Get Started — READ Insight in 20 minutes

READ Insight reads your Klipboard / Palladium SQL Server and never changes it. IT sets it up once (steps 1 to 8); after that each person only signs in (steps 9 to 14).

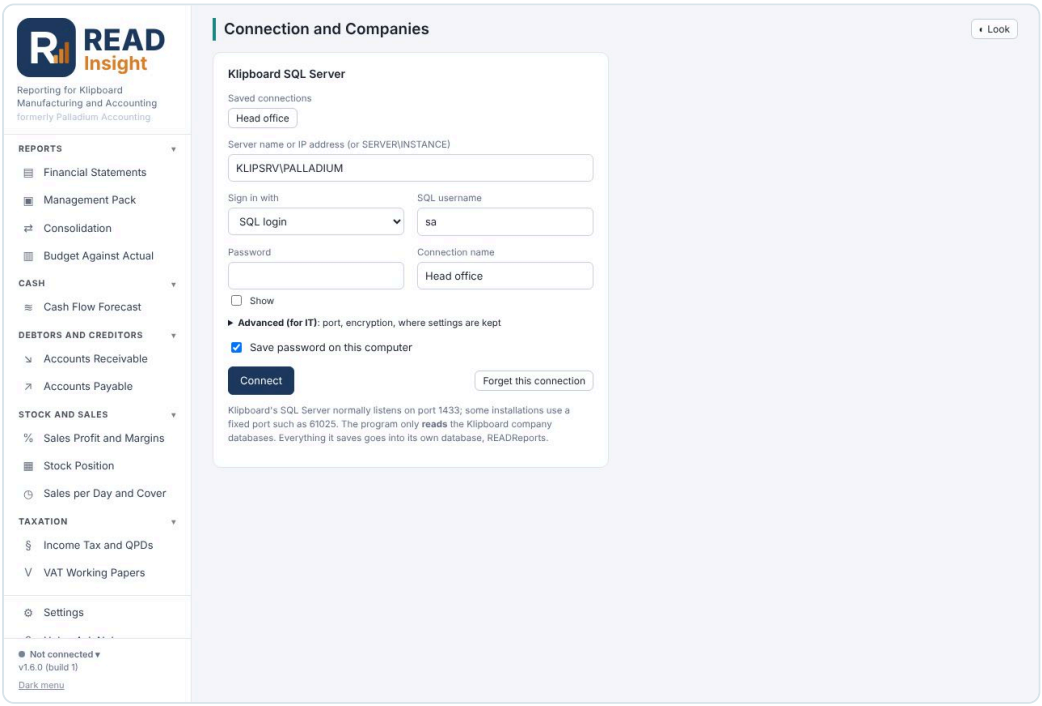
Three things to know first

- **The SQL Server** is the server Klipboard already uses. READ Insight adds one database of its own there, **READReports**, for its settings, layouts, licence and logs. On Klipboard's cloud nothing is added (hosted mode).
- **The connection login** is how the program reaches that server. IT types it once on each computer and ticks *Save password*. Use **sa** (or another SQL administrator) only for setup; everyday computers use a **read-only login** that READ Insight creates for you.
- **Each person** then signs in with their own **Klipboard username and password**, plus a six-digit code from an authenticator app from their second sign-in.

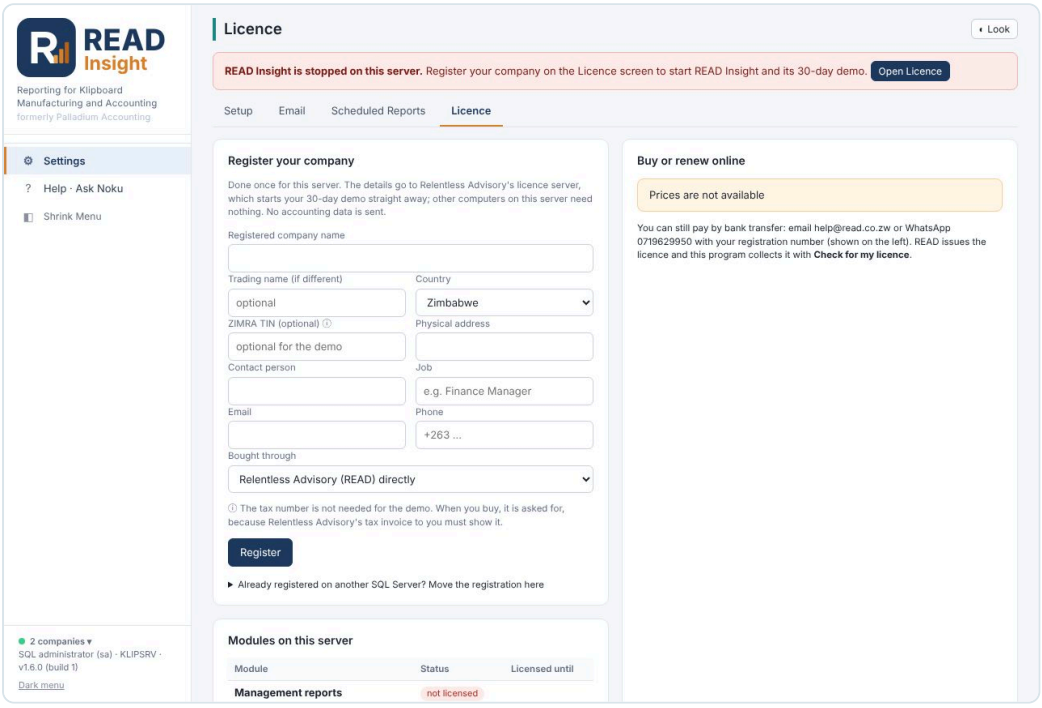
READ Insight can be set up from **any computer** that reaches the SQL Server over the network, including your own laptop: READReports is created on the server, not on the computer you use.

IT does once

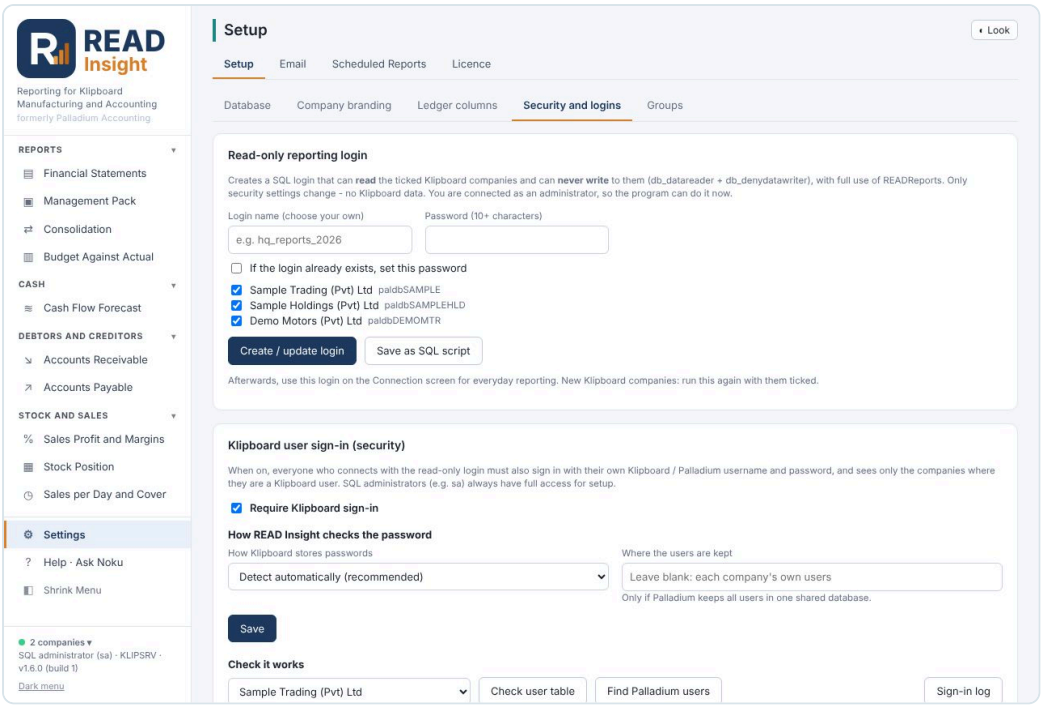
1. **Install.** Run *READ Insight Setup.exe* (Windows asks for administrator permission). Open **READ Insight** from the desktop or the Start menu.
2. **Connect as administrator.** On the Connection screen enter the SQL Server name (as in Klipboard's Server Registration), choose *SQL login*, type **sa** and its password, tick *Save password*, give the connection a name and click **Connect**. Port and encryption are under *Advanced (for IT)*; the usual port is 1433, Klipboard's cloud uses a fixed port such as 61025.



3. **Accept the licence agreement for the organisation.** It is shown once: type your name and title and click **I accept on behalf of my organisation**.
4. **Create READReports.** *Settings* → *Setup* → **Install / update READReports**. This makes the READReports database with the administrator login you connected with; it needs no password of its own. (Skipped on Klipboard's cloud.)
5. **Register the company.** *Settings* → *Licence* → **Register your company**: company name, country, tax number (optional for the demo), address, contact person, email and phone → **Register**. You get a **registration number** (RI-000148): it identifies your company and server to Relentless Advisory, and you quote it when you call or buy. It is not a licence key. The 14-day demo starts at once.
6. **Confirm the email.** Relentless Advisory emails the contact a confirmation link. Click it within 7 days, or READ Insight stops until it is clicked (*Licence* → **Send the link again** if it is lost).



7. **Create the read-only login.** *Settings* → *Setup* → *Read-only reporting login*: choose **your own login name** (not sa or READReports, which are well known) and a strong password, tick the companies and click **Create / update login**. Then on the Connection screen change the SQL username from sa to that login, tick *Save password*, **Connect**. Do the same on each user's computer.



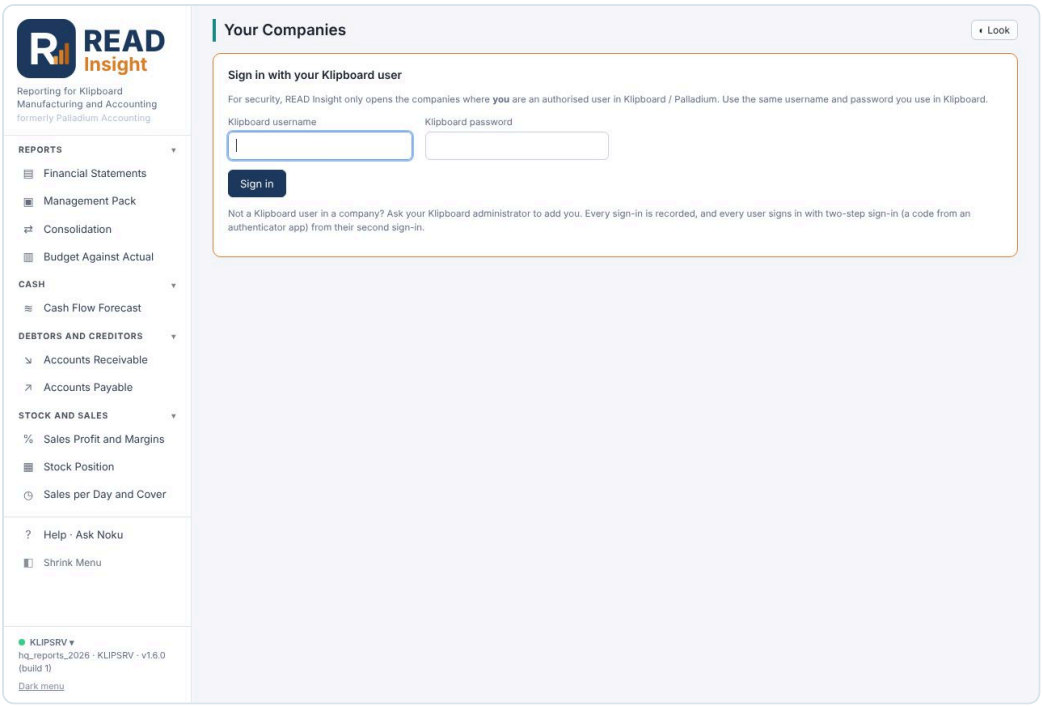
8. **Set up email.** *Settings* → *Email* → the mail server details → **Send test email**.

Who types what

What	Who	When
SQL Server name and sa password	IT	Once, at setup
Licence agreement for the organisation	IT	Once per server
Registration and the email confirmation	IT and the contact	Once per server
Read-only login name and password	IT	Once per computer, then saved
Licence agreement for themselves	Each person	Once
Klipboard username and password	Each person	Each time
Six-digit authenticator code	Each person	Each time, from the second sign-in

Everyone

9. **Sign in.** Type your Klipboard username and password. You see only the companies where you are a Klipboard user; the first time, read and accept the licence agreement for your own use.



10. **Two-step sign-in.** At your second sign-in, scan the QR code with Microsoft Authenticator, Google Authenticator or Zoho OneAuth and type the six-digit code. Lost your phone? IT resets it under *Licence → Two-step sign-in*.
11. **Choose companies.** The box at the bottom of the menu shows the companies you report on; click it to change them.
12. **Run a statement.** *Financial Statements* → statement, companies, currency, columns and dates → **Run report**. Click any amount to see the transactions behind it; **PDF**, **Excel** or **Email**.
13. **Debtors.** *Accounts Receivable* → **Load** for the ageing; tick customers to send statements; under *Reminders* test with your own email first, then **Schedule on this computer**.
14. **Licence.** *Licence* → plan, period and modules → **Pay now** (Paynow, EcoCash, OneMoney or bank transfer), or through your READ Partner. The program checks its licence every 3 days, so connect to the internet at least once a week.

Stuck? **Help → Ask Noku**, or Relentless Advisory (READ): help@read.co.zw · +263 8612 950950 · +263 242 254 366 · WhatsApp +263 719 629 950 · www.read.co.zw