

Rudaya Enterprise Suite 19.3.1 Service & AMC Setup Guide

Release RES 19.3.1 · Version 19.3.1 · Windows 64-bit

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Follow these steps in order to manage the equipment you have sold and serviced in Rudaya Enterprise Suite (RES) 19.3.1: customer sites, installed assets, warranties, AMC contracts and service history. Service & AMC works with every industry package, and most teams can load their installed base in two to three working days.

Before you start

Service & AMC (the **Assets** menu) keeps an installed-base register (CMDB) of every machine at every customer site, with warranty tracking, service contracts (AMC) with renewals, and a service history per asset. Assets can be created straight from an issued invoice, so the register fills itself as you sell.

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 Service & AMC	The Assets menu appears only when it is licensed and switched on
Customer list, and each customer's sites (address, contact)	Customer sites
Installed equipment: name, type, manufacturer, model, serial number, site, warranty end	The installed base
Current AMC contracts: customer, start, end, annual value, covered machines	Service contracts
Recent service visits, if you want history from day one	Service history
Staff list with duties	One sign-in and role per person

Who does what. Your administrator does Parts A and B once. The service team then follows Parts C and D every day.

New in RES 19.3.1. Warranty assets can now be created from Sales > Order Tracking: one asset per serial number on the supplier packing list, linked to the issued invoice line, with the warranty months set on the quotation line. They then appear under Installed Base & CMDB, Warranty and AMC as usual. 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.

1a. Install PostgreSQL 17

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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 **Service & AMC** (and any industry package you also need), then import the signed response Rudaya sends back. Never email passwords.
4. In **Industry Bundles and Core modules**, select **Service & AMC**, 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 customers (administrator, once)

Step 3. Company settings

1. In **Administration > Settings**, complete the company profile and logo.
2. In **Commercial Settings**, save your base currency (INR).
3. Enter your **GSTIN** and check it against your registration certificate (live GST lookup is not configured).

Step 4. Users and roles

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

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Person	Role	Does in Service & AMC
Owner or IT person	Admin	Settings, users
Service manager or engineer	Application Engineer	Sites, assets, contracts, service history
Sales staff	Sales Engineer / Sales Manager	Quotations that create assets on delivery
Accountant	Finance	Invoices for AMC and service
Management	Viewer	Read-only reports

Step 5. Import customers

In **Sales > Customers**, download the **customer import template**, fill it in, **Preview**, then import. Existing rows are skipped, never duplicated. Note each customer's **Customer ID**: you need it when adding sites and contracts.

Part C: Customer sites and installed base (service team)

All of Part C is in **Assets > Installed Base & CMDB**.

Step 6. Add customer sites

Choose **Add customer site** and enter:

1. **Customer ID**, **Site code** (e.g. TATA-PUN-01) and **Site name**.
2. **Address**, **City**, **State** and **Country**.
3. Site **Contact name**, **Contact email** and **Contact phone**.
4. Choose **Save site**. Use **Search sites** (code, name, city or state) to find it later.

Step 7. Load existing equipment

For each machine already installed, add an asset with its name, type, manufacturer, model, serial number, site and warranty dates, then **Save**.

Faster with nameplate text: under **Nameplate suggestions**, paste the text from the machine's nameplate or label (up to 8,000 characters) and choose **Suggest fields**. Check the suggested manufacturer, model, part and serial numbers and the **Duplicate checks**, then **Apply to form** and **Save**. Nothing is saved until you choose Save. Photos of nameplates are not read; type or paste the text.

Step 8. Create assets automatically from new sales

From now on, let each sale fill the register:

1. On the quotation line, tick **Create installed asset on delivery** and set the **Asset type**, whether a **customer site is required**, and the **Warranty months**.
2. After the invoice is issued, enter the **Issued invoice ID** and choose **Load asset suggestions**.
3. For each line, enter the **Asset name**, **Select a site** and the **Serial numbers** (comma-separated).
4. Confirm and choose **Review and create assets**. Only quotation lines approved for asset creation are offered.

Part D: Warranty, AMC and service (service team, every day)

Warranty, AMC and Service History are under the **Assets** menu.

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Step 9. Watch warranties

Open **Warranty** each week:

- **Warranty alerts** list assets whose warranty is ending, with **Days left**.
- **Upcoming warranty expiries** and **Recent warranty renewals** help you plan AMC offers before cover runs out.

Step 10. Create and manage AMC contracts

In **AMC**, choose **New contract**:

1. Enter the **Customer**, **Start** and **End** dates, the **Annual value** and any **Notes**, then choose **Create**.
2. Choose **Link asset** and enter each covered machine's **Asset id**.

To change a contract:

- **Renew:** enter the **Renewal start**, **Renewal end** and a **Reason**, then choose **Confirm renewal**. The **Renewal chain** keeps every term.
- **Extend:** enter the new end date in **Extend until** and choose **Extend**.
- **Cancel contract** ends it early.

The **Contract timeline** records every change, with the previous end, new end and reason.

Step 11. Record every service visit

Open the asset and choose **Record service**: date, type of visit, **Technician**, a short **Summary**, **Cost** and the **Next due** date. The asset's **Service history** and **Lifecycle timeline** then show its full record.

Check **Service overdue** daily: it lists assets past their next service date.

Step 12. Use the reports

- **Assets by customer**, **by site**, **by type** and **by manufacturer**.
- **Warranty forecast (90 days)** and **AMC renewal forecast (90 days)**: your sales pipeline for renewals.
- Use **Change status** on an asset when its condition changes. Only the moves allowed from its current status are offered.

Part E: Workflow design (administrator and managers)

This part shows how Service & AMC 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

New equipment enters the installed base from approved quotation lines once the invoice is issued. The service team then runs warranties, AMC contracts and visits, with every contract change recorded on the timeline.

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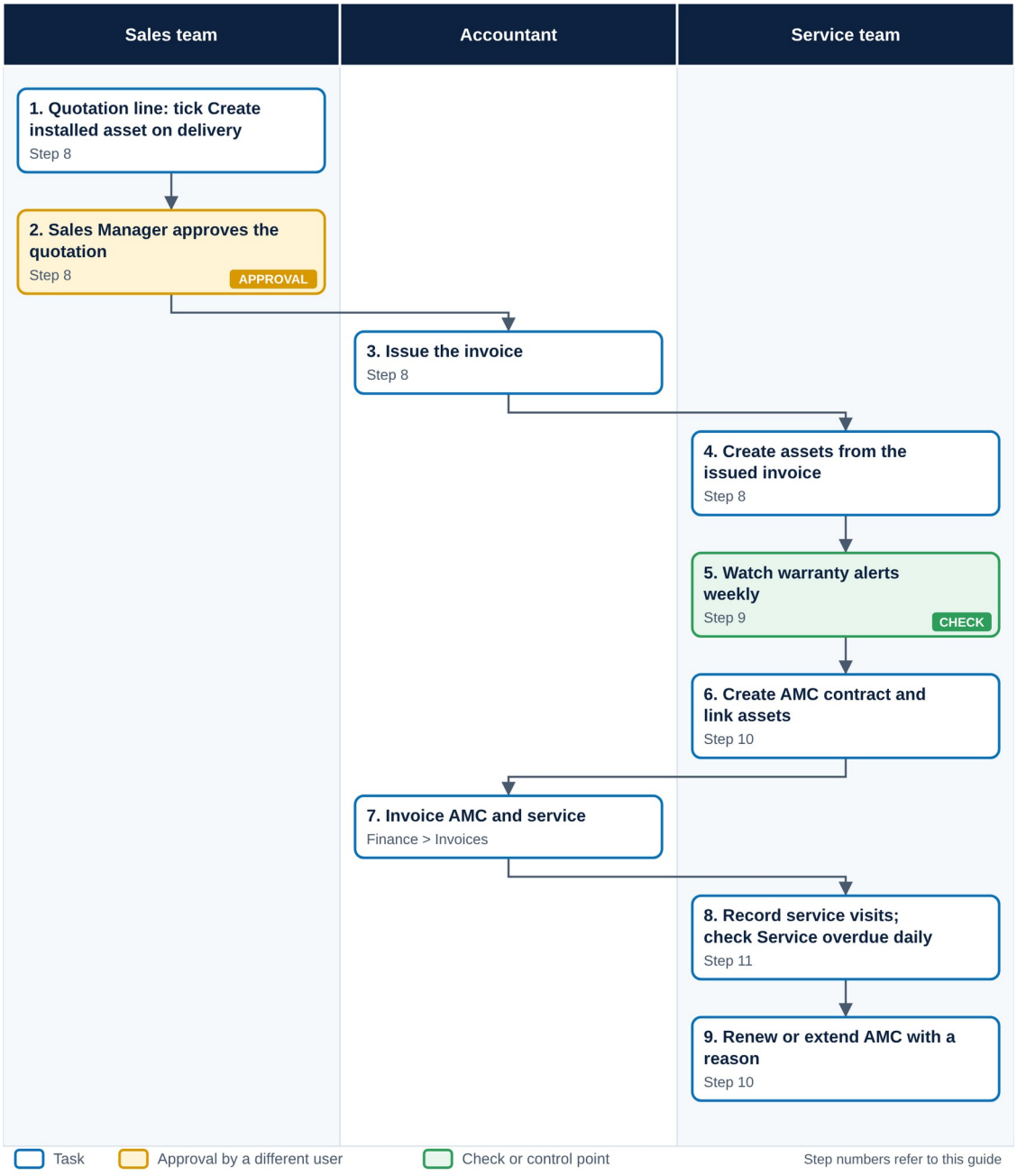

Read the flow top to bottom. Each column is a person or team; step numbers refer to this guide.

Core Foundation integration workflow

Service & AMC runs on Core Foundation. Customers, quotations and invoices are Core records; customer sites, assets, warranties, AMC contracts and service visits are Service & AMC records. New assets are created from issued invoices; AMC invoices are 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 Service & AMC.

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Read the flow top to bottom. The left and right columns are Core Foundation; the middle column is Service & AMC. 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 Service & AMC depends on, and how the information passes.

Core Foundation item	How Service & AMC uses it	How it passes
Customers (Sales > Customers)	Sites, assets and contracts are recorded against the Customer ID.	Automatic
Quotation lines	A line ticked Create installed asset on delivery carries the asset type and warranty months.	Automatic
Issued invoice	After the invoice is issued, enter its ID and load the asset suggestions. Only lines approved for asset creation are offered.	Automatic
Finance > Invoices	AMC billing is separate: a contract records its annual value, and the AMC invoice is raised by a person.	By hand

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

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- **Direct sales orders.** Assets are created from issued invoices of quotation lines, not from direct sales orders.
- **Existing equipment.** Equipment sold before Rudaya is loaded by hand in Step 7.

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
Asset creation from a sale	Sales Engineer ticks Create installed asset on delivery on the quotation line	Only lines on an approved quotation, after the invoice is issued, are offered in Review and create assets	Assets > Installed Base & CMDB
AMC renewal or extension	Service team	Each change is recorded with a reason on the Contract timeline; review the 90-day AMC renewal forecast	Assets > AMC
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. 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.

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Part F: Go live

Go-live checklist

☐ Service & AMC switched on (Administration > Licensing > Installed packages)
☐ Company details, INR currency and GSTIN saved
☐ One account per person; service staff on the Application Engineer role
☐ Customers imported and every customer site added
☐ Installed equipment loaded, with serial numbers and warranty dates
☐ Current AMC contracts created and their assets linked
☐ Asset creation switched on for new quotation lines (Step 8)
☐ Test run done: record a service visit, renew a contract, check the 90-day forecasts
☐ Regular backups scheduled in Administration > Backup & Recovery

What is not included in RES 19.3.1

- **No image reading.** Nameplate photos are not read; paste or type the nameplate text.
- **AMC billing is separate.** Contracts record the annual value; raise AMC invoices in Finance > Invoices.
- **Assets are created from issued invoices** of quotation lines approved for asset creation, not from direct sales orders.

Troubleshooting

You see	What to do
The **Assets** menu shows **Not installed**	Switch on Service & AMC under Licensing > Installed packages
This quotation line is not approved for installed asset creation	Tick **Create installed asset on delivery** on the quotation line before it is approved
No customer sites found	Add the site first (Step 6)
No assets match the search	Search by tag, name, serial number or customer
A permission message	Ask your administrator to review your role
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 Installed Base, Warranty, AMC and Service History screens as they are in RES 19.3.1.

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