Account Setup Checklist

Everything to set up in your first sitting — desktop, settings, and mobile. Check items off as you go. Total time: about ten minutes.

Step 1 — Create your account (2 min)

- [ ] Go to **claude.ai** and sign up with email or Google
- [ ] Verify your email if asked
- [ ] You're on the **free plan** — it includes conversations, web search, memory, file creation, and up to 5 Projects. Start here.

Step 2 — Learn the four essentials (2 min)

- [ ] **New chat** — top of the sidebar; start a fresh conversation any time
- [ ] **The sidebar** — your past conversations; this becomes your searchable library
- [ ] **Model picker** — in the message box; the default model is fine for now
- [ ] **Attachments (+)** — hand Claude documents, spreadsheets, and images

Step 3 — Send the test-drive prompt (3 min)

- [ ] Copy the test-drive prompt from the lesson's Prompt Lab
- [ ] Fill in your job or business in one line, and send it
- [ ] Rename the conversation using Claude's suggested name (hover the chat in the sidebar)

Step 4 — Check your settings (1 min)

- [ ] Open **Settings** and set your display name
- [ ] Peek at **Settings > Capabilities** — this is where Memory controls live if you ever want to manage what Claude remembers

Step 5 — Go mobile (2 min)

- [ ] Install the Claude app (iOS or Android) and log in
- [ ] Send one message from your phone — ask Claude to draft a text reply for you
- [ ] Optional: try voice mode for hands-free questions

Done? You're set up everywhere you work. Next lesson: the three conversation moves that make every Claude answer dramatically better.

Details verified against claude.com in July 2026. Features move fast — the interface may differ slightly by the time you read this.