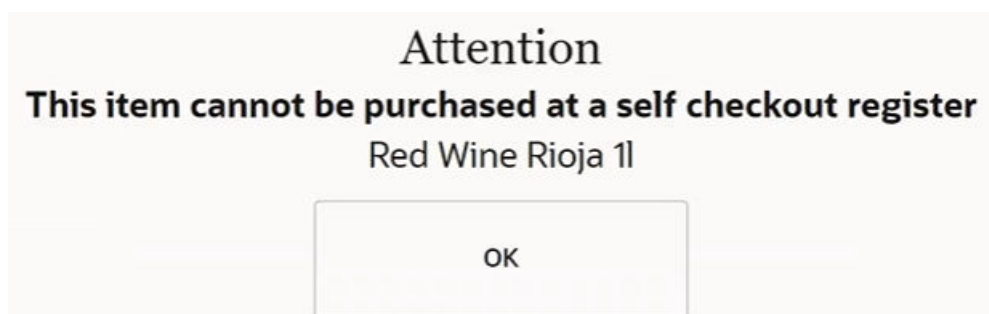
The screenshot shows a form titled "What item would you like to find?". It contains two input fields: "Item ID" and "Description". Below these fields is a button labeled "Process".

3. Enter search criteria (item ID or description) and select **Process** to search for items.
4. Select item from the results list and the item is added to the basket. Items that are not available for Self Checkout cannot be added to the basket.

Note

A retailer configures items that they do not want to sell on a Self Checkout.

Figure 3-26 Items Not Available to Purchase Message



The screenshot shows a message box with the title "Attention". The text inside reads: "This item cannot be purchased at a self checkout register" followed by "Red Wine Rioja 1l". At the bottom of the message box is an "OK" button.

Cancel Transaction

The Self Checkout sale may need to be cancelled if the customer changes their mind about their purchase.

To cancel a sale:

1. Log in as an associate. See [Associate Login](#).
2. From the **Associate** menu, select **Cancel Transaction**.

Figure 3-27 Cancel Transaction



3. Select **Yes**.

Self Checkout cancels the transaction and returns to the main Self Checkout start screen.

Suspend Transaction

A sale on the Self Checkout register may be suspended and picked up on a manned register when a customer, for example, cannot pay at the Self Checkout or specific items cannot be checked out on the Self Checkout. This may occur when a customer does not have a card, or money on the account, or if additional items, which are not available in Self Checkout mode, (such as cigarettes), are to be included in the transaction.

To suspend a sale:

1. Log in as an associate. See [Associate Login](#).
2. From the **Associatemenu**, select **Suspend Transaction**.

A suspend receipt prints, Self Checkout clears the transaction and returns to the main Self Checkout home screen. The suspended sale can be resumed and completed on a standard Xstore register or another Self Checkout register.

Resume Transaction

Transactions suspended at a Self Checkout can be resumed at a Self Checkout.

Transactions suspended at an Xstore POS cannot be resumed at a Self Checkout

A transaction can be resumed by either scanning the suspend receipt from the shopping cart screen or through the associate menu by selecting **Resume Transaction**

To resume a sale from the suspend receipt:

1. Scan a suspend receipt.
2. Log in as an associate. See [Associate Login](#).
After login the transaction displays in the customer's view of the shopping cart.
3. From the **Associate** menu, select **Suspend Transaction**.
A suspend receipt prints, Self Checkout clears the transaction and returns to the main Self Checkout home screen. The suspended sale can be resumed and completed on a standard Xstore register or another Self Checkout register.
To resume a sale from the associate menu:
 1. Log in as an associate. See [Associate Login](#).
 2. From the **Associate** menu, select **Resume Transaction**.
If required, select from the list of suspended transactions. Upon selecting the transaction from the list the customer view of the shopping cart displays.
Alternatively, scan the suspend receipt and the transaction displays in the customer's view of the shopping cart.

Reprint Last Receipt

The receipt for the last sale only can be printed again. This is useful in cases where the receipt failed to print correctly the first time

If a receipt needs reprinting for Self Checkout sales prior to the last Self Checkout sale, then the customer will need to go to a manned register, and the cashier will use the **Reprint Receipt** option in the Electronic Journal. Refer to the *Oracle Retail Xstore Point of Service User Guide* for more details.

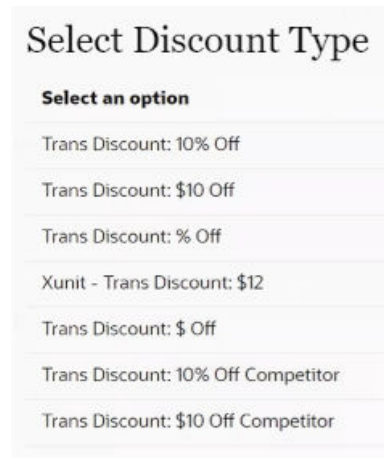
To reprint the last receipt:

1. Log in as an associate. See [Associate Login](#).
2. Self Checkout displays the **Associate** menu. Select **Reprint Last Receipt**.
Self Checkout prints the receipt for the last Self Checkout transaction on that register.
3. Select **OK** to clear the message prompt that the receipt has printed.
4. Depending on your system configuration, select **Back** to return to normal Self Checkout sale mode.

Add Transaction Discount

A transaction discount is applied equally to each eligible item in the transaction. Discounts may be specified as either amount (for example, \$5.00 off) or percentages (for example, 10% off) for transaction discounts.

1. Select **Add Transaction Discount** from the associate menu.

Figure 3-28 Transaction Discount Type

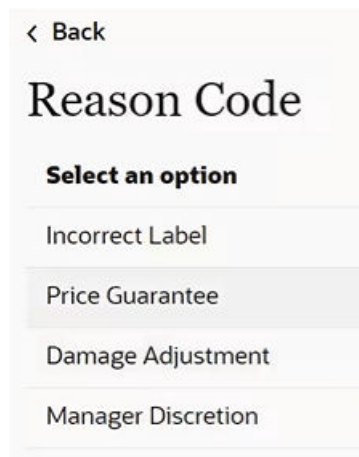
The screenshot shows a mobile application interface titled "Select Discount Type". Below the title is a section labeled "Select an option" followed by a list of eight discount types, each on a separate line with a light gray background:

- Trans Discount: 10% Off
- Trans Discount: \$10 Off
- Trans Discount: % Off
- Xunit - Trans Discount: \$12
- Trans Discount: \$ Off
- Trans Discount: 10% Off Competitor
- Trans Discount: \$10 Off Competitor
- (An additional unlabeled option is partially visible at the bottom)

Note

Because each Self Checkout POS menu is configurable, the discount options shown on your system may be different than the options shown here.

2. Select the discount to apply.

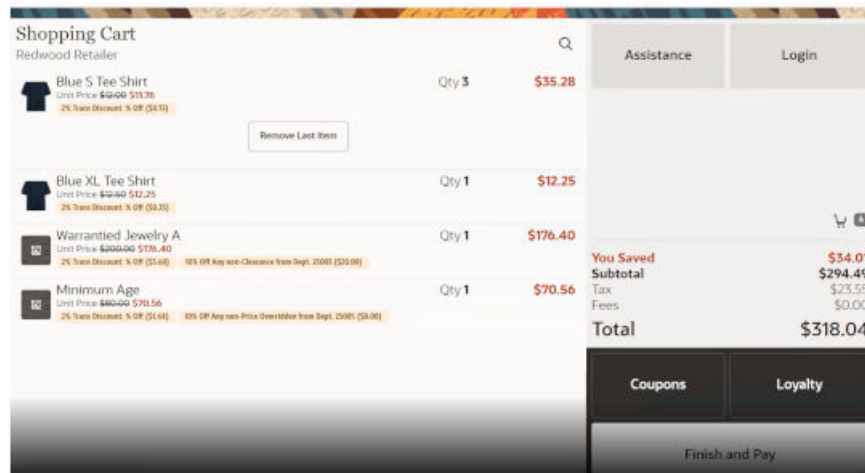
Figure 3-29 Transaction Discount Reason Code

The screenshot shows a mobile application interface titled "Reason Code". At the top left is a back arrow and the text "< Back". Below the title is a section labeled "Select an option" followed by a list of five reasons, each on a separate line with a light gray background:

- Incorrect Label
- Price Guarantee
- Damage Adjustment
- Manager Discretion
- (An additional unlabeled option is partially visible at the bottom)

3. Select the reason for applying the discount.
4. If the discount is not fixed, enter the amount or percentage of the discount.
5. Select **OK**. The discount is applied to the transaction. Return to the sale screen.

Figure 3-30 Transaction Discount Applied



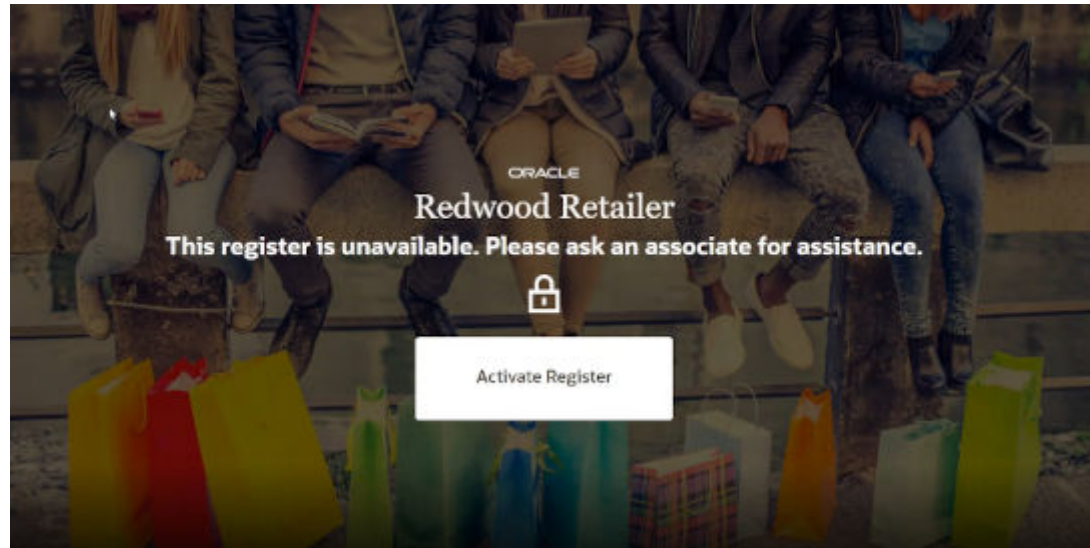
Outside of Sale Mode

When not in a transaction, the register in Self Checkout mode can be used to:

- [Open Register](#)
- [Activate Register](#)
- [Deactivate Register](#)
- [Close Register](#)
- [Xenv Web UI](#)
- [Reintialize Hardware](#)

Open Register

At the start of the day and prior to a Self Checkout being ready for a customer to scan their products, the Self Checkout needs to be activated and the register open. This process can only be done by an associate, and not a customer.

Figure 3-31 Activate Register

To open a Self Checkout register for customer use:

1. An associate needs to press **Activate Register** button.
2. Scan your badge or enter your employee ID and select **OK**.
3. The **Register Open** prompt is displayed.

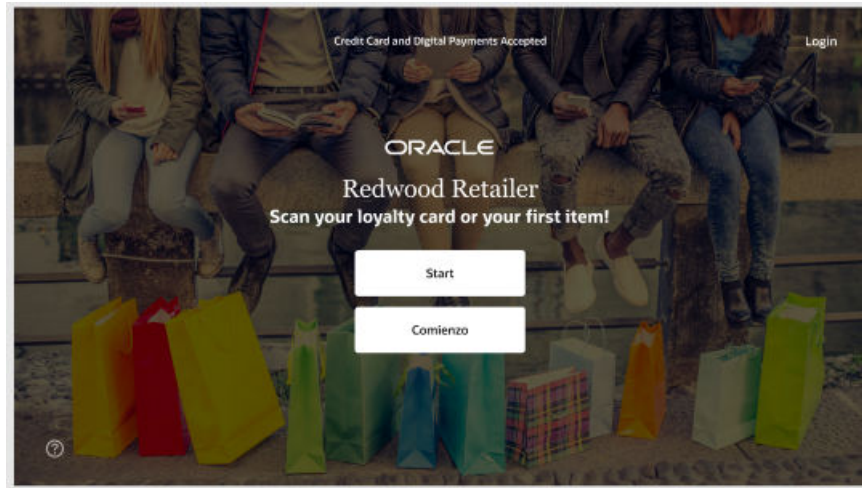
Figure 3-32 Open Register Prompt

Note

There is no cash taken on the Self Checkout so no need for a count process for opening a Self Checkout register.

4. Select **Yes** to open the register.
The Self Checkout opens to the Home screen ready for use.

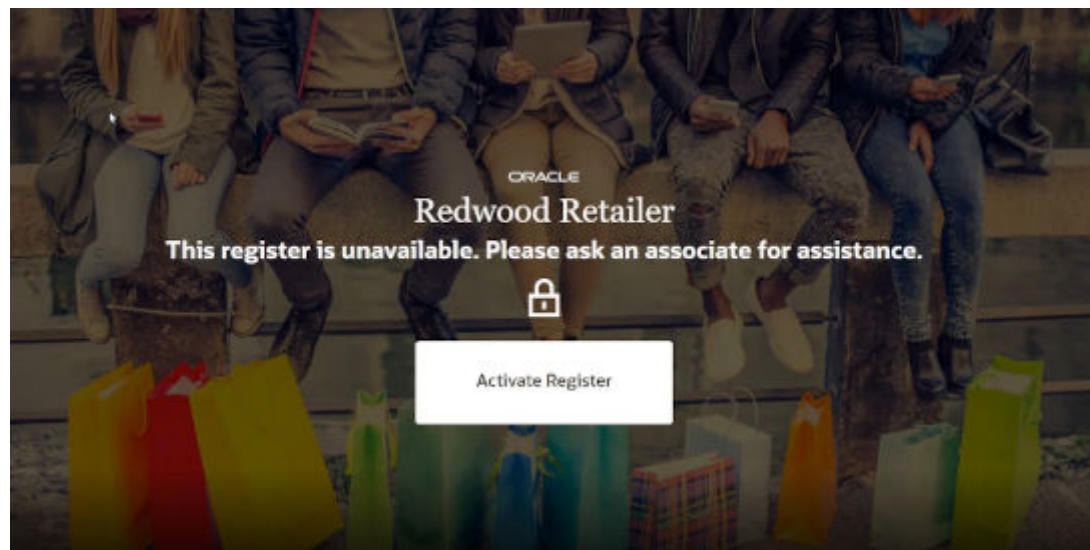
Figure 3-33 Self Checkout HomeScreen



Activate Register

During the day, if the Self Checkout register has been opened previously and is currently deactivated, it needs to be activated/unlocked. Activating a register must be done by an associate. The register will need to be activated before a customer can begin their transaction.

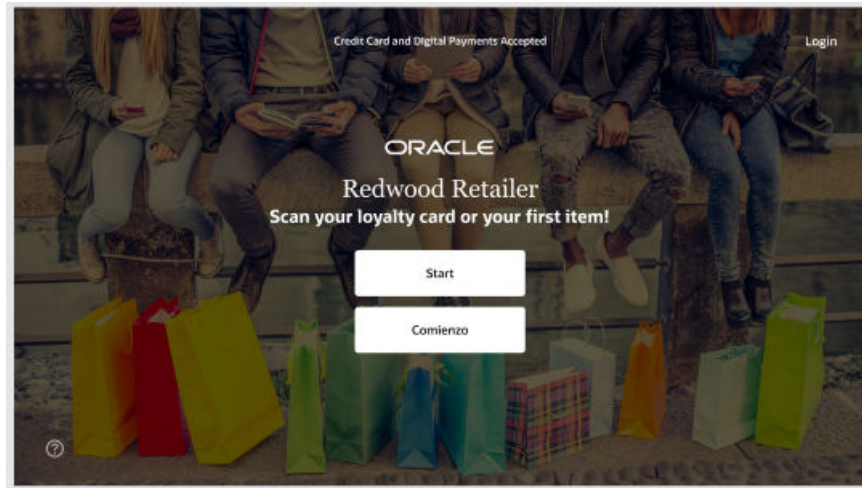
Figure 3-34 Activate Register



To unlock a Self Checkout register for use:

1. An associate needs to press **Activate Register** button.
2. Scan your badge or enter your employee ID and select **OK**.
3. The Self Checkout register opens to the Home screen and ready for use.

Figure 3-35 Self Checkout HomeScreen



Deactivate Register

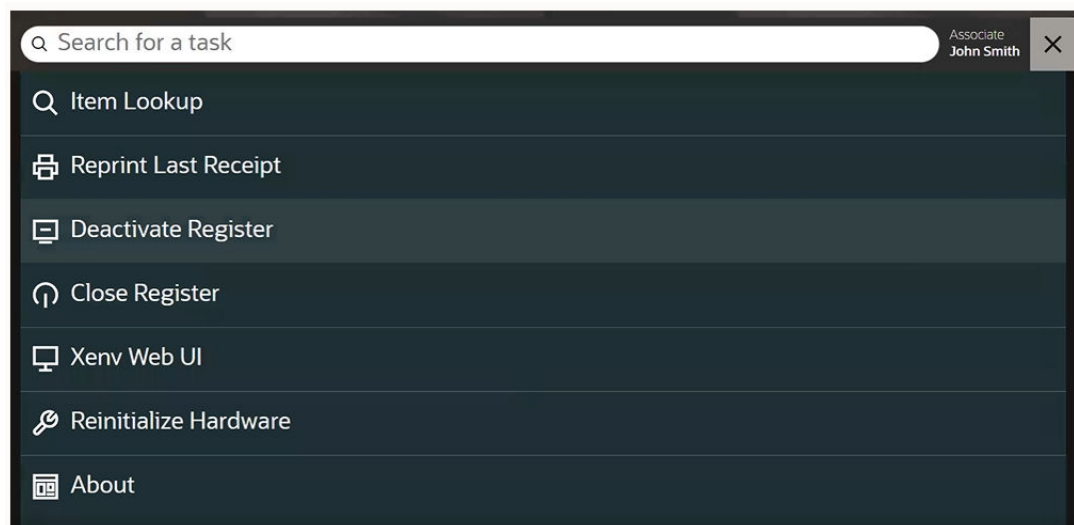
A Self Checkout register can be deactivated (locked) so that it is not available for customers to use. This may be due to the self checkout lane not being ready for customers due to requiring cleaning or no bags available, issues with the Self Checkout printer or payment terminal, quiet times, or the store just wants customers to use manned Self Checkout registers for a period. The register cannot be locked when in a Self Checkout sale.

This process can only be done by an associate, and not a customer.

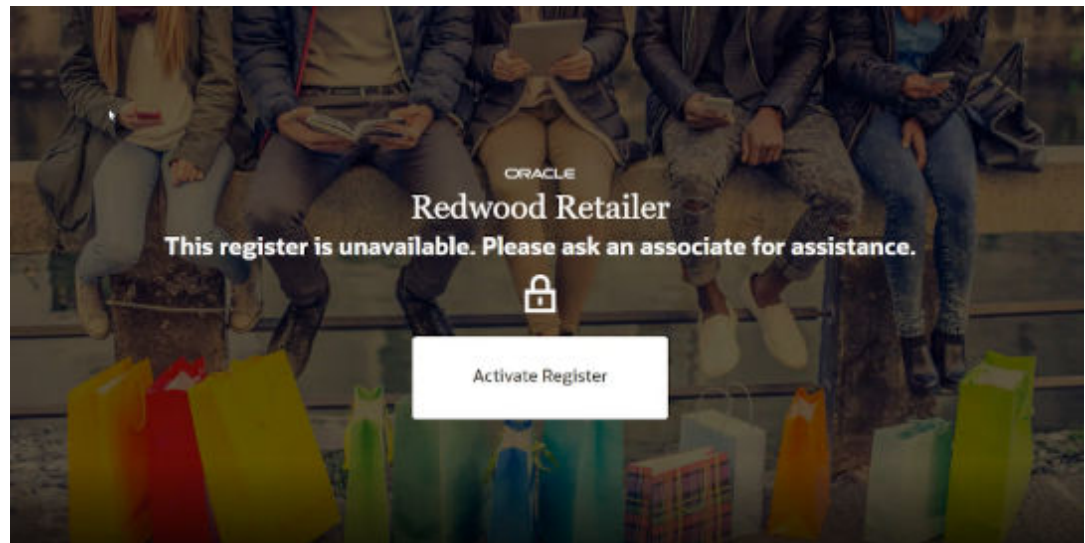
To deactivate a register from customer use:

1. Log in as an associate. See [Associate Login](#).

Figure 3-36 Deactivate Register



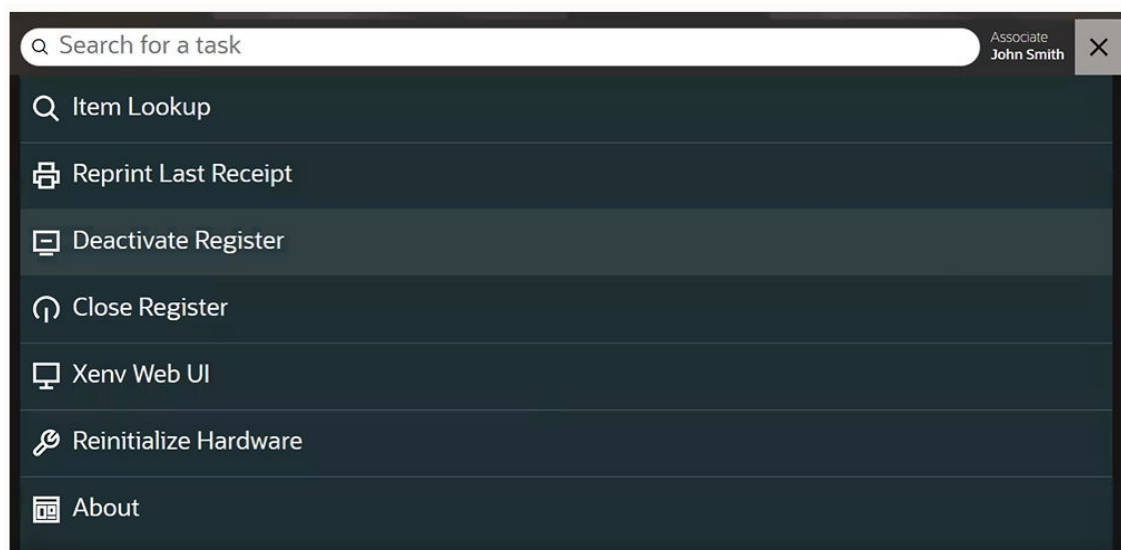
2. Select **Deactivate Register** from the associate menu. The Self Checkout closes and returns to the Activate Register screen

Figure 3-37 Activate Register

A message regarding the register is unavailable is shown to the customer.

Close Register

At the end of the day each Self Checkout register can be closed individually. Closing a register is done by an associate.

Figure 3-38 Close Register

To close a register:

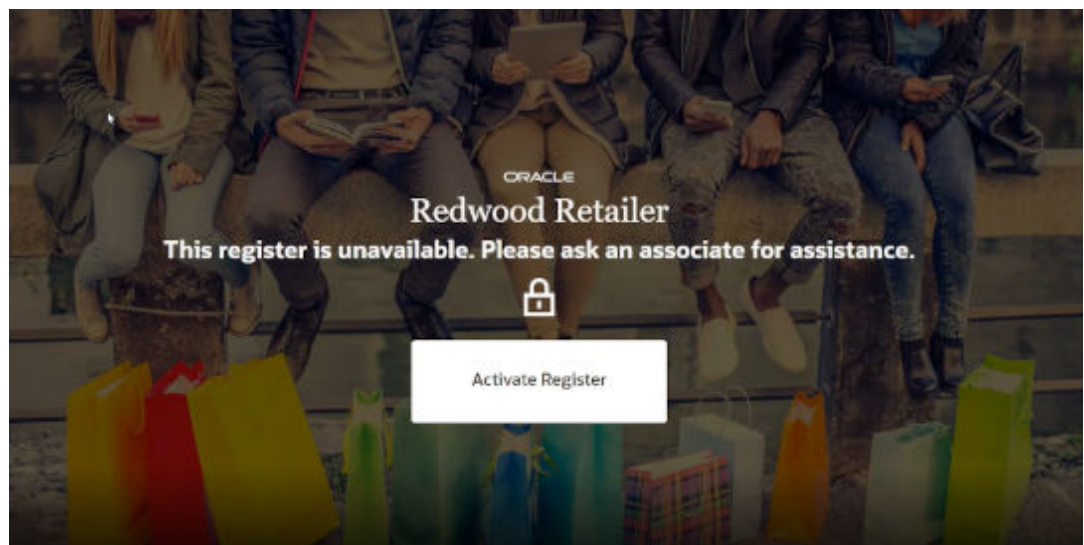
1. Log in as an associate. See [Associate Login](#).
2. Select **Close Register** from the associate menu.

Figure 3-39 Close Register



3. Select **Yes**. The Self Checkout closes and returns to the Activate Register screen. The Self Checkout register is closed for use until the register is opened again.

Figure 3-40 Activate Register

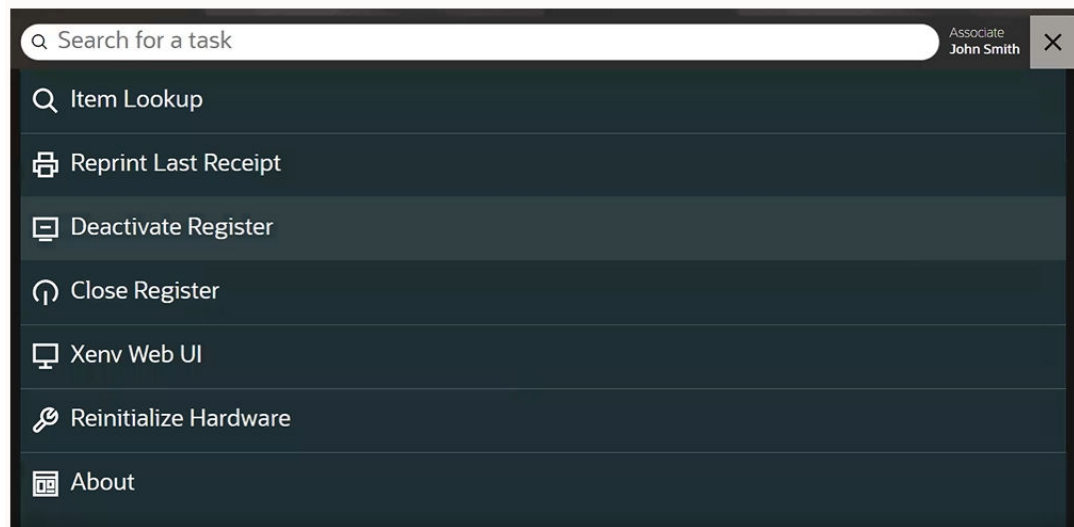


Note

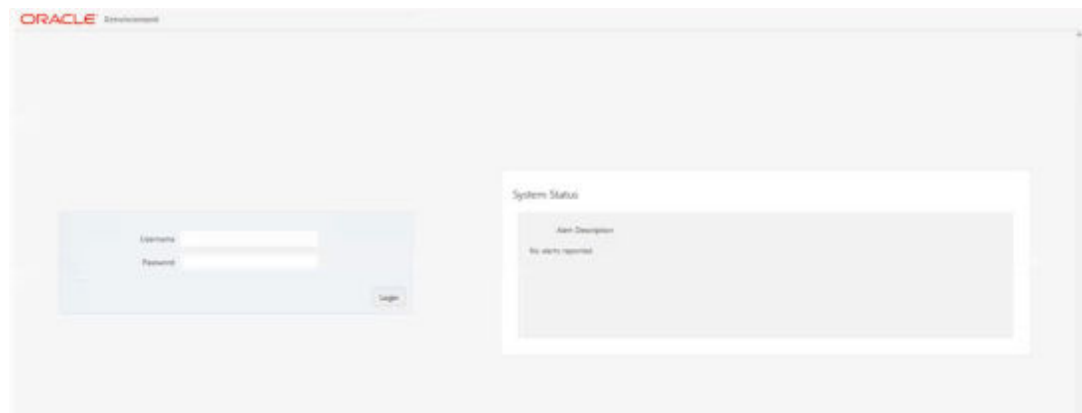
There is no manual tender reconciliation required on the Self Checkout at the close of a register

Xenv Web UI

1. Log in as an associate. See [Associate Login](#).

Figure 3-41 Associate Menu

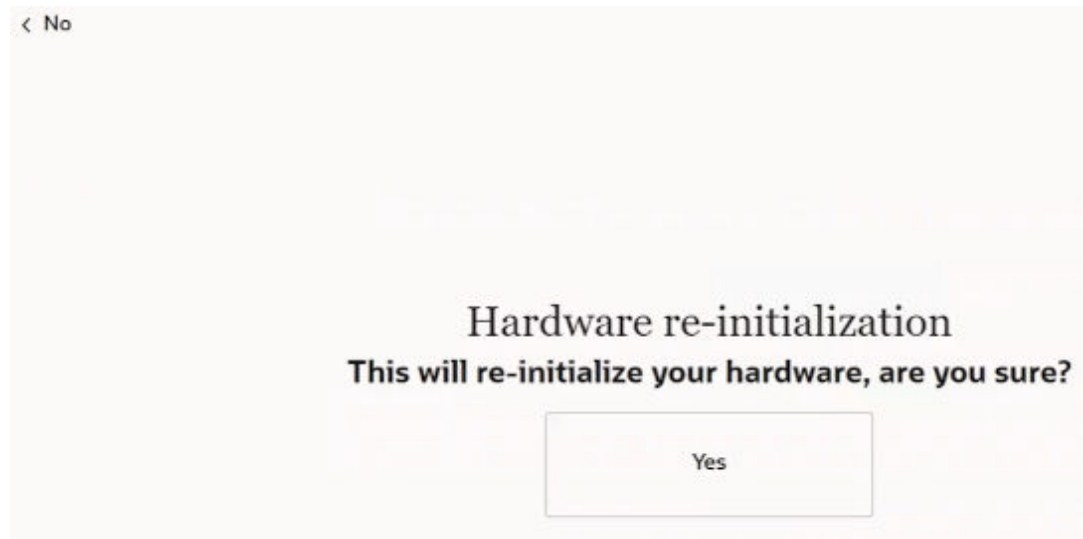
2. Select **Xenv Web UI** from the associate menu to launch the Xenvironment web User Interface (UI).

Figure 3-42 Xenv Web UI

Reintialize Hardware

Occasionally, the peripheral hardware devices must be reset.

1. Log in as an associate. See [Associate Login](#).
2. Select **Reintialize Hardware** from the associate menu.

Figure 3-43 Reinitialize Hardware

3. Select **Yes**. When complete, the associate menu is shown.

24/7 Trading - End of Retail Period Process

A store can function 24 hours a day and seven days a week.

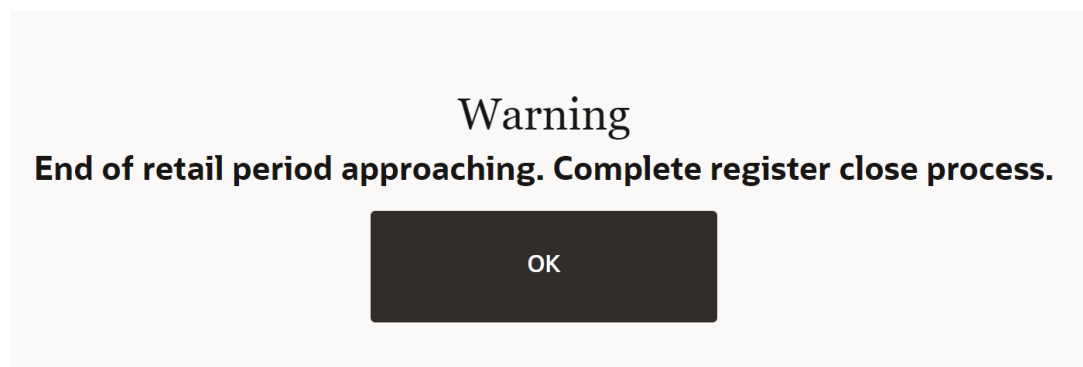
If your system is configured to support a 24-hour store environment, the store will perform a rolling close on registers. Each register will be rolled over to the next retail period (business day) one by one; always keeping at least one register available for use.

If the Xstore Self Checkout is configured with 24/7 trading in your store, the Self Checkout register is locked at the end of retail period and an associate is forced to login to close and open the Self Checkout register for trading on the next business day.

1. If configured, the following prompts are displayed at the end of retail day on the Self Checkout register.

Note

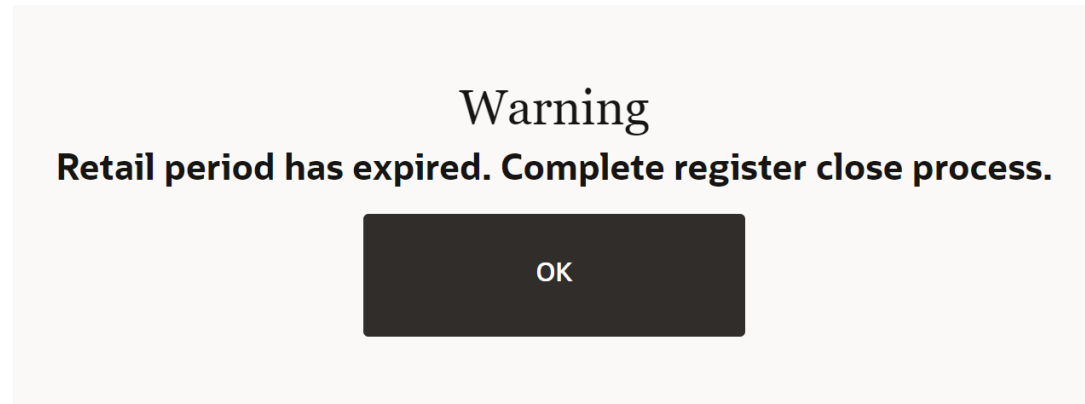
For more information about System Configurations, see the *Oracle Retail Xstore Office User Guide* or the *Oracle Retail Xstore Office Cloud Service User Guide*.

Figure 3-44 End of Retail Period Approaching

This warning message is displayed one hour before the end of the retail period and continues to be displayed on each individual Xstore Self Checkout register at the beginning of a transaction, every 10 minutes until the register close process has been started.

During a configurable grace period, the following message is displayed.

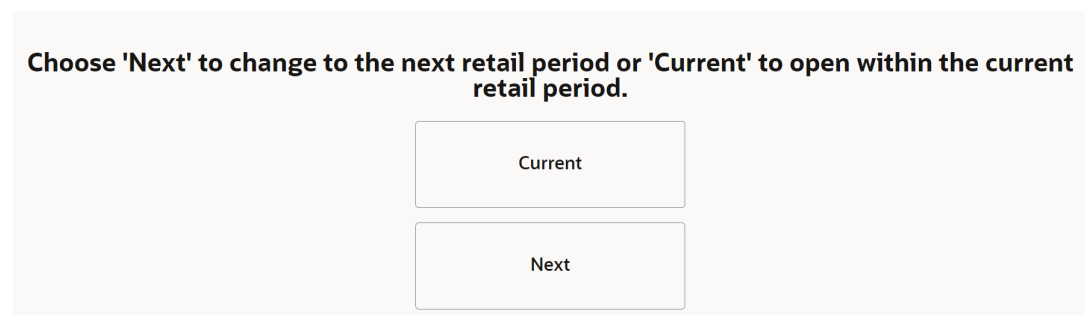
Figure 3-45 Retail Period Expired



When the configurable grace period has passed, the message **No new transactions can be recorded within this retail period. The register must be closed and opened again to proceed.** displays.

2. Log in as an associate. See [Associate Login](#). The Associate menu is displayed.
3. Selects **Register Close**.
4. You are prompted if you want to close the register.
5. Select **Yes**.
 - If you do not want to close the register, select **No**. The system returns to the Associate menu.
6. Depending on your system's configuration you either receive a prompt to open the register, or you need to return to the Associate menu and select **Open Register**.
7. Select **Yes**.
 - If you do not want to open the register, select **No**, you are returned to the Activate screen. For more information, see the [Activate Register](#) section.
8. The following prompt displays.

Figure 3-46 Change to Next Retail Period or Open within Current Retail Period



- Select **Next** to change to the next retail period. The Self Checkout register opens for the next available business date.
- Select **Current** to open within the current retail period. The Self Checkout register opens on the current business date.

About

The About screen displays the copyright, the version, and legal disclaimer of Self Checkout being used.

To view this information:

1. Log in as an associate. See [Associate Login](#).
2. Select **About** from the associate menu.
3. Select **Back** to return to the associate menu.

4

Self Checkout Console

The Self Checkout Console allows associates to oversee all Self Checkout registers in a store from a web browser and provides the ability to open, close, activate, or deactivate single or multiple Self Checkout registers at a time. Additionally, individual registers can be halted in the event of suspicious or problematic activity. The Self Checkout Console also alerts associates of any Self Checkout registers needing associate assistance or experiencing hardware errors.

The Self Checkout Console includes the following:

- [Self Checkout Console Overview](#)
 - [Self Checkout Console Login](#)
 - [Header](#)
 - [Metric Area](#)
 - [Selection Panel](#)
 - * [Views](#)
 - * [Actions](#)
- [Register Details](#)
- [Activate Register](#)
- [Deactivate Register](#)
- [Close Register](#)
- [Pause Register](#)
- [Working with Messages](#)

Self Checkout Console Overview

The Self Checkout Console includes the following areas:

- [Login Screen](#)
- [Header](#)
- [Metric Area](#)
- [Selection Panel](#)
- [Register Details](#)

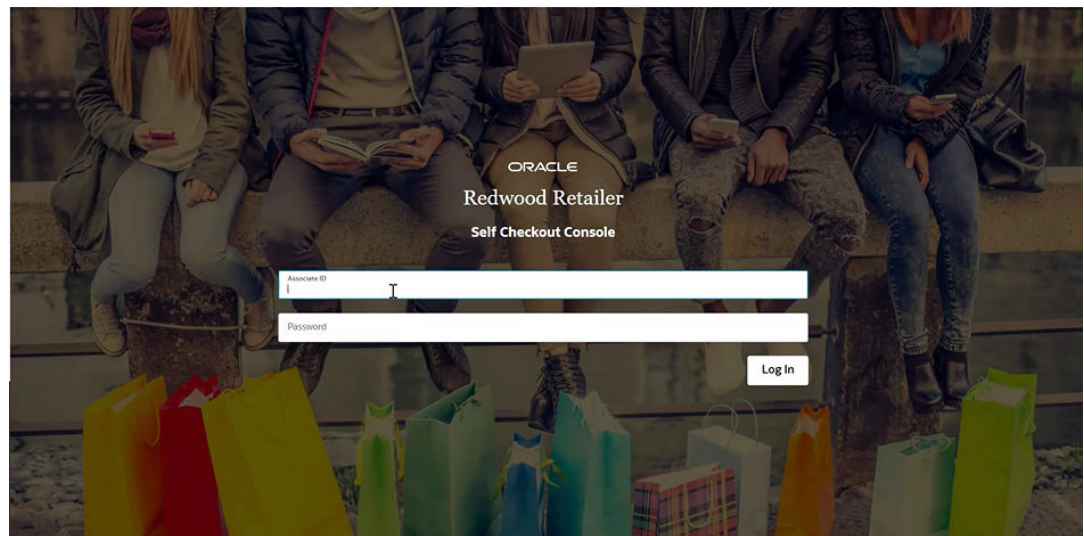
Self Checkout Console Login

The Self Checkout Console uses the Xstore permissions. An associate may have access to the console but not necessarily all of the actions. All logged in users will have the ability to Pause a register from the console.

To gain access to the Self Checkout Console functions, login is required.

1. Select **Associate Login**.

Figure 4-1 Associate Login



2. Scan your badge or enter your **Employee ID**.
3. Enter your **Password**.
4. Select **Login**. The Self Checkout Console appears.

Figure 4-2 Self Checkout Console



Header

This area displays the following information:



- Console Title
- Store Status: Open / Closed
- Store Name
- Store Number
- User Login Initials

Select the **Initials** of the current logged in user to display the About Application and Logout options.

Metric Area

This read only area allows the associate the ability to see the number of all Self Checkout registers in my store, those that are in use, open, closed, those with hardware issues, and the number of those Self Checkout registers that need assistance (customer help is needed).

Metrics include:

Metric	Description
All Registers	Count of total Self Checkout registers in the store - no matter what state the register is in.
<div><div> Note</div><div>The Register must be powered on and the application running to be included in the count.</div></div>	
In Use	Count of all open Self Checkout registers being used by a customer or a logged in associate.
Open	Count of all activated and deactivated Self Checkout registers. Open registers are all those that have been opened. They can either be activated or deactivated.
Closed	Count of all registers that have not been opened (this does not count deactivated Self Checkout registers that have been opened).
Hardware Issue	When the Self Checkout register has the error on the screen (including Help Desk issues).
<div><div> Note</div><div>When an associate clears the message the count is updated. However the Self Checkout may still have an error that needs addressing.</div></div>	
Needs Assistance	Count of all registers where a Self Checkout transaction is waiting for an associate to login .

Selection Panel

The selection panel on the Self Checkout console enables an associate to quickly select all of the Self Checkout registers in their store and perform an action on them, for example, at the end of the day, the ability to close all Self Checkout registers at once. It also allows an associate to select one or more registers to take action on.

The following actions are available:

- Card View (Default)/Table View
- [Close](#)
- [Activate](#)

- [Deactivate](#)
- [Pause](#)

Note

Pause is a single register action. It is not available for more than one register at a time.

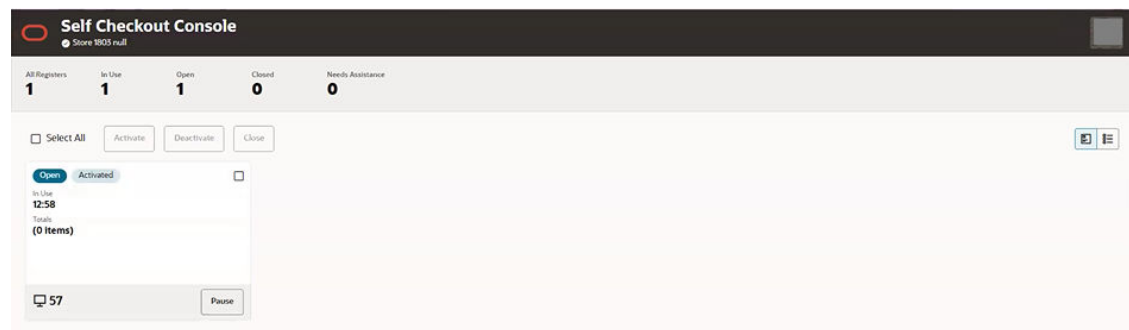
Views

The Self Checkout Console has two register views, Card View and Table View. These views display the exact same information.

Card View

In Card View the registers move based on defined parameters based on the actions of the registers.

Figure 4-3 Console - Card View



When a user logs into the console, the Card View is the default view. Each Self Checkout register will have a register card that provides specific details about the Self Checkout register which include:

- The Select All check box to select all of the Register Cards.
- A badge indicating an Open or Closed status
- A badge indicating an Activated, Deactivated, or Paused status
- A check box to select each specific register to perform an action on
- The running transaction session length
- Totals area
 - A running cart total in the store local currency - this is the amount the customer will pay which includes taxes
 - A running item count
- An icon indicating when an associate is logged in
- A register message is displayed at a time when applicable. The order of messages are:

- Assistance
- Hardware Issue
- Pending Action
- Register Number
- Pause button

The register cards will have the following colors depending on the activity/issues for the register:

- Red - Assistance required
- Orange - Hardware issues
- White - Registers that are open or closed but do not require assistance or have a hardware issue

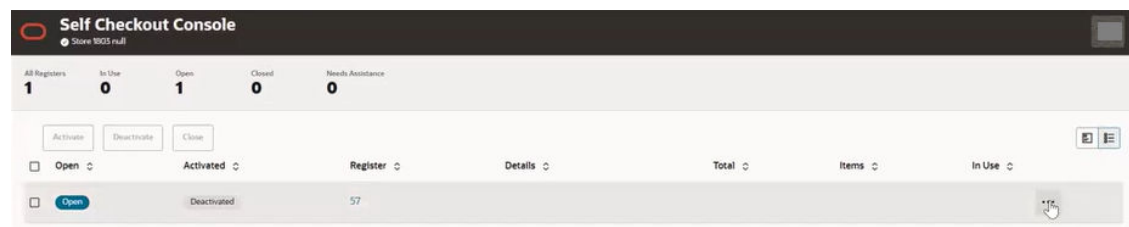
Switching from card view to table view clears all selected registers.

Selecting a register card will open the [Register Details](#).

Table View

In Table View the registers are always displayed by register number (Ascending).

Figure 4-4 Console - Table View



Select the Table View icon to switch from Card View located in the Selection Panel.

The Table View presents the same data as the Card View in a table format. Select a **column label** to sort ascending or descending. The check box in the first column **selects all** Registers.

Every row has a check box to select each specific register to perform an action.

Click the horizontal ellipsis to Pause or view the [Register Details](#) for that register.

Actions

In the selection panel an associate performs one of four actions on any selected register(s). Activate, Deactivate, and Close are disabled until one or more registers are selected.

- [Activate](#)
- [Deactivate](#)
- [Close](#)
- [Pause](#)

Note

Pause is a single register action. It is not available for more than one register at a time. Pause is disabled when a register is Closed, Deactivated, or has a Hardware Issue.

Either select individual register cards or **Select All** to perform the actions in the Card or Table view.

Register Details

To view the Register Details, select a register card or select the register number in table view or from the ellipsis in table view, select Register Details.

Figure 4-5 Console - Card View Register Details

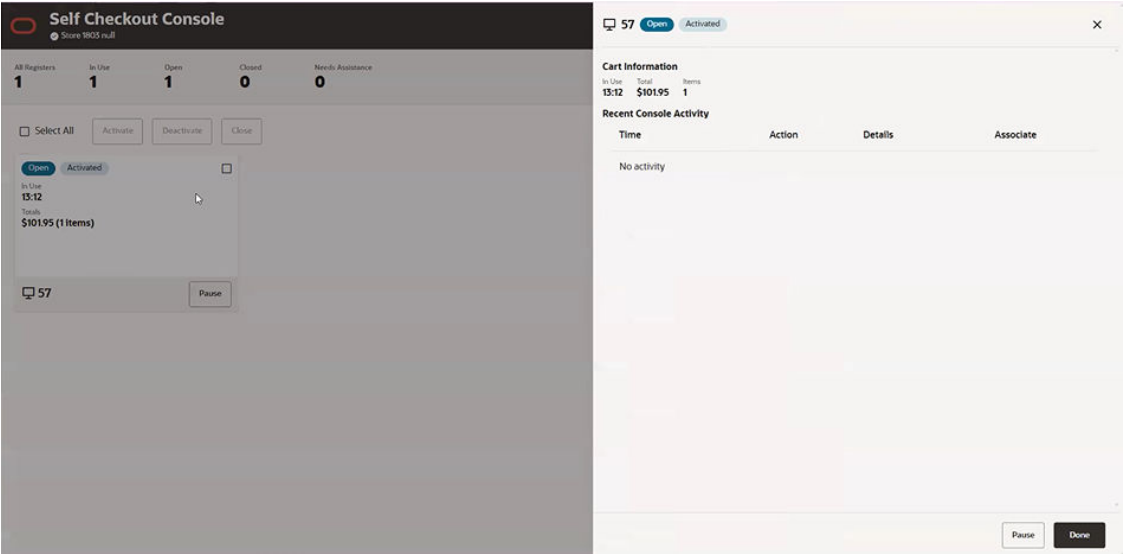
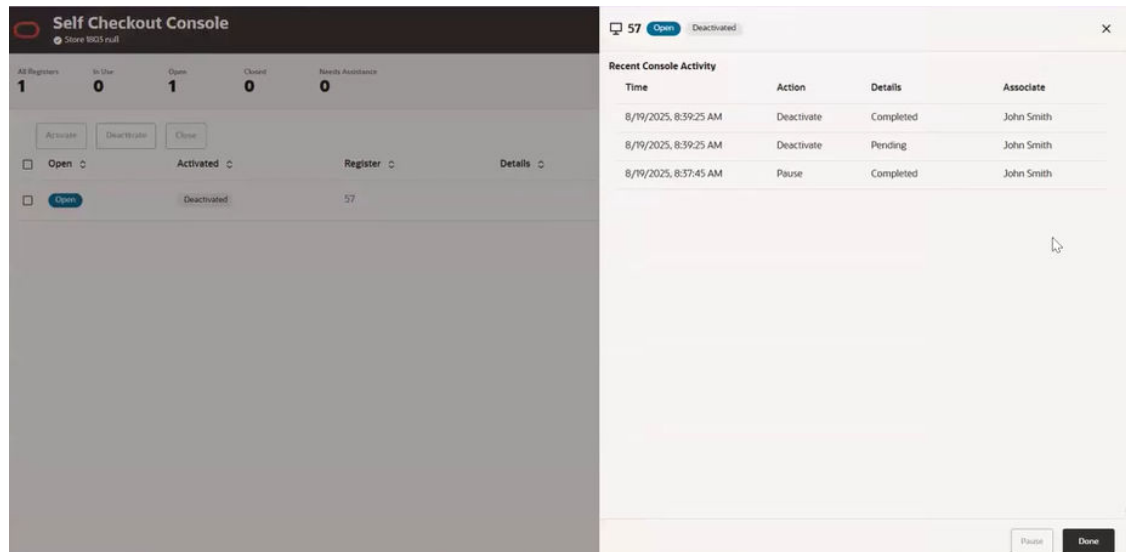


Figure 4-6 Console - Table View Register Details



Register Details include:

- Register Number
- Open or Closed Badge
- Activated, Deactivated, or Paused badge
- Messages - All messages that apply to the register display here. In card view and table view only the most important message displays. The order of messages that display in priority order are: Assistance, Hardware Issue, and Pending Action.
- Cart Information - Displays the running transaction length, running cart total, and running items count.
- Recent Console Activity - Displays the console activities taken per register and the effect that each action had on the register. Only those actions performed on the console are displayed. Any actions, for example, opening a register that are performed on the physical register and not on the console will not display in this activity list.

This information includes:

- Date - Time/Date Stamp
- Action - The type of action performed on the register
- Result - The resolution of the action
- Associate - The User Name of the Associate who performed the action

Note

Actions from previous days do not display. Up to fifteen actions will be listed, and older events will fall off the list as new activities take place.

Activate Registers

Registers that are [closed](#) or [deactivated](#) will be opened upon activating them. If a register is already open no new action is taken on the register as the command is ignored because the register is already in the proposed state. The command will be listed in the recent console activity list found in the [register details](#) as not applicable.

To activate a register in Card View:

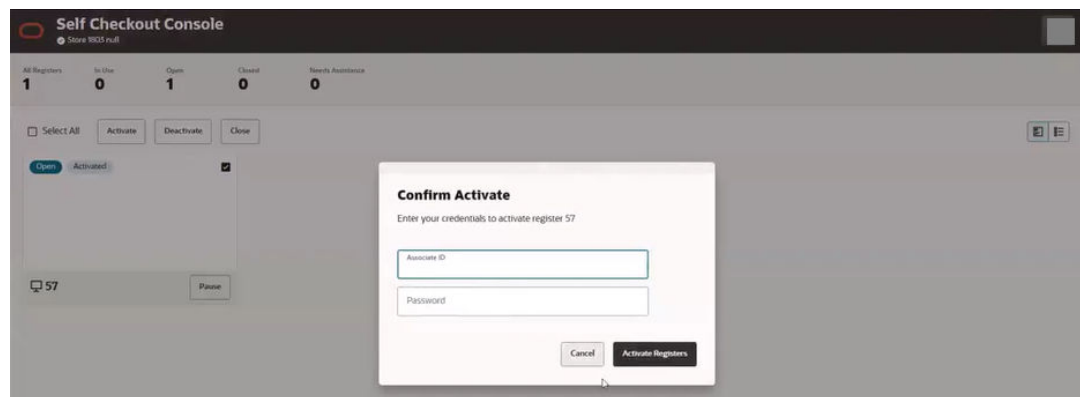
1. Select the check box in one or more registers, or select the check box for Select All to select all the Register Cards.

Figure 4-7 Console - Card View Register Selected



2. Click **Activate**. A confirmation window appears, the register is Open.

Figure 4-8 Console - Confirm Activate Register Prompt



3. You are prompted to enter your login credentials.
4. Then click **Activate Registers** to activate the selected registers, or click **Cancel** to return to the Console.

To activate a register in Table View:

1. Select the check box for one or more rows, or select the check box for Select All to select all the rows.
2. Click **Activate**. A confirmation window appears, the register is Open.
3. You are prompted to enter your login credentials.
4. Then click **Activate Registers** to activate the selected registers, or click **Cancel** to return to the Console.

Deactivate Registers

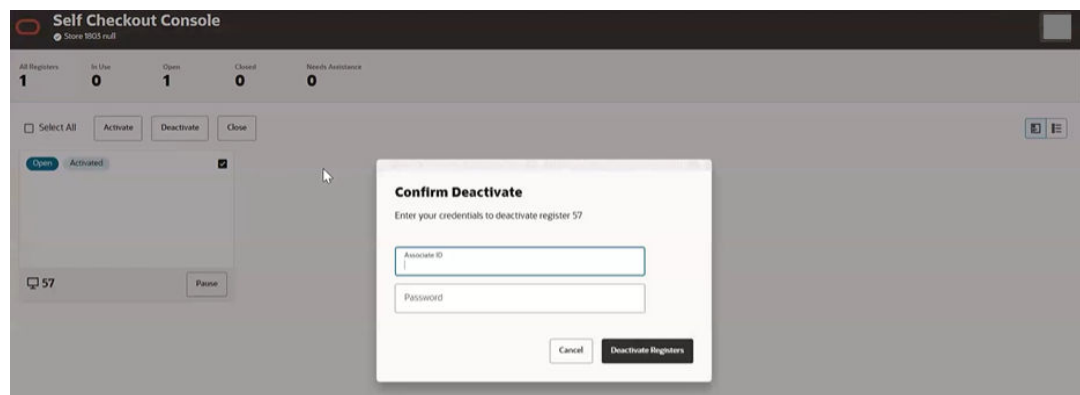
Deactivating one or more registers provides the retailer the ability to adjust the number of registers that are open when there are periods of low traffic in the store, or number of personnel needed to supervise the self check out area are not available to supervise a large number of Open and Activated self checkouts.

Registers that are deactivated will remain open but not available for customer transactions. If a register is already deactivated the command is ignored because the register is already in the proposed state. The command will be listed in the recent console activity list found in the register details as not applicable.

To deactivate a register in Card View:

1. Select the check box in one or more registers, or select the check box for Select All to select all the Register Cards.
2. Click **Deactivate**. A confirmation window appears.

Figure 4-9 Console - Confirm Deactivate Registers Prompt



3. You are prompted to enter your login credentials.
4. Then click **Deactivate Registers** to deactivate the selected registers, or click **Cancel** to return to the Console.

Note

Deactivating a register does not **Close** the register. It is still in an Open state and can be reactivated by using the Action: [Activate](#).

To deactivate a register in Table View:

1. Select the check box for one or more rows, or select the check box for Select All to select all the rows.
2. Click **Deactivate**. A confirmation window appears.
3. You are prompted to enter your login credentials.
4. Then click **Deactivate Registers** to deactivate the selected registers, or click **Cancel** to return to the Console.

Note

Deactivating a register does not **Close** the register. It is still in an Open state and can be reactivated by using the Action: [Activate](#).

Close Registers

Closing a register will close any open and deactivated registers. If the register is already closed the command will be ignored as the register is already in the proposed state. The command will be listed in the recent console activity list found in the register details as not applicable. Registers that are open and in use will list as "Pending Close" until the transaction at the register is completed. Once the action can be performed on the register this "Pending Close" message will no longer display and the register will be closed.

To close a register in **Card View**:

1. Select the check box in one or more registers, or select the check box for Select All to select all the Register Cards.
2. Click **Close**. A confirmation window appears.
3. Click **OK** to close the selected registers, or click **Cancel** to return to the Console.

To close a register in **Table View**:

1. Select the check box for one or more rows, or select the check box for Select All to select all the rows.
2. Click **Close**. A confirmation window appears.
3. Click **OK** to close the selected registers, or click **Cancel** to return to the Console.

Pause Registers

When an associate selects Pause on the Self Checkout Console the self checkout register will display a prompt that states assistance is required, requiring an associate to log in.

Note

Pause is a single register action. It is not available for more than one register at a time.

The Pause feature is used when an associate sees there is unusual or atypical activity being performed on a self check out. Selecting Pause for that Self Checkout may not be immediate. The process will continue until there is a break point in the process. At that time a message will display on the self checkout register letting the customer know that an associate will be with them soon. The Self Checkout remains paused until an associate enters their credentials.

An associate can pause a register in card view and table view:

Card View

To pause a single register in Card View:

1. Click **Pause** in the Register Card. A confirmation window appears.
2. Click **Pause** to pause the selected register, or click **Cancel** to return to the Console.

Table View

To pause a single register in Table View:

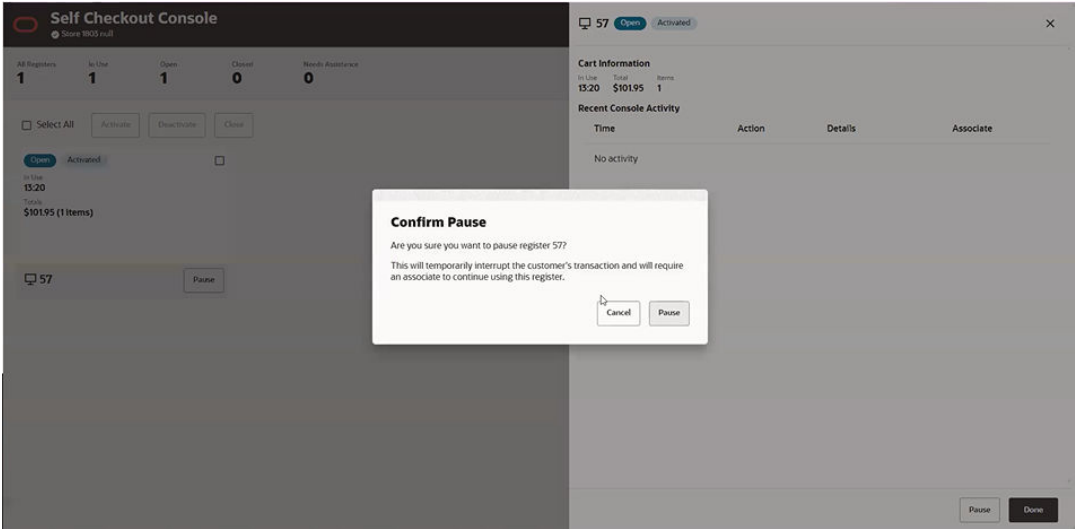
- 1. Click the horizontal ellipsis in the desired row.
- 2. Click **Pause**. A confirmation window appears.
- 3. Click **Pause** to pause the selected register, or click **Cancel** to return to the Console.

Register Details

To pause a single register in the Register Details:

- 1. From the Card view, click a register card to display the register details, or from the table view click the horizontal ellipsis in the desired row and click **Register Details**.
- 2. Click **Pause**. A confirmation window appears.

Figure 4-10 Console - Register Details Pausing a Register



- 3. Click **Pause** to pause the selected register, or click **Cancel** to return to the Card or Table View.

Figure 4-11 Console - Card View Register Paused

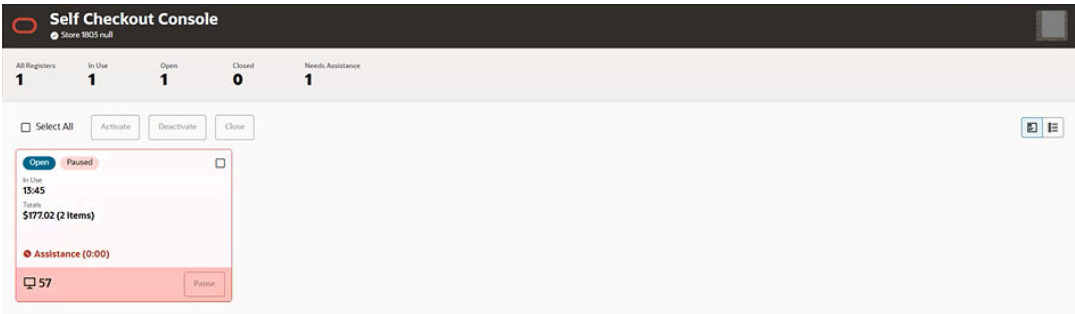
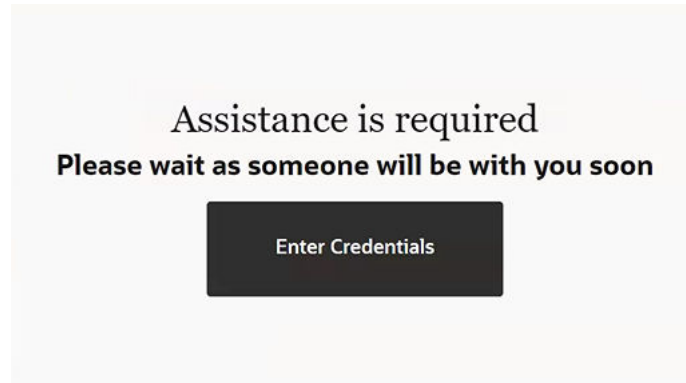


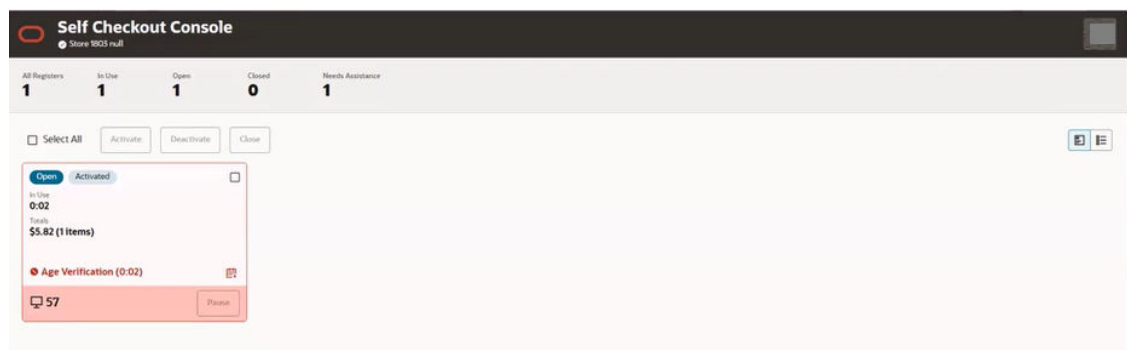
Figure 4-12 SCO - Message when Register Paused

Age Verification

Associates can verify the age of customers remotely at the Self Checkout Console to maintain the flow at the Shelf Checkout registers. If age restricted items are scanned by the customer at the Self Checkout, associates receive an alert on the Console that an Age Verification is required. The message contains the following options:

- Approve - Confirm age remotely
- Verify at Register - Verify age with customer at register

The store must be configured for approving age verification on the console.

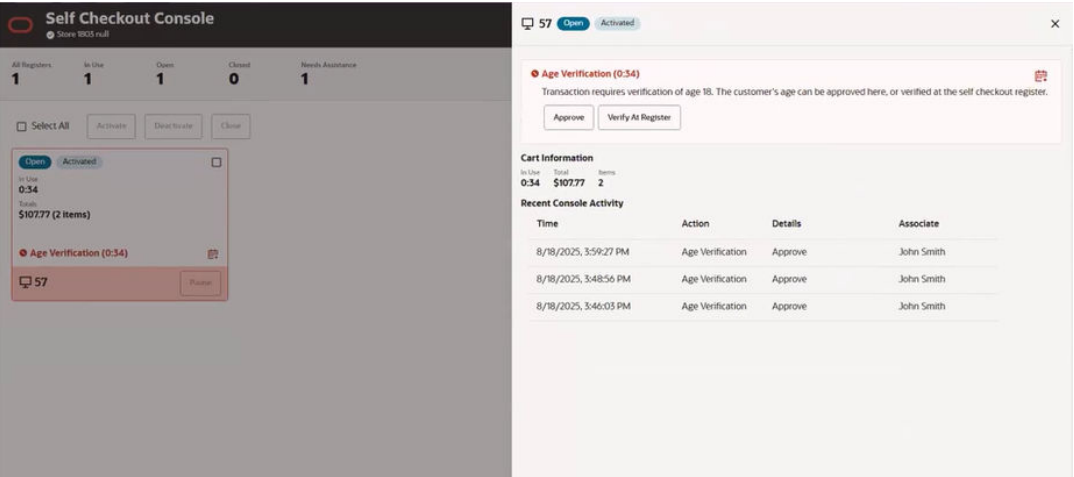
Figure 4-13 Console - Age Verification

Confirm Age Remotely

To confirm the age of the customer remotely, follow the steps below:

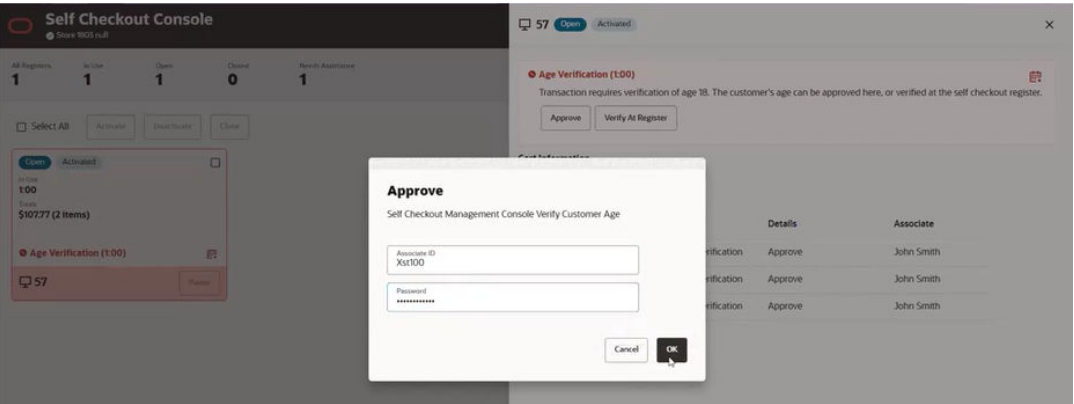
1. Select the card/row to open the register details.

Figure 4-14 Console - Card View Age Verification Register Details



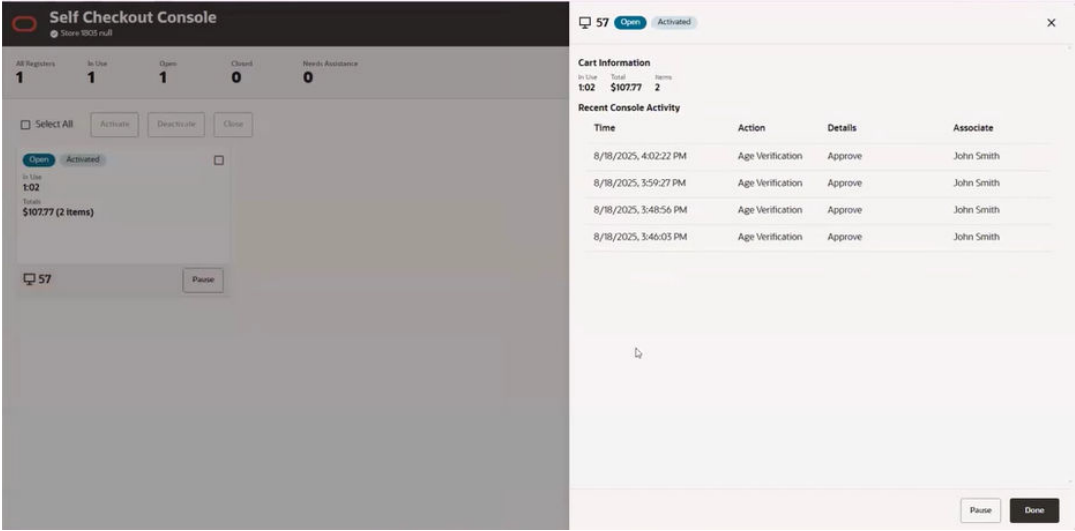
- 2. Visually confirm that the customer is of age and select the **Approve** button in the alert. A confirmation window appears.

Figure 4-15 Console - Approve Customer Age



- 3. You are prompted to enter your login credentials.
- 4. Select **OK** to approve the age of the customer or select **Cancel** to remove item from the basket.
- 5. The age confirmation response is displayed in the Recent Activity Table.
- 6. The assistance message is removed from both the card and the list.

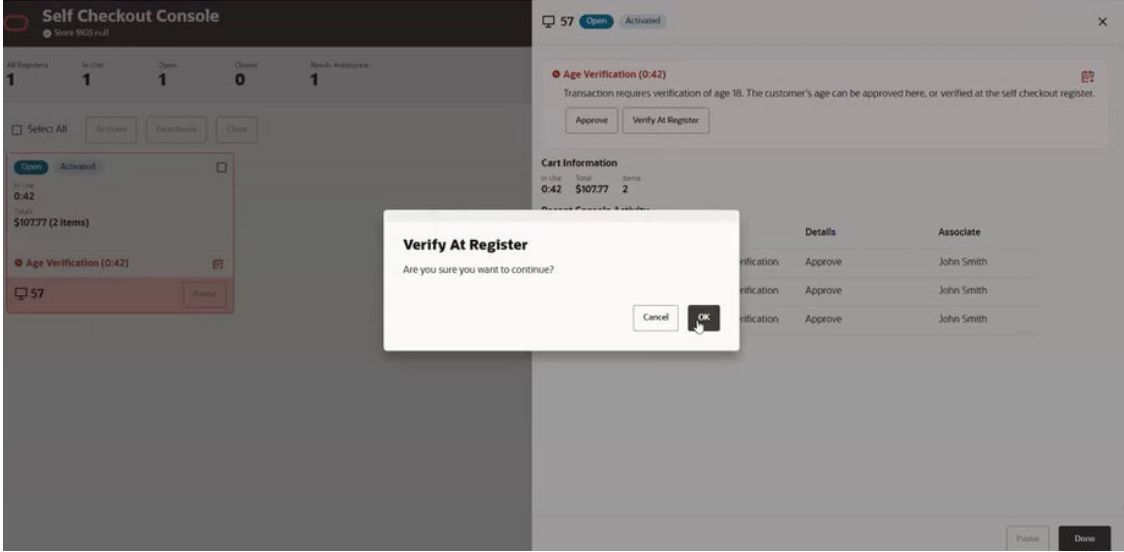
Figure 4-16 Console - Customer Age Approved



Verify Age with Customer

If you select **Verify at Register** you are required to go to the Self Checkout register and enter the customer's date of birth. You are prompted to confirm that you want to verify the age with the customer.

Figure 4-17 Console - Verify at Register Prompt



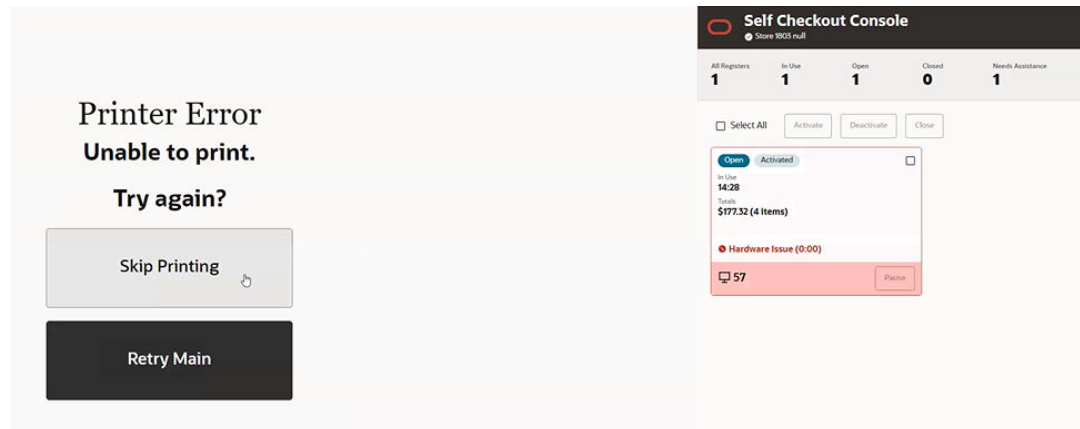
For more information, see the [Age Restricted Items](#) section.

Working with Messages

The Self Checkout Console can display three messages helpful for knowing the state of the register. The three messages are: Assistance, Hardware Issue, and Pending Action .

- **Assistance:** A message that displays when the self checkout register requires an associate to log into the register and assist a customer.
- **Hardware Issue:** A message that alerts an associate when there is a hardware issue that must be addressed before the register can be used by customers.

Figure 4-18 Console - Hardware Issues



- **Pending “Action”:** A message that displays when an action has been taken by an associate on the console, but the register is not able to take immediate action on the command.

Note

An example of Pending “Action” is Pending Close.

An example, is when a register is in use by a customer and a close action has been taken on that register. In the console the message will display for that register, "Pending Close" until the transaction is completed. When the transaction is completed then the pending message will be removed and the register will be closed.

The register cards will have the following colors depending on the activity/issues for the register:

- **Red** - Assistance required
- **Orange** - Hardware issues
- **White** - All other registers, closed, open with no hardware or no assistance

Note

Card View and Table View show only one message. Register cards will show all applicable messages.

Alerts

A retailer can create high, medium, and low level alerts to the Self Checkout Console.

Passive Messages

A retailer can create Passive Messages that enable the ability to send custom, informational messages to the Self Checkout Console based on workflow events at a Self Checkout.

Custom Assistance Request Messages

A retailer can create Custom Assistance Request Messages which allow a retailer to post custom messages to the Self Checkout Console when putting a Self Checkout register into a "needs assistance" state.