Set up Claude Code, step by step

Here's how to set up the three things from my video. You won't write a single line of code. Give it about 15 minutes.

What you need

- A paid Claude plan. Claude Code comes with Pro, Max and Ultra (and with Team and Enterprise). It isn't in the free plan.
- A Mac or a Windows computer.
- Google Chrome, for the browser part of step 1.

Start here: open Claude Code, no terminal

1 Download the Claude desktop app from claude.ai/download, install it and sign in.

2. Click **Code** at the top of the sidebar.
3. Make a new folder for practice, for example “Claude work” in your Documents, and put **copies** of the files you want it to work on inside.
4. In the row under the message box, choose **Local**, then click the folder control, choose **Open folder...** and pick that folder.
5. In the same row, choose **Auto**, so Claude can keep going without stopping to ask at every step. Keep an eye on it: it can edit, move or delete files without asking first, which is why you’re working on copies. If you’d rather approve each change, choose **Manual**.
6. Type what you want in plain English and press Enter.

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1. Let it use your computer

Your browser.

1. Install the Claude extension from the Chrome Web Store: Claude for Chrome.

2. Click the extension and sign in with the same Claude account.
3. Ask Claude Code for something in Chrome, for example:

```
Open my supplier's portal in Chrome and
download last month's invoices into
this folder.
```

   Depending on your settings, it may ask before each new site. Watch it the first few times, because it's using the accounts you're signed in to.

Apps like Excel.

1. In the Claude app, open **Settings**, find **Computer use** and turn on **Enable computer use**.
2. On a Mac, allow the two permissions it asks for: **Accessibility**, so it can click and type, and **Screen Recording**, so it can see the screen. It needs macOS 14 or later.
3. Ask for something in the app, for example:

```
Open sales.xlsx in Excel and add a total
for each month.
```

4. The first time it needs an app, it asks you: **Allow for this session** or **Deny**.

> Press **Esc** at any time to stop it. Computer use is a research preview, on Pro, Max and Ultra, on Mac and Windows.

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2. Give it a long task with a clear goal

Type `/goal` followed by what “done” looks like, and press Enter. Claude keeps working, turn after turn, and after each turn a separate check decides whether the goal is met. You don’t have to prompt it step by step.

For example, on copies of your files:

```
/goal Every transaction in bank-statement.csv
is matched to an invoice or receipt in the
Receipts folder, the ones with no match are
listed in missing.csv, and the matched total
equals the statement total to the cent.
```

- Make “done” something it can check: a total that ties out, a list with nothing missing, a file

that exists.

- Pair it with step 1, and the goal can include your browser and apps, for example downloading the invoices first.
- Type `/goal` on its own to see where it is, and `/goal clear` to stop it.
- In Auto it keeps going without asking at every step, so check on it now and then. In Manual it stops to ask before each change.

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3. Pick it up from your phone

1. In the Claude app, open **Settings** and turn on **Connect new sessions to Remote Control**. For a task you already started, type `/remote-control` in it instead.
2. Install the Claude app on your phone (iPhone or Android) and sign in with the same account.
3. Tap **Code**. Your task shows with a computer icon and a green dot while it's online. Open it to see what it's doing, answer its questions, approve changes or give it the next task.

4 The work runs on your computer, so leave it on and plugged in, with the lid open. Keep **Keep computer awake while Claude works** turned on in Settings. A closed lid still puts it to sleep.

Stay safe

- Work on copies until you trust a task.
- Keep an eye on it. In Auto it can edit, move or delete files without asking first.
- Press Esc to stop it at any time.
- Try it on test files before you let it near client files or real accounts.

Checked against Anthropic's documentation on 4 November 2026. Claude changes fast: if a menu has moved, look for the same words in Settings.