

Copilot, set up *safely* and used well

A one-page starter for first-time users of the personal Copilot app. Nine setup steps, a map of the screen on desktop and phone, a simple way to ask better questions, and the habits that make it useful on Windows.

Level	Time	Works on	Last checked
Entry	about 9 min	Web • Windows • Mac • iPhone • Android • Edge	12 Oct 2026

WHERE THINGS ARE

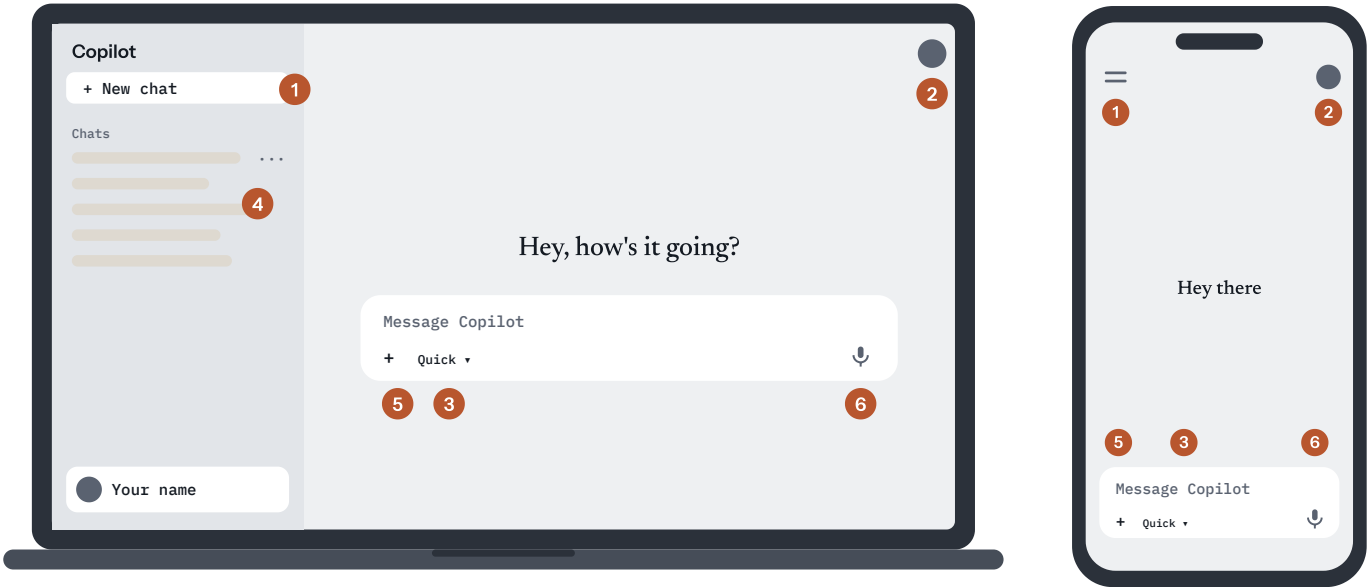
The screen, mapped

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

COPILOT.COM

PHONE APP



- 1

1 Sidebar. New chat and your past chats. On a phone, tap the menu icon (two lines) at top left.
- 2

2 Profile icon. Opens Settings. Memory and the privacy toggles sit under Personalization.
- 3

3 Mode picker. Inside the message box, shown as Quick. Quick response for everyday questions, Think Deeper for harder ones. Leave it on Quick while you learn.
- 4

4 Chats list. Your past chats. Use the three dots next to a chat (right-click in the Windows or Mac app) to delete it.
- 5

5 Plus button. Add a photo, file or screenshot.
- 6

6 Microphone. Dictate, or start a spoken conversation.

SETUP CHECKLIST

Nine steps before your *first real* question

- ☐

01 Get the real app

DESKTOP

Go to `copilot.com`, or open the Copilot app already on Windows 11.

PHONE

App Store or Google Play. Check the publisher is **Microsoft**.

Copilot now comes as one app for personal and work accounts. Sign in with your personal account for personal use. Copilot inside Word or Teams at work is managed by your employer.
- ☐

02 Sign in with a personal Microsoft account

BOTH

Use the account you use for Outlook.com, Xbox or Windows. Create one free at `account.microsoft.com` if needed.

Signing in saves your chats; history only works when you are signed in. You can also sign in with Apple or Google, but a Microsoft account links Copilot to your Microsoft privacy dashboard. Keep personal use on a personal account rather than a work or school one.

- ☐

03

Turn on two-step verification

BOTH

account.microsoft.com > Security > Advanced security options > Additional security > Two-step verification > Turn on

Copilot is only as secure as your Microsoft account. The Microsoft Authenticator app is the simplest second step.
- ☐

04

Know what happens to your chats

BOTH

Update the app first. Microsoft states that in the updated app (from 18 August 2026) your prompts, replies and files are not used to train its foundation models, so there is no training switch to find.

Older versions of the app had training toggles under Privacy. If you still see them, your app has not updated; switch both off. Chats are still saved to your account, so the next three steps matter.
- ☐

05

Turn off what you do not want shared

BOTH

Settings > Personalization : One shared experience (lets your Copilot use personalise Bing, Edge and MSN) and Allow ads personalization

Both are on by default. Switch them off if you would rather your Copilot use stayed inside Copilot and did not shape the ads you see.
- ☐

06

Check what it remembers

BOTH

Settings > Personalization > Saved memories , then IN CHAT Manage

Say "Remember that I run a plumbing business in Geelong and prefer short answers in Australian English." to add one.

The Saved memories switch stops Copilot saving new memories, but does not delete the ones already saved. Use Manage to delete single memories, or Delete all memories to clear the lot. Deleting memories does not delete your chats.
- ☐

07

Know how to clear a chat

BOTH

In the Chats list, open the three dots (More) next to a chat, or right-click it in the Windows or Mac app, and choose Delete. To clear everything, go to account.microsoft.com/privacy/copilot , select Delete all activity history, then Clear.

The personal Copilot app has no documented temporary chat, so delete a sensitive chat afterwards. Otherwise Copilot keeps up to 18 months of chat history.
- ☐

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

Free Copilot has limits and depends on capacity. Microsoft 365 Personal or Family adds higher limits and Copilot in Word, Excel, PowerPoint and Outlook for the account owner. Premium adds the most usage. Compare at microsoft.com/en-au/microsoft-365-copilot/pricing/individuals .

Pay only if you hit limits often or want Copilot in Word and Excel at home. Copilot Pro is no longer sold. Prices are shown in Australian dollars.

— 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."
 Open it with one key On Windows 11, press the Copilot key or Win C to open it from anywhere. On a Mac, Option Space .	 Ask about the page you're on In Edge, select the Copilot icon at the top right to summarise or ask about the page you are on.	 Check the facts It can sound sure and still be wrong. Verify names, numbers, laws and dates.



One topic per chat

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

Sidebar > New chat



Show it, don't describe it

Paste a screenshot or add a photo of a form and ask about it.

"What is this error and how do I fix it?"



Make it teach you

Use it to learn, not only to produce.

"Explain it simply, then quiz me."

Press the Copilot key, then start typing

You need to be signed in to Edge, with **Allow Copilot to read context clues on the web** turned on.

"Summarise this page in 5 dot points."

QUICK REFERENCE

Shortcuts and safety

Send, new line and paste work as in most chat tools. In the Copilot app you can set the open key to bring up the full app or a smaller quick view.

DO THIS	WINDOWS	MAC
Open Copilot	Win C or the Copilot key	Option Space
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

- Explain a Windows error message and fix it
- Summarise a web page in Edge
- Draft a reply to a tricky email
- Build a simple budget or list for Excel
- Explain a bill, policy or form in plain English

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.