FREE GUIDE

AI AUTOMATION HUB

# Getting Started with Claude

Six tools, one account. A plain-English walkthrough from an engineer who uses Claude to build automations for clients every week.

Cowork | Models | Excel | Plugins | Artifacts | Projects

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AI MADE SIMPLE

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# 01 Introduction

Most people think Claude is a chatbot. You type a question, it types an answer. That is roughly one sixth of what it does.

Claude is actually **six interconnected tools** that share one account. Each does something different. This guide walks through all six so you know what exists, what each one is for and how to set it up.

I use Claude every day to build AI automations for clients. I write code in it, generate spreadsheets with it, draft proposals in it and run entire project workflows through it. I am not guessing at what works. Everything in this guide is something I have done in the past week.

## The six tools

### Cowork

Desktop app that reads your actual files and creates documents.

### Models

Choose the right brain. Opus 4.6 with Extended Thinking is the current best.

### Excel Add-in

AI inside your spreadsheet that reads and writes formulas.

### Plugins

Pre-built skill packs for sales, marketing, legal, data and more.

### Artifacts

Interactive outputs: calculators, charts, trackers, diagrams.

### Projects

Folders of chats where Claude remembers your files.

**WHY THIS MATTERS**

You do not need to learn all six on day one. Start with Cowork and a model. Add the rest as you need them. This guide gives you the full picture so you know what to reach for when a task comes up.

### What you need

- ✓ A Claude account at **claude.ai**
- ✓ The Pro plan (£17 per month billed annually, or £20 monthly)
- ✓ About 30 minutes to set everything up
- ✓ A folder on your computer with files you want Claude to work with

## 02 Cowork: The Desktop App

Cowork is a desktop application that can access your actual files. Point it at a folder, and it reads what is there. No copying and pasting. No uploading one document at a time.

### Installation

1. **Download the app**

   Go to **claude.com/download** and install it for your operating system.

2. **Sign in**

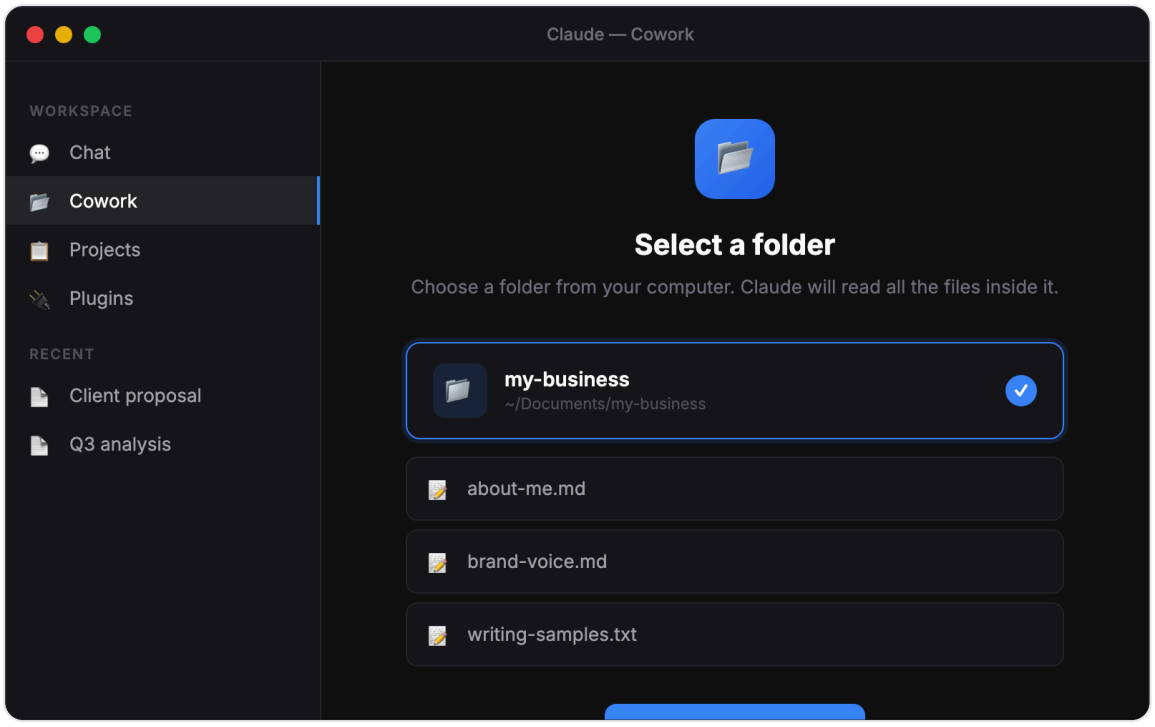
   Log in with your Claude account. If you do not have one, create it at **claude.ai**.

3. **Get the Pro plan**

   The free tier is limited. Pro costs £17 per month (annual) or £20 monthly. It is the minimum you need for serious work.

4. **Open the Cowork tab**

   Click the Cowork tab in the app and select a folder on your machine. Claude now has access to everything in it.




## The right way to start a conversation

Do not type your request straight away. Force Claude to ask you questions first. This is the single biggest improvement you can make to the quality of what you get back.

**YOUR FIRST PROMPT**

*I want to [YOUR TASK] so that [WHAT SUCCESS LOOKS LIKE].*

*First, read the uploaded files completely before responding.*

*DO NOT start executing yet. Instead, ask me clarifying questions so we can refine the approach together step by step.*

*Only begin work once we have aligned.*

This generates a form of questions that help Claude understand exactly what you need. Answer them, then Claude gets to work with the full picture.

## The mindset shift from ChatGPT

If you have used ChatGPT, you learned to write clever prompts. With Claude Cowork, **replace prompt memorisation with text file creation**.

**CHATGPT APPROACH**

**CLAUDE COWORK APPROACH**

Write a long prompt explaining who you are, what you do, how you like things written, every time you start a new chat.

Write it once as a text file. Drop it in your folder. Claude reads it automatically at the start of every conversation.

Upload your writing samples, brand rules, examples and past work as **.md** or **.txt** files. The more context you give it as files, the less prompting you need.

### What to put in your files

Create a file called **about-me.md** with three things:

1. **What you do for work.** Your role, your clients, the problems you solve.
2. **How you like to communicate.** Formal, casual, direct, technical. Give an example.
3. **A sample of your best writing.** Claude will match this style without you asking.

> **KEY PRINCIPLE**
>
> Claude's context window supports over 1,000,000 tokens. That is roughly 3,000 pages. Feed it everything relevant. More context means fewer hallucinations and better output.

## 03 Picking the Right Model

Claude has several models. Picking the right one takes five seconds and makes a noticeable difference in quality.

### The recommended setup

| Setting | Value | Why |
|---|---|---|
| **Model** | Opus 4.6 | The most capable model available right now. |
| **Extended Thinking** | Enabled | Forces Claude to think before answering. Fewer mistakes. |

### How to set it

1. **Open any Claude chat**

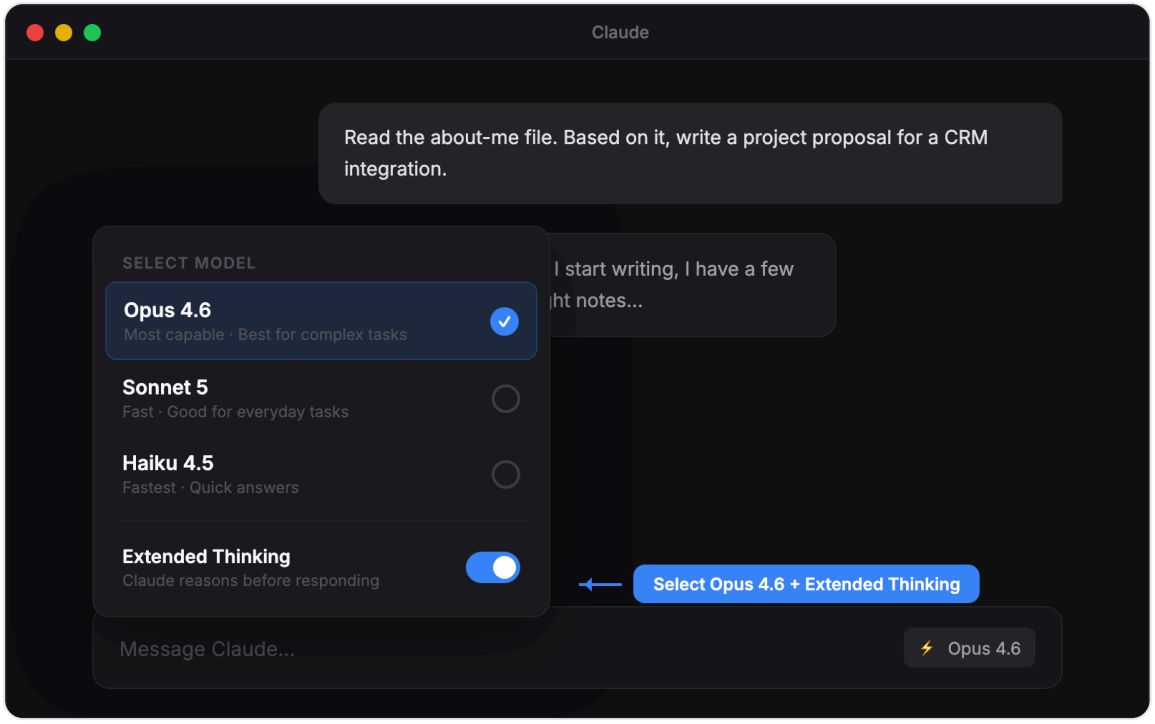
   In the browser at claude.ai or in the Cowork desktop app.

2 **Click the model selector**

It is at the bottom of the chat input area. It shows the current model name.

3 **Select Opus 4.6 + Extended Thinking**

This is the combination you want for any task that matters.




## What Extended Thinking does

Without Extended Thinking, Claude reads your message and starts writing immediately. With it enabled, Claude has an **internal monologue first**. It reasons through the problem, considers edge cases and plans its answer before it begins.

The difference is like asking someone a question while they are walking past you versus sitting them down and giving them five minutes to think. Same person, different quality of answer.

> **WHEN TO USE IT**
>
> Extended Thinking is best for complex tasks: analysis, code, strategy, writing that needs to be precise. For simple questions like "what time zone is Tokyo in", the standard model is fine.

## Connectors: giving Claude internet access

Claude can read from tools you already use. No copy-pasting required.

1 **Open Settings**

Go to Settings in Claude, then find **Connectors**.

2 **Connect your tools**

Available integrations include **Slack, Google Drive, Notion, Figma** and over 50 others. Claude reads from them mid-conversation.

Connectors are free on all plans. Once connected, you can ask Claude to read a specific document from your Drive or pull context from a Notion page without leaving the chat.

# 04 Claude in Excel

Claude has an add-in that sits inside Microsoft Excel. It reads your spreadsheet, understands the structure and can write formulas, fix errors and build new sheets.

## Installation (three minutes)

1 **Open Excel**

You need Excel 2016 or later. Both Windows and Mac work.

2 **Install the add-in**

**Windows:** Insert → Get Add-ins.
**Mac:** Tools → Add-ins.
Search for **"Claude by Anthropic"** and click Add.

3 **Sign in**

Use your Claude account credentials. You need a paid plan (Pro, Max, Team or Enterprise). The add-in itself is free.

4 **Open the panel**

Press **Ctrl+Option+C** (Mac) or look for the Claude icon in the Excel ribbon.

## What to try first

Start with your most familiar spreadsheet. Something you already know well enough to spot mistakes. Ask Claude:

FIRST PROMPT

*Give me a summary of each tab.*

Then get specific:

**Explain a formula**

"Explain what the formula in cell B12 does in plain English."

**Find errors**

"Find all #REF and #VALUE errors in this workbook."

**Format dates**

"Convert all dates to YYYY-MM-DD format."

**Summarise data**

"Create a pivot summary of monthly revenue by product category."

**SAFETY FEATURE**

Claude highlights every cell it wants to change. Nothing is modified until you approve it. You always see exactly what will change before it happens.

## Creating a spreadsheet from scratch

You can also build an entire spreadsheet from a description. Use Cowork for this. Here is the template:

**SPREADSHEET CREATION PROMPT**

*Create a professional Excel spreadsheet (.xlsx) for: [PURPOSE]*
*Context: [WHO IS IT FOR / HOW WILL IT BE USED]*
*It should cover: [LIST WHAT YOU WANT TO TRACK OR CALCULATE]*

*Rules:*
*- Use Excel formulas (SUM, SUMIF, IF, etc.), never hardcoded calculations*
*- Put editable assumptions in their own labelled cells*
*- Freeze top row, auto-fit columns*
*- [ANY EXTRAS: charts, dropdowns, conditional formatting, specific currency, etc.]*

**IMPORTANT**

Always check the formulas Claude generates against a result you already know. Claude is very good with spreadsheets, but you should verify the logic before using it in production.

# 05 Plugins

Plugins are pre-built skill packs that turn Claude into a specialist. Instead of explaining what you need from scratch every time, a plugin gives Claude the context and tools for a specific kind of work.

## Available plugins

Anthropic released official plugins in January 2026. Here is what exists:

**Sales**

Outreach, follow-ups, CRM summaries.

**Marketing**

Content drafts, campaign briefs, audience analysis.

**Legal**

Contract review, clause comparison, compliance checks.

**Finance**

Financial models, forecasting, report generation.

**Data Analysis**

Dataset exploration, visualisations, statistical summaries.

**Product Mgmt**

PRDs, user stories, roadmap planning.

**Customer Support**

Response drafts, ticket categorisation, knowledge base.

**Productivity**

Task planning, meeting summaries, workflow automation.

**+ More**

11 total and growing. Ask Claude what is available for your job.

## How to install

1. **Browse the library**

   Open Claude Cowork and go to **claude.com/plugins**. Browse the categories.

2. **Install**

   Click the plugin you want and install it. It activates immediately.

3. **Use slash commands**

   Type **/** in any chat to see what commands the plugin added. Each plugin has its own set.

### Example prompts

**MARKETING PLUGIN**

*/draft-content Write a LinkedIn post about [topic]. Use my uploaded voice profile. Target [audience]. Goal: [newsletter signups / awareness / engagement].*

**DATA PLUGIN**

*/build-dashboard Create an interactive dashboard from this CSV. Include filters by date and category. Show trends over time.*

**DISCOVERY TIP**

Not sure which plugin fits your work? Ask Claude: "What plugins are available for [your job function]?" It will recommend the right ones.

## 06 Artifacts

Artifacts are interactive outputs that Claude creates inside the conversation. Instead of getting a wall of text, you get something you can use: a calculator, a chart, a tracker, a diagram.

### No setup required

Artifacts work automatically on both claude.ai and the Cowork desktop app. You do not need to install or enable anything.

## What you can build

### Calculators

Interactive tools with inputs that update in real time. Pricing calculators, unit converters, ROI models.

### Charts and comparisons

Visual comparison tables, feature matrices, side-by-side product analyses.

### Project trackers

Kanban boards, task lists, progress trackers with status columns.

### Diagrams

Team structures, process flows, system architectures, decision trees.

## Example prompts

**CALCULATOR**

*Create an interactive HTML calculator that converts monthly expenses into annual projections. Include fields for rent, groceries, transportation, subscriptions, and a "total" that updates in real time. Make it clean and minimal.*

**COMPARISON CHART**

*Create a visual comparison chart of [Product A] vs [Product B] with a clean design.*

**PROJECT TRACKER**

*Build me a simple project tracker with columns for Task, Owner, Status and Due Date.*

**DIAGRAM**

*Make an SVG diagram showing my team's reporting structure.*

**WHAT TO EXPECT**

Artifacts render as interactive HTML right inside the chat. You can interact with them, request changes by typing follow-up messages, and download the result to use elsewhere.

# 07 Projects

Projects are folders of chats where Claude remembers uploaded files across multiple conversations. Upload your documents once, and every chat in that project can reference them.

## Setup (five minutes)

1. **Open Projects**

   Go to **claude.ai** and click **Projects** in the left sidebar.

2. **Create a project**

   Click **Create Project** and give it a name. Something descriptive: "Client Proposals", "Q3 Reports", "Product Launch".

3. **Upload your files**

   Click **Add content** and upload your key documents. Brand guidelines, writing samples, reference materials, datasets.

4. **Start chatting**

   Every conversation in this project now has access to those files. You do not need to re-upload them.

## Projects vs Cowork

**PROJECTS**

Browser-based. Upload files manually. Good for organising separate work streams.

Requires Pro or Team plan.

**COWORK**

Desktop app. Reads from folders on your machine. Simpler workflow, fewer bugs.

Requires Pro plan.

**MY RECOMMENDATION**

I use Cowork with markdown files in a folder on my computer. It is more reliable and quicker to update. Projects are worth knowing about, but Cowork plus well-organised files is the better workflow for most people.

# 08 What Claude Cannot Do

Claude is not the best at everything. No tool is. Knowing where it falls short saves you time and frustration.

## Honest limitations

| Task | Can Claude do it? | What to use instead |
|---|---|---|
| **Generate photos and illustrations** | No | Use Gemini, Midjourney or DALL-E for image generation. |
| **Create videos** | No | Use Seedance 2.0 or Google VEO for video generation. |
| **Real-time internet search** | Limited | Grok is stronger for breaking news and live data. Claude can search via Connectors, but it is not its strength. |
| **Run code on your machine** | Only via Claude Code | Claude Code (the terminal tool) can execute code. The web and desktop apps cannot. |

## Where Claude leads

For **writing, thinking, analysing, building spreadsheets and working with your files**, nothing is beating Claude right now. That is a specific claim about specific tasks. I am not saying it is the best AI. I am saying it is the best tool for knowledge work in September 2026.

> **THE ENGINEER'S RULE**
>
> Use the right tool for the job. Claude for thinking and writing. Image generators for images. Video tools for video. Search tools for search. Do not force one tool to do everything.

# 09 Your 30-Minute Setup

Here is the exact sequence to go from nothing to a working Claude setup. Follow it in order. Each step builds on the last.

## Minutes 0 to 5: Install

- ✓ Download the desktop app from **claude.com/download**
- ✓ Create your account or sign in
- ✓ Get the Pro plan (£17/month annual, £20/month monthly)
- ✓ Open the app and click the **Cowork** tab

## Minutes 5 to 10: Create your first file

Open any text editor. Create a file called **about-me.md**. Write three things:

1. What you do for work
2. How you like to communicate (formal, casual, direct)
3. One example of your best writing

Save it as a markdown file in a folder you will point Cowork at.

## Minutes 10 to 15: First Cowork conversation

**1 Select your folder**

Point Cowork at the folder containing your about-me file.

**2 Send your first message**

"Read the about-me file. Based on it, write [a task you already know how to do well]."

**3 Iterate**

Give feedback. Ask Claude to adjust. This is a conversation, not a one-shot prompt.

> **START WITH WHAT YOU KNOW**
>
> Your first task should be something you can already do well. That way you can judge the quality of the output. Do not start with something you have never done before.

## Minutes 15 to 20: Install a plugin

- [x] Click **Plugins** in the chat bar
- [x] Browse the library
- [x] Start with **Productivity, Marketing or Sales**
- [x] Type **/** in the chat to see the new slash commands

## Minutes 20 to 25: Try an artifact

**TRY THIS**

*Create a weekly planner template as an interactive HTML page with Monday through Friday columns and time slots from 9am to 6pm.*

Interact with it. Ask Claude to change the colours or add a section. Download the result when you are happy with it.

## Minutes 25 to 30: Try the Excel add-in

- [x] Open Excel (2016 or later)
- [x] Install the **Claude by Anthropic** add-in
- [x] Open a spreadsheet you know well
- [x] Ask Claude to explain any formula in plain English

**AFTER 30 MINUTES**

You have Cowork reading your files, a plugin extending Claude's capabilities, an artifact you can interact with and an Excel integration. That is a working setup. The rest is iteration.

# Keep learning inside the Hub

This guide is the starting point. Inside the AI Automation Hub, I teach how to build real AI automations for clients using Claude and the same stack covered in this book.

Free while the first courses ship. No hidden upsells.

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