

Claude for small business: project instructions template

A fill-in project brief, an upload list, two scheduled-task prompts and the ten-minute checklist. From Anthropic's own pricing and help pages, opened October 27, 2026.

WHAT THIS ADDS

One page that says who you are, what you sell and how you sound makes every other Claude feature better. Fill this in first.

1. Your project instructions (copy, fill in, paste)

Create a Project named after your business, open its instructions, and paste this. Replace everything in [brackets]. Five lines is enough.

You are the assistant for [business name], a [type of business] in [city or region]. We sell [products or services] to [who your customers are]. Write in a [warm / direct / formal] voice. Short sentences. No jargon. Sign emails as [name]. Use only the prices and policies in the project files. If something is not in the files, say so and ask me. Never promise a delivery date, never quote a price I have not approved, and always ask me before anything is sent.

2. What to upload to the project

- Your price list and service descriptions
- Your policies: refunds, cancellations, delivery, warranty
- Three to five of your best customer emails (remove private details)
- Your brand voice notes: words you use, words you never use
- Your opening hours and service area

3. Two scheduled-task prompts to start with

Every weekday at 8:00: summarize my unread customer emails from the last 24 hours. List the three that need a reply today, with one line on why each is urgent. Do not send anything.

Every Friday at 3:00: look at next week's calendar and list every job I have not yet invoiced or sent a reminder for. Draft the reminders as drafts only.

4. Data and privacy check

- Which plan are you on? Free, Pro and Max accounts have a model-training choice in Privacy Settings. Anthropic's August 2025 post says Team and Enterprise are under the Commercial Terms instead. Check the current wording in your own settings.
- Settings > Your Claude: look at what memory has saved. Delete anything wrong.
- Keep Claude's approval prompts on for Gmail and Calendar actions for the first month.
- Do not paste anything you could not defend showing a customer.

5. The ten-minute checklist

1. Pick Pro (only you) or Team (two or more).
2. Create one project named after your business.
3. Upload your price list and policies.
4. Write five lines of instructions.
5. Open Settings > Your Claude and check your memory.
6. Make the training choice on purpose.
7. Connect Gmail and Calendar, approvals on.
8. Ask for three draft replies to real emails, then edit them.
9. Schedule one weekday morning summary.
10. After one week, read what Claude saved and fix it.

DO THIS

Fill in the five lines, upload your price list, and test it on three real customer emails before you connect anything.

What Fynl.io is

One portal a small business runs itself on, instead of five subscriptions that do not talk to each other.

- A CRM and pipeline that shows every lead and where it stopped
- A calendar clients can book straight into
- Quotes, contracts and invoices, with deposits taken up front
- A website and form builder, so the enquiry lands in the same place
- Your Gmail connected, so the whole thread sits on the contact
- Automations for the follow-up you keep forgetting to send

The AI runs on **your own Claude or ChatGPT API key** — no markup on it. No SMS or phone calls yet. \$49/month per business, \$149 Agency, and we move your contacts over for you.

Fynl.io is one portal for contacts, calendar, quotes, invoices and email, with AI that runs on your own key.

Sources

- Claude pricing — <https://claude.com/pricing>
- Claude Help Center: What are projects? — <https://support.claude.com/en/articles/9517075-what-are-projects>