Asking Your Data Questions

Set up plain-English questions over your MYOB data, and learn how to ask well.

What this gives you

Ask a question the way you would ask a person, and get an answer straight back — or a finished Word document with a table, a chart and written commentary.

You type	You get
Who owes me money?	A ranked list with how long each invoice has been outstanding
Compare this year's sales to last year, by month	The comparison, with the months that moved called out
Put that in a Word document with a chart	A real .docx — table, chart and a draft commentary

What you need

- The Connector installed and syncing at least one company file
- **Claude Code** on that same PC — Anthropic's assistant. It needs a **paid Claude plan**; the free tier does not include it. See claude.com/pricing
- **Node.js** 22.5 or newer — free from nodejs.org
- The small folder of files we give you

> Everything happens on your own computer. Your database is never uploaded, and your MYOB sign-in details are walled off so they can never be read.

Setting it up

1 Put the folder somewhere sensible

We give you a small folder. Copy it anywhere on the same PC — the desktop is fine. It does not need to be near your data.

2 Connect it to Claude

Double-click **Connect Claude Desktop**. It checks everything is present and registers the connection. If something is missing it tells you in plain English what to do.

3 **Restart Claude Desktop — fully**

Close Claude Desktop completely, **including its icon in the system tray**, and open it again. It only reads its settings at startup, so this step matters.

4 **Ask something**

Type a question. Start with “Who owes me money?” — it is the quickest way to see whether it is reading your real figures.

There are **no paths to type and nothing to configure**. It finds your companies and your data folder by itself. To disconnect again later, the READ ME in the folder shows the one-line command — your data is untouched either way.

Password-locked companies

If you have locked a company with a password (see **Guide 5**), Claude follows the same rule as everyone else: **it inherits your access, never more**. On the PC that manages the company, questions work normally — the unlocking happens invisibly, using the key Windows holds for you. On any other computer the company is listed as locked, and Claude says so plainly rather than answering. The password itself never appears in a conversation.

Never type a company’s database password into Claude — it is never needed. If a locked company will not open on the PC that runs the Connector, something is wrong: ring us rather than working around it.

If Claude cannot find your companies or your data

Claude finds your data through the Connector’s own settings — wherever you chose to put the data folder. There is nothing to tell it and no path to type. If it says it cannot find your companies:

1. Open the Connector and check it lists your companies and has synced. Claude can only see what the Connector on **this PC** manages.
2. If you have moved your data folder, point the Connector at the new location first, then ask Claude again — it follows the Connector.
3. Run **Connect Claude Desktop** again and restart Claude Desktop fully. It re-checks everything and says plainly what is missing.

Asking well

Name the company if you have several

If you run more than one MYOB file, say which one — or ask it to list them first.

Ask for the shape you want

“By month”, “top 10”, “this financial year”, “as a table”. It will follow the instruction.

Follow up rather than starting again

“Now break that down by customer” works, and comes back instantly, because it is reading the copy on your machine.

Ask for the document at the end

Get the answer right on screen first, then say “put that in a Word document with a chart”.

Questions to start with

- Who owes me money, and how long has it been outstanding?
- Who are my top 10 customers this quarter?
- Compare this year’s sales to last year, by month.
- What did I spend last quarter, and on what?
- Has anyone who used to buy regularly stopped?
- Show me my bank transactions for last month.
- What is my average invoice value, and how has it changed?

Why you can trust the answers

Accounting tables are full of columns that *look* like the one you want and are not. Point AI at a raw accounting database and it will confidently pick the wrong one and hand you a number that seems perfectly reasonable.

So the folder includes a **written dictionary of your data** — what every field means, which one holds the balance owing, how the tables join, and which columns to leave alone. That is read before any question is answered.

> It is the difference between an answer that is plausible and an answer you can put in front of your bank.

What it will not do

- **It cannot change anything.** Read-only by construction — it can answer, it cannot edit.
- **It will not guess.** If your data cannot answer the question, it says so.
- **It cannot see your MYOB login.** Those details are deliberately unreachable.

A few things are simply not in the data yet — supplier balances owing, cash-basis figures and period-based reporting. Ask anyway; it will tell you rather than invent a number.

If it does not appear in Claude

1. Did you fully restart Claude Desktop, including the system tray icon?
2. Run **Connect Claude Desktop** again and read what it prints.
3. Check Node.js is present: type **node --version** in a command window — it needs 22.5 or newer.
4. Still stuck? Ring us — the numbers are at the bottom of the page.

If something looks wrong

Ask it to show you the query it used and which records it counted. The usual cause of a surprising total is a document type being included or excluded — for example money receipts being counted alongside invoices. Then ring us.

Need a hand? Email sales1@datawise.co.nz or ring Mark on 021 296 5298 / Mike on 027 474 5918. You will talk to the people who built it.