



Claude Working Session Recap

The Claude toolkit:

Which Model to Use

Model	When to use it
Fable	The big building tasks: larger builds and heavier, multi-step projects.
Opus	Your everyday default. Use it for most things.
Sonnet	A good option when you want to be conservative with tokens.
Haiku	Don't use. Last updated in September.

Quick tip: talk, don't type. When you start using Claude, just speak to it with voice input. You don't need to type everything out, and typing long instructions wastes a lot of time.

Skills

A skill is a repeatable memory file you create inside Claude so you can reuse a process in future chats without walking through the whole thing again. You do have to go through the process at least once to build it, and then all you have to say is **"Hey Claude, create this as a skill."** Save a copy of your skills to your computer or iCloud so that if anything happens, you can import them back into Claude later.

Connectors

Connectors link Claude to the tools you already use. Attach them through the + sign in the chat. Salesforce has a connector. **Manage each connector's permissions** so it can't delete anything in your systems.

Projects

A project is the big sandbox where you build something in Claude, and it keeps everything organized in one place. The most important thing is **attaching files** so Claude has material to reference. Projects are where repeatable processes live (RFPs, marketing, and so on), and they work hand in hand with skills.

Claude Code

Don't think of Claude Code as daunting. Just start using it. It takes what Cowork does to the next level with building capabilities Cowork doesn't have, and you still talk to it in plain English. If you want to build something like the Excel model you mentioned, this is the place to do it.

Claude in Chrome and Excel

With the Chrome browser extension, Claude can work right inside your browser and you can watch what it's clicking. You can also connect Claude to your Excel files.

Artifacts

An artifact is a standalone piece of work Claude creates that lives outside the chat, like a web page, calculator, dashboard, or interactive tool. It opens in its own window, you can come back to it and update it later, and you can share it with a link. Just say to Claude: **"Create this as an artifact."**