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# Getting Started with Claude

From first sign-in to full AI workflow

## Stage 1: Claude Desktop & Web

Account, privacy, integrations, skills, Excel

## Stage 2: Claude Code (CLI)

Terminal agent, plugins, IDE, and how it all connects

**Plex Consulting**

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For training session attendees

# Stage 1 — Claude Desktop & Web

Everything you need with zero technical setup. 10 minutes to fully operational.

## 1 Sign Up for Claude Pro (\$20/month)

1. Go to **claude.ai** and click **Sign Up**
2. Create an account with your email (or Google/Apple sign-in)
3. Click your name (bottom-left) → **Upgrade to Pro**
4. Enter payment details — you're now on Claude Pro

**What Pro gets you:** Opus 4.6 (best model), Projects, Memory, Research, Skills, Claude Code, Excel add-in, web search, file creation, and all connectors. Free tier is very limited — Pro is where it starts.

## 2 Download the Desktop App

1. Go to **claude.ai/download**
2. Download for Windows (or Mac)
3. Install and sign in with your account

The desktop app gives you the same features as the web, plus one-click MCP server installs (Desktop Extensions) and better file access.

## 3 Set Up Privacy & Data Controls

**This is important.** By default, Pro plan data is not used for training. But check these settings:

1. Click your **name** (bottom-left) → **Settings**
2. Go to **Privacy & Data** (or **Data Controls**)
3. Confirm these settings:

Setting	Recommended	What It Means
<b>Improve Claude</b>	OFF	Your conversations are NOT used to train future models
<b>Chat History</b>	ON	You can see and search past conversations
<b>Memory</b>	ON	Claude remembers your preferences across sessions

**Enterprise note:** Team and Enterprise plans have admin-controlled data policies, SSO, audit logs, and Zero Data Retention (ZDR) options. If your company requires these, speak to your IT team about an Enterprise plan.

## 4 Configure Memory

Memory lets Claude learn your preferences, role, projects, and communication style over time.

1. **Settings** → **Capabilities** → ensure **Memory** is ON
2. In any conversation, tell Claude things to remember:

```
"Remember that I'm the CEO of Acme Corp. I prefer bullet points over paragraphs.
My team uses Slack for comms and Monday.com for project tracking.
Always use NZ English spelling."
```

Claude auto-summarises conversations every 24 hours and builds a profile. You can review what it remembers anytime:

- **Settings** → **Memory** → view, edit, or delete saved memories

**Tip:** The more context you give Claude upfront, the better it performs. Spend 5 minutes telling it who you are, what you do, and how you like to work. It pays dividends in every future session.

## 5 Create Your First Project

Projects are persistent workspaces. Each one has its own uploaded documents, custom instructions, and conversation history.

1. Click **Projects** in the left sidebar
2. Click **+ New Project**
3. Give it a name (e.g. "Q2 Strategy", "Marketing Copy", "Board Prep")
4. Add **Custom Instructions** — tell Claude how to behave in this project:

```
"You are helping me prepare board papers for Acme Corp.
Always use formal business English. Reference NZ market data where relevant.
Structure documents with executive summary first, then detail sections.
Financial figures in NZD. Use FY26 as the current financial year."
```

1. **Upload documents** — drag in PDFs, spreadsheets, reports. Claude reads them all (200K context = ~500 pages)
2. Start chatting — Claude uses everything you've uploaded as context

**Project = your knowledge base.** Upload your company's strategy doc, financial reports, brand guide, org chart — whatever Claude needs to give you informed answers. Every conversation inside that project has access to all of it.

## 6 Connect Your Tools (Integrations)

Integrations let Claude search and pull data from your existing tools — no copy-pasting needed.

### In the Claude Desktop App:

1. Click **Settings** (gear icon) → **Extensions** or **Integrations**
2. Browse available connectors and click **Connect** on the ones you use

### On [claude.ai](https://claude.ai) web:

1. Visit [claude.ai/directory](https://claude.ai/directory) to browse 75+ available connectors
2. Click **Connect** and authorise with your account

Integration	What Claude Can Do
<b>Google Workspace</b>	Search Gmail, read Calendar, access Google Docs & Drive files
<b>Slack</b>	Search messages, read channels, find conversations
<b>Notion</b>	Search pages, read databases, access workspace content
<b>Jira / Confluence</b>	Read tickets, search documentation, access project data
<b>Asana</b>	Read tasks, search projects, access team workspaces
<b>Zapier</b>	Connect to 1,000+ apps through Zapier's automation platform
<b>Linear</b>	Search issues, read project status, access team boards

**How it works:** Once connected, you can ask Claude things like "check my Gmail for the latest email from Sarah" or "what's on my calendar tomorrow" — Claude pulls the live data directly. Your credentials are stored securely in your Anthropic account.

## 7 Explore Skills

Skills are pre-built capability packs that make Claude instantly better at specific tasks.

### Built-in Skills (already available on Pro):

Skill	What It Does
<b>Excel (xlsx)</b>	Creates formatted spreadsheets with formulas, charts, multiple tabs
<b>Word (docx)</b>	Creates professional Word documents with formatting and styles
<b>PowerPoint (pptx)</b>	Creates slide decks with layouts, charts, and speaker notes
<b>PDF</b>	Creates formatted PDF documents
<b>Research</b>	Deep multi-agent research across web and connected services

To use a skill, just ask Claude naturally:

```
"Create a PowerPoint presentation summarising our Q2 results"
"Build an Excel spreadsheet tracking our marketing budget with formulas"
"Research the NZ construction market and write a 3-page report as a PDF"
```

Claude automatically activates the right skill based on your request. The output appears as a downloadable file.

## 8 Install Claude in Excel

The official Microsoft Excel add-in puts Claude inside your spreadsheets.

1. Open **Excel** (2016 or later, or Excel Web)
2. Go to **Insert** → **Get Add-ins** (or **Office Add-ins**)
3. Search for **"Claude"**
4. Click **Add** → sign in with your Anthropic account

### What it can do:

- Read your actual formulas, cell references, and tab structure — not just the visible text
- Explain complex formulas in plain English
- Debug formula errors and suggest fixes
- Write new formulas based on what you describe
- Analyse data patterns across your workbook
- Generate charts and summaries from your data

**Example:** Select a range of cells, open the Claude panel, and ask "What's wrong with this VLOOKUP?" or "Create a pivot summary of this data by region and quarter". Claude sees the actual spreadsheet structure, not a screenshot.

## 9 Use Artifacts for Live Documents

Artifacts are interactive outputs that appear in a dedicated panel alongside your chat.

- **Documents** — reports, proposals, meeting notes that you can edit live
- **Calculators** — interactive tools (ROI calculator, pricing model, budget tracker)
- **Dashboards** — visual data displays with charts
- **Web apps** — functional mini-applications (forms, trackers, tools)
- **Diagrams** — org charts, process flows, architecture diagrams

Ask Claude to "create an artifact" or just describe what you need — it'll create one automatically when appropriate.

```
"Build me an interactive ROI calculator for our SaaS product"
"Create a project timeline diagram for our office move"
"Make a comparison table of these 5 vendors as a shareable document"
```



## Stage 1 Complete

You now have:

- Claude Pro with privacy configured
- Memory learning your preferences
- Projects as persistent knowledge bases
- Integrations pulling data from your tools
- Skills creating professional documents
- Claude inside Excel
- Artifacts for interactive outputs

**This is enough for most people.** Stage 2 is for those who want to go deeper with code, automation, and the terminal agent.

## Stage 2 — Claude Code (CLI)

The terminal-based AI agent. Writes code, manages files, runs commands, and connects to everything.

### ⚡ What is Claude Code?

Claude Code is an **AI agent that lives in your terminal**. Unlike the chat interface, it can:

- **Read and write files** on your computer directly
- **Run terminal commands** (build, test, deploy, git)
- **Edit code** with full understanding of your project structure
- **Search your codebase** instantly across thousands of files
- **Spawn sub-agents** for parallel work
- **Connect to MCP servers** for external tool access

It's included free with your Claude Pro subscription. Same account, same models.

### 1 Install Claude Code

**Option A: Use the PowerShell setup script** (recommended)

```
powershell -ExecutionPolicy Bypass -File setup-claude-code.ps1
```

This installs Node.js (if needed), Claude Code CLI, your choice of plugins, and the VS Code extension. Interactive — you pick what you want.

**Option B: Manual install**

```
# Install Node.js first from nodejs.org, then:  
npm install -g @anthropic-ai/claude-code
```

**Option C: VS Code only**

1. Open VS Code
2. Press **Ctrl+Shift+X** (Extensions)
3. Search **"Claude Code"**
4. Click **Install**

## 2 First Run & Authentication

1. Open a terminal in any project folder
2. Type `claude` and press Enter
3. A browser window opens — sign in with your Anthropic account
4. Return to the terminal — you're connected

First thing to do:

```
/init
```

This scans your project and generates a `CLAUDE.md` file — a set of instructions that Claude reads at the start of every session. Think of it as your project's briefing document for the AI.

## 3 Memory in Claude Code

Claude Code has **two memory systems**:

System	Who Writes It	What It Contains
<b>CLAUDE.md</b>	You	Project instructions, coding standards, build commands, team conventions
<b>Auto Memory</b>	Claude	Things it learns during sessions — your patterns, preferences, corrections

Both are loaded automatically at the start of every session. Claude Code's memory is **file-based and local** — it lives on your machine, not in the cloud.

**Key commands:**

Command	What It Does
<code>/memory</code>	View and manage what Claude remembers
<code>/compact</code>	Compress conversation to free up context space
<code>/context</code>	Check how much context window you've used
<code>/model</code>	Switch between Opus, Sonnet, and Haiku
<code>/effort</code>	Set thinking depth (more effort = deeper reasoning)
<code>/plan</code>	Safe mode — Claude proposes changes, waits for approval

## 4 Plugins & Integrations

Plugins extend Claude Code with new capabilities. Install from the official marketplace:

```
# Core plugins (recommended for everyone)
/plugin install code-review@claude-code-marketplace
/plugin install security-guidance@claude-code-marketplace
/plugin install frontend-design@claude-code-marketplace

# Language intelligence (pick your language)
/plugin install typescript-lsp@claude-code-marketplace
/plugin install pyright-lsp@claude-code-marketplace
/plugin install csharp-lsp@claude-code-marketplace

# Tool connectors
/plugin install github@claude-code-marketplace
/plugin install slack@claude-code-marketplace
/plugin install context7@claude-code-marketplace
```

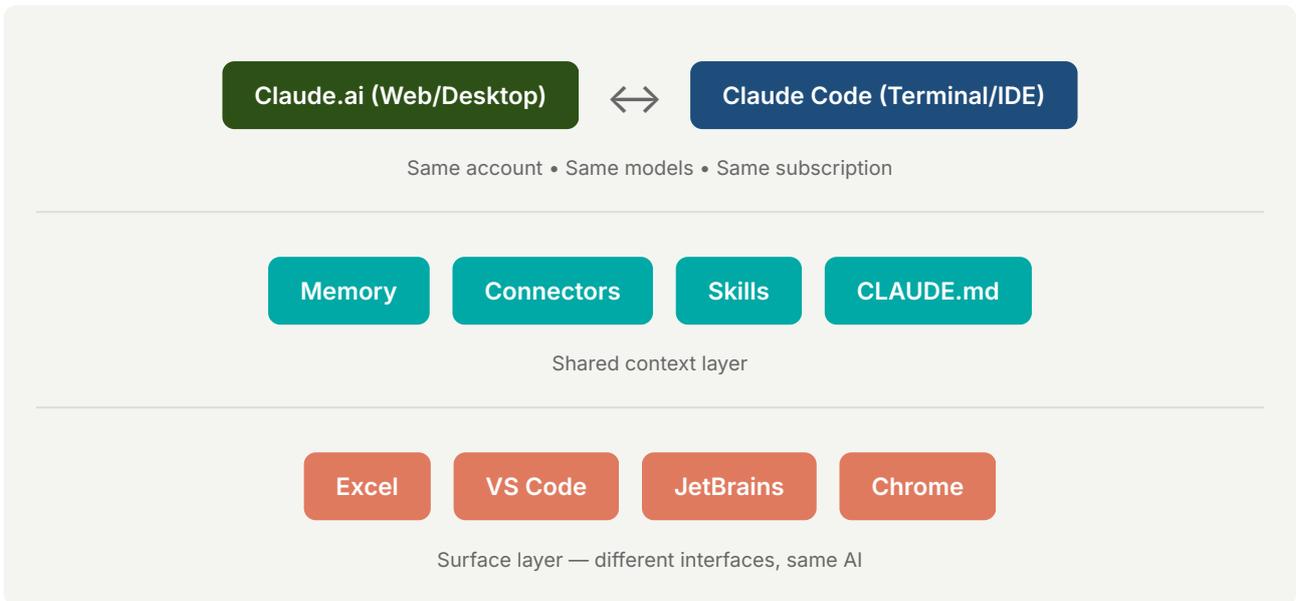
Manage plugins anytime with `/plugin`. View installed plugins with `/plugin list`.

## 5 Built-in Skills

These ship with every Claude Code installation:

Skill	What It Does	Example
<code>/batch</code>	Parallel changes across your codebase using sub-agents	"Rename all API endpoints from camelCase to snake_case"
<code>/claude-api</code>	Loads Claude API reference for your language	Auto-activates when writing Claude integrations
<code>/debug</code>	Troubleshoots your current session	"Why did that last command fail?"
<code>/loop</code>	Runs a prompt on a recurring interval	"/loop 5m check if the build passed"
<code>/simplify</code>	Reviews recent changes for quality and reuse	Run after writing code to catch issues

★ How It All Connects



**The key insight:** It's all one Claude. Your web account, desktop app, CLI, VS Code extension, and Excel add-in all share the same subscription, models, and (where supported) connectors. You don't pay separately for any of these.

What Carries Over	From → To
Account & subscription	Everywhere
Web connectors (Gmail, Slack, Notion)	Claude.ai ↔ Claude Code
Skills (document creation)	Claude.ai ↔ Claude Code
CLAUDE.md instructions	Shared across Claude Code & VS Code
Chat memory (auto-learned)	Claude.ai (cloud-based)
Auto memory (file-based)	Claude Code (local to your machine)

## 6 Cowork — The Bridge

**Claude Cowork** is Anthropic's GUI tool that bridges web and code. Think of it as the desktop version of Claude Code with a visual interface.

Feature	Claude.ai	Cowork	Claude Code
Chat interface	✓	✓	✓ (terminal)
File access	Upload only	✓ Local files	✓ Full filesystem
Run commands	×	✓	✓
CLAUDE.md	×	✓	✓
Connectors	✓	✓	✓
Skills	✓	✓	✓
Scheduled tasks	×	✓ (/schedule)	✓ (/loop)
Git integration	×	✓	✓

### When to use which:

**Claude.ai** — thinking, writing, research, quick questions

**Cowork** — project work that needs file access and command execution, with a GUI

**Claude Code** — full power, automation, scripting, multi-agent workflows, CI/CD

## Quick Reference Card

Action	How
Start Claude Code	<code>claude</code> in any terminal
Set up a project	<code>/init</code>
Check what Claude remembers	<code>/memory</code>
Free up context space	<code>/compact</code>
Switch model	<code>/model</code> (Opus for quality, Haiku for speed)
Install a plugin	<code>/plugin install name@claude-code-marketplace</code>
Review a pull request	<code>/code-review</code>
Run something on repeat	<code>/loop 10m check the deploy status</code>
Safe mode (ask before acting)	<code>/plan</code> or <b>Shift+Tab</b> before typing
Check token usage	<code>/context</code>
See all commands	<code>/help</code>

## Resources — Where to Find More

Top GitHub repos, Instagram creators, and community hubs for Claude agents, skills, and tips.

### Top GitHub Repos for Agents & Skills

Repository	What It Is
<a href="#">anthropics/skills</a>	Official Anthropic skills — document creation (xlsx, docx, pptx, pdf), frontend design, API reference, and more
<a href="#">anthropics/claude-code</a>	Official Claude Code repo — CLI source, bundled skills, plugin architecture, documentation
<a href="#">anthropics/claude-plugins-official</a>	Official plugin marketplace — 32 Anthropic plugins + 15 partner plugins
<a href="#">modelcontextprotocol/servers</a>	Official MCP servers — filesystem, git, memory, fetch, sequential thinking, and community servers
<a href="#">anthropics/anthropic-cookbook</a>	Code examples and patterns for building with the Claude API
<a href="#">frankbriar/ralph-claude-code</a>	Ralph Loop — autonomous development agent loops for long-running coding sessions
<a href="#">thedotmack/claude-mem</a>	Enhanced long-term memory system for Claude Code (was #1 trending on GitHub)

#### Skills discovery & community:

Site	What You'll Find
<a href="#">agentskills.io</a>	Open standard for agent skills — works across multiple AI tools
<a href="#">operatoros.ai</a>	Agent skills platform by @daviss.dev — /swarm for multi-agent orchestration
<a href="#">claude.ai/directory</a>	Official connector directory — 75+ integrations for Claude Desktop

**Installing community skills:** Use `npx skills add author/repo@skill-name` in your terminal. For example:  
`npx skills add anthropics/skills@frontend-design`

## ★ Top Instagram Creators for Claude Tips

These accounts consistently post practical Claude tutorials, skills, and workflows:

Account	Focus	Why Follow
@mindwired.ai	Claude Code tools & plugins	Best breakdowns of new plugins and GitHub tools. First to cover Ralph Loop, Claude Mem, code review agents.
@ux.amish	AI design skills	Design-focused Claude skills (UI-UX-Pro-Max, accessibility, web design guidelines). Great for designers learning Claude Code.
@os.operator (daviss.dev)	Agent skills & orchestration	Creator of OperatorOS.ai. Multi-agent /swarm patterns, skill architecture, advanced workflows.
@natan_mohart	Thinking partner prompts	Practical prompt frameworks for using Claude as a strategic advisor and thinking partner.
@okaashish	n8n automation	Complete n8n masterclasses — from beginner nodes to complex AI-powered workflows.
@meetavinash	Figma Make + AI	Prompt frameworks for Figma Make — systems architect, visual design, conversion copy.
@analytics_vidhya	AI tutorials & MCP	Technical walkthroughs of MCP setup, Figma integration, Claude Code features.
@theaisolopreneur	AI for business	Practical business use cases, prompt templates, productivity workflows with Claude.
@aiaboratory	AI tools & workflows	Side-by-side tool comparisons, new feature coverage, beginner-friendly tutorials.

**Tip:** Follow 3–4 of these accounts and spend 5 minutes a day watching their reels. The AI landscape moves fast — Instagram creators often cover new features before the official docs are updated.

## 📄 Official Anthropic Links

Resource	URL
Claude (sign up / chat)	<a href="https://claude.ai">claude.ai</a>
Claude Code docs	<a href="https://code.claude.com/docs">code.claude.com/docs</a>
Connector directory	<a href="https://claude.ai/directory">claude.ai/directory</a>
Pricing & plans	<a href="https://claude.ai/pricing">claude.ai/pricing</a>
Desktop app download	<a href="https://claude.ai/download">claude.ai/download</a>
API documentation	<a href="https://docs.anthropic.com">docs.anthropic.com</a>
Anthropic blog	<a href="https://anthropic.com/news">anthropic.com/news</a>
Claude Code GitHub	<a href="https://github.com/anthropics/claude-code">github.com/anthropics/claude-code</a>