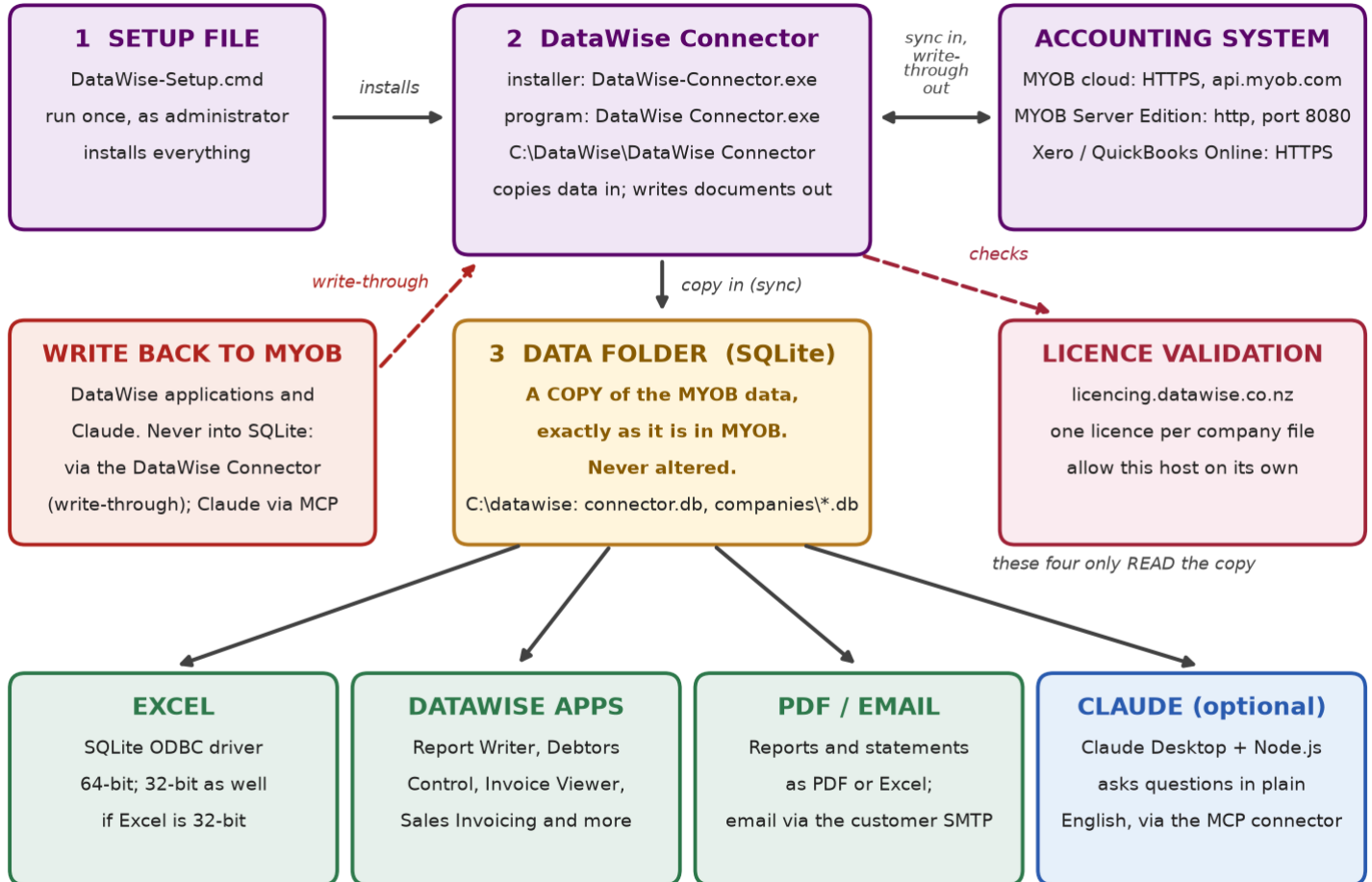


IT Install Guide - DataWise Connector

Applies to every version - for IT support. Follow it as written; no input from DataWise is needed.

1 Picture first

How DataWise Connector fits together



- The setup file installs the programs. The Connector copies the accounting data into SQLite files on this PC.
- Those SQLite files are a COPY of the MYOB data exactly as it is in MYOB, and they are never altered: Excel, the DataWise applications and Claude only read them.
- Changes to MYOB are written to MYOB itself, never to the copy: DataWise applications through the DataWise Connector (write-through), and Claude through the MCP connector and the DataWise Connector.
- The Connector checks its licence with licencing.datawise.co.nz (one licence per company file).
- Everything else (Excel, the applications, PDF and email, Claude) reads those files. Nothing needs to reach into the PC from outside.

2 What it does

DataWise Connector is a Windows program that makes a copy of a company's MYOB (cloud, or a MYOB AccountRight Server Edition file on the network), Xero or QuickBooks Online accounting data on the customer's own PC, in SQLite database files. The sync itself only reads. DataWise programs that need to (for example Sales Invoicing) also post documents such as invoices back to the accounting system through the Connector (write-through); Claude can do the same. The copy on the PC is never altered. Once the copy is there, the customer can use it from Excel, from the DataWise screens (reports, debtors control, invoice viewing), as PDF and email output, and - if they choose - by asking Claude questions in plain English. There is no DataWise server holding customer accounting data. DataWise runs a licence server, and the Connector checks its licence with it.

3 Before you start

- You need local administrator rights on the PC. Installing to C:\DataWise raises the Windows administrator prompt, and it must be answered. The prompt gives up after about two minutes.
- The customer (or you) needs the MYOB sign-in of an administrator of the company file. A non-administrator sign-in fails later and will not re-ask.
- Internet access to the addresses in section 6.
- Know which antivirus is installed. ESET has caused trouble before; section 6 says what to allow.
- Claude Desktop is optional. The install works with or without it.
- The files are not digitally signed. Windows shows "unverified publisher" and may show SmartScreen. That is expected. Allow by file name, size or folder, not by publisher.

4 The files - exactly what to allow

Two names are easy to confuse: the downloaded INSTALLER is called DataWise-Connector.exe, and the installed PROGRAM is called "DataWise Connector.exe". They are different files.

Downloaded file (installer)	What it is	Address to download it from
DataWise-Setup.cmd	The setup file. Runs the whole install. Starts PowerShell with execution policy bypass (see section 6).	https://www.datawise.co.nz/files/Installers/DataWise-Setup.cmd
DataWise-Connector.exe	Installer for the Connector	https://www.datawise.co.nz/files/Installers/DataWise-Connector.exe
DataWise-Debtors-Control.exe	Installer, optional add-on	https://www.datawise.co.nz/files/Installers/DataWise-Debtors-Control.exe
DataWise-Report-Writer.exe	Installer, optional add-on	https://www.datawise.co.nz/files/Installers/DataWise-Report-Writer.exe
DataWise-Invoice-Viewer.exe	Installer, optional screen	https://www.datawise.co.nz/files/Installers/DataWise-Invoice-Viewer.exe
DataWise-Dispatch-Viewer.exe	Installer, optional screen	https://www.datawise.co.nz/files/Installers/DataWise-Dispatch-Viewer.exe
DataWise-Sales-Invoicing.exe	Installer, optional screen	https://www.datawise.co.nz/files/Installers/DataWise-Sales-Invoicing.exe
DataWise-Report-Starter.exe	Installer, optional screen	https://www.datawise.co.nz/files/Installers/DataWise-Report-Starter.exe
DataWise-HQ.exe	Installer, optional	https://www.datawise.co.nz/files/Installers/DataWise-HQ.exe

The Connector's own Install buttons, and the setup file, are sometimes blocked by security software. If that happens, download the installer you need straight from its address above, with a browser or IT's own download tool, put it in the folder IT allows, and run it from there as administrator with /S (for example DataWise-Connector.exe /S). Every installer works on its own: the Connector does not need the setup file, and the other programs do not need the Connector to install them. The address never changes: the version is inside the file, not in the name.

The setup file also downloads three helpers, and each has a copy on our server if the original site is blocked:

Helper file	What it is	Address
Git-64-bit.exe	Git for Windows	https://www.datawise.co.nz/files/Installers/Git-64-bit.exe
node-lts-x64.msi	Node.js	https://www.datawise.co.nz/files/Installers/node-lts-x64.msi
sqliteodbc_w64.exe	SQLite ODBC driver, 64-bit (sqliteodbc.exe is the 32-bit one)	https://www.datawise.co.nz/files/Installers/sqliteodbc_w64.exe

Allow these file names and the address www.datawise.co.nz/files/Installers/ and every download in this step can be made.

- To check a download is the real file: the current size of every installer is listed at <https://www.datawise.co.nz/files/Installers/datawise-versions.json>. For a SHA-256 of the current version, ask DataWise.
- If the browser saved the file as "DataWise-Connector (1).exe", it is the same installer downloaded twice. Compare its size with the table. If the size matches, delete the extra copy and run the one without "(1)". If it does not match, delete both and download again.
- Keep installers in one fixed folder if IT prefers an allow-list by folder (for example C:\DataWise Install). Run each installer from there.
- Installed programs (what to allow after install): "DataWise Connector.exe", "DataWise Debtors Control.exe", "DataWise Report Writer.exe" and the other screens, each in its own folder under C:\DataWise\.

5 Default folders

What	Where	Notes
Programs	C:\DataWise\<program name>	For example C:\DataWise\DataWise Connector. Chosen automatically. An upgrade stays where the program already is.
Accounting data (SQLite)	C:\datawise (suggested)	The customer chooses this at first run. Holds connector.db and a companies folder with one .db per company. Back this up.
Setup work and log	C:\datawise\setup	setup-log.txt is here. This is the file to send DataWise if setup fails.
Per-user settings	%APPDATA%\DataWise Connector	Window state, saved profiles. Not the data.
Update downloads	%TEMP%\DataWiseConnectorUpdate and %TEMP%\DataWiseScreens	Where the in-program Update button and the screens installer save the installer before running it. See section 9.
Scheduled syncs	Task Scheduler, root folder	Tasks named "DataWise MYOB Connector Sync 1" and so on, only if the customer sets a schedule.

- Never install with the /D= switch. The installer cuts the folder at the first space and puts the program in the wrong place. Run it with /S only.
- The installer records where it installed in the registry (HKLM\SOFTWARE\WOW6432Node\<program id>\InstallLocation). An upgrade honours that.

6 Antivirus and firewall - what to allow

- Folders (exclude from real-time scanning, or allow-list): C:\DataWise , C:\datawise , and the two temp folders in section 5.
- Programs: every .exe in section 4, and DataWise-Setup.cmd.
- DataWise-Setup.cmd runs PowerShell with -ExecutionPolicy Bypass and runs its own text as a command. Some endpoint products block that pattern. If Setup stops or the window closes with nothing happening, this is the first thing to check.
- The setup file downloads and silently runs Node.js, Git for Windows and the SQLite ODBC driver. A product that blocks silent installs will block them.
- Outbound HTTPS (port 443) only. No inbound ports, nothing to open on the firewall.

Address	Used for
www.datawise.co.nz	Installers, version file, setup fallbacks
licencing.datawise.co.nz (its own host name - allow it separately from www)	Licence check, and the MYOB sign-in token exchange for the DataWise MYOB app
secure.myob.com , api.myob.com	MYOB sign-in and the MYOB cloud API
nodejs.org , github.com , api.github.com , git-scm.com	Node.js and Git for Windows (copies also on our server)
www.ch-werner.de (http, port 80)	SQLite ODBC driver (a copy is also on our server)
claude.ai , api.anthropic.com	Claude Desktop - only if the customer uses it
Their own SMTP server	Debtors Control email - only if used
MYOB Server Edition, on the LAN: http port 8080	Only where the company file is on a MYOB Server Edition

licencing.datawise.co.nz is a different host name from www.datawise.co.nz. A rule that allows only www does NOT cover it, and a rule that allows *.datawise.co.nz does. If it is blocked:

- A company that has never been checked on this PC cannot sync at all: the Connector must reach the licence server once to register a trial or confirm a licence.
- A company already checked keeps syncing for up to 7 days on its saved licence, with a warning. After 7 days without reaching the server, syncing stops.
- For companies using the DataWise MYOB app (the normal case), MYOB sign-in and every renewal of the sign-in also go through this host, so MYOB cloud syncs stop much sooner than 7 days. A company using its own MYOB developer key is not affected by this part.
- MYOB Server Edition companies need the licence check but have no sign-in to renew.
- The licence reply is signed. A proxy or filter that rewrites or blocks the reply is treated the same as an unreachable server.

7 The install, in order

- Download DataWise-Setup.cmd. Double-click it. Choose Run, and Yes to the Windows box. It asks for administrator rights.
- Leave it running. It shows nine numbered steps, each marked "working", "not working - fixing" or "fixed": 1 internet and versions, 2 DataWise Connector, 3 Claude Desktop (asks "installed here?" if it cannot find it), 4 Node.js, 5 Git, 6 SQLite ODBC driver, 7 connect Claude to the data, 8 restart Claude, 9 final check.
- Node.js, Git and the ODBC driver are installed whether or not Claude is there. Only steps 7 and 8 wait for Claude.
- The Connector does not open by itself. Open it from the Start menu.
- First screen: confirm the data folder (suggested C:\datawise, press Create folder), enter name, company and email, then Close.
- + add company > name > choose the system (MYOB company file, Xero organisation, QuickBooks Online, or MYOB SE for Server Edition) > Create.
- Press the coloured Connect button on the new row. MYOB sign-in opens: sign in as an administrator of the company file, then select the company file. (MYOB SE: enter the server name, press Refresh, pick the file, enter the MYOB user and password, Test Connection, Save.)
- Run a sync: tick the areas, set the From date, press Run. The first sync takes the longest.
- Optional add-ons (Report Writer, Debtors Control): Connector > Settings > Add-on Modules. ProActive screens: Settings > ProActive UI screens.
- Silent install of any installer, once it is on the PC: DataWise-Connector.exe /S (run from an elevated command prompt).

7a MYOB Server Edition (company files on a MYOB AccountRight Server)

- Needs DataWise Connector 22.41.15 or later. An older Connector saves the company as a cloud company, so its row says "MYOB" and it asks for the MYOB cloud sign-in, which is wrong for a Server Edition file.
- In + add company choose "MYOB SE (Retired 2026)". The Type column must then read "MYOB SE". The type cannot be changed afterwards: if it is wrong, remove the company and add it again.
- There is no cloud sign-in and nothing to sign in to at MYOB. Press Connect and enter the computer name of the MYOB server, press Refresh MYOB company list, pick the company file, then the MYOB user name and password of that company file (the same ones used to open it in MYOB), Test Connection, Save.
- Network: the Connector PC must reach the server on http port 8080 (on the LAN, plain http, nothing leaves the building for this). The connection uses the server computer name entered, not "localhost".
- Syncing works as for a cloud file. Writing works too: DataWise programs, and Claude through the Connector, can post an invoice to a Server Edition file with the same --post command. Allow it as any other write to the MYOB server.
- The licence check still applies (one licence per company file), so licencing.datawise.co.nz in section 6 is still needed.
- A company file that MYOB Server itself will not open (for example it answers an error to MYOB's own window) will not open in the Connector either. Test the file in MYOB first.

8 Standalone or shared

	Standalone	Shared
Layout	One PC. Connector, data folder and the people using it are all on that PC.	One PC syncs (the data PC). Its data folder is shared on the network. Other PCs only read it.

Other PCs need	Nothing.	Read access to the shared folder, plus the DataWise screens or Excel with the SQLite ODBC driver, and Claude Desktop if wanted.
Connector on the other PCs	n/a	Not required for reading. If one is installed there, point it at the same data folder.
Test first	n/a	Open the shared folder in File Explorer from the other PC. If Explorer cannot open it, nothing else will.
Allow-list	This PC only.	The data PC (everything) and each reading PC (the screens and the ODBC driver).

9 Updates

- The Connector's header shows its version. When a newer one exists the button turns green and says Install <version>.
- Pressing it downloads the new installer to %TEMP%\DataWiseConnectorUpdate, runs it, and the Connector closes while it installs. The ProActive screens do the same from %TEMP%\DataWiseScreens.
- On a PC where only a fixed folder may run programs, that update will be blocked. Today the way round is: download the new installer by hand into the allowed folder, close the Connector, and run it there with /S. Ask DataWise whether the Update button can save to a folder IT chooses.
- After an upgrade, run a full sync once.

10 If something fails

- Setup shows a menu when a step fails: R retry, M do it by hand, H ask Claude, E email the log to DataWise, S skip, Q quit. Quit is safe: run the file again and it carries on from the failed step.
- The log is C:\datawise\setup\setup-log.txt. Send it to sales1@datawise.co.nz, or press E in the menu.
- Download stalls, or a file disappears after download: antivirus. Add the exclusions in section 6 and retry.
- After install: Connector > Settings > Check and repair installation, and Email setup log.
- MYOB error after sign-in: not an administrator. Manage (the gear) > Clear MYOB sign-in, then Connect again.
- Claude answers but not from the customer's figures: close Claude completely and reopen it.
- Photograph or copy every error message as it appears. The log has the same text.

11 Uninstall

- Windows Settings > Apps, or the Uninstall program in each program's folder. Run with /allusers /S for a silent removal.
- The data folder and the settings folder are not touched. Delete them by hand only if the customer wants the data gone.
- The recorded install location survives an uninstall by design. Delete it only if you are deliberately moving the program to a different folder.

12 Backup and Restore - copying a setup to other PCs

When the same companies have to be set up on several PCs, set up one PC properly, make a backup, and restore it on the others. It saves the typing and the choices, not the accounting data.

- The Connector has Backup and Restore buttons in its header. A backup holds the settings only: the company list with each company's settings, the run profiles and the schedule. It never holds company data. A restored company gets a new, empty data file in that PC's data folder and fills at the next sync, so run a sync after restoring.
- A backup can be locked with a password. The whole file is then encrypted (extension .dwbak, AES-256) and the saved MYOB, Xero and QuickBooks sign-ins are included, so the restored companies are already connected. With no password the sign-ins are left out and each company shows Connect.
- Some things are locked by Windows to one PC and one Windows user and never travel in any backup: a company's own MYOB developer key, a database password, and the email password in Debtors Control. Type these again on the new PC.
- A restore merges and never deletes. It adds the companies the PC does not have. A company already there is recognised by the accounting system's own company id, not by its name, and the person restoring chooses to keep the one already on the PC or take the backup's settings. A backup made by a newer Connector can be restored into an older one (a warning, not a refusal).
- Debtors Control, Report Writer, Dispatch Viewer and Report Starter have their own "2 Backup & Restore" tab on the Setup page of their start screen. Each saves only its own settings (layouts, email settings, and so on). Each company's settings are matched

to the same company on the new PC even though the Connector numbers it differently. Restore the Connector backup first, then the programs.

- Backup files contain no accounting data, but a backup made with a password holds sign-ins: store it like a password.

13 Contacts

- DataWise Limited, Browns Bay, Auckland - sales1@datawise.co.nz
- Mark 021 296 5298 Mike 027 474 5918
- Also read "DataWise Connector - 4 Notes for IT and Auditors" for how the data is stored and what leaves the PC.