

Perplexity, 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 make an answer engine with sources genuinely useful.

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

WHERE THINGS ARE

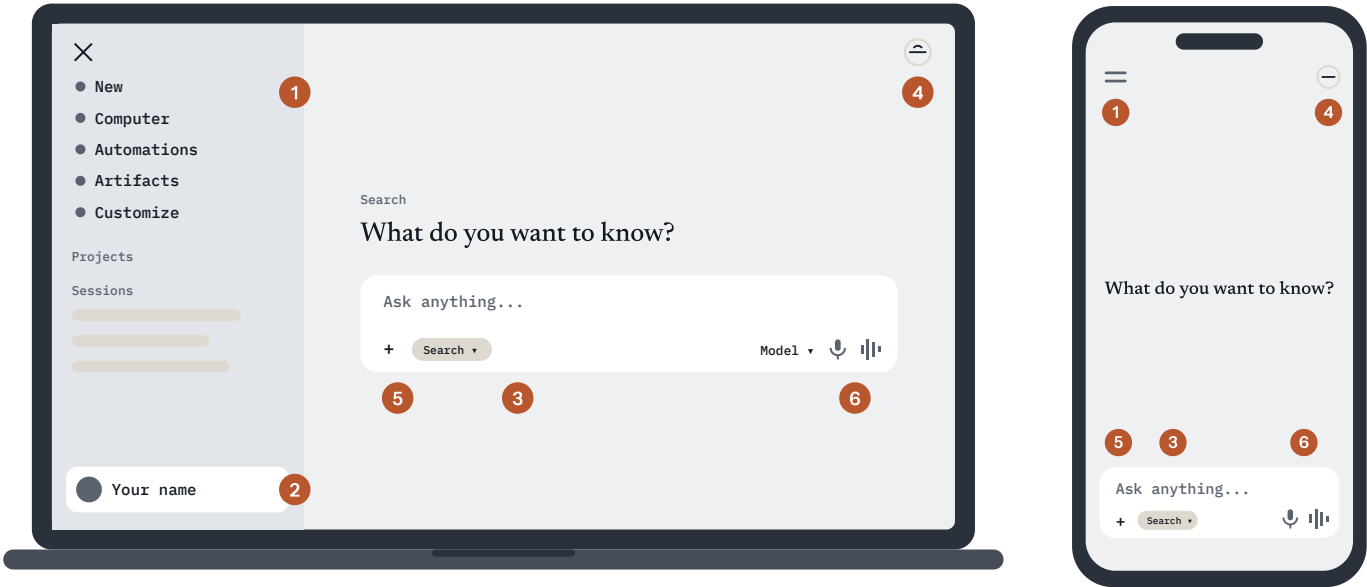
The screen, mapped

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

PERPLEXITY.AI

PHONE APP



- 1 **Sidebar.** New, Projects, your Sessions (past searches) and Customize. On a phone, tap the two lines at top left.

2 **Your name.** Bottom of the sidebar; opens Account and Settings. On a phone, tap your profile picture.

3 **Mode and model.** Inside the message box: Search for everyday questions, and the model picker at the right. Leave both on the default while you learn.
- 4 **Incognito.** The icon at the top right. Incognito sessions are not saved, do not use memory and expire within 24 hours.

5 **Plus button.** Add a file or photo.

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 `perplexity.ai`, or install the desktop app from the same site.

PHONE App Store or Google Play. Check the developer is **Perplexity AI, Inc.**

You can ask questions without signing in, but you need an account to save sessions, upload more files or use Pro Search.
- ☐ **02 Create your account**

BOTH Sign in with Google or Apple (Perplexity's recommended option), or enter your email and use the link or one-time code it sends. There is no Perplexity password to set. Perplexity says it does not support creating passwords, so your Google, Apple or email account is the front door.

- ☐

03

Lock the front door

EMAIL ,
GOOGLE
OR
APPLE

Turn on two-step verification on the account you signed in with. Add phone verification by SMS if your account offers it, under Account settings.

Whoever controls the account you signed in with can get into Perplexity, so secure that account first.
- ☐

04

Decide whether your data helps train the model

BOTH

Account > Preferences > AI data retention , switch off (or open perplexity.ai/account/preferences)

AI data retention is on by default on Free, Pro and Max. Switching it off opts you out of AI training data collection from that date on; data already collected cannot be erased. Core features keep working.
- ☐

05

Tell it about you, once

BOTH

Settings > Profile : add your role, your location and how you like answers.

Perplexity uses the profile to shape answers. Example: "Community nurse in regional Victoria. Use Australian English. Keep answers short, with sources."
- ☐

06

Check what it remembers

BOTH

Settings > Memory : the Use search history and Notes switches, and Manage memories to search, delete one or clear all

Switching memory off stops Perplexity referencing it, but existing memories stay until you clear them under Manage memories. Memory and past searches are always off in incognito mode.
- ☐

07

Know how to start an incognito session

BOTH

Click the incognito icon at the top right before you type. Click it again to leave.

Incognito sessions are not saved to your library, do not use memory or past searches, and expire within 24 hours. They cannot be recovered.
- ☐

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 Standard (free), Pro and Max, plus Education Pro for verified students. Compare at perplexity.ai/pro .

Free gives practically unlimited basic searches, a few Pro Searches a day, one Research query a month and limited uploads. Upgrade when you hit those limits often, not before, and check the price shown for Australia 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.
--	--	---

— 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 the sources Every answer carries numbered citations. Click them. The answer is only as good as the pages behind it.	Use Research for the big questions Research reads many pages and writes a report with links. Free accounts get one a month.	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?"



"Which of these sources is ..."

One topic per session

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

Sidebar > New



Mode picker > Research

Keep repeat work in a Project

A Project holds files and instructions for a job you come back to.

Sidebar > Projects > New



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 the Perplexity web app. Perplexity does not publish a separate shortcut list.

DO THIS	WINDOWS	MAC
Send your question	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

- Compare products with dated sources
- Check a claim you saw online, with the source
- Explain a bill, policy or form in plain English
- Research a local council rule or rebate
- Summarise a long report you upload

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.