

Claude, set up *safely* and used well

A one-page starter for first-time users. Nine setup steps, a map of the screen on desktop and phone, a simple way to ask better questions, and the habits that get the most out of it.

Level	Time	Works on	Last checked
Entry	about 9 min	Web • Windows • Mac • Linux (beta) • iPhone and iPad • Android	12 Oct 2026

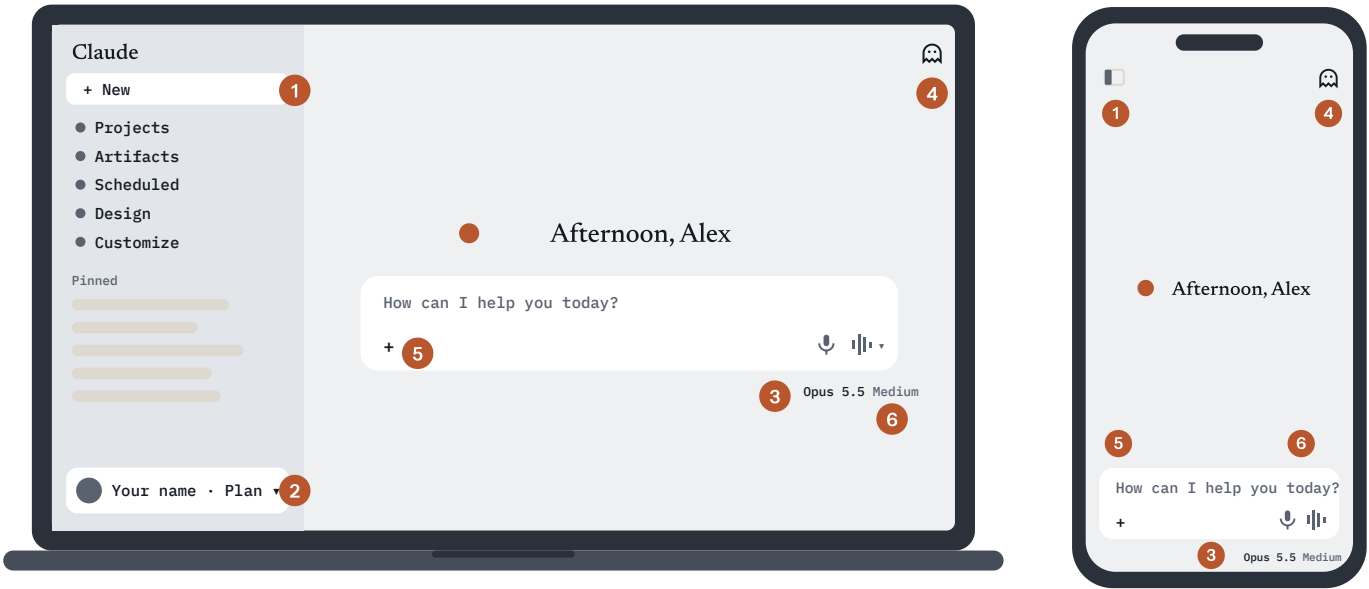
WHERE THINGS ARE

The screen, mapped

Drawn from the real screens as they looked on 12 October 2026, so positions and labels match what you will see. Buttons move between app updates, so if something has shifted, look for it by name.

DESKTOP AND WEB BROWSER

CLAUDE.AI PHONE APP



- 1

1 Sidebar. New chat, Projects and your past chats (called Recents on some accounts). On a phone, tap the panel icon at top left.
- 2

2 Your name. Bottom of the sidebar; opens Settings. On a phone, open the sidebar and tap your name or initials.
- 3

3 Model picker. The small model name by the message box. Leave it on the default while you learn.
- 4

4 Incognito chat. The ghost icon at top right of a new chat. Not saved to history, not used for memory or training.
- 5

5 Plus button. Add files or photos, or connect tools such as Google Calendar.
- 6

6 Microphone and voice. Dictate, or start a spoken conversation.

SETUP CHECKLIST

Nine steps before your *first real* question

- ☐

01 Get the real app

DESKTOP

Go to `claude.ai`, or install the desktop app from `claude.com/download`.

PHONE

App Store or Google Play. Search for **Claude by Anthropic** and check the developer is **Anthropic**.

Copycat apps exist. Check the developer name before you install, and never pay for an app that claims to be Claude from another company.
- ☐

02 Create your account

BOTH

Sign in with Google, or enter your email and use the link Claude sends you. If you open the link on a different device, it gives you a code to type in. New accounts also verify a mobile number by text message.

There is no Claude password to set. Each sign-in comes through your email or Google account, so those accounts are your front door. You must be 18 or older to use Claude.

- ☐

03

Lock the front door

EMAIL

Turn on two-step verification on the email account you signed up with.

GOOGLE

myaccount.google.com > Security & sign-in > 2-Step Verification

There is no Claude password, so whoever controls your email or Google account can get into Claude. Secure that account first.
- ☐

04

Decide whether your chats help train the model

DESKTOP

Your name > Settings > Privacy > Help Improve our AI models

PHONE

Your name > Settings > Privacy , same toggle

Switch it off if you would rather your conversations are not used to train future models. Once it is off, your new and past chats are not used in future training, but anything already used stays there. If you leave it on, chats can be kept for up to 5 years for training.
- ☐

05

Tell it about you, once

BOTH

Your name > Settings > General > Instructions for Claude . On some accounts the box is still under Settings > Profile .

Add your role, your country and how you like answers. Example: "I'm a bookkeeper in Perth. Use Australian English. Keep answers short and plain."It applies to all your chats.
- ☐

06

Check what it remembers

DESKTOP

Settings > Memory > Generate memory from chats ,

IN CHAT

Ask "What do you remember about me?" and tell it to change or forget anything.

Memory is on by default on Free, Pro and Max. You can read, edit or delete every topic it holds, so check it once after your first week.
- ☐

07

Know how to start an incognito chat

BOTH

Start a new chat, then tap the ghost icon at the top right before you type.

Incognito chats stay out of your history, are not used for memory and are not used for training, even if training is on. Anthropic still keeps them for 30 days for safety. You can't use incognito inside a Project.
- ☐

08

Set your own "never paste" rule

BOTH

See the list at the end of this sheet. Remove names and numbers before you paste, or describe the situation instead.

Treat anything you type as something that could be stored. Privacy settings reduce risk; they do not remove it.
- ☐

09

Pick a plan only when free runs out

BOTH

Plans are Free, Pro and Max. Compare current prices at claude.com/pricing , or in the app store on your phone.

Free is enough to learn on. Upgrade when you often hit the usage limit, not before. Prices show in your local currency where Anthropic supports it, and buying through the App Store or Google Play can cost a different amount. Check the price before you pay.

— ASKING BETTER

The three-part question

Most weak answers come from short questions. Give it these three things and the answer improves straight away.

PART 1 Who it's for Your role, the reader, the situation.	PART 2 What you need The task, plus the facts it needs to do it well.	PART 3 How you want it Length, format, tone, Australian English.
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— TIPS AND TRICKS

Nine habits that make it *far* more useful

? Let it ask you first For anything important, end with this line. "Ask me 3 questions before you start."	↩ Reply, don't restart Keep shaping the same answer in the same chat. "Shorter." "Plainer." "Make it a table."	≡ Ask for options Choosing between drafts is faster than fixing one. "Give me 3 versions: formal, warm, brief."
📁 Use a Project for repeat work A Project keeps your files and instructions together so you stop re-explaining. Free accounts can have up to five.	📄 Ask for a document, not a reply Claude can build a document, table or slide-style page you can keep and edit. "Turn this into a one-page document."	✓ Check the facts It can sound sure and still be wrong. Verify names, numbers, laws and dates. "Which parts of this should I double-check?"

Sidebar > Projects > + New



One topic per chat

Long mixed chats get muddled. Start fresh for a new job.

Sidebar > New chat



Show it, don't describe it

Drop in a photo of a form, a PDF or a screenshot and ask about it.

"What does this letter want me to do?"



Make it teach you

Use it to learn, not only to produce.

"Explain it simply, then quiz me."

QUICK REFERENCE

Shortcuts and safety

These common keys work in most chat boxes, including Claude. On a Mac with the desktop app, double-tap the Option key to open Claude from any app.

DO THIS	WINDOWS	MAC
Send your message	Enter	Return
New line without sending	Shift Enter	Shift Return
Paste a screenshot into the chat	Ctrl V	Cmd V

Never paste

- Passwords, PINs or sign-in codes
- Tax file number, Medicare, licence or passport numbers
- Bank or card details
- Other people's health, legal or personal records
- Confidential work material your employer has not cleared

Good first uses

- Rewrite a hard email so it lands well
- Turn messy notes into a clean document
- Explain a contract or policy in plain English
- Draft a plan for a project at home or work
- Practise a difficult conversation

YOUR NEXT MOVE

Set up? Now see where you stand.

Take the free ApplyAI check to see how ready you are to use AI in your job, then pick a free course matched to your result.

Checked against the official help pages on 12 October 2026. Claude changes often; if a menu has moved, search for the setting by name inside Settings.

General information only, checked on the date shown and provided free of charge. These apps change their settings and menus often, so confirm every step against the app in front of you. Nothing here is legal, financial, security or privacy advice, and you use it at your own risk. To the extent permitted by law, AJILITY PTY LTD (trading as Apply AI Co and Adopt AI Co) excludes all liability for any loss arising from reliance on this guide. Our [Terms](#) apply.

- [Anthropic: How do I change my model improvement privacy settings](#)
- [Anthropic: How long do you store my data](#)
- [Anthropic: Use chat search and memory](#)

- [Anthropic: Use incognito chats](#)
- [Anthropic: Personalization features](#)
- [Anthropic: Log in to your Claude account](#)
- [Anthropic: Verify your phone number](#)

- [Anthropic: Change the model](#)
- [Anthropic: Create and manage Projects](#)
- [Anthropic: What is the Pro plan](#)
- [Anthropic: Install Claude desktop](#)

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