

The setup nobody does. Then the steps that get Claude doing real work for you. Your settings, your files, and your first real task.

Set up Claude. Then put it to work.

One guide, from your first settings to finished work.

Traci Gurney

LinkedIn · YouTube · tracigurney.com

UPDATED EDITION
NOVEMBER 2026

WHAT IS IN HERE

Contents

Start Why Claude Felt Disappointing

Set up 01 Create Your Account and Find Your Way Around

Set up 02 Turn Off the Data Training Setting

Set up 03 Write Your Instructions for Claude

Set up 04 Turn On Memory and Check What It Saves

Set up 05 Set Up a Project

Set up 06 How the Pieces Fit Together

Work 01 Understand the Models

Work 02 Voice Mode and File Uploads

Work 03 Research and Check the Sources

Work 04 Connect Your Tools

Work 05 Teach Claude a Skill

Work 06 Give Claude a Job to Do

Try it What a Finished Result Looks Like

Work 07 Documents, Slides, and More

Code 01 Start Your First Claude Code Task

Code Find the Folder, Progress, and Finished Files

Code 02 When a Chat Gets Long

Code 03 Side Chats and Split View

Code One Chat or Several?

Code 04 Continue From Your Phone or Start a New Chat

Repeat 01 Scheduled Tasks

Together Put It Together: A Weekend Promotion

Handy What to Include When You Ask for Help

Set up The 3 Mistakes Most People Make

Misses When Claude Gets It Wrong

Usage Keep an Eye on Your Usage

Checklist You're Set Up. Now Try It.

Sources Sources and update notes

START HERE

Why Claude Felt Disappointing

You opened Claude. You typed a question. It gave you something generic and flat. And you thought, what is all the hype about?

Give it something to work with

Here's the thing. If you haven't told Claude about your work, your goals, or how you like to talk, it's got nothing to go on. So it guesses. This guide fixes that first. Then I'll show you how to use it on a real job.

How to use this guide

Open Claude in your browser or the desktop app, and follow along as you read. Start with the basics: your account, privacy, instructions, memory, and your first project. That part takes about 20 minutes. The practical exercises after it take longer, and that's fine.

Here's a video of how to set it up

Rather watch first? I walk through the whole setup, step by step. I recorded it with the earlier edition, so a few buttons have moved. Where the video and this guide don't match, follow the guide and the current help pages.



WATCH THE SETUP VIDEO → YOUTU.BE/LOM1J4OO7GU

Already using Claude? Read this anyway.

Check the settings you skipped. Then try the sections on finished files, Claude Code, and scheduled tasks. Use a real task from your week, so you finish with something you can actually use.

A few things to know before you start

Buttons move. New features show up. Settings get renamed. That's just how it goes.

Right now Claude is combining Chat and Cowork into one, but some accounts still show both. I'll tell you which version each step is for. Can't find something? Check your plan and the help page I've linked.

One example we'll use

We'll follow a small bakery putting together a weekend promotion. Swap in your own details. You don't need to run a bakery for this to work.

TRY THIS AND CHECK

Pick one thing you want Claude to help you finish this week. Keep it next to you as you go.

Official help: The new Claude experience.

🚀 **Want updates on what's working to build your business online?**

Join my newsletter here.

SET UP / 01

Create Your Account and Find Your Way Around

You've probably done this already. Two minutes if you haven't.

Create your account

Go to claude.ai. Click Sign Up and follow the prompts. Already have an account? Sign in. Use the same account on your phone and your computer, so your work is always there.

Choose a plan

You can start the basic setup on the free plan. The Code tab and scheduled tasks need a paid plan. Before you upgrade, check the current price, how often you're billed, and what's included. Your plan, and any rules at your workplace, change what you see.

Find your way around

The message box is where you type. The sidebar holds your conversations and Projects. Click your name or initials to open Settings. When we get to connectors and skills, look for Customize.

Get the desktop app when you need it

It's at claude.com/download. Install Claude Desktop and sign in. The Code tab sits at the top of its sidebar. You don't need to install any separate command-line tool for the desktop exercises in this guide.

Chat, Cowork, and Code

If Chat and Cowork still show up as two separate choices, use Cowork when you want Claude to actually do a job. In the new version, you just ask in the same conversation. Code is its own tab. We'll get to it once the basics are done.

TRY THIS AND CHECK

Find Settings, Projects, and the button that starts a new conversation. That's enough to get going.

Official help: The new Claude experience | Install and start Claude Code Desktop | Scheduled tasks.

SET UP / 02

Turn Off the Data Training Setting

Don't want your conversations used to train Claude? Turn this off before you start sharing your work.

Where to find it

Click your name or initials, then Settings > Privacy. Find the model-improvement setting and turn it off. Read the words next to the switch, because the label can change.

What it changes

On a personal account, turning it off keeps your chats and coding sessions out of future training. There are exceptions, like training that's already underway. Business accounts have different terms.

What it doesn't change

It doesn't delete your saved chats. It also doesn't mean nobody can ever review a conversation. When you delete a chat on a personal account, it's generally removed from their storage within 30 days, with exceptions for legal and safety reasons. Training data and feedback have their own rules for how long they're kept.

Incognito is a separate choice

Incognito chats don't show up in your history, and they don't use or create memory. Your profile preferences can still apply. They're generally kept for 30 days, with exceptions for organizations and a few other cases. Save anything you need before you close one.

Use the switch, not a promise in chat

Telling Claude "keep this private" doesn't change a single setting. Check the actual switch. The official explanations are in Sources at the end.

TRY THIS AND CHECK

Open Privacy and make sure the setting is off. For work you want to come back to, use your normal chat history.

Official help: Data retention and training choices | Incognito chats.

SET UP / 03

Write Your Instructions for Claude

Your instructions tell Claude who you are, what you care about, how you want your answers, and what it should never do.

Where to put them

Click your name or initials. Open Settings > Your Claude > Instructions. On older layouts, look for Instructions for Claude under Account. Paste your text in and save it.

What to write

Cover four things: who you are, what you care about, how you want your answers, and what Claude should never do. The real power is in those last two. They're how you stop making the same corrections over and over.

Already used Cowork instructions?

In the new combined version, your old Cowork Global instructions become part of Instructions for Claude. Read through them once. Take out anything that repeats itself or contradicts another instruction.

> COPY-PASTE PROMPT
>
> Here is who I am: [your name], [your job or main focus], based in [your city or region].
>
> I care about: [two or three things that matter to you].
>
> How I want my answers: Keep things short and plain. No jargon. If I want more detail I will ask. Give me a clear answer first, then explain if needed.
>
> Never do this: Do not give me long disclaimers. Do not assume I want a list. Do not invent facts. If something important is missing, tell me.

TRY THIS AND CHECK

Open a new chat and ask for a short email. Does it sound more like what you asked for? If not, adjust what you saved.

Official help: Instructions and personalization.

SET UP / 04

Turn On Memory and Check What It Saves

Tired of explaining your work and your preferences every time? Memory helps with that. And you should know what it's written down about you.

Find the setting

Open Settings > Your Claude. On older layouts, memory may sit under Memory or Capabilities. Look at the memory and chat-search controls your account has.

These are three different things

They get mixed up all the time. Saved history is the conversation you can reopen. Chat search finds things you talked about before. Memory keeps useful details for future conversations. And closing a regular chat doesn't erase it.

Check the notes

Open the memory management view. Read what's saved and fix anything that's wrong. Newer memory updates as you talk. The older, legacy system uses summaries that update every so often. The two don't work exactly the same way.

Projects need an extra check

In the newer system, a project can use your account memory, and its memory can show up outside the project. Want to keep a project separate? Open that project's Memory settings and turn off Use account memory. Older project memory works differently.

What about Code?

Code has its own instruction files and its own auto memory. Don't count on your account memory to brief a Code task. Save the facts that matter in the project files.

TRY THIS AND CHECK

Look at the notes that are actually saved, and at your project's memory setting. Find one outdated detail? Fix it.

Official help: Chat search and memory | Code instructions and memory.

SET UP / 05

Set Up a Project

A project is one place for one area of your life or work: a client, a personal goal, or something you're doing for your business.

Make your first one

Open Projects in the sidebar and choose the option to create a project. Give it a name you'll recognize, like Sweet Life Bakery Promotion.

Give it what it needs

Add the project instructions and the files that matter: a brief, a price list, a writing sample. Say what the project is about, who it's for, and which file has the current facts.

Save the instructions

Use the project's instructions field for anything that should apply to every chat inside it. Pasting a message into one conversation isn't the same as saving project instructions.

Check memory too

Want this project kept separate? Do the memory check on the previous page. A project keeps you organized, but its name alone doesn't promise that none of your account memory gets used.

COPY-PASTE PROMPT

Help me write the instructions for this project.

Project name: [name].
What this is for: [the work].
Tone and style I want: [your choice].
The audience: [who will read it].
Facts to use: [files or details].

Ask about anything missing that would change the result. Give me the text to save in project instructions.

TRY THIS AND CHECK

Start a new chat inside the project. Ask it to sum up the goal using the files. Check its answer against what you saved.

SET UP / 06

How the Pieces Fit Together

This is where people get caught. They put the right thing in the wrong place and wonder why Claude keeps ignoring it.

Instructions for Claude

Who you are and how you want your answers. You're a business owner who wants short answers and hates jargon. Put that here, once.

A Project

The job you're working on. The client, the brief, the files, the audience. True for this job, and irrelevant to plenty of other conversations.

Memory

Useful details Claude carries forward. Your job is to check it now and then, and correct it when it gets something wrong.

A Skill

A set of steps to follow when a certain task comes up. Your weekly Facebook post format goes here, so you don't keep explaining it.

A Connector

Access to another service, like your calendar or Google Drive. It lets Claude pull information from there, or take the actions that service allows.

The message you're writing now

The actual request. "Use the promotion brief to write three posts and a customer email." Tell it what you want finished this time.

TRY THIS AND CHECK

Who you are goes in your instructions. This job's details go in its project. A process you repeat goes in a skill. Do that and you'll repeat yourself a lot less.

WORK / 01

Understand the Models

You don't need to memorize the numbers. Just know what each model is good for, and pick the one that fits the job.

Sonnet: everyday work

Drafting, summarizing, writing, analysis, and working an idea back and forth. Not sure where to start? Start here.

Haiku: quick, simple jobs

A short answer, a basic summary, or pulling a few details out of a file. It's the lighter option.

Opus: more complicated thinking

A long comparison, detailed research, or a decision with a lot of moving parts. It uses more of your allowance, so save it for the jobs that need it.

Fable: the biggest, most demanding jobs

It's built for long, complex tasks. Before you pick it, check in your account whether you have it and what it costs to use. Don't assume every model is included the same way.

Where to choose

Open the model menu next to the send button. Current official guidance lists Haiku 5.5, Sonnet 5.5, Opus 5.5, and Fable 5.1. Your list might look different.

Effort and thinking

The same menu controls effort and thinking, where the model supports them. Start with the default. Turning effort up can take longer and use more of your allowance. It depends on the model, so you won't always see a thinking switch.

TRY THIS AND CHECK

Give the same small task to two models you have. Compare how accurate and useful the answers are, not how much they wrote.

Official help: Choosing Haiku, Sonnet, Opus, or Fable | Model, effort, and thinking controls.

WORK / 02

Voice Mode and File Uploads

Don't retype what's already in a document. Give Claude the files, and tell it what you want out of them.

Upload, or pick the right folder

Use the attachment button for files. If you're working with a folder on your computer, choose that folder and confirm which files Claude can see. While you're learning, work on copies.

Give each file a job

Tell Claude which file has the approved facts, which one is just an example of the tone you like, and which one is an old draft. Skip that, and Claude may treat an old price as the current one.

Voice can help you get started

If your version has dictation or voice conversation, use it to talk through a messy idea. Dictation types your words. Voice conversation also talks back. Either way, check the transcript for names, amounts, and dates.

Ask for something useful

Say what format, audience, and length you want. "Review these files" leaves too much open. "Create a one-page comparison of the three quotes" tells Claude exactly what to hand back.

> COPY-PASTE PROMPT
>
> Use [current brief] as the source of facts. Use [writing sample] only for tone. Read [old draft] for context, but flag any conflicts with the brief. Create a one-page summary of the approved offer and the questions I still need to answer.

TRY THIS AND CHECK

Ask which files it used. Check a few important details against the originals. If a scan or table couldn't be read, give it a clearer copy.

WORK / 03

Research and Check the Sources

Research helps when the answer depends on information you don't have yet. You don't need it before every email or caption.

Ask a specific question

Name the market, the dates, the audience, and the decision you're making. For the bakery, "Compare local preorder options for weekend collections" works a lot better than "Research marketing."

Use the research tools you have

If your account has web search or Research, use them for anything current. Ask for original sources, like the business's own offer page. Don't trust a summary with no source for prices or availability.

Keep facts and suggestions apart

A competitor's published collection hours are a fact, and a fact needs a source. A suggestion to change your own hours is a recommendation. You decide whether it's a good one.

Bring it back to the task

Ask for a short brief that helps you decide, then use only the findings you approve. Keep invented offers, discounts, and claims out of the final copy.

> COPY-PASTE PROMPT
>
> Research [specific question] for [location/audience]. Use current original sources where possible. For each finding, link the source and record the date checked. Separate verified facts from your recommendations. Finish with three implications for my project and any information you could not verify.

TRY THIS AND CHECK

Open the sources behind the important claims. Make sure the page actually says that, and that it's current.

WORK / 04

Connect Your Tools

Start with the one service that helps your first task. There's no prize for connecting everything.

Pick the job before the connection

Calendar for meeting prep. Drive for source documents. Email for drafting replies. Decide what you want Claude to do before you give it access.

Connect and read the request

In the current version, open Customize > Connectors. Choose the service, sign in, and read what it's asking to access. What Claude can do there depends on the connector and on your organization's settings.

Reading and writing are different

Reading pulls information out. Writing can create or change things. Even read access can show sensitive material, so pick the right account and only the access the task needs.

Try one small request first

Ask for one thing you already know is there. Check it came from the right account and the right dates before you ask for a bigger report.

Keep drafting separate from sending

If you want drafts, say drafts. If an action needs your approval, use the permission controls too, not just your instructions.

> COPY-PASTE PROMPT
>
> Using my connected calendar, summarize tomorrow's appointments in [time zone]. Include the time, title, and anything I should prepare from the event notes. Do not create, move, or delete events. Tell me if you cannot access the calendar.

TRY THIS AND CHECK

Compare the answer with your actual calendar. Check the time zone and any all-day events before you rely on it.

Official help: The new Claude experience.

WORK / 05

Teach Claude a Skill

Think about what you do over and over. A certain type of message. A weekly update. A summary in a set format. A skill saves you explaining that process every time.

Start with a process you like

Let's say you write Facebook posts for a local bakery. They always need a hook, a main point, and a call to action. Give Claude an example you're happy with, and tell it what should stay the same every time.

In regular Claude

First, check that Create and edit files is turned on in Settings. Older layouts call it Code execution and file creation. Then go to Customize > Skills. To upload a skill, click +, then Create skill > Upload a skill. Upload the skill ZIP and turn it on.

In Claude Code

In Code, a skill is a folder with a file called SKILL.md inside it. That's just a plain-text instructions file. Ask Claude to create it for this project or for your user account, and to show you where it saved it. Those are two different places.

Try it in a new chat

Ask for the skill by name. In Code, a loaded skill can also have its own /skill-name command. Not showing up? Check it's installed in the workspace you're using.

> COPY-PASTE PROMPT
>
> Help me create a Facebook-post skill from this example. Keep the hook, main point, and call to action. Use only the facts I provide for each post. Ask me about anything missing. Package it for [regular Claude / this Code project] and explain how to save and test it.

TRY THIS AND CHECK

Try it on a different offer in a new chat. If you keep making the same correction, add that correction to the skill.

Official help: Enable, upload, and use skills | Skills in Claude Code.

WORK / 06

Give Claude a Job to Do

"Help me with content" starts a conversation. To get something finished, tell Claude what to make and what information to use.

Use the workspace you have

In the new combined version, ask for the whole task right in the conversation. If you still have separate Chat and Cowork choices, use Cowork when you're handing off a job.

Tell it what you need

What do you want made? Which files should it use? Who's it for? What's it allowed to change? What should it check before it's done?

Tell it what to do when something's missing

Ask Claude to point out missing facts instead of filling them in. If the offer has no confirmed price, a polished email with a made-up price is still wrong.

Look at the actual result

Open the document or file. Check the content, the links, the numbers, and the formatting. Claude saying "done" isn't the result. The file is.

> COPY-PASTE PROMPT
>
> Use the approved weekend-promotion brief to create a customer email and three social posts. The audience is local customers. Keep the email under 180 words and each post under 80 words. Use only approved facts. Save everything in one document with clear labels. Do not publish or send it. Check the dates, price, and ordering link before you finish.

TRY THIS AND CHECK

Make sure the document exists and has all four pieces. Read it like a customer would, then check the facts against the brief.

Official help: The new Claude experience.

TRY IT YOURSELF

What a Finished Result Looks Like

Here's a made-up example, so you can see what to check. These are sample details, not a real offer.

The facts you gave Claude

Business: Sweet Life Bakery. Offer: six cinnamon rolls for $18. Order by Friday at noon. Collect Saturday, 9 AM to noon. Order by replying to the email. Do not invent a discount or limited stock.

The job

Write a short customer email using those facts. Keep it friendly. Give people one clear way to order.

One possible result

> **Subject: Cinnamon rolls for Saturday**
>
> Planning a slow Saturday morning? Order a box of six cinnamon rolls for $18 from Sweet Life Bakery.
>
> Reply to this email by noon on Friday to place your order. Collection is Saturday between 9 AM and noon.
>
> See you Saturday!

What to check

Six rolls. $18. Friday at noon. Saturday, 9 AM to noon. Reply to order. All five details are there. And it hasn't made up a discount, an address, a customer review, or a stock limit.

What still needs you

Decide whether it sounds like your business. Check that replies really are how you want to take orders. Then approve the final message before it goes out.

TRY THIS AND CHECK

Try it with your own facts. If something sounds wrong, tell Claude which sentence you'd never say, and ask it to rewrite it.

WORK / 07

Documents, Slides, and More

Tell Claude how you're going to use the result. The format should fit the job.

Documents and presentations

Ask for an editable document or a presentation when you need to revise the work or present it. Say who it's for, how long it should be, and what each section or slide has to do.

Spreadsheets and dashboards

Ask for a spreadsheet when someone needs to check rows, formulas, or totals. Ask for a dashboard when you just want to see a few numbers at a glance. Say where the data comes from and what dates it covers.

Designs and motion

Give it the size, your brand details, and where it's going. Ask for a preview before the final export. The tools and export formats you have can vary.

Edit, export, and share on purpose

The newer Docs, Slides, and Design tools can let you edit directly. You can also ask Claude to make the changes. Check the controls on each one, because they don't all work the same way. And check who can see a link before you share it.

A refresh button doesn't prove the data is live

Ask what updates the numbers and when the data was last pulled. If it's built from a file you uploaded, give it an updated file before you trust the figures as current.

> COPY-PASTE PROMPT
>
> Turn this approved brief into a six-slide customer presentation. Give each slide one main point. Use only supplied numbers. Mark missing data instead of making it up. Provide an editable format available here and tell me how to export it.

TRY THIS AND CHECK

Open the exported file, not just the preview. Test the links and formulas, and look for text that's cut off.

Official help: The new Claude experience.

CODE / 01

Start Your First Claude Code Task

You don't need to start with a website or an app. Start by asking Claude to work with a few documents.

1. Open the desktop app

Install it from claude.com/download and sign in. Open Code at the top of the sidebar. You'll need Pro, Max, Ultra, Team, or Enterprise, and workplace settings can limit access.

2. Pick a practice folder

Make a folder called Claude Practice and put copies of two documents in it. Start a new Code session. Under the message box, choose your local computer, then pick the folder with the project-folder control.

3. Check permissions

Want Claude to ask before actions that need approval? Use Manual. Plan lets Claude look at the job and suggest steps before it changes anything. Switch out of Plan when you're ready for it to do the work. Read every permission request before you accept it.

4. Try the prompt below

A .md file is just a text document. You can open it in any text editor. This exercise gives you one new file to look at.

> COPY-PASTE PROMPT
>
> Read the two documents in this folder. Make a new file called source-summary.md. Give each document its own heading, three main points, and any details that disagree with the other document. Include the filenames. Leave the original documents unchanged.

TRY THIS AND CHECK

Open source-summary.md. You should see two headings with three points under each. Check one point against each original.

Official help: Install and start Claude Code Desktop | Claude Code desktop workspace.

CLAUDE CODE

Find the Folder, Progress, and Finished Files

You don't need to understand everything on the screen. Start with the parts that answer the questions you actually have.

Where is it working?

In the current Code layout, the Environment card in the session details panel shows where the task is running. A local task runs on your computer. Cloud work runs somewhere else. Check this before you assume a file is there.

What is it doing?

Read the task steps and the latest activity in the conversation. For work running in the background, open the three-dot menu in the title bar and choose Background tasks. You can look at a task there, or stop it.

How full is the chat?

The Context card shows how much of the conversation's working space is used. Type /context for the breakdown. That's not the same as your plan's usage.

Where's the finished file?

Click the file path Claude gives you. Also ask for the exact save location, so you can open it in your normal file browser. The preview in the app is handy, but check the actual file you'll use.

If your screen looks different

Look for the same information in the session controls. Older layouts put some of them in other places. Use the desktop reference linked below for your version.

> COPY-PASTE PROMPT
>
> Before you start, tell me which folder you are using and which files you can read. When you finish, give me the exact path to the new file and tell me what you checked.

TRY THIS AND CHECK

Open the saved file yourself. Make sure the work is actually in it, not just a description of what Claude planned to make.

Official help: Claude Code desktop workspace.

CODE / 02

When a Chat Gets Long

A long chat isn't a filing system. Save the decisions you need to carry forward.

Check what the session is carrying

Use the Context display, or type /context in Code, to see what the session is holding. /compact summarizes the session to free up space. Summaries can lose details, so keep approved facts in files.

Save a working brief

Keep a short brief with the goal, the sources, the decisions so far, and the next steps. Update it whenever a decision changes.

Save folder instructions in CLAUDE.md

Claude Code reads instruction files like CLAUDE.md. Put the instructions you want it to follow in this folder there: what the workspace is for, where finished work goes, and which files have the current facts. Keep detailed step-by-step procedures in skills.

Don't assume your account settings carry over

Check which instructions the Code session actually loads. Its instruction files and auto memory are separate from the personal settings in your main Claude account.

> COPY-PASTE PROMPT
>
> Create a concise working-brief.md for this task. Include the goal, approved decisions, source filenames, completed work, unresolved questions, and the next action. Mark anything uncertain. Do not include passwords or account credentials.

TRY THIS AND CHECK

Read the brief before you carry on in a new chat. If it gets a decision wrong, fix it first.

Official help: Claude Code desktop workspace | Code instructions and memory.

CODE / 03

Side Chats and Split View

Claude's working and you've got a question. Or you want to see two jobs at once. Here's how to do both in the desktop Code tab.

Ask a question on the side

Type /btw to open a side chat, or press Ctrl + ; on Windows or Cmd + ; on Mac. Ask your question there. In supported local sessions, it can see the main chat's context without adding your question to it.

What to ask

Try: "Explain the plan in plain English. What will it change?" If the answer changes the task, put that decision in the main chat. Save anything important before you close the side chat.

Look at two chats together

Right-click another session in the sidebar and choose Open in > Split view. The current shortcut is Alt-click on Windows or Option-click on Mac. Click the pane you want before you type.

Give each chat its own job

One chat can write the email while another checks it against the brief. Ask them to save to different files, so they're not changing the same draft at the same time.

> COPY-PASTE PROMPT
>
> Review customer-email.md against promotion-brief.md. Check the offer, price, dates, and ordering link. Write any problems in email-review.md. Do not change the email yet.

TRY THIS AND CHECK

You'll end up with a review you can compare against the draft. Take the corrections back to the chat that's writing the email.

Official help: Claude Code desktop workspace.

CLAUDE CODE

One Chat or Several?

You don't need a team of agents to write a short email. Use more than one chat when the jobs can be split up, and you know what each one should hand back.

One chat

Use one chat to read a brief, draft an email, and revise it with you. Each of those steps depends on the one before.

A subagent

This is a helper Claude uses for part of a task. You can ask for one to look into something specific, like checking a set of facts. Give it a clear question and ask for a short report.

A separate session

This is another conversation. You can open it and give it its own instructions. For example, one session could research a topic while another works up ideas from a brief you've already approved.

When you run them yourself

Give each chat the same current brief and a different file name to save to. When both are done, bring their results into the main chat. Ask it to point out where they disagree before it combines anything.

If you let Code coordinate

Code can work across supported sessions, but that doesn't mean every chat knows everything. Ask which sessions it can access. Confirm what each one will do before you start a bigger job.

> COPY-PASTE PROMPT
>
> I need research and a customer email for [task]. Tell me which work can happen separately and which needs to wait. Keep the plan simple. Give each job a filename and say what I should check before combining the results.

TRY THIS AND CHECK

Each job should have a clear purpose and a result you can look at. More chats should mean less confusion, not more to keep track of.

Official help: Subagents in Claude Code | Claude Code desktop workspace.

CODE / 04

Continue From Your Phone or Start a New Chat

Sometimes you want to step away from your desk. Other times you just want a fresh conversation without explaining everything again.

Carry on from your phone

In a supported local Code session, type /remote-control and follow the steps to connect. Open the session on your phone, or at claude.ai/code, using the same account. Keep your computer on and the session running.

Check you have access first

Remote Control needs an eligible paid plan. On Team and Enterprise, the owner has to turn it on. It controls work that's still running on your computer. It doesn't move your files or the task to the cloud.

Start a new conversation

Ask the old chat for the summary below. Read it, fix anything wrong, then give it to the new chat along with the files it needs.

Keep the summary where you can find it

Save it with the project files. If the next chat can't see a file, attach it or pick the right folder before you carry on.

> COPY-PASTE PROMPT
>
> Write a summary I can give to a new chat. Include what we are trying to do, what I decided, what is finished, which files to read, and what still needs doing. Separate facts from assumptions. Finish with the next step.

TRY THIS AND CHECK

Open the new or remote chat and make sure it has the right task and files before you ask it to keep going.

Official help: Remote Control.

REPEAT / 01

Scheduled Tasks

Get the task working once before you put it on a schedule. Automate a weak prompt and you'll get a weak result, right on time.

Create the recurring task

In the new combined version, describe the job and the schedule in a conversation. Then review the schedule it suggests and confirm it. On older Cowork layouts, use Scheduled or /schedule.

Say when, and what to use

Give it the day, time, time zone, reporting period, data sources, and where the result should go. "Monday morning" isn't precise enough when your devices, or the people you work with, are in different time zones.

Know where it runs

Scheduled tasks now run remotely, using supported connectors and files saved to your Claude account. Some older tasks still run on your computer. Check how an existing task is set up before you assume it works with your computer off.

Plan for a quiet week

Tell it what to do when there's nothing new, or a source isn't available. You want a useful result, not a report for the sake of having one.

> COPY-PASTE PROMPT
>
> Every Monday at 8 AM in [time zone], review [named source] for the previous seven days. Create a short summary of changes relevant to [business]. Link the sources. If there is nothing relevant, say so briefly. If access fails, report the failure rather than guessing. Save the result to [supported destination]. Do not send customer messages.

TRY THIS AND CHECK

Look over the saved schedule and the first finished run. Check the dates, the sources, where it saved, and any error messages.

Official help: Scheduled tasks.

PUT IT TOGETHER

Put It Together: A Weekend Promotion

Use this order for your own offer, client update, event, or launch. Finish one step before you hand its result to the next.

1. Approve the facts

Save a promotion brief with the product or service, the price, the dates, the audience, and the ordering or booking link. Mark anything that's missing. Don't let a later draft fill it in for you.

2. Build the first draft

Ask for one email and three posts using that brief and your saved instructions. If you've got a promotional-writing skill you've already tested, ask Claude to use it.

3. Run a separate review

Have a second chat, focused only on checking, compare the draft against the brief. Look for made-up claims, prices that don't match, unclear dates, and missing calls to action.

4. Revise and export

Fix what the review found. Ask for the format you'll actually use. Open the export and check it on the device or app you'll be working in.

5. Check it before you send it

Confirm the final text, where it's going, and when, before you publish or send it. Keep the version you approved, so your next promotion starts from an example you trust.

6. Save the part you'll repeat

Like the process? Turn the structure and the review checklist into a skill. Keep this promotion's dates and prices in its brief, not in the skill you'll reuse.

TRY THIS AND CHECK

You'll finish with an approved brief, content you can use, a record of the review, and a process you can repeat. You don't need every advanced feature to get there.

KEEP THIS HANDY

What to Include When You Ask for Help

Use this when a task feels vague. Swap the brackets for real information before you send it.

Say what you want made

"Create a one-page customer FAQ" is clearer than "Help with customer questions."

Say which file has the facts

Say which document has the facts and which one is just a style example. Ask Claude to flag it when they disagree, instead of picking one without telling you.

Say what needs checking

For a spreadsheet, test the totals. For a customer email, check the offer and the link. For research, open the sources. Match the check to the work.

COPY-PASTE PROMPT

GOAL: Create [the thing you want made] for [audience].

INPUTS: Use [files, links, or connected sources]. Use [source] if the files disagree.

REQUIREMENTS: Include [items]. Use [tone, length, format].

BOUNDARIES: You may [allowed changes]. Ask me before [decisions or external actions].

MISSING INFORMATION: Ask about gaps that would change the result. Label other assumptions.

CHECK: Verify [specific facts or functions].

DELIVERY: Save or return it as [format and destination]. Tell me what still needs review.

TRY THIS AND CHECK

If the answer's wrong, say exactly what's wrong: the facts, the tone, a missing section, or a format you can't use. That works much better than asking for "better."

ONCE YOU'RE SET UP

The 3 Mistakes Most People Make

Once you're set up, these three things make a real difference in what you get back.

Mistake 1. Asking without explaining the job

Give it context. Explain what you're trying to do and why. "Write a post" gives Claude far less to work with than the audience, the offer, and the point you want to make.

Mistake 2. Not giving it enough to go on

Tell Claude what you already know, and what you need the answer to do for you. Upload the document instead of describing it from memory.

Mistake 3. Accepting an answer that misses

Push back. Ask it to simplify. Tell it what you liked and what missed. Say "make this shorter" or "explain it like I'm new to this." You don't have to take the first version.

One more tip

When the job depends on current facts, ask for research and sources before the final piece. When you already have the facts, hand them over and let Claude get on with the work.

TRY THIS AND CHECK

Open a new chat. Tell Claude about one real thing you're working on this week. Give it context and ask for help. Then correct the part of the answer that doesn't fit.

WHEN SOMETHING MISSES

When Claude Gets It Wrong

Most frustrating results get easier to fix once you figure out which part of the setup, or the task, is missing.

The answer sounds generic

Give it the audience, the purpose, and one example you like. Ask for a rewrite using those. If the same problem shows up on every task, check your saved instructions.

It used the wrong facts

Name the file with the right facts and point to the claim that's wrong. Ask it to correct each fact, one by one. Take old files out of the active brief, or label them clearly.

It says it can't find something

Check the account, connector, project, folder, and the exact file name. Files on your computer and files in the cloud aren't automatically the same set.

It keeps forgetting a decision

Put the decision in the working brief. Ask the next step to read that file. After a long handoff or a summary, check the brief again.

A command or feature is missing

Check whether you're in regular Claude or in Code, then look at its command menu. A command in someone else's video isn't necessarily installed, or available on your account.

It looks finished but doesn't work

Open the output. Test the formula, link, export, or button that matters. Tell Claude exactly what failed, ask it to fix that part, then check it again.

TRY THIS AND CHECK

Keep your best finished example, and the corrections that got you there. They make a great starting point for your next project or skill.

HOUSEKEEPING

Keep an Eye on Your Usage

Claude isn't unlimited. Longer conversations, bigger models, and higher effort all use more of your allowance.

Where to check

Open Settings > Usage. You'll see your limits and when they reset. Regular Claude and Claude Code share the same subscription limits.

Usage and context aren't the same thing

Usage is how much work your plan allows over a stretch of time. Context is how much Claude can work with in the current conversation. A full chat and a used-up allowance are two different problems.

When the conversation gets long

Claude can summarize the earlier part of a conversation to keep going. If an important detail gets lost, point it back to the file with the facts. Or start a fresh chat with a summary of what's done and what's left.

Starting over doesn't reset your allowance

A new conversation can help you keep a task focused. It doesn't give you back the usage you've already used.

Before a big job

Try a small sample first. Make sure your instructions get you what you want before you ask Claude to work through dozens of files or run several chats.

TRY THIS AND CHECK

Look at your actual usage page before you buy extra usage or change plans. Check what's included and what costs extra.

Official help: Usage and conversation limits.

YOUR WORKING CHECKLIST

You're Set Up. Now Try It.

You don't need a perfect system. You need a setup that helps you finish work, and the habit of checking what it gives you.

Foundation

- ☐ I reviewed my privacy settings.
- ☐ My instructions reflect how I want to work.
- ☐ I know where memory is managed.
- ☐ My first project has a clear brief.

A real result

- ☐ I gave Claude a specific task and the information it needed.
- ☐ I checked the facts against their sources.
- ☐ I opened and tested the final output.
- ☐ I know where the version I approved is saved.

A repeatable process

- ☐ I saved the instructions worth reusing.
- ☐ I tested any skill in a fresh task.
- ☐ I ran a recurring task once before scheduling it.
- ☐ I know what needs my approval.

Your next move

Pick another real task this week. Use the same pattern: brief, draft, review, finish. Add the advanced tools only when they help with that work.

WHAT NEXT

Need help applying this to your business?

👉 Book a call. For more practical ideas, join my community.

TRY THIS AND CHECK

Success is a result you can trust and use. Not the number of settings you've switched on.

SOURCES AND UPDATE NOTES

Where to Check the Details

Official references checked November 5, 2026. Click a title below to open the source. Features can differ by plan, device, organization settings, and rollout.

The new Claude experience

support.claude.com/en/articles/16761823-claude-cowork-and-chat-are-one-claude

Data retention and training choices

privacy.claude.com/en/articles/10023548-how-long-do-you-store-my-data

Incognito chats

support.claude.com/en/articles/12260368-use-incognito-chats

Instructions and personalization

support.claude.com/en/articles/10185728-understanding-claude-s-personalization-features

Chat search and memory

support.claude.com/en/articles/11817273-use-claude-s-chat-search-and-memory-to-build-on-previous-context

Usage and conversation limits

support.claude.com/en/articles/11647753-how-do-usage-and-length-limits-work

Claude Code desktop workspace

code.claude.com/docs/en/desktop

Skills in Claude Code

code.claude.com/docs/en/skills

Code instructions and memory

code.claude.com/docs/en/memory

Remote Control

code.claude.com/docs/en/remote-control

Scheduled tasks

support.claude.com/en/articles/13854387-schedule-recurring-tasks-in-claude-cowork

Choosing Haiku, Sonnet, Opus, or Fable

academy.claude.com/tutorials/choosing-the-right-claude-model

Model, effort, and thinking controls

support.claude.com/en/articles/8664678-change-the-model-effort-and-thinking-settings

Enable, upload, and use skills

support.claude.com/en/articles/12512180-use-skills-in-claude

Install and start Claude Code Desktop

code.claude.com/docs/en/desktop-quickstart

Subagents in Claude Code
code.claude.com/docs/en/sub-agents

What was checked

The feature descriptions and named steps were checked against official documentation. The exercises and sample email are teaching examples, not results from a live test in your Claude account. Follow the instructions that match your screen.

Book a call with Traci

COPYRIGHT © 2026 TRACI GURNEY. ALL RIGHTS RESERVED.