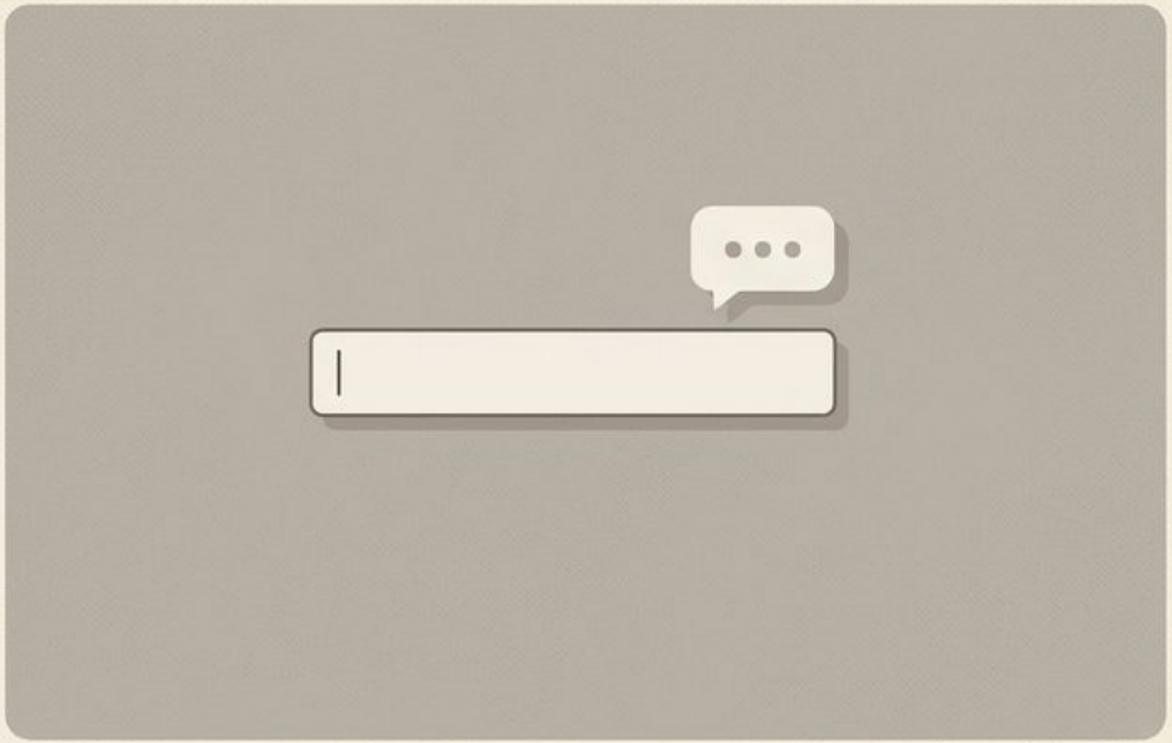
From First Chat to Full Workflow

Mastering Every ‘Desk’ in Claude AI (Nov 2026 Edition)



Gemini Notebook

The Chatbot Era



Generic chatbots answer questions and forget you.

The Digital Office



Claude plans research, builds slide decks, remembers your rules, and runs tasks while your laptop sleeps.

Stop asking for answers; start asking for outcomes

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Which Office Lease is Right for You?

Free ($0)

Models:
Sonnet & Haiku 5.5

Specs: 5 Projects, basic files

Best For:
Daily questions and light drafting



Pro ($20/mo)

Models:
Adds Opus 5.5
Specs:
Unlimited Projects, Deep Research, Scheduled Tasks

Best For:
The sweet spot for workflow automation



Max ($100/mo)

Models:
Adds Fable 5.1
Specs:
5x Pro usage limits, $100 API credits

Best For:
Heavy power users and agencies



Ultra ($200/mo)

Models:
Fable 5.1
Specs:
10x Pro usage, $200 API credits

Best For:
Enterprise-scale local automation





Watch the Meter: Long research or file-building tasks use far more context limits than quick questions. Monitor Settings > Usage.

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The Office Floorplan



1. The Beginner Desk:
Chats, Attachments & Settings

2. The Organizer Desk:
Projects, Memory & Artifacts

3. The Power User Desk:
Deep Research, Connectors & Skills

4. The Automation Desk:
Scheduled Tasks, Local Folders & Design System

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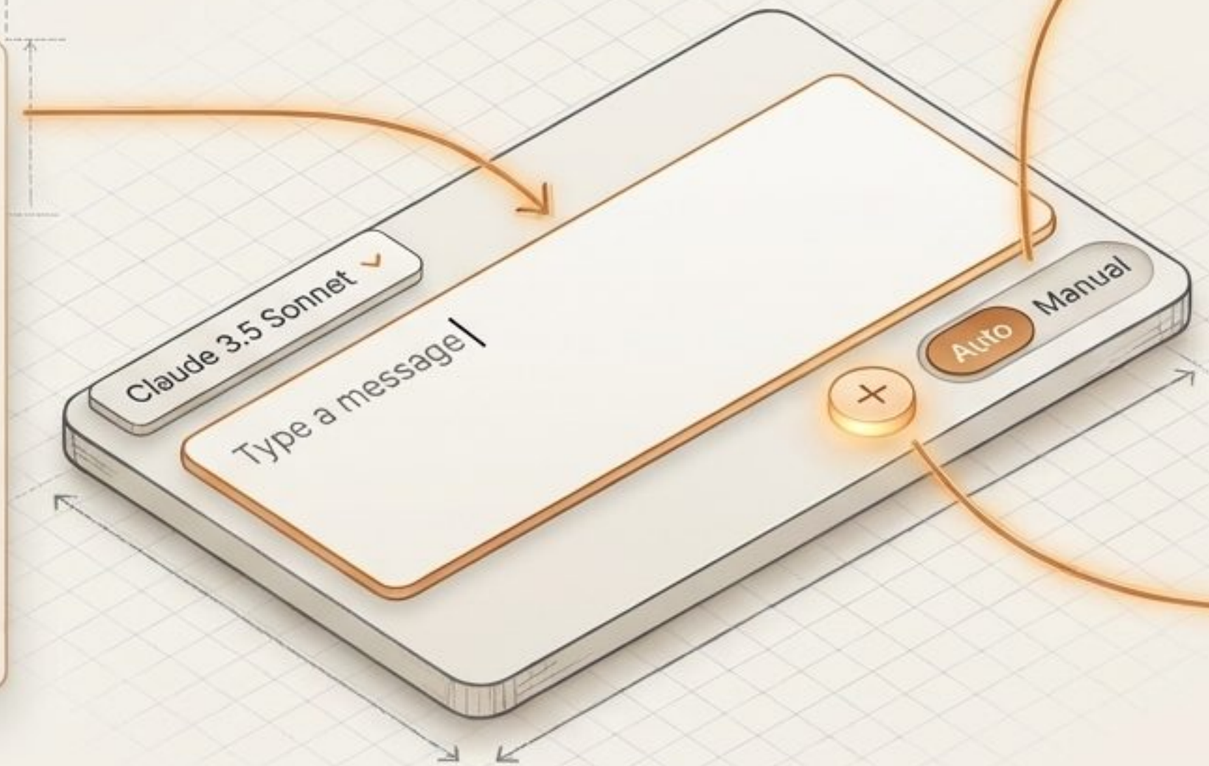
Desk 1: Mastering the Basics

The Perfect Prompt

Brief Claude like a colleague.

Always provide Outcome + Format + Inputs.

(e.g., ‘Compare the iPhone 18 Pro and 17 Pro. Give me a 1-page table with battery life and my final pick.’)



Permissions

Set to ‘Auto’ for fast research/writing.

Switch to ‘Manual’ so Claude asks permission before touching connected emails or important files.

Attachments

Click ‘+’. Upload up to 20 files (30MB each). Drop CSVs, PDFs, slides, or whiteboard photos.

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Desk 1: Day-One Settings to Change

1. Global Instructions (Settings > Your Claude)

Set your universal tone and brand voice here so every single chat inherits your baseline style without repeating yourself.



2. Memory Activation (Settings > Memory)

Toggle on “Generate memory from chats” and “Search and reference past chats” to allow Claude to remember your role and preferences over time.



3. Core Capabilities (Settings > Capabilities)

Switch on “Code execution and file creation.” This is completely vital—without this, advanced Skills and direct file downloads will fail.



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Desk 2: The Organizer (Projects & Memory)

Project Folder



Projects: Private workspaces with dedicated instructions. Every new chat inherits the rules instantly, saving token usage. Client data stays insulated.

Memory Thread



Memory: Carries your personal context (your job, preferences, formatting quirks) across standard chats.

Privacy Note: Need total privacy? Use the Incognito chat icon. It skips history and memory entirely, leaving no trace.

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Desk 2: Artifacts (Outputting Finished Work)

An Artifact is any finished file generated beside the chat. Stop copying and pasting plain text.



Edit Directly

Highlight a single paragraph to edit just that section without regenerating the whole file.

Export Anywhere

Download instantly to Word, PDF, PowerPoint, or Google Slides.

Beta Exclusives

Dashboards (Pro/Team) and Motion (Team/Enterprise).

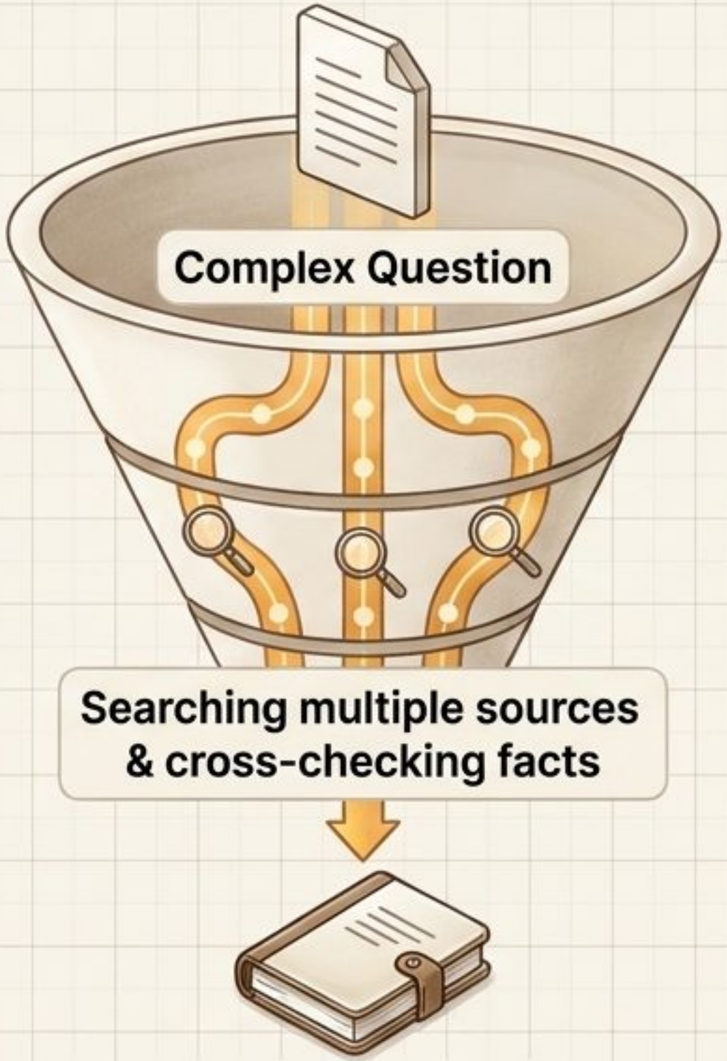
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Desk 3: The Systematic Investigator

Trigger: Type /deep-research.

Turns Claude into a systematic investigator.

Takes 5 to 45 minutes to finish depending on complexity.



Pro-Tip: Guide the funnel.

Add hard constraints like, “Exclude refurbished models, launched in 2026 only” to prevent the research from drifting.

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Desk 3: Connectors & Skills



Connectors (MCP)

Link Claude directly to your apps. Ask naturally: “Find last month’s unpaid invoices in Drive.” Set tool access to **On Demand** to protect context.

Skills

Teach Claude a process once. A saved procedure (e.g., formatting YouTube chapters) triggered **automatically** by your prompt.

Plugins

Ready-made toolkits available on paid plans. Bundles of Skills and Connectors for specific roles (Sales, Legal, Marketing).

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Desk 4: The Automation Desk

Local Control: Point Claude at your Downloads folder to sort files, or let it click through live websites.

Requires the desktop app open.

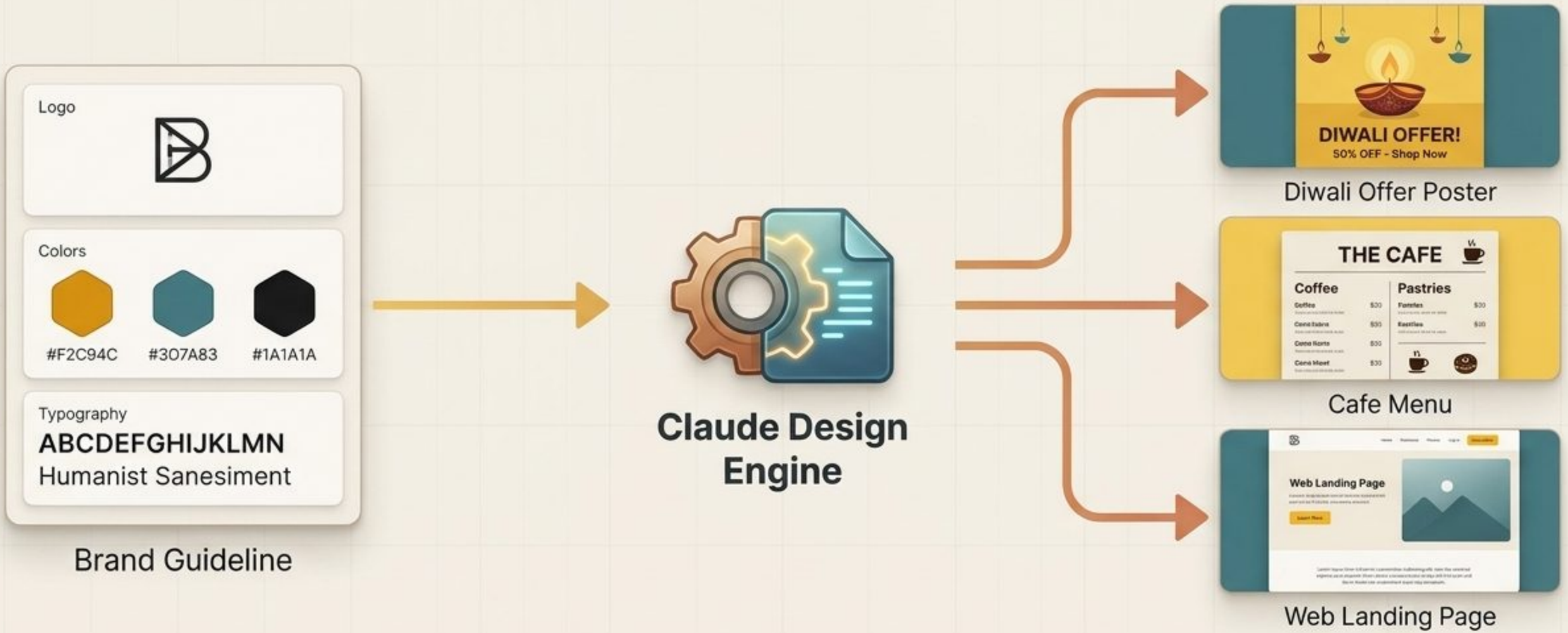


Cloud Automation: “Every weekday at 8 AM, summarize new emails.”

Runs entirely in the cloud while you sleep. Your computer can be off.

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The Design System (Brand Consistency on Autopilot)



Upload your brand guidelines or past decks once. Claude Design automatically applies your specific fonts, colors, and components to every new visual artifact or landing page generated.

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Synthesis: The SoulAI Article Engine

How to run 4 desks at once.



1. Rules (Projects)
Master SOP loaded.



2. Facts (Memory)
Keeps stable brand facts across chats.



3. Truth (Research)
Verifies official pricing/data independently.



4. Result (Artifacts)
Returns a fully formatted WordPress-ready PDF.

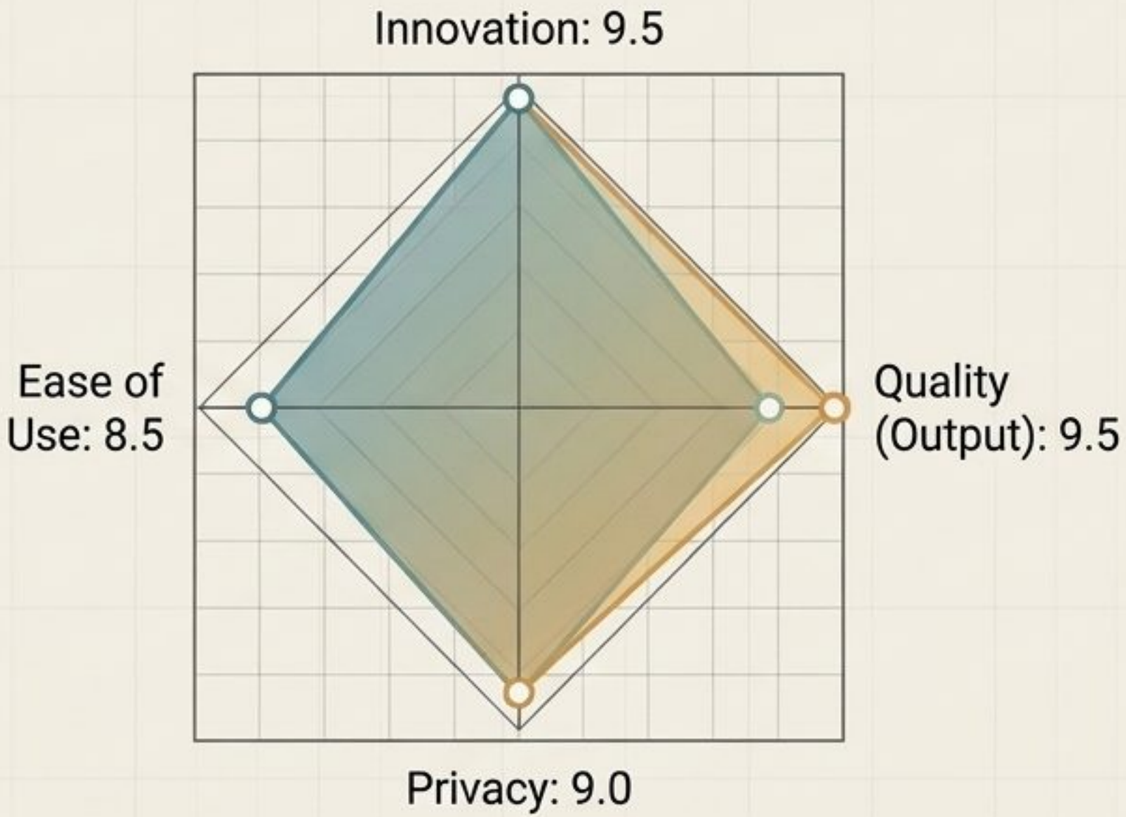
The Golden Rule: Separate your workflow. Let Projects hold rules, Memory hold facts, Research hold truth, and Artifacts hold results.

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Earn with Claude

- Done-for-you reports and pitch decks.
- Daily inbox automation setups for local businesses.
- Content engine systems for creators.

The Score Card



The Verdict: 9/10. A complete AI workspace that heavily rewards users willing to climb the learning curve.

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Your Office is Open

Start Small This Week:

- [ ] Write your global instructions in Settings.
- [ ] Create one Project for your most repeated task.
- [ ] Turn one recurring manual chore into a Skill.

Stop asking for answers.
Build your workflow.

Explore Part 2: Claude AI Models Explained (Opus vs. Fable vs. Sonnet)

