READ Insight — IT Guide

Version 1.2 · November 2026 · for the client's IT administrator

This guide covers what IT needs to install, secure and support READ Insight. Further technical detail is available to a client's IT on request from help@read.co.zw.

1. Architecture at a glance

Part	What it is
`readinsight.exe`	The program. One Windows file (about 15 MB) with everything inside it — no runtime, framework or database driver to install
Program window	Microsoft Edge (or Chrome) in "app mode": a plain window with no address bar, showing the program's screens
Local engine	`readinsight.exe` runs a small private web server on **127.0.0.1 (this PC only)** on a random port, protected by a one-time token. The window talks to it; nothing on the network can
Accounting system	Version 1: Klipboard / Palladium (company databases named *paldb…*). The Connection screen has an *Accounting system* choice so that adapters for Sage Evolution and other SQL-based systems can be added later; each needs its own table mapping and is not yet available
SQL Server	The client's existing Klipboard SQL Server. The program connects directly (TCP, usually port 1433 or a fixed port such as 61025)
READReports	The Suite's own SQL database on the same server: tables + stored procedures that build the statements
Background sender	Windows Task Scheduler runs `readinsight.exe --agent` every 30 minutes to send Accounts Receivable reminders
Installer	`READ Insight Setup.exe` — copies the program, creates shortcuts and the Windows "Apps" uninstall entry

```
 [Program window: Edge app mode] ⇄ [readinsight.exe on 127.0.0.1] ⇄ [Client SQL Server]
                                                                    ├─ Klipboard companies (paldb...) — READ ONLY
                                                                    └─ READReports — Suite's own data
[Task Scheduler every 30 min] → readinsight.exe --agent → SQL Server + client's mail server
```

No component sends accounting data to READ or to any internet service. The program connects to the client's own mail server when sending email, and to Relentless Advisory's licence server (`https://licence.read.co.zw` , port 443) to register, to check in every 3 days, to buy and to collect licences. Allow that address through the firewall: without a check-in for 7 days the program stops until it can check in.

2. System requirements

Item	Requirement
Workstation	Windows 10 (1809+) or Windows 11, 64-bit; Microsoft Edge (built in) or Google Chrome; 4 GB RAM
SQL Server	The Klipboard SQL Server, 2016 SP1 or later (the scripts use `CREATE OR ALTER`), on-premises or Azure SQL Managed Instance / VM
Network	TCP access from the workstation to the SQL Server port (1433 or the fixed port, e.g. 61025)
Email (optional)	SMTP access to the client's mail server (587 STARTTLS or 465 SSL)
Permissions	Installer: local administrator. First READReports install: a SQL login with CREATE DATABASE (e.g. sysadmin). Day-to-day: see section 5

3. Installation and files

Location	Content
`C:\Program Files\READ Insight\readinsight.exe`	Program
`C:\Program Files\READ Insight\uninstall.exe`	Uninstaller (a copy of the setup program)
`C:\ProgramData\READ Insight\config.json`	Saved connections (passwords encrypted with Windows DPAPI, machine scope); export folder;

Location	Content
	which connection the background sender uses. Users group has modify rights
`C:\ProgramData\READ Insight\logs\app-YYYY-MM.log`, `agent-YYYY-MM.log`	Program and background-sender logs (no ledger data)
`%LOCALAPPDATA%\READ Insight\window\`	The program window's private Edge profile
`Documents\READ Insight\`	Default export folder
Registry `HKLM\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall\READInsight`	Apps & features entry
Task Scheduler `READ Insight\Accounts Receivable reminders`	Created only when a user clicks *Schedule on this computer*

Silent / mass deployment: copy `readinsight.exe` to the same folder on each PC and create a shortcut; the setup program is optional. **Upgrade:** run the new setup; it closes the program, replaces the .exe and keeps all settings. **Uninstall:** Windows *Apps* → READ Insight; READReports stays on the SQL Server.

Command line: `readinsight.exe` opens the program (a second launch opens another window on the running copy); `readinsight.exe --agent` sends due reminders and exits; `readinsight.exe --version`.

4. SQL Server security

The read-only rule is enforced three ways: (1) every query against Klipboard databases is a SELECT; (2) all writes go through a separate connection to the READReports database; (3) the READReports installer refuses any script batch that tries `USE` on another database. Recommended logins make it impossible at the server level too:

```
-- once, as sysadmin
CREATE LOGIN READReports WITH PASSWORD = '<strong password>', CHECK_POLICY = ON;
-- in each Klipboard company database:
USE [paldbCompanyA]; CREATE USER READReports FOR LOGIN READReports; ALTER ROLE db_datareader ADD MEMBER READReports;
-- in READReports (after it is created):
USE READReports; CREATE USER READReports FOR LOGIN READReports; ALTER ROLE db_owner ADD MEMBER READReports;
```

The program can do this for you: connect as **sa** (or any login with ALTER ANY LOGIN), open **Setup and groups → Read-only reporting login**, enter a name and password, tick the companies and click **Create / update login**. It creates the login (password policy on), a user in each ticked Klipboard database in **db_datareader** and **db_denydatawriter** (so even a mistake cannot write), and a user in READReports in **db_owner**. This changes security settings only — no Klipboard data. **Save as SQL script** produces the same steps for IT to run in SSMS. Run it again whenever a new Klipboard company is created. The procedures read Klipboard through three-part names (`[paldbX].dbo.tblJournal`), so the login needs db_datareader in each Klipboard database it should report on. Companies the login cannot open are simply not listed — this is how access is restricted per user.

Klipboard user sign-in (on by default once READReports is installed). After connecting with the read-only login, each person signs in with their own Klipboard / Palladium username and password and sees only the companies where that user exists and is active. The program only reads the Klipboard user list; it never changes it. Every attempt is written to an access log, and repeated failures are slowed down. Confirm on the first live server that sign-in works with a known user (*Setup → Klipboard user sign-in → Check user table*).

Two-step sign-in. From a user's second sign-in, a six-digit code from an authenticator app (Microsoft Authenticator, Google Authenticator or similar) is required after the password. Repeated wrong codes lock that user for a short time. IT can reset a user who has lost their phone under *Licence → Two-step sign-in*. Keep access to the READReports database to IT and the read-only login. A SQL administrator connection skips sign-in, for setup only.

Encryption: *Off* is normal on a local network with older SQL Server versions; use *On* / *Strict* for Azure or across the internet. Over the internet, use a VPN rather than exposing SQL Server.

5. The READReports database, registration and updates

READReports is a database the program creates on the client's own SQL Server for its own settings, report layouts, licence keys and logs. It never changes a Klipboard database. Back it up with the server's other databases. Where a login may not create a database (for example Klipboard's own cloud), the program runs in *hosted mode*: nothing is created on the server and the settings are kept in a file under `C:\ProgramData\READ Insight\hosted\`, which should be backed up too.

Registration and check-in. Before first use, IT registers the company once (*Licence → Register your company*). The program then checks in with Relentless Advisory's licence server every 3 days. If it cannot check in for 7 days it stops until it can, so allow

outbound HTTPS (port 443) to `licence.read.co.zw`. The check-in sends the registration number and program version only; no accounting data.

Updates. The program looks for updates once a day and installs them only when a user clicks *Install update*. Every update is checked against Relentless Advisory's signature before it is installed. Offices without internet can be given the update files to place in a shared folder (*Help → Updates*).

6. Email and background sending

- SMTP with STARTTLS (587), SSL (465) or none (25); PLAIN or LOGIN authentication (works with Microsoft 365 SMTP AUTH, Gmail app passwords, cPanel mail). TLS 1.2 minimum.
- The background sender runs as a scheduled task under the user who scheduled it, every 30 minutes, only while that user is signed in (change to "Run whether user is logged on or not" in Task Scheduler if required). It uses the saved connection named in `config.json → agentProfile`; SQL logins need *Save password* ticked.
- Rules: sending window, weekdays only, minimum overdue, maximum emails per run (default 100), 1.5 seconds between emails.

7. Troubleshooting

Symptom	Check
Window does not open	Edge installed? Look in `logs\app-*.log`. Try `readinsight.exe --version` from a command prompt
Cannot reach SQL Server	`Test-NetConnection <server> -Port 61025` in PowerShell; SQL Server TCP/IP enabled; firewall; SQL Browser for named instances without a port
Login failed for user	SQL Server in mixed mode; password; login has access to the databases
TLS / certificate errors	Encryption Off, or tick Trust server certificate; old SQL Servers may need Windows TLS 1.2 updates
No companies listed	Login lacks db_datareader on the paldb databases
Install READReports fails	Login lacks CREATE DATABASE; run the saved scripts in SSMS as sysadmin
Reminders not sent	Task exists (`schtasks /Query /TN "READ Insight\Accounts Receivable reminders"`), within sending hours, *Send reminders automatically* on, `logs\agent-*.log`
AR ageing does not match the balance sheet	Setup → Schema check; check Balance/Paid column and CreditTypes
Program keeps running after the window closes	It closes itself 5 minutes after the last window closes (or after a background job ends)

8. Windows trust: code signing, SmartScreen and antivirus

What the client sees. A new program downloaded from the internet that Microsoft has not seen before shows *"Windows protected your PC"* (Microsoft Defender SmartScreen).

What to expect. Each READ Insight program file carries Windows version details (company, product, version) and an icon, and every update is checked against Relentless Advisory's signature. If SmartScreen shows the warning on a first install, check that the file came from www.read.co.zw (the download page lists its SHA-256 checksum), then click *More info → Run anyway*. Files copied from a USB stick or a network share usually do not show the warning. If an antivirus product flags the program by mistake, send the file and the message to help@read.co.zw.

What clients' IT may need to allow: the program folder `C:\Program Files\READ Insight`, outbound HTTPS (port 443) to updates.read.co.zw for updates (optional) and to licence.read.co.zw for registration, the 3-day check-in and licences (required), and TCP to the SQL Server port. The program opens no inbound ports — its engine listens only on 127.0.0.1.

9. Support

help@read.co.zw · 08612950950 / 0242254366 · WhatsApp 0719629950 · www.read.co.zw · Relentless Advisory (Pvt) Ltd, 151 Sam Nujoma Extension, Belgravia, Harare