

Rudaya Enterprise Suite 19.3.1 Retail Setup Guide

Release RES 19.3.1 · Version 19.3.1 · Windows 64-bit

Revision 7 · 21st November 2026

CLASSIFICATION: INTERNAL

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Contents

Before you start

Part A: Install and activate (administrator, once)
- Step 1. Install Rudaya Enterprise Suite
- Step 2. Complete the Setup Wizard and switch on Retail

Part B: Set up your company (administrator, once)
- Step 3. Company profile and branding
- Step 4. Currency, tax and commercial settings
- Step 5. Users and roles

Part C: Products and stock (administrator or store manager)
- Step 6. Choose how your store tracks stock
- Step 7. Load your product range

Part D: Stores and tills (administrator or store manager)
- Step 8. Create your stores and tills
- Step 9. Put products on sale in each store

Part E: Daily store operations (store staff, every day)
- Step 10. Open the till
- Step 11. Record a sale
- Step 12. Handle a return or refund
- Step 13. Close the till and reconcile cash
- Keep stock and records right

Part F: Workflow design (administrator and managers)
- Process flow
- Core Foundation integration workflow
- Approvals and checks
- Approval settings in RES 19.3.1
- Set up approvals (administrator, once)

Part G: Go live
- Go-live checklist
- What Retail does not do in RES 19.3.1
- Troubleshooting
- Support

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Follow these steps, in order, to run a single shop or a chain of stores in Rudaya Enterprise Suite (RES) 19.3.1. Most retailers finish setup in one to two working days and start selling on day three.

Before you start

The Retail package manages your stores, tills, sales, returns and end-of-day cash reconciliation. It uses the shared product catalogue and stock of the Suite core.

Have the following ready before you begin:

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 the Retail industry package	Retail screens appear only when the package is licensed and switched on
Company details, GSTIN and PAN	Company profile and tax settings
A list of your stores and tills (counters)	Each sale is recorded against a store and a till
Your product list as a spreadsheet (code, name, HSN, unit, price)	Fast import instead of typing every product
Opening stock for each store	So stock levels are right from the first sale
A list of staff and their duties	Each person gets their own sign-in and role

Who does what. Your administrator or IT person completes Steps 1 to 9 once. Store staff then follow Steps 10 to 13 every day.

New in RES 19.3.1. Order Tracking for Sales Orders does not apply to point-of-sale sales, which keep their own screens. 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

Before you install, make sure you have:

- A 64-bit Windows computer or server
- A Windows administrator account
- Port 5111 free
- A current version of Edge, Chrome or Firefox

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

1a. Install PostgreSQL 17

1. Download the PostgreSQL 17 installer for Windows x64 from postgresql.org/download/windows.

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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 and switch on Retail

The wizard session lasts 15 minutes, but every saved step is kept. If it times out, choose **Open Setup Wizard** in the installer to continue.

1. Accept the licence agreement.
2. Create the first **application administrator** (your name, email and a strong password).
3. Enter your company details.
4. **Activate your licence:**
   a. Download the activation request file.
   b. Email it to sales_rudaya@rudayapowers.com with your company name, edition and the packages you need. Ask for **Retail**. Never email passwords.
   c. Import the signed activation response that Rudaya sends back.
5. In **Industry Bundles and Core modules**, select **Retail**.
6. Finish the wizard and sign in at http://localhost:5111.

Tip: A 30-day trial is available. If you add Retail later, switch it on under **Administration > Licensing > Installed packages**.

More than one store? Staff in other stores or on other PCs reach the Suite over your network once your administrator enables HTTPS (script Enable-RudayaIntranetHttps.ps1). Contact Rudaya support for help.

Part B: Set up your company (administrator, once)

Step 3. Company profile and branding

1. Sign in as the application administrator.

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2. Open **Administration > Settings** and complete your company details: legal name, address, logo and contact details.
3. Choose a **Visual theme** (Light, Dark or Rudaya Executive) from the header. Each user's choice is kept in their own browser.

Step 4. Currency, tax and commercial settings

1. In **Administration > Settings**, open **Commercial Settings** and save your base currency, **INR**. Stores use this currency, and stock tracking cannot be switched on until it is saved.
2. Enter your **GSTIN**. Rudaya checks the format, PAN portion, state code and check digit locally. Live GST lookup is not configured, so compare the details with your registration certificate.
3. Set your date and number formats and commercial defaults.

Step 5. Users and roles

Give every person their own account. Shared logins make the audit history useless.

1. Open **Administration > Users & roles** and create one account per person.
2. Assign a role that matches the job:

Person	Role to start from	What they do in Retail
Owner or IT person	Admin	Settings, users, stores, tills, products
Store manager	Admin, or a role with Retail management access	Creates products, closes tills, reviews reconciliation
Cashier	A role with Retail operations access	Opens the till, records sales and returns
Accountant	Finance	Reviews cash, receivables and reports
Auditor or partner	Viewer	Read-only access

1. Extra permissions are granted under **Users & roles > Governed permission assignments**, with a recorded reason.
2. Sign in as a cashier once and check that **Sales > Retail Operations** appears. If it shows **Not installed**, the Retail package is not switched on (Step 2). If a permission message appears, the role needs Retail access.

Part C: Products and stock (administrator or store manager)

Step 6. Choose how your store tracks stock

Retail can sell two kinds of item. Pick one per product before you load your range.

	Retail-local item	Shared Inventory product
Best for	Shops that use the **Retail package only**	Businesses that also hold **Distribution & Trading** or **Manufacturing**
Where stock is kept	In the store's own Retail stock	In the Suite's shared Inventory, by stock location
How you add it	In Retail Operations: SKU, name, price, opening quantity	Enable stock tracking on a catalogue product, then connect it to the store
Returns can restock it	Yes	No; a returned item is not put back into shared Inventory automatically

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Recommendation: most retail-only customers should use Retail-local items.

Step 7. Load your product range

Retail-local items are added in Step 9, store by store.

Shared Inventory products (only if you also have Distribution & Trading or Manufacturing):

1. Open **Sales > Product Catalog**. Make sure the manufacturers, categories and units (UOM) you need exist.
2. Import your products from a CSV file: download the **product import template**, fill it in, and **Preview** before importing.
   - Manufacturer, Category and UOM must match names already in the catalogue.
   - Rows that already exist show as **Existing** and are skipped, never duplicated. If an import result is uncertain, preview the same file again.
3. Open **Sales > Distribution & Trading > Stock setup** and save your **stock locations** (a code and a name for each store or stockroom).
4. Choose **Enable stock tracking** for each product you sell.
5. Record your opening stock as an **Inbound receipt**: product, location, quantity and total value. Rudaya never guesses opening quantities.

Customers: import B2B customers from the **customer import template** in the same way. Contacts, tax registrations, sites and payment terms are added on each record afterwards. Walk-in shoppers do not need customer records.

Part D: Stores and tills (administrator or store manager)

Everything in this part is in **Sales > Retail Operations**, under **Store and till setup** and **Store inventory**.

Step 8. Create your stores and tills

1. Choose **Create store** and enter:
   - **Store code**, short and unique, e.g. PUN-01
   - **Store name**, e.g. Pune FC Road
   - **Currency**: INR
2. Choose **Create till** to add each billing counter to the store: a **Till code** (e.g. PUN-01-T1) and a **Till name** (e.g. Counter 1).
3. Repeat for every store. Each till needs its own code, because cash is counted and reconciled per till.

Step 9. Put products on sale in each store

Select the store, then add its products under **Store inventory**.

Retail-local item (choose **Standalone Retail-local item**, then **Add product**):

1. **SKU**: your item code or barcode number.
2. **Product name**: as it should appear on the sale.
3. **Retail unit price**: the selling price.
4. **Opening quantity**: stock on the shelf today.

Shared Inventory product (choose **Connect shared Inventory Product**):

1. Select the stock-tracked product and its stock location. The product's currency must match the store's.
2. Enter the **Retail unit price** and choose **Connect shared Inventory Product**.

The product list shows **SKU, Product, Available** and **Stock authority**, which tells you whether stock is kept in Retail or in shared Inventory. Check that every item and quantity is right before the first sale.

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Large ranges: Retail-local items are added one at a time. For hundreds of SKUs, plan the time, or contact Rudaya about a shared Inventory setup.

Part E: Daily store operations (store staff, every day)

All daily work happens in **Sales > Retail Operations > Point of sale and till close**. A store's day runs: open the till, sell, handle returns, then close and reconcile.

Step 10. Open the till

1. Choose the **Till**.
2. Count the cash in the drawer and enter it as **Opening cash**.
3. Choose **Open till**. The screen confirms *Till session opened. Opening cash is recorded.*

A till must be open before any sale can be recorded.

Step 11. Record a sale

1. Select the **Product** and enter the **Quantity**.
2. Choose the **Tender type**: **Cash**, **Card** or **Other** (for example UPI or a wallet).
3. Choose **Post Retail sale**. Available stock goes down straight away.
4. The sale appears under **Recent Retail sales** with its tender, total and lines.

Step 12. Handle a return or refund

1. In **Return or refund**, choose the original **Sale** and then the **Sale line**.
2. Enter the **Return quantity**.
3. Tick **Restock returned items** if the item can go back on the shelf. This works for Retail-local items only.
4. Choose **Record return and refund**, then give the customer their refund.

Step 13. Close the till and reconcile cash

1. Open **Till reconciliation**. **Current till totals** shows **Cash sales**, **Sales** and **Expected cash** (what the drawer should hold).
2. Count the cash in the drawer and enter it as **Counted cash**.
3. Choose **Close till and reconcile**. The store manager should look into any gap between expected and counted cash the same day.

Keep stock and records right

- **Stock check:** compare **Available** in **Store inventory** with a shelf count at least once a week.
- **Reordering:** the **Retail replenishment workbench** suggests what to reorder from your sales history: choose the store, the **sales history days** (1–365), the **target cover days** (1–90) and a **minimum target stock per SKU**, then **Prepare current preview**. It only saves a planning draft; it does not create a purchase order.
- **Who did what: Retail audit history** lists every Retail change with time, action, record and user.
- **If the screen asks you to recheck:** after a slow connection or a refresh, choose **Recheck pending Retail transaction** before recording anything else. This stops a sale from being recorded twice.

Part F: Workflow design (administrator and managers)

This part shows how Retail 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.

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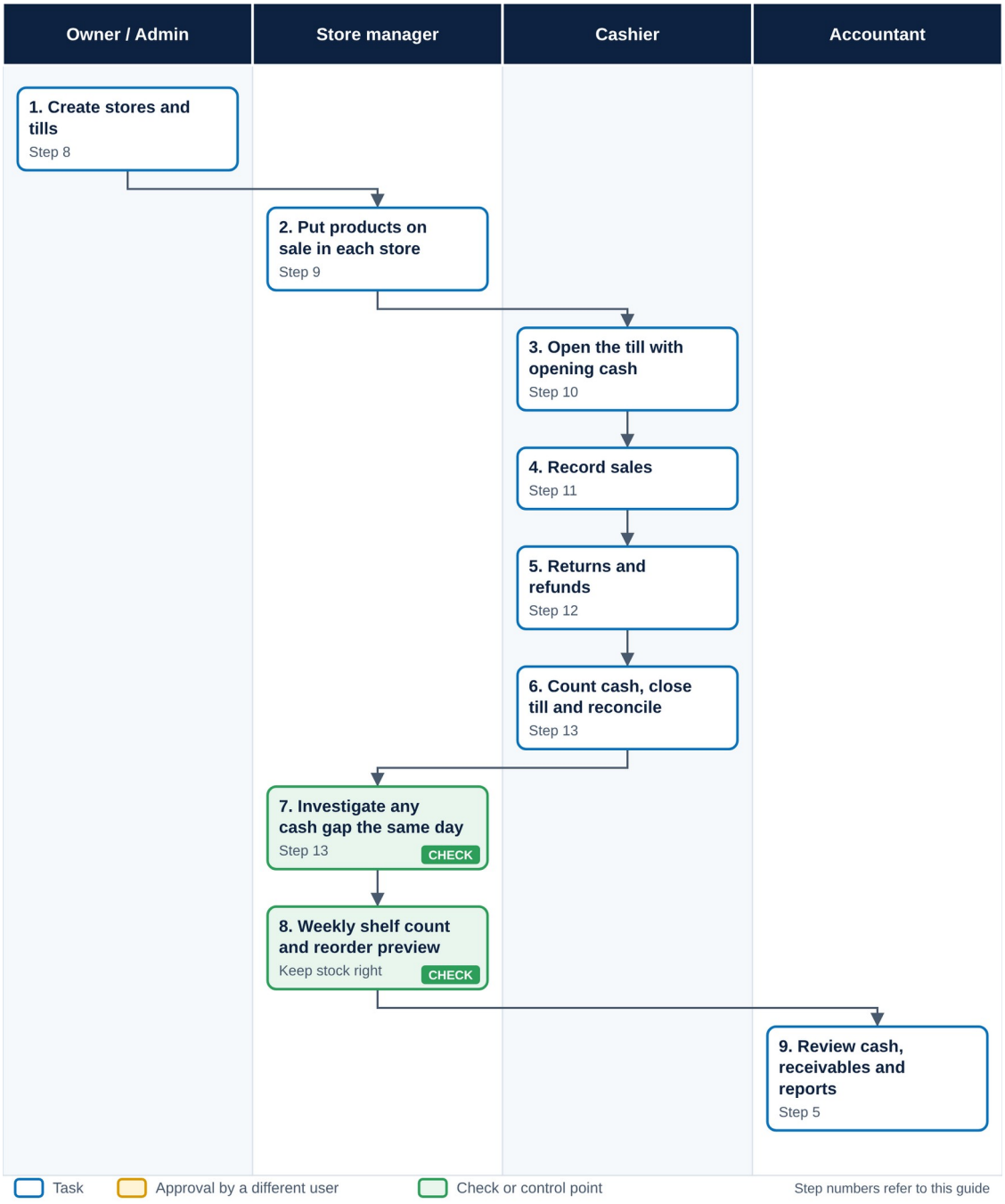
Process flow

A store day runs from opening the till to closing and reconciling it. Retail sales and returns are recorded directly by the cashier; control comes from the till reconciliation and from who holds Retail management access.



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

Core Foundation integration workflow

Retail runs on Core Foundation. Stores, tills, sales, returns and the till close are Retail records. A product can be kept in Retail only, or connected to the Core product catalogue and shared Inventory. Retail sales are not posted to 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 Retail.

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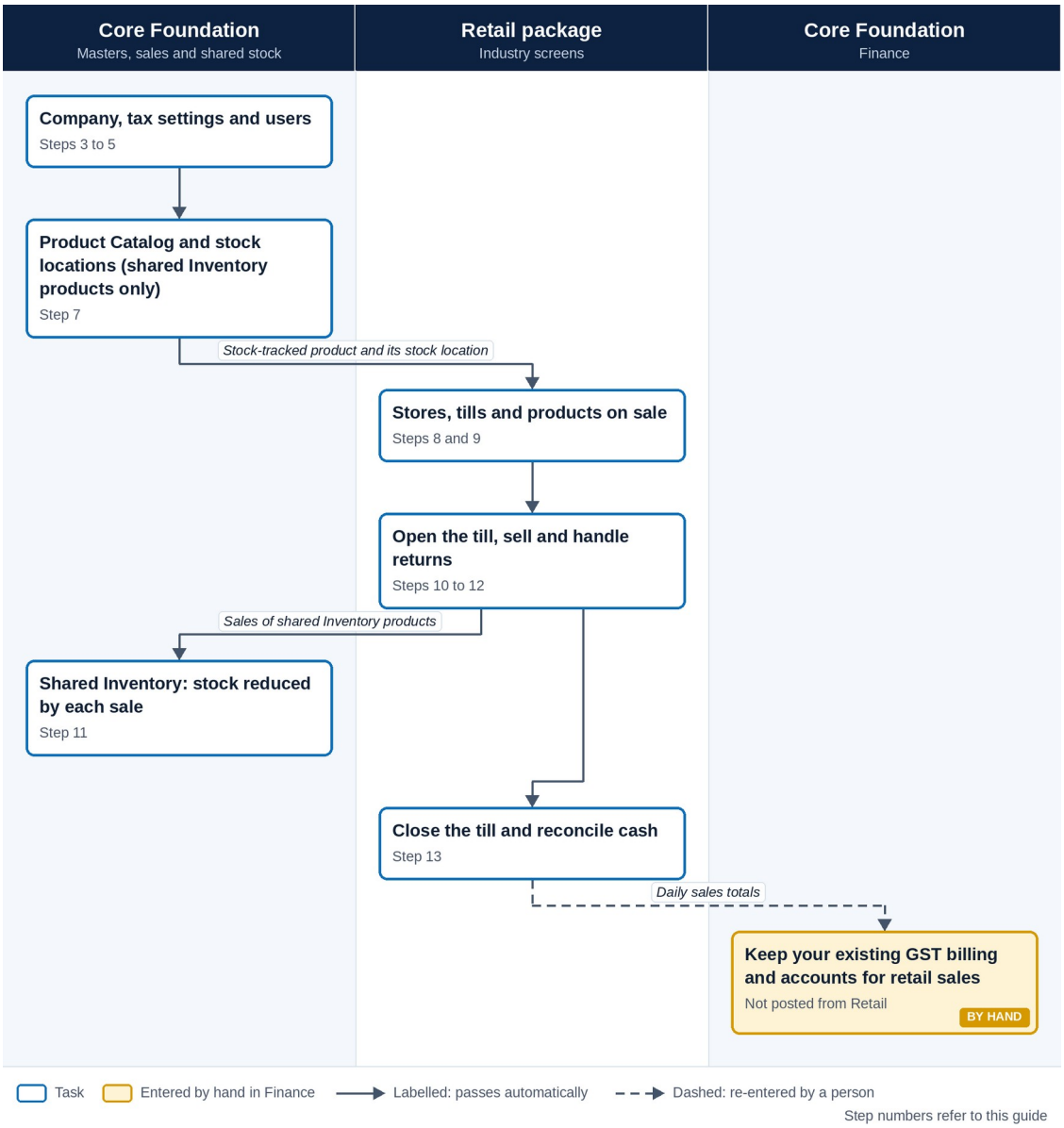

Read the flow top to bottom. The left and right columns are Core Foundation; the middle column is Retail. A labelled arrow shows what passes automatically; a dashed arrow shows what a person enters again. Step numbers refer to this guide.

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

Core Foundation item	How Retail uses it	How it passes
Product Catalog and shared Inventory	Used only for products connected with Connect shared Inventory Product. The Stock authority column shows where each product keeps its stock.	Automatic
Retail-local items	Kept in Retail only: SKU, price and quantity are entered in Store inventory and do not appear in the Core catalogue.	Not connected
Customers (Sales > Customers)	Optional, for B2B customers. Walk-in shoppers need no customer record.	Not connected
Finance and GST	Retail sales and returns are stored in the Retail ledger only.	By hand

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Core Foundation item	How Retail uses it	How it passes
Users and roles	One sign-in for each person; cashiers and store managers get Retail access through roles.	Automatic

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

- **Returns.** Restocking on return applies to Retail-local items only. There is no automatic restock to shared Inventory.
- **No accounting or GST posting.** Keep your existing GST billing and accounting process for retail sales.

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
Till close and cash reconciliation	Cashier enters Counted cash and chooses Close till and reconcile	Store manager investigates any gap between expected and counted cash the same day	Sales > Retail Operations > Till reconciliation
Stock and records check	Store staff	Store manager compares Available with a shelf count weekly and reviews Retail audit history	Sales > Retail Operations > Store inventory
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:

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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.

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. Retail has two permissions, read and manage. Give manage only to staff who work the tills or maintain stores, and read to people who only review. Retail has no second-person approval, so rely on till reconciliation and the Retail audit history.
5. 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.
6. 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.
7. 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.
8. 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.
9. Show each approver where their requests wait, because there is no single inbox.

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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 G: Go live

Go-live checklist

☐ Retail package switched on (Administration > Licensing > Installed packages)

☐ Company details, INR currency and GSTIN saved

☐ One account per person, and a cashier has tested signing in

☐ Every store and till created

☐ Every product on sale in each store, with the right price and opening quantity

☐ Test run done: open a till, sell one item, return it, close and reconcile

☐ Regular backups scheduled in Administration > Backup & Recovery

What Retail does not do in RES 19.3.1

- **No accounting or GST posting.** Retail sales and returns are stored in the Retail ledger only. They are not posted to Finance and do not appear in GST reports. Keep your existing GST billing and accounting process for retail sales until Rudaya confirms this link.
- **One tender per sale.** Each sale is Cash, Card or Other; split payments are not supported.
- **No automatic restock to shared Inventory.** Restocking on return applies to Retail-local items only.
- **Reorder suggestions are drafts.** The replenishment workbench does not raise purchase orders.
- **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.

Troubleshooting

You see	What to do
Retail Operations shows **Not installed**	Switch on Retail under Licensing > Installed packages; check that your licence includes it
A permission or licence message	Ask your administrator to review your role and permissions
Create a till before opening a session	Create a till for the store (Step 8)
No products are configured at this store	Add products to that store (Step 9)
Recheck the pending Retail transaction before starting another operation	Choose **Recheck pending Retail transaction**; do not record the sale again
Retail operations remain unavailable until the Retail database migration is applied	Contact Rudaya support
A message with a reference ID	Send the reference ID and a screenshot to support

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Support

- Email **sales_rudaya@rudayapowers.com** or call **+91 020-46761610**.
- Video tutorials: the Rudaya Enterprise Suite YouTube channel.
- When you contact support, 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 Retail Operations screens as they are in RES 19.3.1.

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