Claude Quick Start Guide

Get productive with Claude in 5 minutes.

Access Claude

1. Go to **claude.ai** and sign in with your organization account
2. Bookmark it — you'll use this daily

Interface Overview

Element	Location	What It Does
New Chat	Top of left sidebar	Start fresh conversation
Search	Left sidebar	Find past conversations
Starred Chats	Left sidebar	Pinned important conversations
Model Selector	Top right	Switch between Haiku / Sonnet / Opus
Voice Mode	Microphone icon, top right	Speak instead of type (3-5× faster)
Attachments	+ button in prompt area	Upload PDFs, CSV, images, docs
Style Buttons	Below prompt area	Write / Learn / Code / Life stuff
Artifacts Panel	Right side (appears when needed)	View/edit generated documents and code
Code Mode	Dropdown, left sidebar	Optimize workspace for coding tasks

Set Up Personal Preferences (Do This First!)

Settings (gear icon) → **General** → **Profile**

Write 2-3 sentences about yourself. This applies to ALL conversations.

Template:

> I am a [your role] at [company type] in [industry]. My expertise: [areas].
> Communication preferences: [concise/detailed], [formal/casual], [beginner/expert]
> level.

Example:

> I am a Finance Manager at a mid-size healthcare company. My expertise:
> budgeting, forecasting, variance analysis. Preferences: concise responses with
> specific numbers, professional tone, intermediate technical level. Our fiscal year
> runs April-March.

Time saved: ~5 min/day on repeating context.

Create a Project (5 Steps)

1. Click **Projects** in left sidebar
2. Click **+ New Project**
3. **Name it** clearly (e.g., "Monthly Board Reports")
4. **Add custom instructions** — tell Claude how to behave for this project
5. **Upload reference docs** — PDFs, spreadsheets, style guides

Use Projects for: Anything recurring — monthly reports, client work, ongoing analysis.
Use regular chat for: One-off questions, quick brainstorming, exploration.

Keyboard Shortcuts

Shortcut	Action
Cmd/Ctrl + K	New chat (fastest way)
Cmd/Ctrl + Shift + S	Search conversations
Cmd/Ctrl + Shift + ;	Star/unstar current chat
/	Open slash commands
Shift + Enter	New line without sending

Top 5 First Tasks to Try

1. **Summarize a document:** Upload PDF → "Summarize key findings in 5 bullets"
2. **Draft an email:** "Write a follow-up email to [person] about [topic], professional tone, 3 paragraphs"
3. **Analyze data:** Upload CSV → "What are the top 3 trends?"
4. **Brainstorm:** "Generate 10 ideas for [project/campaign/initiative]"
5. **Reformat:** Paste text → "Convert to a professional table with headers"

When to Use Which Model

Model	Use When	Speed	Cost
Haiku	Quick lookups, simple formatting	⚡ Fastest	$
Sonnet	90% of work (default)	⚡⚡ Fast	$$
Opus	High-stakes, complex analysis	☐Slower	$$$

Rule of thumb: Start with Sonnet. Switch to Opus only when stakes are high.