Claude Cowork, set up right.

A 20-minute setup for small business owners: one safe folder, the right approvals, two connectors, a project that knows your business, and five first jobs with prompts to copy.

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The 20-minute setup

Do these in order. Tick each one off.

- [ ] **Get Claude Pro or higher.** Cowork isn't on the free plan. Install the Claude desktop app and sign in.
- [ ] **Make one folder called "Claude work"** and connect only that folder. Not your Desktop, not Documents, not your whole computer.
- [ ] **Copy in what Claude needs:** last month's sales export, your price list, your returns policy, a few typical customer emails.
- [ ] **Keep these out:** banking, tax, payroll, passwords and anything with full card numbers.
- [ ] **Set approvals to Manual** for anything that touches money, customers or messages sent as you.
- [ ] **Connect two trusted tools, not twenty.** Gmail and Google Drive are good first picks. Add more once you trust it.
- [ ] **Make a project** with your business details (next page) so every task starts with the right context.
- [ ] **Read the plan before every job.** Cowork shows what it's about to do. That's where you catch "delete the originals".

The one rule: Claude drafts, you approve. Nothing goes to a customer, spends money or changes your store until you've checked it.

Safe permissions

For your first two weeks, use this table. Loosen it only once a job has worked well by hand.

Job touches…	Approval	Why
Files in "Claude work" only (tidy, rename, build a sheet)	Ask first time, then allow	Easy to check, easy to undo
Emails to customers	Manual, drafts only	You read every reply before it goes
Money: refunds, orders, ad budgets, prices	Never. You do these	Claude can prepare the numbers, not press the button
Deleting or moving originals	Never	Ask for a copy instead
Logging in to new sites	Never	You sign in yourself

Your business project

Create a project in Claude and paste this in, with your details filled in. Every task in the project starts from it.

> **PROMPT TO COPY**
>
> Here are my business details for this project: business name, what we sell, who our customers are, our tone of voice, our price list and our returns rule. Keep them for every task. Before any job, show me your plan and wait for my OK. Never delete files, send messages or log in to anything unless I say so.

5 first jobs

Start with jobs you can check in minutes. Every prompt says what not to do.

1 · TIDY A MESSY FOLDER

In the Invoices folder, rename each PDF as YYYY-MM Supplier – Amount. Don’t delete or move anything. List any file you couldn’t read.

2 · BUILD YOUR WEEKLY SALES SHEET

Using the sales and ads exports in Reports, build one sheet for last week: sales, refunds, ad spend, kept after ads, with formulas and a chart. Show me where each number came from.

3 · DRAFT CUSTOMER REPLIES

Read today’s customer emails. Draft replies in my Drafts folder using my business project. Don’t send anything. Flag any email about a refund over $100 for me.

4 · CHECK COMPETITOR PRICES

Look up the public prices for these 3 competitors’ versions of our best seller. Make a table of product, price, shipping and the page you read it on. Don’t sign up or contact anyone.

5 · MAKE A MONTHLY REVIEW

Using last month’s exports in Reports, make a one-page review: what sold, what didn’t, refunds and the three biggest changes from the month before, in plain English. Show the numbers you used.

Put one job on a schedule

Once a job works by hand at least three times, schedule it. A Monday morning brief is a good first one.

1. Type **/schedule** in a Cowork task, or open **Scheduled** in the sidebar.
2. Choose the day and time.
3. Check the first two runs yourself.

> **PROMPT TO COPY · MONDAY MONEY BRIEF**
>
> Every Monday at 8am, read last week’s sales and ads exports in the Reports folder and write my Monday brief: sales, ad spend, refunds and kept after ads, each with the change from the week before, then one thing to do this week. Save it as a new file. Don’t send it to anyone.

Don't schedule these yet

- [ ] Anything that sends to customers without you seeing it first
- [ ] Anything that spends money or changes prices
- [ ] A job that hasn't worked well by hand at least three times

Scheduled tasks that use local files or your browser need the desktop app open and your computer awake.

What to do next

Pick one job from page 4 and run it today. Then, when you want more:

Watch the full Cowork tutorial (free)

The whole setup on screen, step by step, about 8 minutes.
https://mindfulclicks.com.au/videos/#tutorials

Take the course: Claude for Small Business and Online Stores

9 modules and over an hour of video: Claude vs ChatGPT, Cowork, Claude in Chrome, customer service, store operations, ads and tracking, and Black Friday. A prompt for every job, a worksheet for every module, both automation kits (20 ready-made automations), Q&A and a monthly group call. A$149 once, lifetime access.
https://mindfulclicks.com.au/claude-course/

Rather do it together?

Book a free 20-minute quick install and we'll set up one automation live on your own accounts.
https://cal.com/digitalytics-agency-ovvg7m/quick-install

Made by Limon Ghosh, Mindful Clicks, Sydney. Questions? Reply to any of our emails or write to contact@mindfulclicks.com.au. Claude and Cowork are made by Anthropic; features and plans can change.