

Rudaya Enterprise Suite 19.3.1 Distribution & Trading Setup 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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Follow these steps in order to run your distribution or trading business in Rudaya Enterprise Suite (RES) 19.3.1: warehouse stock, sales orders, dispatch and customer returns. Most distributors can complete setup in two to three working days.

Before you start

The Distribution & Trading package adds stock locations, stock tracking, receipts at recorded cost, transfers between locations, fulfilment of sales orders (reserve and dispatch), customer returns and stock reconciliation. It works with the Suite core's customers, product catalogue, quotations and sales orders.

Have these ready:

What	Why you need it
A Windows server or PC for the Suite	Rudaya runs on your own hardware; staff use it from a web browser
Your RES licence, including Distribution & Trading	The screens appear only when the package is licensed and switched on
Company details, GSTIN and PAN	Company profile and tax settings
Your product list as a spreadsheet (code, name, part number, HSN, unit, manufacturer, category)	Fast import into the product catalogue
A list of your warehouses and godowns	Each becomes a stock location
Opening stock per location, with quantity and total cost value	Opening receipts at recorded cost
Your customer list as a spreadsheet	Fast import of customer masters
Staff list with duties	One sign-in and role per person

Who does what. Your administrator does Parts A to C once. Sales, warehouse and dispatch staff then follow Part D every day.

New in RES 19.3.1. Order Tracking (Sales > Order Tracking) follows each Sales Order to closure and lists its dispatches (FUL-) with carrier, tracking and dispatch date; the order cannot be closed until every dispatch is dispatched or cancelled. Supplier purchase orders for a Sales Order are raised under Finance > Receivables, Procurement tab, for stock-tracked products (switch tracking on under Inventory). Also in 19.3.1 for every edition: Standard Quote and Standard Invoice layouts, approval email alerts, removing a user with handover, and installer windows that fit laptop screens. See the RES 19.3.1 User Manual.

New in RES 19.3. The 30-day trial and Enterprise Plus licences also open GST Dashboard, Tax Classification, Purchase Register analysis, cash-flow forecasts and FX actuals under Finance (User Manual, section 9). An upgrade from RES 19.1 or RES 19.2 needs no new activation. The steps in this guide are unchanged from RES 19.2. Since RES 19.2: Setup does not require the PostgreSQL ODBC driver, and bank connections, AI suggestions in Finance using a local model and e-invoice settings are optional additions.

Part A: Install and activate (administrator, once)

Step 1. Install Rudaya Enterprise Suite

You need a 64-bit Windows computer or server, a Windows administrator account, port 5111 free, and a current Edge, Chrome or Firefox browser.

Install in this order: PostgreSQL 17, then Rudaya. Each step must finish before the next one starts. The PostgreSQL ODBC driver is optional.

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1a. Install PostgreSQL 17

1. Download the PostgreSQL 17 installer for Windows x64 from postgresql.org/download/windows.
2. Run it as administrator. Keep port **5432** and set a strong password for the `postgres` administrator account. Keep this password safe; Rudaya Setup asks for it.
3. Finish the installation. Stack Builder is not needed.

1b. PostgreSQL ODBC driver (optional)

1. Rudaya does not use the ODBC driver. Install it only if another program on this computer needs it: download the 64-bit Windows installer psqlodbc_x64.msi from the official PostgreSQL ODBC site.
2. Run it as administrator and accept the defaults.
3. To check it, open ODBC Data Sources (64-bit) from the Start menu. On the Drivers tab, PostgreSQL Unicode(x64) is listed.

The driver is not included in the Rudaya installer. Rudaya Setup shows it as optional and continues without it. Upgrading from RES 19.1, 19.2 or 19.3: run the 19.3.1 Setup as administrator and choose Upgrade; your data, settings and activation are kept and no new activation is needed.

1c. Install Rudaya Enterprise Suite

1. Download `RudayaEnterpriseSuite-19.3.1-Setup.zip` from rudayapowers.com (Trial & downloads).
2. Check the download. In PowerShell, in the download folder, run `Get-FileHash -Algorithm SHA256 .\RudayaEnterpriseSuite-19.3.1-Setup.zip`. The result must match the checksum on the download page exactly.
3. Extract the ZIP, right-click `RudayaEnterpriseSuite-19.3.1-Setup.exe` and choose **Run as administrator**. If Windows shows “Windows protected your PC”, choose **More info**, check the file name, then **Run anyway** (only if the checksum matched).
4. Choose **Install**. On **Connection & data**, choose **connect to an existing PostgreSQL 17 server** and enter address `localhost`, port `5432`, the `postgres` account and its password.
5. Enter a database name and an application database account (for example `rudaya_app`), review the summary and choose **Install**.
6. When installation finishes, the **Setup Wizard** opens in your browser.

Step 2. Complete the Setup Wizard

1. Accept the licence agreement and create the first **application administrator**.
2. Enter your company details.
3. **Activate your licence:** download the activation request, email it to sales_rudaya@rudayapowers.com asking for **Distribution & Trading**, then import the signed response Rudaya sends back. Never email passwords.
4. In **Industry Bundles and Core modules**, select **Distribution & Trading**, finish, and sign in at http://localhost:5111.

The wizard session lasts 15 minutes, but saved steps are kept; choose **Open Setup Wizard** in the installer to continue. A 30-day trial is available. Packages can be switched on later under **Administration > Licensing > Installed packages**.

Part B: Company, users and masters (administrator, once)

Step 3. Company and commercial settings

1. In **Administration > Settings**, complete the company profile and logo.
2. In **Commercial Settings**, save your base currency (INR). This is also your **stock currency**; stock tracking cannot start until it is saved.
3. Enter your **GSTIN** and check it against your registration certificate (live GST lookup is not configured).
4. Set payment-term defaults and the quotation validity period.

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Step 4. Users and roles

Give each person their own account in **Administration > Users & roles**.

Person	Role	Extra permission
Owner or IT person	Admin	Distribution management, to set up locations and tracking
Sales staff	Sales Engineer	None
Sales head	Sales Manager	None; approves quotations and sales orders
Warehouse and dispatch staff	A role with Distribution access	Distribution permission
Accountant	Finance	None

Distribution & Trading needs a permission that no role has by default. Grant it under **Users & roles > Governed permission assignments**, with a recorded reason.

Step 5. Import customers and products

1. Open **Sales > Product Catalog**. Create the manufacturers, categories and units (UOM) you use first: imported rows must match them.
2. Download the **product import template**, fill it in, **Preview**, then import. Rows that already exist show as **Existing** and are skipped, never duplicated.
3. Do the same in **Sales > Customers** with the **customer import template**. Add contacts, tax registrations, sites and payment terms on each customer afterwards.
4. Make sure every product you will stock is **Active**. Only active products can be stock-tracked.

Part C: Warehouses and opening stock (administrator, once)

All of Part C is in **Sales > Distribution & Trading > Stock setup**, under **Stock locations and tracking**.

Step 6. Create stock locations

1. Enter a **Location code** (e.g. WH-PUNE) and a **Location name** (e.g. Pune main godown).
2. Choose **Add location**. Saving a location adds no stock or value.
3. Repeat for every warehouse, godown, showroom store or transit location you want to track separately.

Step 7. Turn on stock tracking

1. Enter the **Product code to track** and choose **Track product**.
2. Repeat for every product you sell from stock. Products sold as services or made to order can stay untracked.

Only **Active** products can be tracked, and stock tracking cannot be switched on until the stock currency is saved in Commercial Settings (Step 3).

Step 8. Record opening stock

Use **Receive stock at recorded cost** for each product and location:

1. **Receipt product** and **Receipt location**.
2. **Receipt quantity**.
3. **Receipt total value**: the total cost of that quantity, from your stock valuation.
4. **Receipt supporting document reference**, e.g. OPENING-2026-11-30.
5. Choose **Receive stock**.

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Rudaya never guesses quantities or values: what you receive is what it holds. Check the **Stock** view (On hand, Reserved, Available) against your physical count before go-live.

Part D: Daily operations (sales, warehouse and dispatch staff)

An order moves through: quotation, approval, customer acceptance, Open Sales Order, fulfilment (reserve, then dispatch), invoice, and returns if any.

Step 9. Take the order

From a quotation (Sales > Quotation Center):

1. Choose **New quotation**, enter the customer and lines (choose catalogue products, so they can be fulfilled from stock), then save.
2. Choose **Submit for approval**. A different user with approval permission approves it.
3. When the customer accepts, open the quotation, enter their PO or acceptance reference and evidence, tick the confirmation and choose **Record acceptance & create Open Sales Order**.

Without a quotation (Quotation Center > Direct Sales Orders): choose **New direct Sales Order**, complete the customer, GST, place of supply and terms, add lines, choose **Record order for approval** and **Submit for approval**. A different user approves it. The first time, two users must set up the Direct Sales Order approval policy.

Step 10. Fulfil and dispatch

In **Sales > Distribution & Trading > Fulfilments**:

1. Choose **New fulfilment** and pick the Sales Order.
2. Choose the **Dispatch location**, then add each **Sales Order line** and its **Fulfilment quantity** (up to 50 lines). Lines that cannot be fulfilled from stock are listed separately.
3. Choose **Create fulfilment**. A draft does not hold stock yet.
4. Choose **Reserve stock** to set the goods aside for this customer.
5. When the goods leave, enter the **Carrier** and **Tracking reference**, then choose **Dispatch stock**. Stock on hand goes down.
6. To stop a fulfilment that has not been dispatched, enter a **Cancellation reason** and choose **Cancel order**.

Step 11. Invoice the customer

In **Finance > Invoices**, enter the quotation ID, choose **Load quotation**, enter the invoice quantities and choose **Create draft invoice**. Then **Issue and generate PDF** to give it its official number. Record payments with **Record payment**.

Step 12. Customer returns

Open the dispatched fulfilment and use **Customer return**:

1. Choose the line and the quantity coming back.
2. Choose a **Return reason**: Damaged, Wrong item, Excess, Quality or Other.
3. Choose the **Restock location** and add a **Return note**.
4. Choose **Record return**. Stock goes back into that location.

Step 13. Purchases and transfers

- **Goods received from suppliers:** use **Receive stock at recorded cost** (as in Step 8) with the supplier invoice or GRN number as the document reference.
- **Moving stock between godowns:** in **Stock transfer**, choose the product, **Source stock location**, **Destination stock location**, **Transfer quantity** and a **Transfer document reference**, then **Transfer stock**.

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Step 14. Check stock every week

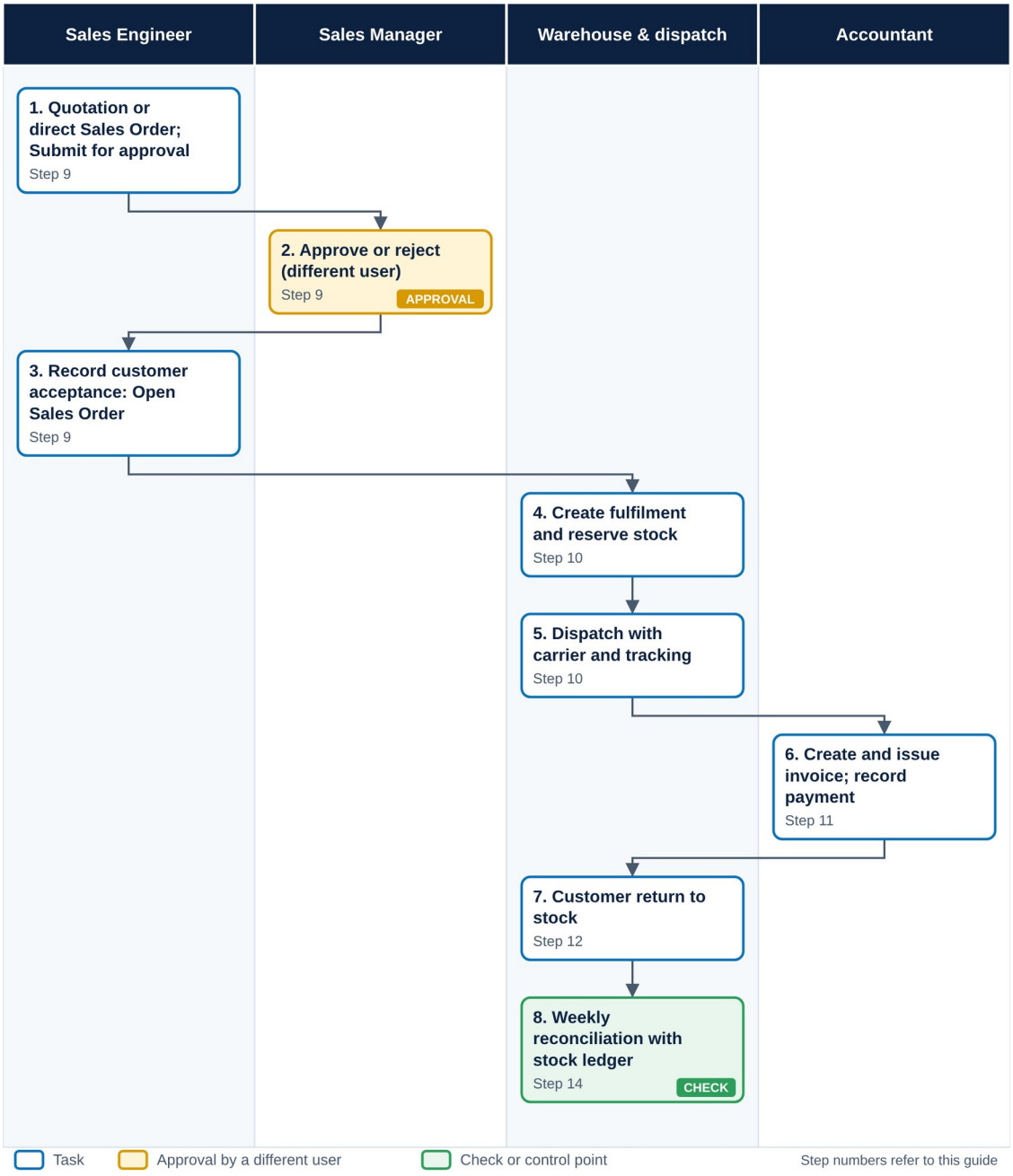
Open **Reconciliation**. It compares dispatched, returned and net quantities with the stock ledger. **Matches ledger** means all is well. If you see *Action required: some products do not match the stock ledger*, review those products before relying on the figures.

Part E: Workflow design (administrator and managers)

This part shows how Distribution & Trading work flows through Rudaya Enterprise Suite, who does each step, and where a second person must approve. Agree it with your managers and set up the approvals once, before go-live.

Process flow

An order moves from quotation (or direct Sales Order) through approval, customer acceptance, fulfilment, dispatch and invoice. Nothing can be fulfilled or invoiced until a different authorised user has approved it.



Read the flow top to bottom. Each column is a person or team; step numbers refer to this guide.

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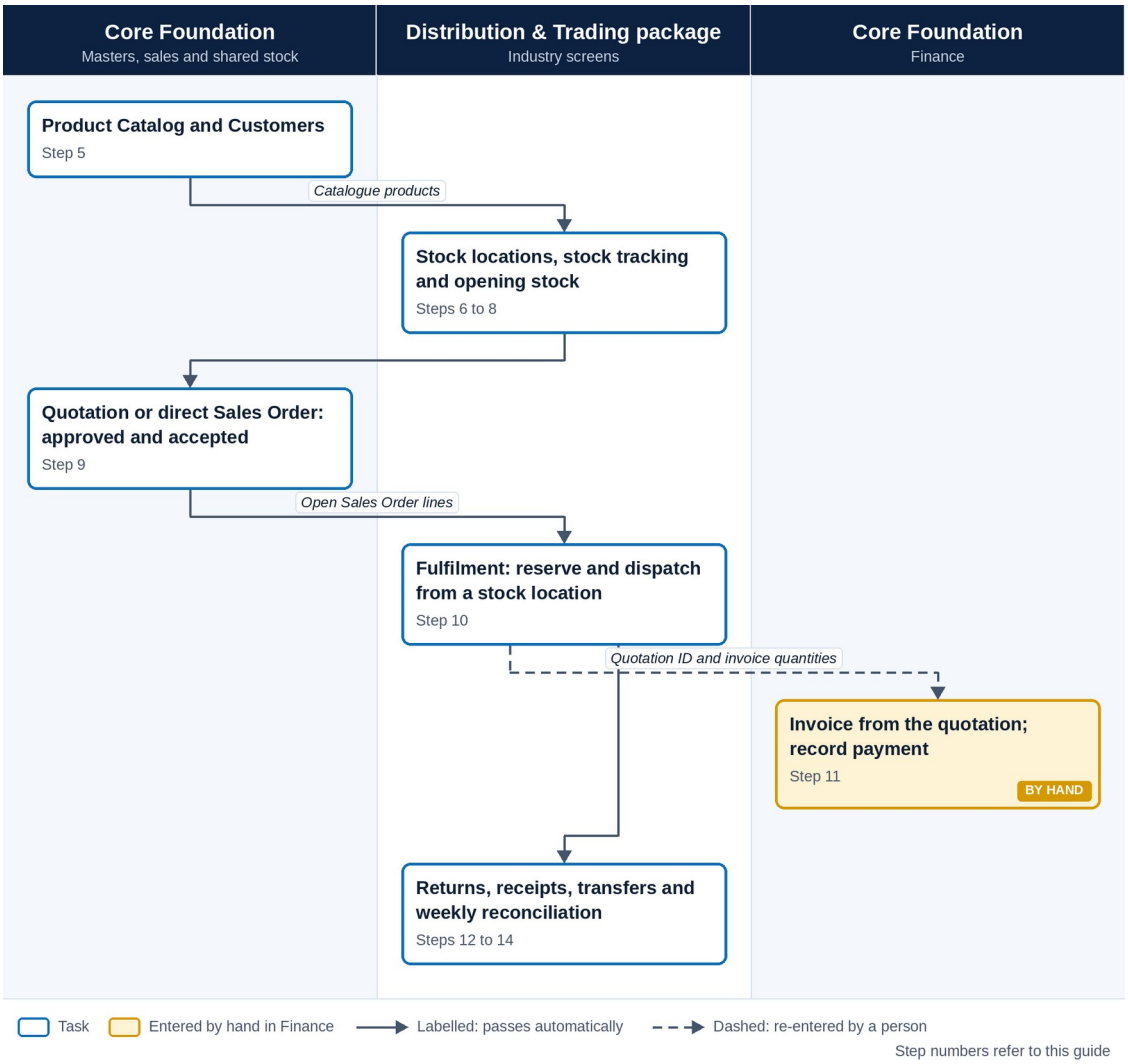
Core Foundation integration workflow

Distribution & Trading runs on Core Foundation. Products, customers, quotations and Sales Orders are Core records; stock locations, fulfilment, returns and reconciliation are Distribution & Trading work on the shared stock ledger; the invoice is raised in Core Finance.

This diagram is separate from the process flow above. The process flow shows who does each step; this one shows where each step is done and what passes between Core Foundation and Distribution & Trading.



Read the flow top to bottom. The left and right columns are Core Foundation; the middle column is Distribution & Trading. A labelled arrow shows what passes automatically; a dashed arrow shows what a person enters again. Step numbers refer to this guide.

What Core Foundation provides. Each Core Foundation item that Distribution & Trading depends on, and how the information passes.

Core Foundation item	How Distribution & Trading uses it	How it passes
Product Catalog (Sales > Product Catalog)	Only catalogue products can be stock-tracked and fulfilled from stock.	Automatic
Customers (Sales > Customers)	The customer on the quotation, Sales Order and fulfilment.	Automatic
Quotation and Sales Order	A fulfilment is created from an approved, accepted Sales Order and its lines.	Automatic
Shared stock ledger	Receipts, dispatches, returns and transfers all move the same stock ledger. Reconciliation compares them with it.	Automatic

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Core Foundation item	How Distribution & Trading uses it	How it passes
Finance > Invoices	The invoice is started by a person: enter the quotation ID and the invoice quantities. A dispatch does not create an invoice.	By hand

What stays separate in RES 19.3. Plan for these points before go-live.

- **Direct sales orders.** They are not invoiced from the Invoices screen. Use the quotation route for orders you need to invoice in Rudaya.
- **Purchasing.** Requisitions, purchase orders and goods receipt against a Sales Order need Procurement permissions and the Payables entitlement. Without them, supplier goods are added with Receive stock at recorded cost.

Approvals and checks

Rudaya enforces a maker–checker rule on the server for quotations, direct sales orders, supplier bills, supplier payments, bank postings and the approval policies themselves: the person who prepares a record cannot approve it. There is no central approval inbox. Waiting requests are listed in each area, for example Finance > Adjustment approvals and Requests waiting under Finance > Payables > Bill & payment controls.

Approval or check	Prepared by	Approved or checked by	Where
Quotation	Sales Engineer saves it and chooses Submit for approval	A different user with approval permission (Sales Manager) enters a reason and chooses Approve or Reject	Sales > Quotation Center
Direct Sales Order approval policy (once)	One user proposes the approval window, validity and reason	A different user confirms it	Sales > Quotation Center > Direct Sales Orders
Direct Sales Order	Sales Engineer chooses Record order for approval, then Submit for approval	A different user chooses Approve order or Reject order, then Apply approval and open order	Sales > Quotation Center > Direct Sales Orders
Fulfilment	Warehouse staff create the fulfilment	Only possible against an approved, Open Sales Order with tracked products	Sales > Distribution & Trading > Fulfilments
Weekly stock reconciliation	Warehouse staff	Review any product marked Action required before relying on the figures	Sales > Distribution & Trading > Reconciliation
Purchase order (if you use procurement)	Buyer prepares the purchase order from the sales order procurement screen	A different user approves it under the purchase order approval policy	Sales order procurement > Approval policy

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Approval or check	Prepared by	Approved or checked by	Where
Supplier bill and its payment (once switched on)	Finance user records the supplier bill or payment	A different user holding finance.bill.approve approves the bill; another holding finance.payment.authorise authorises the payment. No built-in role holds these permissions	Finance > Payables > Bill & payment controls (Requests waiting)
Finance adjustment	Finance user prepares the adjustment	A different user approves it under the finance adjustment approval policy	Finance > Adjustment approvals
Bank Intelligence posting (if used)	Creator prepares the draft; a reviewer records a human review; the creator submits for posting approval	A different user approves under the bank posting approval policy; a user with posting permission chooses Post exact approved settlement	Finance > Bank Intelligence

Approval settings in RES 19.3.1

RES 19.3.1 has no screen for drawing a custom approval chain. Approvals are controlled by these settings:

Setting	Where	How it works in 19.3.1
User grades and positions	Administration > Users & roles > User grades and approval authority	Active
Workflow grade rules (a permission needs a minimum grade)	Same panel	Active
Monetary approval limits per user	Same panel	Saved only; not enforced in 19.3.1
Direct Sales Order approval policy	Sales > Quotation Center > Direct Sales Orders	Active once set
Purchase order approval policy	Sales order procurement > Approval policy	Active once set
Finance adjustment approval policy	Finance > Adjustment approvals	Active once set
Bank posting approval policy	Finance > Bank Intelligence > Approval policy	Active once set
Supplier bill approval and supplier payment authorisation	Finance > Payables > Bill & payment controls	Off until two people switch them on; then permanent

Each “active once set” policy is proposed by one person and approved by a different person, with an approval window and a validity period. Until a policy exists, that kind of approval cannot be completed.

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Set up approvals (administrator, once)

1. Decide who prepares and who approves for every row in the approvals table. Each approval needs at least two people, because no one can approve their own record.
2. In Administration > Users & roles, give preparers and approvers different roles. For example, Sales Engineer prepares quotations and Sales Manager approves them.
3. In Users & roles > User grades and approval authority, give each person a grade and position, and add workflow grade rules where a permission should need a minimum grade. You can record monetary approval limits there, but 19.3.1 does not enforce them yet.
4. Supplier bill approval and supplier payment authorisation need the permissions finance.bill.approve and finance.payment.authorise, which no built-in role holds. Create two custom roles, one for each, and give them to different people. Grant any other extra permissions under Users & roles > Governed permission assignments, with a recorded reason.
5. Set up each approval policy you will use: Direct Sales Order (if you take orders without a quotation), purchase order (if you use procurement), finance adjustment, and bank posting (if you use Bank Intelligence). One person proposes the policy with its approval window and validity; a different person approves it.
6. When you are ready, two people switch on supplier bill approval and payment authorisation in Finance > Payables > Bill & payment controls. Once on, they cannot be switched off.
7. Test the workflow with two accounts before go-live: prepare a record as one user, approve it as another, and check that the first user cannot approve their own record.
8. Show each approver where their requests wait, because there is no single inbox.

Small team? You still need two people for every approval. If only one person works in an area, choose a second approver, such as the owner, before go-live.

Part F: Go live

Go-live checklist

☐ Distribution & Trading switched on (Administration > Licensing > Installed packages)

☐ Company details, INR stock currency and GSTIN saved

☐ One account per person; warehouse staff granted Distribution permission

☐ Customers and products imported; stocked products Active and tracked

☐ Every stock location created and opening stock received at recorded cost

☐ Stock view checked against a physical count

☐ Test run done: quotation, approval, sales order, fulfilment, dispatch, invoice, return

☐ Regular backups scheduled in Administration > Backup & Recovery

What is not included in RES 19.3.1

- **Direct sales orders are not invoiced** from the Invoices screen. Use the quotation route for orders you need to invoice in Rudaya.
- **Purchasing needs extra access.** Sales Order procurement (requisitions, purchase orders with independent review, goods receipt) needs Procurement permissions and the Payables entitlement. Without them, add supplier goods with Receive stock at recorded cost.
- **Bank connections need your bank.** Since RES 19.2, customer-managed bank connections are available under Finance > Bank Intelligence > Bank connections (HDFC statement calls built in; ICICI, Axis, Kotak and Yes Bank as a provision). Each company arranges API access with its own bank and enters the details there; statements arrive in an inbox and nothing is posted automatically. Until then, customer payments reach Finance through bank statement import.
- **Exchange rates need approval.** Enter rates under Finance > Exchange Rates. A rate is used only after a different user approves it.

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Troubleshooting

You see	What to do
Distribution & Trading shows **Not installed**	Switch it on under Licensing > Installed packages; check your licence includes it
Save the stock currency in Commercial Settings	Save INR in Commercial Settings (Step 3)
Only an Active product can be stock tracked	Activate the product in the Product Catalog first
Turning on stock tracking needs Distribution management permission	Ask your administrator to grant the permission
Before you can create a fulfilment	Follow the listed steps: stock location, tracking, approved sales order with tracked products
Cannot be invoiced or fulfilled until a different authorized user approves it	Ask an approver
A message with a reference ID	Send the reference ID and a screenshot to support

Support

- Email **sales_rudaya@rudayapowers.com** or call **+91 020-46761610**.
- Video tutorials: the Rudaya Enterprise Suite YouTube channel.
- Include the product version shown in the app, your workspace name and a screenshot. Never send passwords, licence keys or customer data.

Based on the RES 19.3.1 User Manual, the RES 19.3.1 Installation Guide (released 21 November 2026) and the Distribution & Trading screens as they are in RES 19.3.1.

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