

# DataWise for MYOB — Setup Guide

From install to asking your first question.

## What we will be installing

Six things go on this PC. **You install the first one. We install the other five for you, in one go — see page 3.** Everything but the Connector is free to download; Claude itself needs an Anthropic plan, and page 2 explains which. The addresses below are the exact files, not the home pages they sit behind, so you can see precisely what goes on your machine.

- 1

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**Claude Desktop** 126 MB

The assistant you ask the questions. **This is the one you install yourself**, because it needs your own Anthropic account — see the next page. The desktop version, not the website: only the desktop app can reach data on your own machine.

<https://claude.ai/download>
- 2

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**DataWise Connector for MYOB 22.36.2** 79.1 MB

The engine. Copies your MYOB figures into a database on this PC and keeps that copy up to date. Everything else builds on it.

<https://www.datawise.co.nz/files/Installers/DataWise-Connector-22.36.2.exe>
- 3

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**Node.js 24.19.0 LTS** 31.4 MB

A small free helper Claude uses to talk to the Connector. You will never open it. Click Next through the installer, accepting everything.

<https://nodejs.org/dist/v24.19.0/node-v24.19.0-x64.msi>
- 4

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**Git for Windows 2.55.0.4** 62.4 MB

Another small, free, standard tool. Nothing here needs it today, but Claude Code asks for it later, so we put it on now and you are never stopped for it. You will never open it.

<https://github.com/git-for-windows/git/releases/download/v2.55.0.windows.4/Git-2.55.0.4-64-bit.exe>
- 5

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**Connect Claude to your data** already on the PC

The piece that joins Claude to your figures. It is not a download — it came with the Connector. Run **Connect Claude Desktop** from the folder below, or click the **Windows Start button** and type **Connect Claude**. It finds your data by itself and asks nothing.

<C:\DataWise\DataWise Connector for MYOB\Ask your data>
- 6

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**SQLite ODBC driver, 64-bit** 2.1 MB

Only if you want Excel or Power BI reading your data live. The 64-bit one is right for almost every modern Office. Not needed to ask questions.

[http://www.ch-werner.de/sqliteodbc/sqliteodbc\\_w64.exe](http://www.ch-werner.de/sqliteodbc/sqliteodbc_w64.exe)

**Nothing here is a job for you except number 1.** Install Claude Desktop and sign in, then run the setup on page 3 and it puts the rest on in one go, in the right order, without asking you anything.

# Which Claude Plan to Install

## What Free can do

A free Anthropic account, at no cost:

- **Answers questions from your own figures.** The piece that joins Claude to your data is read-only, and behaves the same on every plan.
- **Builds a real Word document, Excel workbook or PDF** from an answer, for you to download. Anthropic make file creation available on every plan, free included.
- **Stops when the allowance runs out.** A free account carries a usage limit, and when it is reached Claude pauses for a few hours. Fine for a look around, no good halfway through a month end.

## What Pro and Claude Code can do

From US\$20 a month:

- **No usage wall** in the middle of a job — the reason to pay, and on most days the only one that matters.
- **Claude Code**, which is not on the free plan at all. It is the same assistant working *in your own folders* rather than in a chat window.
- **Reports written straight into your business folders**, and a script left behind that produces the same report again next month.
- **Running things, not only reading them** — setting up the Excel ODBC connection, batches, scheduled jobs. A chat window cannot do any of that.
- **DataWise HQ**, if you go on to use it — and you will, because it is free and it is the best way to organise all the clever things you are about to start doing. Its assistant is Claude Code, so it does nothing at all without a paid plan.

**You do not have to decide today.** Start free, ask it a few questions, and move to Pro when the allowance starts getting in your way. Nothing needs reinstalling — you sign in to the same app.

# Running the setup

One file does the whole of the rest. It fetches everything on page 1 straight from the makers, installs each one without asking you anything, joins Claude to your figures, and restarts Claude so it picks the connection up. About ten minutes, most of it downloading.

## First, the one thing that must already be done

**Claude Desktop installed, opened, and signed in.** The setup checks for it before it does anything at all, and stops with a message if it is not there. Nothing is half-installed if that happens.

## Then

### 1 Download the setup file 13 KB

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One small file. Save it anywhere — your Downloads folder is fine.

<https://www.datawise.co.nz/files/Installers/DataWise-Setup.cmd>

### 2 Double-click it, and choose Run one click

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Windows asks whether you want to run a file you downloaded. That is normal for any setup, and the answer is Run.

### 3 Click Yes to the Windows permission box one click

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It appears once, at the start, because three of the installs are machine-wide. This is the last thing you have to click.

### 4 Leave it alone for about ten minutes no clicks

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It tells you what it is doing as it goes: downloading, installing, connecting, restarting Claude. A black window with white writing is exactly what it should look like.

## What is left when it finishes

The Connector opens by itself, and five things remain — every one of them needs *you*, so nobody could have done them for you. **The next page takes them one at a time.**

- Choose the **data folder** your figures will live in.
- Your **name, company and email** in the Connector.
- **Sign in to MYOB** and approve access. **You must be an administrator of the company file** — MYOB requires it the first time, and a non-admin sign-in fails later without asking again.
- **Choose your company file**, if your MYOB login reaches more than one.
- **Run the first sync** and let it finish. It is the long one; every sync after it is quick.

# After the setup — your part

The Connector opens by itself when the setup finishes. Five things are left, and every one needs *you*. Ten minutes, plus the first sync running in the background. **Every name in bold below is exactly what is on the screen.**

- 1

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**Set the data folder** Application data folder  
The Connector asks where to keep your accounting data. Anywhere is fine, but **pick somewhere your normal business backup already covers** — this is where your figures will live. Press **Check folder** and it confirms it can write there.
- 2

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**Your details** Your name · Your company · Email  
Fill the three boxes and press **Send verify email with code**. A code arrives; type it in and press **Confirm**. Give an email you actually read — it is how we know whose Connector this is and where support happens. **It never blocks you:** if the email is slow, carry on and confirm later.
- 3

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**Connect to MYOB** + add company  
Press **+ add company**, then the coloured button beside it — that is what connects a company to MYOB, and the colour is that company's own. MYOB's own sign-in page opens in your browser. **Your password is typed into MYOB, never into our software.**
- 4

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**Choose your company file** Select the MYOB company file  
If your MYOB login reaches several files, pick one and press **Use selected file**. You can add the others later; each gets its own 14-day trial.
- 5

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**Run the first sync** Run  
Choose how far back to go — two or three years suits most people — tick the areas you actually use, and press **Run**. **This one is slow**, because it is fetching your history. Every sync after it asks MYOB only for what changed. Carry on using your PC while it works.

**“MYOB will not let me approve access.”** The login you used is not an **administrator** of that company file, and MYOB requires one the first time. It keeps the sign-in and will not ask again, so go to **Manage company**, press **Clear MYOB sign-in**, and do step 3 again.

## Then check it worked

Ask Claude Desktop a question only your own figures can answer:

- **List MYOB companies** — it should name your company back. That is the whole chain proved: Connector, data, and Claude.
- **What were my sales last month?** — and you are away.

**If Claude does not seem to know about your data**, close it and open it again — it only reads its settings at startup. Still stuck? Ring us.

# Your first report, step by step

No report designer, no field picker, no template. **You type the question.** Claude reads a written dictionary of your data before it answers, so it knows which column holds the balance owing and which ones look right and are not.

## 1 Ask for it in plain English type it into Claude

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Say what you want the way you would say it to a person. There is nothing to set up first and no syntax to learn.

**Show me sales by item for customers in Custom List 1**

## 2 Say what your own categories mean one sentence

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MYOB stores the *value* in a custom list but not the *name* you gave the list. Claude will quote your codes back exactly as they are — **TRADE, RETAIL** — and will not guess what they stand for. Tell it once and it uses your words for the rest of the conversation.

**Custom List 1 is customer type. TRADE is wholesale, RETAIL is shopfront**

## 3 Narrow it until it is the report you wanted keep talking

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Do not start again — follow up. Each answer comes back in seconds because it is reading the copy on your own machine, not asking MYOB.

**Just this financial year, top 10 items, as a table**

## 4 Ask for it as a document Word or Excel

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Get the answer right on screen first, then ask for the file. You get a real .docx or .xlsx to download — table, chart and a draft commentary if you want one.

**Put that in an Excel workbook with a chart by month**

**Do not add the categories together.** If one of your categories invoices another — a wholesale arm selling to a retail arm — the same goods are in the file twice and a grand total counts them twice. Claude is told to report each category on its own row and leave the total off. **That is not a fault in the figures; it is what your books contain.**

## Questions worth trying next

- Who owes me money, and how long has each invoice been outstanding?
- Compare this year's sales to last year, by month.
- Who are my top 10 customers this quarter?
- Has anyone who used to buy regularly stopped?

**If a figure ever looks wrong, ask it to show you which records it counted.** The usual answer is a document type included or left out — quotes counted as sales, or credits not netted off. Then ring us.

# Connecting Excel

Your data is an ordinary database file, so Excel can read it directly. Build the workbook once and press **Refresh** from then on — a live connection, not an export you have to redo every month. Power BI, Access and anything else that reads a database work the same way.

## 1 Install the driver — once per PC 2.1 MB, free



Run it and click Next through, accepting everything. **The 64-bit one is right for almost every modern Office.** Only needed on machines that will run Excel; it is nothing to do with the Connector.

[http://www.ch-werner.de/sqliteodbc/sqliteodbc\\_w64.exe](http://www.ch-werner.de/sqliteodbc/sqliteodbc_w64.exe)

## 2 Find your company's database file one file per company



Inside your data folder there is a **companies** folder holding one **.db** file per company, named after the company. Note the full path — you type it in step 4.

`C:\SQLiteData\companies\1_Harbourside Joinery.db`

## 3 In Excel: **Data > Get Data > From Other Sources > From ODBC** Excel's own menu



Leave the **Data source name** box on **(None)**. There is no DSN to create — click **Advanced options** instead, which opens a box for a connection string.

## 4 Type the connection string, all on one line the only fiddly bit



Put your own path from step 2 after **Database=**. The driver name must be exactly as below, brackets and all. If Excel then asks how to sign in, choose **Default or Custom** and press **Connect** — there is no username or password.

`Driver={SQLite3 ODBC Driver};Database=C:\SQLiteData\companies\1_Harbourside Joinery.db`

## 5 Pick a table and press **Load** and you are in Excel



Excel lists every table in your data. From then on, **Data > Refresh All** pulls the latest synced figures into the workbook. Save the workbook and the connection is saved with it.

**Two things for whoever runs your network.** If the data folder is on a share, staff need **read AND write** access to it — the driver keeps two small working files beside each database while it reads. And a company you have **locked with a password** cannot be opened this way at all: that is the protection doing its job, not a fault.

# When it does not work

Every one of these has happened to somebody. They are in the order you are likely to meet them.

| What you see                                                      | What it is, and what to do                                                                                                                                                                                                                           |
|-------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The setup stops and says <b>Claude Desktop is not installed</b>   | Exactly what it says, and nothing was half-installed. Install Claude Desktop, <b>open it and sign in</b> , then run the setup again.                                                                                                                 |
| Windows says the publisher is <b>unknown</b> or <b>unverified</b> | Expected. We are a small New Zealand company and our installers are not code-signed. Choose <b>More info</b> , then <b>Run anyway</b> .                                                                                                              |
| MYOB gives an error after you sign in                             | <b>The login was not an administrator of the company file.</b> MYOB requires one the first time. The Connector keeps the sign-in and will not ask again, so: <b>Manage company &gt; Clear MYOB sign-in</b> , then connect again as an administrator. |
| Claude answers, but not from your figures                         | It only reads its settings when it starts. <b>Close Claude Desktop completely and open it again.</b> This is the cause nine times out of ten.                                                                                                        |
| Claude says it cannot see any MYOB data at all                    | Run <b>Connect Claude to your data</b> from the Start menu and read what it prints — it says plainly what is missing. Then restart Claude.                                                                                                           |
| The money questions come back empty                               | The first sync has not finished, or it wrote to a different folder from the one Claude was given. Check the Connector shows your company and a recent sync.                                                                                          |
| Excel will not connect                                            | Usually the <b>driver and Office are different bit-versions</b> — install the 64-bit driver for 64-bit Excel. Otherwise the company is password-locked, or staff lack <b>write</b> access to the shared folder.                                      |
| A figure looks wrong                                              | Ask it to show you which records it counted. The usual answer is a document type in or out — quotes counted as sales, credits not netted off. Then ring us.                                                                                          |
| Claude stops and says it needs a break                            | That is the <b>free plan's usage limit</b> , not our software. It resumes in a few hours; Pro removes the wall. See page 2.                                                                                                                          |
| <b>You are upgrading an older Connector</b>                       | Run a <b>full</b> sync afterwards, not the usual catch-up. Budgets and the financial-year calendar only arrive from version 22.34.0 and do not backfill.                                                                                             |

**Still stuck? Ring us.** Mark on 021 296 5298 or Mike on 027 474 5918 — you will talk to the two people who wrote it. It helps to know your Connector version: it is beside the name at the top of the Connector window.