



ces edge



CES EDGE WEB PORTAL GUIDE VERSION 1.0

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CES Edge Web Portal Guide

Introduction:

CES Edge is a “POS on a Payment Terminal” Android application designed to run on Clover Flex and Clover Mini devices. It is centrally managed through the CES Edge Web Portal, providing a streamlined way to configure, monitor, and maintain your system.

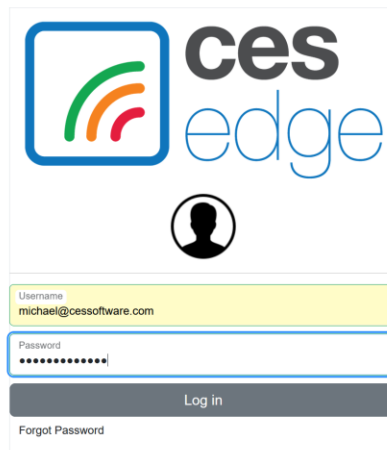
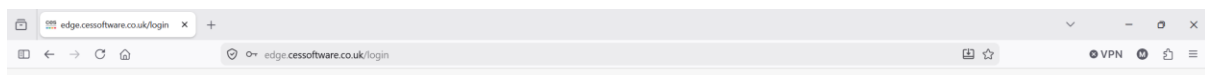
This guide outlines how to set up and manage the CES Edge Web Portal, as well as how to access and run sales reports.

CES Edge Login:

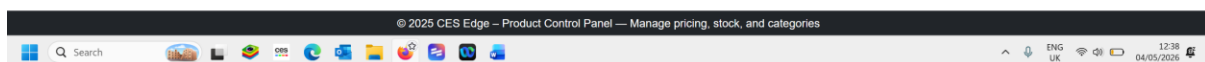
Accessing the Portal

To access the CES Edge web portal, open your preferred web browser and navigate to:

<https://edge.cessoftware.co.uk/login>



The login page features the CES Edge logo at the top, which consists of a blue square containing three curved lines in green, orange, and red, followed by the text 'ces edge' in a sans-serif font. Below the logo is a circular icon of a person's head and shoulders. The form includes a 'Username' field with the text 'michael@cessoftware.com', a 'Password' field with masked characters, a 'Log in' button, and a 'Forgot Password' link.



Logging In

1. Enter your **username** in the Username field.
2. Enter your **password** in the Password field.
3. Click the **Log in** button to access the system.

Troubleshooting Login Issues

Incorrect Username or Password

- Double-check that your login details are entered correctly.
- Ensure that **Caps Lock** is not enabled.
- Passwords are case-sensitive.

Forgotten Password

- Click the **“Forgot Password”** link on the login page.
- Follow the on-screen instructions to reset your password.
- If you do not receive a reset email, check your spam/junk folder.

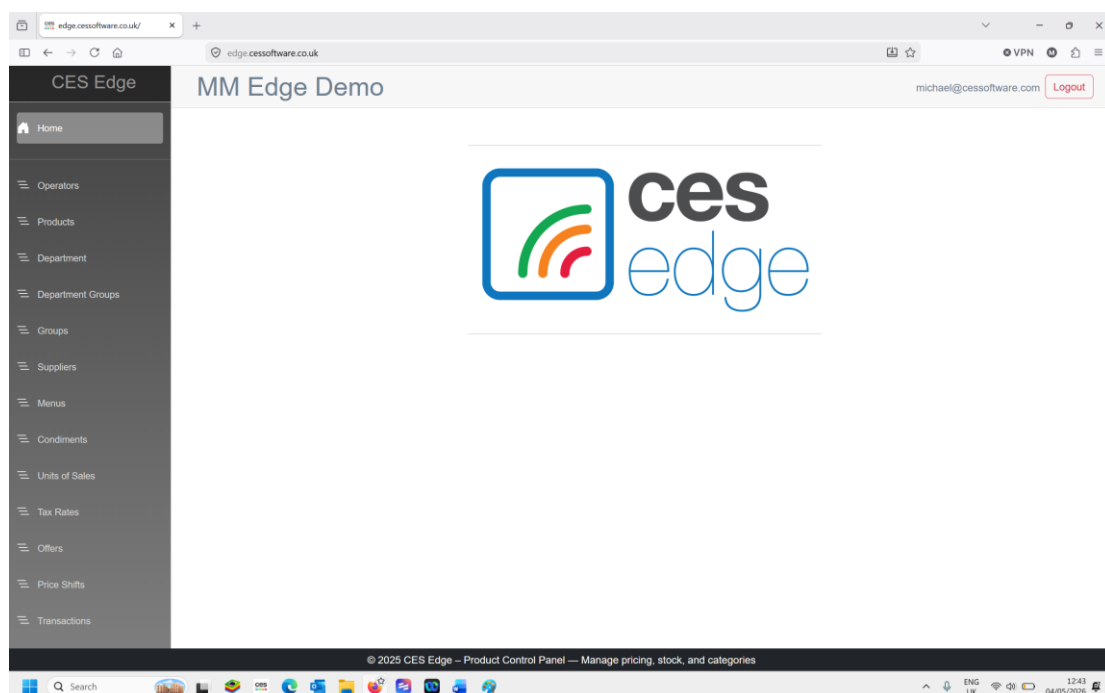
Expired Password / Reset Link

- If your password reset link has expired, request a new one from the login page.
- Alternatively, contact your system administrator for ass

Log into the CES Edge website using the URL above and enter your username and password.

Main Menu:

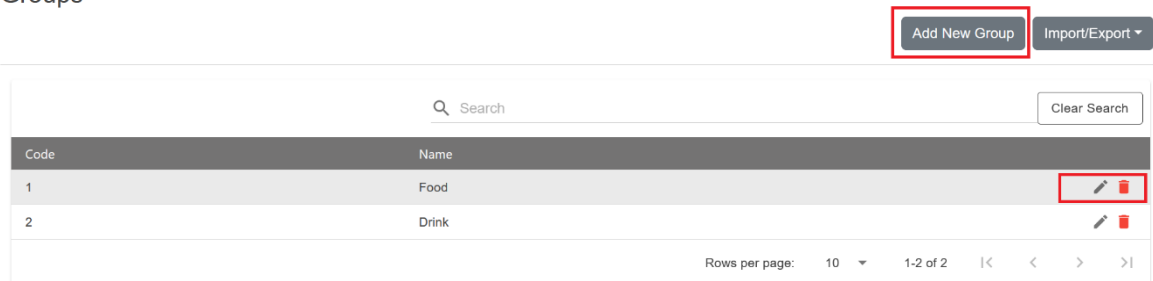
Once logged the home page will be displayed with the menu on the left-hand side.







Add, Edit Delete:

All menu sections used to configure system options follow a consistent layout. Each section includes an “Add New” option at the top. Existing entries can be modified using the “Edit” option (pencil icon) or removed using the “Delete” option (bin icon).

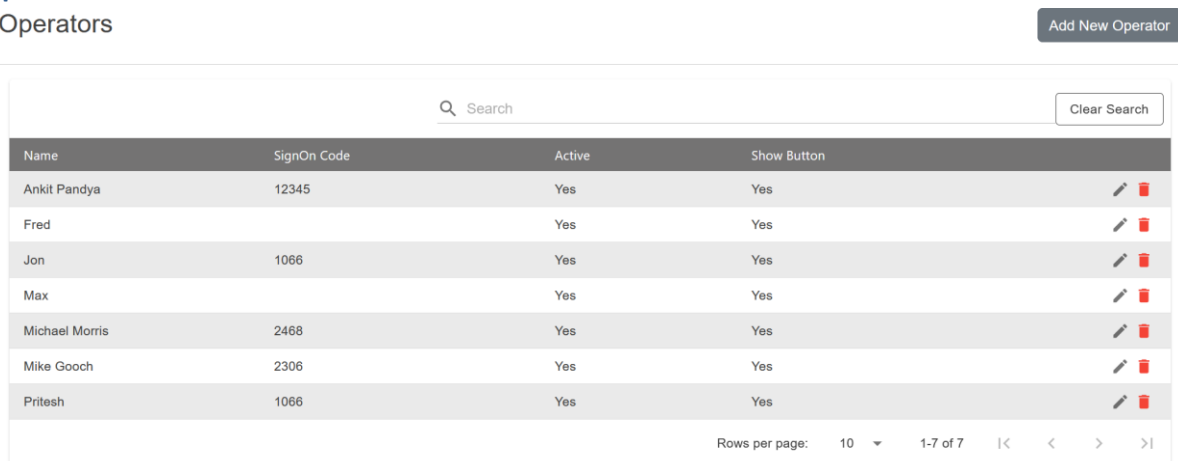
Groups

















Code	Name	
1	Food	 
2	Drink	 

Operators:

Operators



Name	SignOn Code	Active	Show Button	
Ankit Pandya	12345	Yes	Yes	 
Fred		Yes	Yes	 
Jon	1066	Yes	Yes	 
Max		Yes	Yes	 
Michael Morris	2468	Yes	Yes	 
Mike Gooch	2306	Yes	Yes	 
Pritesh	1066	Yes	Yes	 

Operators are the users of the Edge app who are responsible for processing sales. The operator is recorded against each transaction, allowing sales activity to be tracked.

Operators can be configured to either display as a button on the sign-on screen or require a Sign On Code to access the Edge app. Both sign-on methods can also be configured to require a password.

Operator Settings:

- **Name** – Enter the operator’s name.
- **Sign On Code** – Enter the operator’s sign-on code (optional)
- **Password** – Enter the operator’s password (optional).
- **Active** – Tick to make the operator active.
- **Display Button** – If ticked, an operator button will be displayed on the Edge app sign-on screen.

Edit Operator

Name

SignOn Code

Password

Active

Display Button

Product Prerequisites



Before creating your product list, ensure the following areas are set up correctly in CES Edge. These are required to allow products to be configured and reported accurately.

Required Setup

1. **Tax Rates**
 Define the applicable tax rates (e.g. Standard, VAT Zero VAT) that will be assigned to products.
2. **Units of Sale**
 Set up how products are sold (e.g. Each, Small, Medium, Large) this ensures correct pricing and stock handling.
3. **Suppliers**
 Add supplier records for purchasing and stock control purposes.
4. **Groups**
 Create product groups to help organise items (e.g. Food, Drink).
5. **Departments**
 Set up departments for reporting and categorisation (e.g. Burgers, Pizza, Can Drinks, Hot Drinks).

Products

Edit Product

Barcode 202003		Price Levels	
Description Cappuccino		1	Small £ 2.5
Department Hot Drinks		2	Medium £ 2.9
Supplier Default	Cost 0.0	3	Large £ 3.3
Tax Code Standard	Tax Rate 20.0%	4	Each £ 0.0
Sequence 0	Text Color 	5	Each £ 0.0
	BG Color 	6	Each £ 0.0
Condiments		7	Each £ 0.0
Condiment 1 None	Condiment 2 None	8	Each £ 0.0
Condiment 3 None	Condiment 4 None		
Condiment 5 None	Condiment 6 None		

Product Settings:

- **Barcode** – Any alphanumeric code can be used. It is recommended to align barcodes with their department (e.g. Department 101: use barcodes 101001, 101002, 101003).
- **Description** – Enter the product description.
- **Department** – Select the department from the drop-down list.
- **Supplier** – Select the supplier from the drop-down list.
- **Tax Code** – Select the tax code from the drop-down list.
- **Sequence** – Determines the order in which products are displayed.
- **Text and BG Colors** – Sets the product text and button colours
- **Condiments** – Select any required condiments from the drop-down lists. Up to 6 condiments can be assigned to each product.
- **Price Levels** – Select the unit of sale and enter the corresponding price.

Menus

Menu 1
None

Menu 2
None

Menu 3
None

Menu 4
None

Menu 5
None

Menu 6
None

Price Shifts

Price Shift 1
None

Price Shift 2
None

Price Shift 3
None

Offers

Offer
None

Print to Kitchen

Zero priced item

As Condiment

Multi Price

Stop

Cancel
Save Product

- **Menus** – Select any required menus from the drop-down lists. Up to 6 menus can be assigned to each product.
- **Price Shifts** – Select any required price shifts from the drop-down lists. Up to 3 price shifts can be assigned to each product.
- **Offers** – Select any required Mix and Match offer from the drop-down list.
- **Print to Kitchen** – Enables kitchen printing for the product.
- **Zero Priced Item** – Enables the product to be sold at a zero price. If this option is not ticked, selecting a zero-priced product will prompt the operator to enter a price.
- **As Condiment** – Allows the product to be used as a chargeable condiment (e.g. Extra Cheese).
- **Multi Price** – Enables multiple price options to be displayed on the Edge app.
- **Stop** – Prevents the product from being displayed on the Edge app.

Batch Products

The Batch Products option allows multiple products of the same type to be created quickly, reducing the time required to enter each product individually.

This function is typically used for groups of products that share the same settings, such as belonging to the same department, having the same supplier, tax rate, or other common attributes. For example, a range of soft drinks can be created as a batch and then individual details, such as product names, prices, or barcodes, can be adjusted as required.

When the Batch Products option is selected, the screen below will be displayed.

Enter the first barcode number and the quantity of products to be created. In the example below, the first barcode is **201006** with a quantity of **6**, which will create products with barcodes **201006 to 201011**.

Select the required **Department**, **Supplier**, **Tax Rate**, and **Unit of Sale** from the drop-down selections, then click the green **Create Batch** button to generate the products.

Create Batch

Barcode
201006

Quantity
6

Department
Soft Drinks

Supplier
Bookers

Tax Rate
20.0%

Unit of Sale
Each

Text Color

BG Color

Print to Kitchen

As Condiment

Cancel

Create Batch

The screen below will be displayed, allowing you to enter the **Description** and **Price** for each of the products created. Once all the required details have been entered, click the green **Save Products** button to complete the batch product creation process.

Update Batch Products

6 products found

201006	Product Description	£ 0.0
201007	Product Description	£ 0.0
201008	Product Description	£ 0.0
201009	Product Description	£ 0.0
201010	Product Description	£ 0.0
201011	Product Description	£ 0.0

Cancel

Save Products

Departments:

Departments are used to group products into categories, with each department represented by a button on the Edge app. Selecting a department button on the Edge app will display the products within that department, allowing them to be selected for sale.

Departments

Add New Department Import/Export ▾

<input type="text" value="Search"/> Clear Search			
Code	Name	Group	Display
101	Burgers	Food	Yes
102	Pizza	Food	Yes
201	Can Drinks	Drink	Yes
202	Hot Drinks	Drink	Yes

Rows per page: 10 ▾ 1-4 of 4 |< < > >|

Department Settings:

- **Code** – Any alphanumeric code can be used. It is recommended to align codes with their group (e.g. Group 1: 101, 102, 103; Group 2: 201, 202, 203).
- **Name** – The department name
- **Sequence** – Determines the position of the department button on the Edge app
- **Group** – The group the department is linked to selected from the drop down
- **Department Group** – Allows products from multiple departments to be displayed under a single button
- **BG Colour** – The background colour of the department button on the Edge app
- **Text Colour** – The text colour used on the department button
- **Display Button** – A checkbox that must be ticked for the department button to appear on the Edge app

Edit Department

Code

Name

Sequence

Group

Department Group

BG Color

Text Color

Display Button

Department Groups:

Department Groups are used to combine multiple departments into a single button on the Edge app, for example **Spirits and Mixers**. This allows operators to access and select products from multiple departments through one button, making the sales screen easier to navigate and reducing the number of department buttons required.

Department Groups

Code	Name	Display
1	Spirits & Mixers	Yes

Rows per page: 10 | 1-1 of 1 | < >

Department Group Settings:





- **Code** – The unique code used to identify the Department Group.
- **Name** – The name displayed for the Department Group button.
- **Sequence** – Determines the order in which the button appears on the sales screen.
- **BG Colour** – Sets the background colour of the button.
- **Text Colour** – Sets the colour of the text displayed on the button.
- **Display Button** – Tick this option to display the Department Group button on the sales screen.

Groups:

Groups are primarily used for reporting purposes and sit at the top of the hierarchy for analysing product sales. Departments are the next level down and must be assigned to a Group.

Groups

Add New Group Import/Export

Search		Clear Search
Code	Name	
1	Food	 
2	Drink	 

Rows per page: 10 1-2 of 2 |< < > >|

Group Settings:

- **Code** – Group Code
- **Name** – Group Name

Edit Group

Code

Name







Suppliers:

Suppliers are a compulsory field that must be assigned to each product, allowing you to link products to their respective suppliers.

The Edge Web Portal includes a **Default Supplier**, which can be used by customers who do not require detailed supplier setup.

Suppliers

Add New Supplier

Search				Clear Search
Code	Name	Phone	Email	
1	Default Supplier			 
2	Booker Cash and Carry	01992 456123	info@booker.co.uk	 
3	ABC Meats	0207 205 8866	sales@abcmeats.com	 

Rows per page: 10 1-3 of 3 |< < > >|

Supplier Settings:

- **Code** – Supplier Code
- **Name** – Supplier Name
- **Phone Number** – Supplier phone number
- **Email** – Supplier email address

Edit Supplier

Code

Name

Phone Number

Email

Menus:

Menus contain a list of products that are assigned to a main product to prompt the operator to select additional products to be sold with the main product. Up to 6 menus can be assigned to a single product.

For example, a **Burger Meal Deal** could include one menu to select a side order and a second menu to select a drink option.

Menus

Code	Title	Minimum	Maximum	Compulsory	
001	Choose Sides	1	1	Yes	
002	Choose Drink	1	1	Yes	
003	Exclusions	0	0	No	
004	Drink And Side Upgrade	0	0	No	
005	Choose Burger	0	0	No	
006	Extras 2	0	0	No	
007	Add Mixer	0	0	No	

Rows per page: 10 1-7 of 7 |< < > >|

Menu Settings:

- **Code** – The unique code used to identify the menu.
- **Title** – The name displayed for the menu.
- **Minimum** – The minimum number of selections required from the menu.
- **Maximum** – The maximum number of selections allowed from the menu.
- **Compulsory** – Tick this option to make the minimum number of selections mandatory.
- **Option** – Click the search icon to the right of the box and search for the required product to add as a menu option.
- **Price Level** – Select the required price level from the drop-down menu.
- **Description** – Enter the description that will be displayed for the menu option when selected on the app.

Edit Menu

Code 001	Title Choose Sides	Minimum 1	Maximum 1	Compulsory <input checked="" type="checkbox"/>
Option 1 102001 - Regular Fries	Q	Price Level 2 - Meal Deal - 0.0	Description Regular Fries	✕
Option 2 102002 - Large Fries	Q	Price Level 2 - Meal Deal - 1.25	Description Large Fries	✕
Option 3 102003 - Chicken Wings	Q	Price Level 2 - Meal Deal - 1.2	Description Chicken Wings	✕
Option 4 102004 - Garlic Bread	Q	Price Level 2 - Meal Deal - 0.0	Description Garlic Bread	✕
Option 5	Q	Price Level	Description	✕

Condiments:

Condiments are attached to products and allow the operator to add special instructions, make selections, or apply modifiers to an item. Condiments are commonly used for kitchen instructions and are printed on kitchen tickets alongside the associated product.

Condiments

Add New Condiments Import/Export ▾

<input type="text" value="Search"/> Clear Search				
Code	Title	Minimum	Maximum	Compulsory
001	No Options	0	0	No
002	Extras	0	0	No
003	How Cooked	1	1	No
004	What Bread	0	0	Yes
005	What Side	0	0	Yes
006	Sauce	0	0	Yes

Rows per page: 10 ▾ 1-6 of 6 |< < > >|

Condiment Settings:

- Condiments have Minimum and Maximum settings to control the number of selections that can be made.
- If the **Compulsory** setting is ticked, users must select at least the minimum number of options when the condiment is displayed in the Edge app.
- Condiments can contain up to 12 options. Below the 12th option are the Save and Cancel buttons, which require scrolling down to access.

Edit Condiments

Code

Title

Minimum Maximum Compulsory

Units of Sale:

Units of Sale are used to define product variations with different sizes or price levels, such as Regular and Large or Pint and Half Pint.

When adding new products, the “Each” unit of sale is used by default.

When a product with multiple Units of Sale is selected in the CES Edge app, a pop-up menu is displayed, allowing the operator to choose the appropriate option. The selected Unit of Sale will also be printed on kitchen tickets.

Units of Sales Add New Unit of Sale

Clear Search

Description	Prefix	Qty	
Each	Each	1.00	✎ ✖
Half	Hf	0.50	✎ ✖
Large	Lrg	1.00	✎ ✖
Medium	Med	1.00	✎ ✖
None	None	0.00	✎ ✖
Pint	Pt	1.00	✎ ✖
Regular	Reg	1.00	✎ ✖

Rows per page: 10
1-7 of 7
|< < > >|

Units of Sale Settings:

- **Description**, used in the Web Portal to assign the unit to product price levels
- **Prefix**, abbreviation used on price level selection pop-up menus, kitchen tickets, receipts, and requested bills within the Edge app
- **Quantity**, used to define the size, e.g. Half 0.5

Edit Unit of Sale

Description

Prefix

Quantity





Cancel
Save

Tax Rates:

CES Edge comes preconfigured with two default tax rates: **Standard VAT (20%)** and **Zero VAT (0%)**. These can be used immediately or adjusted, and additional tax rates can be created if required.

Tax Rates

Add New Tax Rate

Code	Description	Rate (%)	
1	Standard VAT	20.00%	 
2	Zero	0.00%	 

Search: Clear Search

Rows per page: 10 1-2 of 2 |< < > >|

Tax Rate Settings:

- **Code** – The unique code used to identify the tax rate.
- **Description** – The description or name of the tax rate.
- **Rate** – The percentage value of the tax rate.

Edit Tax Rate

Code

Description





Rate

Offers:

The Offers option is used to create fixed-price mix-and-match promotions, allowing a specified quantity of selected items to be sold together for a set price. Offers can be scheduled using start and end dates and can also be configured to run during specific times of the day and on selected days of the week.

Offers

[Add New Offer](#)

Offer Id	Description	Start	End	Days	Qty	Price Level	On Stop	
3	2 for £2.00	10/03/2026 09:00:00	10/03/2027 15:00:00	Tue,	2	£2.00	No	 
1	2 for £3.00	01/06/2026 11:00:00	10/06/2026 15:28	Sun, Mon, Tue, Wed, Thu, Fri, Sat,	2	£3.00	No	 

Rows per page: 10 ▾ 1-2 of 2 |< < > >|

Offer Settings:

- **Number** – Unique number assigned to the offer.
- **Description** – Description of the offer.
- **Qty** – The quantity of items required to trigger the offer.
- **Fixed Amount** – The fixed selling price applied when the offer is triggered.
- **Start Date** – The date the offer becomes active.
- **End Date** – The date the offer expires.
- **Start Time** – The time of day the offer becomes active.
- **End Time** – The time of day the offer finishes.
- **Days of the Week** – Tick the days on which the offer is active.
- **Stop** – Puts the offer on hold without deleting it.

Edit Offer

Number 1

Description

Qty Fixed Amount

Start Date Start Time

End Date End Time

Sunday Monday
 Tuesday Wednesday
 Thursday Friday
 Saturday Stop

Price Shifts:

Price Shifts are a type of offer that allows Edge to automatically apply different price levels during specific dates, times, and days of the week using a price offset value. This is useful for scheduled promotions such as happy hour, where products can be sold at a different price level between set times, for example from 5:00 PM to 7:00 PM on selected days.

A Price Offset is used to increase the price level used for products by a set amount. For example, if a Pint is normally sold using Price Level 1 and a Half Pint uses Price Level 2, a Price Offset of 2 will change them to use Price Level 3 and Price Level 4 respectively during the active Price Shift period.

Price Shifts

Number	Title	Start Date	End Date	Days	Price Offset	On Stop	
2	Beer Happy Hour	10/03/2026 09:00:00	10/03/2027 15:00:00	Tue, Wed,	2	No	

Rows per page: 10 1-1 of 1 < >

Price Shift Settings:

- **Number** – Unique number assigned to the Price Shift.
- **Description** – Description of the Price Shift.
- **Price Offset** – Set the number of price levels to offset when the price shift is active.
- **End Date** – The date the price shift expires.
- **Start Time** – The time of day the price shift becomes active.
- **End Time** – The time of day the price shift finishes.
- **Days of the Week** – Tick the days on which the price shift is active.
- **Stop** – Puts the price shift on hold without deleting it.

Edit Price Shift

Number 2

Title

Price Offset

Start Date

Start Time

End Date

End Time

Sunday Monday
 Tuesday Wednesday
 Thursday Friday
 Saturday Stop

Transactions:

This is where historical transactions can be viewed, set the start and end date and click on the search button. If multiple terminals are in use you can also select a specific terminal to view its transaction data.

A full transaction list will be displayed for the date range selected, to view a specific transaction click on the up arrow on the right hand side of the transaction.

Transactions

From: To: Terminal:

Transaction Number: 001-03-00164
 Order Number: 3004
 16-06-2026 16:54:21 ^

Transaction Number: 001-03-00164 Terminal Number: 3

PLU	Description	Qty	Unit Price	Vat Rate	Vat Amount	Total Price
101002	Cheeseburger	1	£6.50	20.0%	£1.08	£6.50
Sub Total:						£6.50
Cashback:						£20.00
Paid By Card:						£26.50

Transaction Number: 001-04-00003
 Order Number: 4007
 16-06-2026 16:12:55 ^

Transaction Number: 001-04-00002
 Order Number: 4006 ^

Reports:

There are three reports available:

- Daily Sales
- Group/Department Sales
- Product Sales

Each report includes options to enter a From and To date and select a specific terminal when multiple terminals are in use. If the terminal selection is left at the default value of zero, the report will include data from all terminals.

To run a report, select the required report from the drop-down list, enter the From and To dates, and select a terminal number if reporting on a specific terminal. Press the Run Report button to generate the report.

Reports

Reports
 Sales By Period ▼

From: 18/06/2026

To: 18/06/2026

Terminal: 0

Run Report

Example Sales by Period report below

Sales By Period																				
From: 01/06/2026		To : 18/06/2026																		
Terminal: All																				
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%;">Transactions:</td> <td style="width: 20%; text-align: right;">17</td> <td style="width: 40%;"></td> </tr> <tr> <td>Gross Sales:</td> <td style="text-align: right;">47</td> <td style="text-align: right;">£164.50</td> </tr> </table>			Transactions:	17		Gross Sales:	47	£164.50												
Transactions:	17																			
Gross Sales:	47	£164.50																		
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%;">Less Refunds:</td> <td style="width: 20%; text-align: right;">0</td> <td style="width: 40%; text-align: right;">£0.00</td> </tr> <tr> <td>Less Discount:</td> <td style="text-align: right;">0</td> <td style="text-align: right;">£0.00</td> </tr> <tr> <td>Net Sales:</td> <td></td> <td style="text-align: right;">£164.50</td> </tr> <tr> <td>Balance:</td> <td></td> <td style="text-align: right;">£164.50</td> </tr> </table>			Less Refunds:	0	£0.00	Less Discount:	0	£0.00	Net Sales:		£164.50	Balance:		£164.50						
Less Refunds:	0	£0.00																		
Less Discount:	0	£0.00																		
Net Sales:		£164.50																		
Balance:		£164.50																		
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%;">Cash:</td> <td style="width: 20%; text-align: right;">9</td> <td style="width: 40%; text-align: right;">-£11.58</td> </tr> <tr> <td>Card:</td> <td style="text-align: right;">8</td> <td style="text-align: right;">£84.91</td> </tr> <tr> <td>Balance:</td> <td></td> <td style="text-align: right;">£73.33</td> </tr> <tr> <td>Service Charge:</td> <td></td> <td style="text-align: right;">£0.00</td> </tr> <tr> <td>Cashback:</td> <td></td> <td style="text-align: right;">£20.00</td> </tr> <tr> <td>Tips:</td> <td></td> <td style="text-align: right;">£0.00</td> </tr> </table>			Cash:	9	-£11.58	Card:	8	£84.91	Balance:		£73.33	Service Charge:		£0.00	Cashback:		£20.00	Tips:		£0.00
Cash:	9	-£11.58																		
Card:	8	£84.91																		
Balance:		£73.33																		
Service Charge:		£0.00																		
Cashback:		£20.00																		
Tips:		£0.00																		
VAT Analysis																				
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Rate (%)</th> <th style="width: 30%;">Goods(Ex)</th> <th style="width: 40%;">VAT</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px 0 0 20px;">20.00%</td> <td style="text-align: right; padding: 5px 0 0 20px;">£124.37</td> <td style="text-align: right; padding: 5px 0 0 20px;">£34.63</td> </tr> <tr> <td style="padding: 5px 0 0 20px;">0.00%</td> <td style="text-align: right; padding: 5px 0 0 20px;">£3.50</td> <td style="text-align: right; padding: 5px 0 0 20px;">£0.00</td> </tr> <tr> <td style="padding: 5px 0 0 20px;">5.00%</td> <td style="text-align: right; padding: 5px 0 0 20px;">£1.90</td> <td style="text-align: right; padding: 5px 0 0 20px;">£0.10</td> </tr> <tr> <td style="padding: 5px 0 0 20px;">Total:</td> <td style="text-align: right; padding: 5px 0 0 20px;">£129.77</td> <td style="text-align: right; padding: 5px 0 0 20px;">£34.73</td> </tr> </tbody> </table>	Rate (%)	Goods(Ex)	VAT	20.00%	£124.37	£34.63	0.00%	£3.50	£0.00	5.00%	£1.90	£0.10	Total:	£129.77	£34.73					
Rate (%)	Goods(Ex)	VAT																		
20.00%	£124.37	£34.63																		
0.00%	£3.50	£0.00																		
5.00%	£1.90	£0.10																		
Total:	£129.77	£34.73																		

When the report is displayed, scroll down to the bottom of the page where the Close and Export buttons can be found. The Export button will generate an A4 version of the report that can be printed.

Total:	£129.77	£34.73		
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px 0 0 20px;">Date: 18/06/2026</td> <td style="width: 50%; text-align: right; padding: 5px 0 0 20px;">Time: 07:43:40</td> </tr> </table>			Date: 18/06/2026	Time: 07:43:40
Date: 18/06/2026	Time: 07:43:40			
Close	Export			

Options:

The Options screen is where the following settings are configured:

- **Receipt Details** – Used to configure the header and footer information printed on receipts.
- **Service Charge** – The default value is set to 0.0. Entering a percentage value will enable service charge on the Edge app.
- **Security** – A Manager Password can be configured to restrict access to the Main Menu options within the Edge app.

Receipt Details

Receipt Header: CES Software Ltd 39 Lindsey Street Epping CM16 6RB	Receipt Footer: Thank you Please come again!	Edit
---	---	----------------------

Service Charge

Service Charge Title Service Charge	Service Charge Rate 10.0
--	-----------------------------

Security

Manager Password 2468

[Save](#)

Users

There are two types of users in Edge: Edge Portal users and Edge App users. Only one of each user type is required.

Users

[Add New User](#)

User Name	App User
mike@mm	Yes
michael@cessoftware.com	No

Rows per page: 10 | 1-2 of 2 | < >

The **Edge Portal user** provides access to the Edge Portal. There is no significant advantage to creating multiple users, as user permissions are not currently available. All users have access to all features within the portal.

The **Edge App user** is used to log into the merchant's account, download configuration data, and upload transaction data to the correct account.

Each merchant account has a unique suffix that is automatically appended to the app username. In the example below, **@mm** is automatically populated.

When creating a new Edge App user, the **App User** tick box must be selected.

Add New User

User Name
Jon




Password
2468

App User

Cancel Save

Users

[Add New User](#)

User Name	App User	
mike@mm	Yes	
michael@cessoftware.com	No	
Jon@mm	Yes	

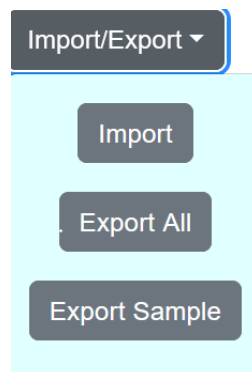
Rows per page: 10 1-3 of 3 < > >|

Import/Export

Many data tables include an Import/Export function, which allows data to be populated or edited using CSV files. In sections that support this feature, an **Import/Export** button is displayed in the top-right corner of the screen.

Clicking the arrow on the right-hand side of the **Import/Export** button opens a menu with the following options:

- **Import** – Imports a CSV file into the selected section.
- **Export All** – Exports all data from the selected section (e.g., all products).
- **Export Sample** – Exports the first record as a sample file, which can be used as a template when creating a CSV file for import.



Version History

Version	Date	Author	Changes Made
1.0	June 2026	Michael Morris	Initial release