AI MADE EZ · LEVEL 3 SUMMARY

Claude at work

8 lessons · about 52 minutes in all · free

01 Pick your station **02** Standing orders **03** Plates you keep **04** Do the research **05** Open the storeroom **06** Hand off the whole task **07** Recipe cards for the crew **08** A safe kitchen at work

01 Pick your station.

- In Level 1, a station was a project. Here it's a kind of work.
- Chat talks. Research looks things up. Cowork does the job.
- Claude in Chrome works in your browser.

Chat = talk it through · Research = look it up, with sources
Cowork = hand off a task on your files and apps
Claude in Chrome = work on websites in a side panel
Claude Code = coding jobs, like fixing a website
Model selector = click the model name by the send button

Say it: "This one needs my files, so it's a Cowork job."

02 Standing orders.

- You set up one project in Level 1. Now stack the layers.
- Instructions for Claude go on every ticket.
- Project instructions are for one job.

Instructions for Claude = every chat (Settings › Your Claude)
Project instructions = one job only
Project knowledge = the files that job uses
Memory = what Claude remembers (each project has its own)
Chat search = Claude can look back at old chats (paid)

Say it: "Let's put that in the project instructions so nobody retypes it."

03 Plates you keep.

- Claude can plate real files.
- Name the file you want.
- Artifacts start private.

Ask for the file type (Excel, Word, PowerPoint, PDF) and formulas
No file? Settings › Capabilities › file creation on
Download it or save it to Google Drive
Artifact = what Claude makes beside the chat; private at first
Share (paid) › pick who › Can view, Commenter or Can edit

Say it: "Claude made the tracker as a real spreadsheet. I'll check the formulas, then share it."

04 Do the research.

- Research is the long market run.
- Start it with the + button.
- Every claim needs a receipt.

Research = many sources, one answer with links (paid)
Start: + › Research, or type /deep-research
Free: web search does a shorter run
It reads connected apps without asking; switch off what you don't need
Paste a URL = Claude reads that page

Say it: "I ran it through Research and opened every source I'm quoting."

05 Open the storeroom.

- Connectors open your work apps to Claude.
- Claude sees only what you can see.
- Each action gets a permission.

Connector = a work app Claude uses as you, seeing only what you see
Add: Customize › Connectors › + (phone: add on a computer first)
Always allow = reading, low risk
Always ask = send, share, delete; asks every time
Blocked = this job never needs it

Say it: “Reading can be Always allow. Anything that sends or deletes is Always ask.”

07 Recipe cards for the crew.

- A custom skill is your team’s recipe card.
- Claude reads the description first.
- Upload it once, use it anywhere.

Custom skill = a folder with SKILL.md
Frontmatter = name (≤64) + description (≤200)
The description decides when it’s used
Zip it › Customize › Skills › + or Add › Upload › turn on
All plans; code execution and file creation on

Say it: “Let’s make that a skill so the whole team writes it the same way.”

06 Hand off the whole task.

- Describe the task. Read the plan. Steer.
- It works on folders you connect.
- You choose how often it asks.

Describe › read the plan › steer › check
Connected folder = the only files it touches
Auto = keeps going; an automatic check reviews risky steps
Manual = you Allow or Deny before it acts
Rules: keep originals, new folder, ask before send/share/buy/delete

Say it: “I’ll hand it to Cowork in Manual mode and spot-check five rows before it goes out.”

08 A safe kitchen at work.

- Your plan decides the rules.
- Incognito stays out of your history.
- At work, the owner sets the rules.

Personal plans: Settings › Privacy › training setting
Work plans: no training on chats by default
Incognito = ghost icon: no history, no memory, no training
Never paste passwords, account numbers, records
Emails and pages can hide orders: check before it acts

Say it: “Scrub names first, and check what our plan’s settings allow.”

Prompts to try

Change the parts in [brackets] to fit you. One a day is plenty.

01 · Pick your station.

ORDER #001 copy · paste · send

I work as an office manager, on Free, on my phone. My week is mostly: emails, spreadsheets.
Make a table of 6 real tasks from a week like mine.
For each: the best Claude station (Chat, Research, Cowork, Chrome or Claude Code) and why.
If my plan or device can't use it, give the closest way that works.
Then pick the task I'd save most time on and do its first step with me now.

02 · Standing orders.

ORDER #002 copy · paste · send

Set up Claude for my work. I'm an office manager. Tone: plain and short. Ask up to 3 short questions first.
1. Account-wide Instructions for Claude, under 100 words: only what fits every chat.
2. Project instructions for a project called "weekly status report": goal, reader, format, checks, never-dos.
3. Five files to add as project knowledge, and what to strip first (names, account numbers, patient or student details).
4. Where to paste each part.

03 · Plates you keep.

ORDER #003 copy · paste · send

Create an Excel tracker for our team's vacation schedule, as a real file I can download. Ask up to 3 questions first.
1. Use sample content marked [EXAMPLE]. Use formulas for every total.
2. Add a short "how to use this" note at the top.
3. After the file, list 3 things to check before I share it.
4. Two edits to ask for next.
Can't make files here? Name the setting to turn on.

04 · Do the research.

ORDER #004 copy · paste · send

Use Research, or web search if it's off. Question: compare 3 tools for a job my team does.
Before you search, ask me 2 questions (what exactly, and my budget or limits), then wait for my answers.
Sources: only official or dated sources.
Brief: 1. A 3-line answer. 2. Five findings, each linked and dated.
3. Which come from the original source. 4. Where sources disagree or are unconfirmed.
5. Three things to check myself.

05 · Open the storeroom.

06 · Hand off the whole task.

ORDER #005 copy · paste · send

```
I’m connecting Gmail and Google
Calendar to Claude for: prep me for
tomorrow’s meetings.
Personal or free account with
patient, student or customer
records? Stop; tell me to ask my
office.
1. Per app, list the actions this
job needs.
2. Mark each: Always allow
(reading), Always ask (send, share,
delete) or Blocked.
3. Do the job once. Show me drafts
before anything sends.
Not connected? Tell me what to paste
in; work from that.
```

ORDER #006 copy · paste · send

```
Task: turn a folder of receipts into
an expense sheet by month. I’m using
Manual mode.
First show your plan in 5 steps or
fewer; wait for my OK.
Rules: never delete or move my
originals. Save new files in a
folder called “Claude output”. Ask
before anything that sends, shares,
buys or deletes.
When done: 1. What you did, in 5
lines. 2. What you skipped or
doubted. 3. Five items to spot-
check.
```

07 · Recipe cards for the crew.

ORDER #007 copy · paste · send

```
Write a Claude skill for a weekly
status update, used by my team.
First ask 3 questions about how we
do it.
1. A short folder name.
2. The SKILL.md: name (under 64
characters), description (under 200:
what and when), steps, one example,
never-dos. No passwords or real
names.
3. If you can make files, zip the
folder.
4. Three test requests that should
use it, one that shouldn’t.
5. Upload steps for claude.ai.
```

08 · A safe kitchen at work.

ORDER #008 copy · paste · send

```
Write a “Using Claude safely at
work” sheet for my team at an
office. We use a company Team or
Enterprise plan. Under 300 words.
1. Five never-paste items for my
workplace. 2. OK once names and
numbers are out. 3. Settings to
check: training, memory, incognito,
connectors; say which are personal-
plan only.
4. Hidden instructions in emails or
pages: what to do.
5. A blank for our admin. Flag what
IT must confirm.
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> You can run a real shift with Claude now.

Made by Alexandra Vargas · not affiliated with Anthropic