

Rudaya Enterprise Suite 19.3.1 Installation Guide

Release RES 19.3.1 · Version 19.3.1 · Windows 64-bit

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RUDAYA POWERS PVT. LTD.

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Contents

1. About this guide
2. Before you start
3. Install
4. First-time setup in the browser
5. Licence activation
6. After installation
7. Optional features: email, AI, bank connections and e-invoice settings
8. Upgrade, repair and uninstall
9. Troubleshooting
10. Support

Revision history

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1. About this guide

This guide explains how to install Rudaya Enterprise Suite (RES) 19.3.1 on a Windows computer or server, complete the first-time setup in your browser, activate your licence and choose your industry packages. It also explains how to upgrade from RES 19.1, 19.2 or 19.3.

One installer, RudayaEnterpriseSuite-19.3.1-Setup.exe (called Setup below), contains the whole Suite. It is downloaded inside a ZIP file, RudayaEnterpriseSuite-19.3.1-Setup.zip:

- **Core Foundation:** customers, products, quotations, sales orders, invoices, receivables, payables, cash flow, purchase register, approvals, audit and backup.
- **Industry packages:** Distribution & Trading, Manufacturing, Retail, Construction and Real Estate.
- **Service & AMC:** Installed Base / CMDB, warranty, AMC and service history, shared across industries.

You do not download separate installers for industries. An industry package becomes usable when your licence includes it and you switch it on under Administration > Licensing > Installed packages.

New in RES 19.3.1

- **Installer fits laptop screens.** The Setup windows are smaller, so the Next and Install buttons stay visible on a laptop screen.
- **Order-to-cash tracking.** Order Tracking for each Sales Order (customer PO / WO, supplier purchase orders, shipments, customs, delivery, invoice, payment, warranty and closure), Standard Quote and Standard Invoice layouts, approval email alerts, and removing a user with handover of their open work. The upgrade updates the database automatically; no installation step changes. See the RES 19.3.1 Order-to-Cash Workflow Setup Manual.
- **Audit trail.** New audit events always link to the stored chain. If Audit Center reports a break dated before the upgrade, see section 9.
- **From RES 19.3: more areas in the 30-day trial and in Enterprise Plus.** GST Dashboard and GST reports, tax classification (HSN / SAC), purchase analytics and input tax reports, FX actuals and cash-flow forecasting now open under Finance (section 7.10).
- **No new activation.** A trial or commercial activation from RES 19.1, 19.2 or 19.3 stays valid after the upgrade (section 8).
- **Unchanged since RES 19.2.** The PostgreSQL ODBC driver is optional, the licence stays valid when the network changes, and bank connections, AI suggestions and e-invoice settings are available (sections 3, 5 and 7.7 to 7.9).

2. Before you start

2.1 System requirements

Item	Requirement
Operating system	Windows, 64-bit (x64)
Account	A Windows administrator account (services are installed)
Database	PostgreSQL 17. Install it first (section 3.1, recommended), or let Setup install PostgreSQL 17 for you
Database driver	PostgreSQL ODBC driver (psqlODBC): optional. Rudaya does not use it and Setup continues without it (section 3.2)
Network port	Port 5111 free on the server

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Item	Requirement
Browser	A current version of Microsoft Edge, Google Chrome or Mozilla Firefox
Other software	None. The .NET runtime is built into the installer

2.2 What to have ready

- The PostgreSQL 17 installer for Windows x64, from postgresql.org/download/windows.
- The installer ZIP RudayaEnterpriseSuite-19.3.1-Setup.zip, downloaded from the Rudaya website.
- A name for your company workspace.
- The details of the first application administrator (name, email, a strong password).
- A strong password for the PostgreSQL administrator account (postgres).
- Contact with Rudaya for licence activation (section 5).

2.3 Verify the download

The download page shows a SHA-256 checksum for the ZIP file. Open PowerShell in the download folder and run:

```
Get-FileHash -Algorithm SHA256 .\RudayaEnterpriseSuite-19.3.1-Setup.zip
```

The result must match the checksum on the website exactly. If it differs, delete the file and download it again. Do not use a file whose checksum does not match.

Then right-click the ZIP, choose Extract All, and open the extracted folder. It contains RudayaEnterpriseSuite-19.3.1-Setup.exe. Its own SHA-256 is shown on the download page under the ZIP checksum. If a large download is interrupted, use Resume in your browser.

2.4 Windows security prompt

The installer is not code-signed, so Windows SmartScreen may show "Windows protected your PC" with an unknown publisher. Run the installer only after the checksum matches. Choose More info, check that the file name is RudayaEnterpriseSuite-19.3.1-Setup.exe, then choose Run anyway. If you are unsure, contact Rudaya support first.

3. Install

Install in this order. Each step must finish before the next one starts.

3.1 Install PostgreSQL 17

1. Run the PostgreSQL 17 installer for Windows x64 as administrator.
2. Keep the default port 5432. Set a strong password for the postgres administrator account and keep it safe; Setup asks for it in section 3.3.
3. Finish the installation. Stack Builder is not needed.

3.2 PostgreSQL ODBC driver (optional)

Rudaya does not use the PostgreSQL ODBC driver, and it is not included in the Rudaya installer. Setup shows it as optional and continues without it.

Install it only if another program on this computer needs it: download the 64-bit installer psqlodbc_x64.msi from the official PostgreSQL site (odbc.postgresql.org) and run it as administrator. If you installed the driver for RES 19.1, you can leave it in place.

3.3 Install Rudaya Enterprise Suite

1. Right-click RudayaEnterpriseSuite-19.3.1-Setup.exe and choose Run as administrator. Approve the Windows prompt.

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2. On the welcome screen choose Install. If Setup finds an existing Rudaya installation, it offers Upgrade, Repair, Recovery or Uninstall instead (section 8).
3. Connection & data. Choose to connect to an existing PostgreSQL 17 server and enter the server from section 3.1: address localhost (or the database server name), port 5432, and the postgres administrator account and password. Alternatively, let Setup install PostgreSQL 17.
4. Verify workspace. Enter the database name and the application database account (for example rudaya_app). If that account already exists on the server, enter its current password or choose a different account name; Setup never changes the password of an existing account.
5. Review the summary and choose Install. Setup creates the database and installs three Windows services: Core, Scheduler and License.
6. When installation finishes, Setup opens the Setup Wizard in your browser.

4. First-time setup in the browser

The browser Setup Wizard is a secure session that lasts 15 minutes from when Setup opens it. Every step you save is kept. If the session ends, return to the installer, choose Open Setup Wizard and confirm the administrator to continue from where you stopped.

1. Read and accept the licence agreement.
2. Create the first application administrator. This account is separate from the PostgreSQL administrator.
3. Enter your company details.
4. Complete Activation (section 5), or start the 30-day trial.
5. In Industry Bundles and Core modules, select the industry packages your licence includes.
6. Finish the wizard and sign in at the address shown, normally http://localhost:5111 on the server.

5. Licence activation

Activation ties your licence to this installation.

1. In the Setup Wizard, or later under Administration > Licensing, download the activation request and save the file.
2. Email the activation request to Rudaya. Tell us your company name, edition and the industry packages you need. Never email passwords.
3. Rudaya returns a signed activation file.
4. Import the signed activation file in the same screen.

Notes

- An activation file works only on the installation that produced its request. A file for a different computer or workspace is refused.
- The licence is tied to this computer: its Windows installation and its built-in network adapter. Switching between network cable and Wi-Fi, or adding virtual network adapters, does not affect it. Reinstalling Windows, replacing the mainboard or built-in network adapter, or moving to another computer needs a new activation; contact Rudaya.
- A trial or commercial activation issued for RES 19.1, 19.2 or 19.3 stays valid after the upgrade to RES 19.3.1.
- RES 19.3.1 offers a 30-day trial. An upgrade does not restart or extend a trial.
- An expired activation is refused. Ask Rudaya for a new one; do not edit the database or reinstall to reset it.

6. After installation

6.1 Users and permissions

Sign in as the application administrator and open Administration > Users & roles. Create one account per person. Standard roles include Admin, Sales Engineer, Sales Manager, Application Engineer, Finance and Viewer. Some areas (Bank Intelligence and bank connections, Distribution & Trading, Inbox email review and

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the finance approval controls) need permissions that no role has by default. Grant them under Users & roles > Governed permission assignments, with a recorded reason.

The menu shows only areas that are both licensed and permitted for the signed-in user.

6.2 Change industry packages later

An administrator with licence-management permission can open Administration > Licensing > Installed packages to switch licensed packages on or off. Switching a package off hides it but keeps all its records; switching it back on makes them visible again. Core cannot be removed.

6.3 Access from other computers on your network (optional)

By default the Suite is reachable on the server itself. To allow other PCs on your local network, an administrator enables HTTPS once with the included script Enable-RudayaIntranetHttps.ps1 and an approved server certificate. See the Intranet HTTPS Administrator Guide supplied with the installation, or contact Rudaya support. The setting is kept across upgrades.

7. Optional features: email, AI, bank connections and e-invoice settings

These features are optional and can be set up at any time after installation. Sections 7.1 to 7.6 need the Enterprise Plus edition, a Microsoft 365 tenant, and an IT administrator who can register applications in Microsoft Entra. Settings are under Administration > Settings. Secret values (client secrets, API keys) are stored encrypted and are never shown again; leave a secret field blank to keep the saved value.

Feature	What it does	Section
Microsoft 365 outbound email	Sends quotations, invoices and notifications from your Microsoft 365 mailbox	7.1
Microsoft Graph inbox	Lets users review selected customer emails inside Rudaya	7.2
AI provider	Reads a selected email to suggest CRM leads and create RFQs	7.3
Microsoft 365 Copilot	Optional AI provider using each user's Copilot licence	7.4
User permissions and checks	Gives users access and verifies the configuration	7.5, 7.6
Bank connections (new)	Pulls bank statements from your company's own bank into an inbox	7.7
AI suggestions in Finance (new)	Suggests bank entry matches and reads supplier bill text with a local model	7.8
E-invoice settings (new)	Records your e-invoice details for a later release	7.9

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7.1 Microsoft 365 outbound email (Microsoft Graph)

1. In the Microsoft Entra admin center, register an application (single tenant) for Rudaya and create a client secret. Note the tenant ID, application (client) ID and the secret value.
2. Give the application the Microsoft Graph application permission Mail.Send and grant admin consent. Restrict it to the sending mailbox only (Exchange Online application access policy or RBAC for Applications), and check that no wider tenant-wide grant remains.
3. In Rudaya open Settings > Email, choose Microsoft 365, and enter the sending mailbox, tenant ID, client ID and secret value. No mailbox password is used and multi-factor authentication stays on.
4. Choose Save, then Recheck to validate the configuration and sign-in.
5. Choose Send test email to a recipient you name, and confirm it arrives (or check Exchange message trace).

Other email providers (SMTP host, port, TLS, user and app password) remain available in the same screen.

7.2 Microsoft Graph inbox (for email review)

1. Use the same Entra application or a separate one in the same tenant. Give it read access to the mailbox that receives customer enquiries (Microsoft Graph application permission Mail.Read), restricted to that mailbox only.
2. Open Settings > Microsoft Graph. The setup checklist at the top shows each step as done or open, with the next action.
3. Enter the mailbox settings, tick sync enabled and choose Save Graph settings.
4. Turn on selected-email body review. This allows a user to open the text of one email they choose; nothing is read in bulk.

7.3 AI provider

Open Settings > AI, tick Enable AI features, and choose a provider:

Provider	Enter	Notes
Local model	Ollama or LM Studio running on the Rudaya server	Data stays on your server. Used for lead suggestions and for the Finance suggestions in section 7.8
Azure OpenAI	Endpoint, deployment name, API version and API key from the Azure portal	Lead suggestions and RFQ creation

Then return to Settings > Microsoft Graph and record the Azure OpenAI data scope approval. This approval is bound to the exact mailbox, provider configuration and fixed instructions. Approvals must be recorded by a user with the Admin role; a super administrator can view but not approve. Changing any provider or mailbox setting withdraws the approval, so approve again after a change. Cloud providers are off until approved.

7.4 Microsoft 365 Copilot (optional)

Microsoft 365 Copilot is a second cloud AI provider for leads and RFQs. Each user needs a Microsoft 365 Copilot licence and signs in with their own work account. Microsoft offers the Copilot Chat API it uses as a preview.

1. In the Microsoft Entra admin center, in the same tenant as the Graph mailbox, register a Web application. Add the redirect URI shown in Rudaya's Copilot settings panel: https://<your-rudaya-address>/api/v1/crm/copilot/callback. Rudaya must be opened over HTTPS for this (section 6.3), or on the server itself as localhost. Create a client secret.
2. Add these Microsoft Graph delegated permissions and grant admin consent: Sites.Read.All, Mail.Read, People.Read.All, OnlineMeetingTranscript.Read.All, Chat.Read, ChannelMessage.Read.All, ExternalItem.Read.All, plus openid, profile and offline_access. Microsoft requires this full set for the Copilot Chat API.
3. In Settings > Microsoft Graph, fill Microsoft 365 Copilot (CRM lead extraction): tenant ID, application (client) ID and client secret value. Tick Enable and save.

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4. Review the fixed instructions and record the Microsoft 365 Copilot data scope approval (Admin role).
5. Each user opens Sales > Inbox email review > Your Microsoft 365 Copilot connection > Connect Microsoft 365, signs in and consents. Disconnect removes their connection.

Saving the Copilot settings again later requires every user to reconnect.

7.5 Give users access

1. Open Administration > Users & roles > Governed permission assignments.
2. Grant crm.email_intake to each user who will use Inbox email review, with a reason. Grant customer.manage to users who may create customers from an email.
3. The super administrator account cannot receive these permissions; use named user accounts.

7.6 Check the configuration

1. Open Settings > Configuration verification and run the checks. Results are kept in Verification history.
2. In Settings > Microsoft Graph, confirm every checklist item is done.
3. Ask a user to follow User Manual section 7 to create a test lead from a sample email.

If a check fails, the message names the setting to correct. Never paste secrets into email or support tickets.

7.7 Bank connections (since RES 19.2)

A bank connection lets Rudaya pull account statements from your company's own bank. Your company arranges API access with its bank; Rudaya provides the screens to record the details. Rudaya Powers cannot do the bank onboarding on your behalf.

1. A super administrator grants the bank permissions to a role under Users & roles > Governed permission assignments, with a reason. The role must not be one held by their own account.
2. A user with that role opens Finance > Bank Intelligence > Bank connections, chooses the bank and enters the details the bank issued. For HDFC Bank the form lists the onboarding steps to complete with the bank. For ICICI, Axis, Kotak and Yes Bank the details are recorded as a provision, and statements are imported as files (MT940 or camt.053).
3. A second person approves the connection. Until it is approved it cannot be used.
4. Start in your bank's test (UAT) environment. Move to production only after your bank confirms the test.

- Statements arrive in an inbox for review. Nothing is posted to your accounts automatically.
- Secrets are stored encrypted on the server and masked on screen. Every statement pull is recorded in the audit trail.
- The HDFC statement calls were built to the bank's published specification and tested against a simulator. Your bank's own UAT confirmation is required before production use.

7.8 AI suggestions in Finance (since RES 19.2)

With a local model configured in Settings > AI (section 7.3), two helpers become available. They work only with a local model on your own server; no data leaves it.

- **Bank entry matching.** In Finance > Bank Intelligence, choose Ask the local AI model on a bank entry to get a suggested match.
- **Supplier bill reading.** In Finance > Payables, paste the text of a supplier bill to have the fields read and checked against the text.

Both give advice only. A person reviews and decides; the approval rules are unchanged. Without a local model the screens say so and continue to work manually.

7.9 E-invoice settings (since RES 19.2)

Under Administration > Settings > E-invoice you can record the details your company receives for the government e-invoice system. In RES 19.3.1 this is a provision only: the details are stored (secrets encrypted and not shown again) and nothing is sent to the e-invoice system. Continue to raise e-invoices by your present method.

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7.10 Areas opened by RES 19.3 (30-day trial and Enterprise Plus)

RES 19.3 opens the areas below for the 30-day trial and for Enterprise Plus licences. They appear under Finance > Finance Center after the installation or upgrade; nothing has to be switched on and no new activation is needed.

- **GST Dashboard:** output and input GST, ITC analysis, HSN and SAC analysis, tax liability, period comparison and adjustments.
- **Tax Classification:** HSN / SAC codes, suggestions, sales and purchase summaries, history, catalogue defaults and analytics.
- **Purchase Register:** vendor analysis, input taxes, period summary and trends.
- **Cash Flow:** forecasts, including advanced forecasts, and FX actuals.

BSIQE Discover is not part of RES 19.3.1. It follows in a later release.

8. Upgrade, repair and uninstall

- **Upgrade from RES 19.1, 19.2 or 19.3:** run RudayaEnterpriseSuite-19.3.1-Setup.exe as administrator and choose Upgrade. Setup creates and verifies a safety backup before changing anything. Your data, settings and commercial activation are kept.
- **Repair:** run the same Setup.exe and choose Repair to restore damaged program files without changing data.
- **Backup:** use Administration > Backup & Recovery for regular backups.
- **Downgrade** is not supported; to return to an earlier release, restore a backup taken before the upgrade.
- **Uninstall:** run Setup as administrator and choose Uninstall. Setup asks whether to keep your data and backups, and needs a verified backup before it removes data. PostgreSQL and unrelated databases are not removed.
- **ODBC driver:** no longer needed by Setup. A driver installed for RES 19.1 can stay or be removed; Rudaya is not affected.

9. Troubleshooting

Problem	What to do
Checksum does not match	Download again. Do not run the file.
"Windows protected your PC"	See section 2.4.
Setup shows "ODBC not installed (optional)"	No action is needed. Setup continues without the driver (section 3.2).
Next stays disabled on Connection & data	Check that the PostgreSQL administrator connection is verified.
Message naming the application database account	The account already exists. Enter its current password or choose another name.
Setup Wizard says the session has ended	Choose Open Setup Wizard in the installer and confirm the administrator.
Activation file refused	Make sure it was issued for this installation's request. After reinstalling Windows or changing the computer's hardware, ask Rudaya for a new activation (section 5).

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Problem	What to do
"The existing workspace could not be verified"	Setup does not recognise the installation as belonging to this computer. Reconnect the network adapter that was in use at installation and run Setup again, or contact Rudaya support. Your data is preserved.
Port 5111 in use	Stop the other program using the port, then run Setup again.
A menu item shows "Not installed"	Switch the package on under Licensing > Installed packages if your licence includes it.
A permission message	Ask your administrator to grant the permission.
AI or Inbox email review menu missing	Check the Enterprise Plus licence and the crm.email_intake permission (section 7.5).
"Approval required" for a cloud AI provider	Record the data scope approval as an Admin-role user (sections 7.3 and 7.4).
Copilot sign-in fails	Check the redirect URI, delegated permissions, admin consent and the user's Copilot licence (section 7.4).
Audit Center says the audit chain is not valid, at an event dated before the upgrade to 19.3.1	RES 19.3 could link two audit events written at the same moment to the same predecessor. RES 19.3.1 prevents this for new events; the earlier break stays visible and the events themselves are unchanged. Keep the finding on record. Contact Rudaya support if Audit Center reports a break dated after the upgrade.
Bank connection cannot be used	Check that a second person approved it and that your bank has enabled API access (section 7.7).

10. Support

Email Rudaya support at sales_rudaya@rudayapowers.com, call +91 020-46761610, or use the contact page at rudayapowers.com.

Step-by-step video tutorials for installation, configuration and everyday workflows are on the Rudaya Enterprise Suite YouTube channel: https://www.youtube.com/@rudaya3321

Include the product version shown in the application, your workspace name and a screenshot of any message. Never send passwords, licence keys or customer data.

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Revision history

Revision	Date	Change
5	21st November 2026	RES 19.3.1. Smaller installer windows for laptop screens; order-to-cash tracking, Standard Quote and Invoice layouts, approval email alerts and user removal with handover; audit-chain fix (section 9). Upgrade from RES 19.1, 19.2 or 19.3 keeps the activation.
4	16th November 2026	RES 19.3. The 30-day trial and Enterprise Plus licences also open GST Dashboard and GST reports, tax classification, purchase analytics, FX actuals and cash-flow forecasting (section 7.10). No setup step changes. Upgrade from RES 19.1 or RES 19.2 keeps the activation.
3	16th November 2026	RES 19.2. PostgreSQL ODBC driver is optional; installation order PostgreSQL 17, then Rudaya. Licence stays valid across network changes. Bank connections, AI suggestions in Finance and e-invoice settings added (sections 7.7 to 7.9). Upgrade from RES 19.1 and uninstall through Setup (section 8).
2	15th November 2026	RES 19.1. PostgreSQL ODBC driver added as a mandatory requirement (withdrawn in revision 3).
1	14th November 2026	First release for RES 19.1.

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