

Claude for small business: how to set it up, what it costs, and a 10-minute checklist

Which Claude plan to pick, what it costs, how Projects, memory, Gmail and Calendar connectors and scheduled tasks work, and what happens to your data. From Anthropic's own pages. Free PDF, no sign-up.

WHAT THIS ADDS

Most owners open Claude and start chatting. This guide starts one step earlier: pick the plan, build one Project that holds your prices, policies and voice, and only then switch on memory, connectors and schedules. Every figure and menu name comes from Anthropic's own pricing and help pages, and where the pages disagree or look dated, this guide says so.

Why owners are searching for this

On October 27, 2026, AnswerThePublic showed about **1,000 US searches a month** for *claude ai for small business*. In the same list, *ai for small business* showed about 1,900, *ai receptionist for small business* about 1,600 and *ai tools for small business* about 720. People are not asking what Claude is. They are asking how to set it up so it does real work.

Important: this guide was written from Anthropic's pricing page and help pages, opened on October 27, 2026. It was not tested by running a business through Claude.

Step 1: pick the plan

The pricing page lists these plans (US prices, excluding tax):

Plan	Price	Notes
Free	\$0	Chat on web, desktop and mobile, memory, connectors
Pro	\$17/month billed yearly (\$200 up front), \$20 billed monthly	Lists Projects, scheduling, Claude in Chrome
Max	From \$100/month	5x or 20x Pro usage
Team, standard seat	\$20/seat/month yearly, \$25 monthly	2 to 150 seats
Team, premium seat	\$100/seat/month yearly, \$125 monthly	Mixed seat types allowed

Plan	Price	Notes
Enterprise	\$20/seat/month plus usage	Annual only, 20 seats minimum

If it is only you, look at Pro. If two or more people will use it, look at Team: the help page says Team plans need a minimum of two members and are not intended for individual use. The person who creates the Team must use a business email; public domains such as gmail.com, yahoo.com and hotmail.com are not allowed for the creator, though they can be added as permitted domains for other members. Team also lists up to \$500 a month in pooled API credits, which only matters if you build something with the API.

Step 2 and 3: make one Project and fill it with your business

Anthropic describes a Project as a self-contained workspace with its own chat history and knowledge base. You upload documents, text or other files, and Claude uses them as context in that project's chats. Free accounts can create a maximum of five projects. On paid plans, when your knowledge nears the context limit, Claude switches to a mode that expands capacity by up to 10x.

Upload your price list, service descriptions, policies, a few of your best customer emails and your brand voice notes. Then write the project instructions: who you are, what you sell and to whom, how you sound, and what Claude must never do. Five lines is enough, and every chat inside the project starts with all of it.

On Team and Enterprise you can share a project. *Can view* lets people see the contents and chat; *Can edit* lets them change instructions and knowledge. You can share by email or with the whole organization, and shared projects appear under *Shared with me*. Owners can turn sharing off.

Step 4: memory

Memory lets Claude carry context from your chats into new ones. It is on by default for Free, Pro and Max. On Team and Enterprise, an owner enables it for the organization first, then each member turns it on. The setting is under *Settings > Your Claude > Memory from chats*.

- Each project has its own memory. Inside a project, Claude uses that project's memory plus your memory from non-project chats, not memory from other projects.
- For a chat that leaves no trace, click the ghost icon in the top right of a new chat outside a project (incognito). On Team and Enterprise those chats are still included in organization data exports.
- *Pause memory* keeps existing memories but stops using or creating them. *Reset memory* permanently deletes all memories, including project memories.
- Select *Manage* next to *Your memory* to read, edit or delete individual topics.

Step 5: connect Gmail, Calendar and Drive

In a chat, click the + button, hover over *Connectors*, and switch connectors on or off per conversation. The Google Workspace help page says Claude can search and read Gmail, draft emails and manage labels; view and create Calendar events and find mutual availability; and search and read Drive files including Docs, Sheets, Slides and PDFs. The Team plan page also lists GitHub, Microsoft 365 and Slack.

On Team and Enterprise, an Owner or Primary Owner must enable the connectors at the organization level (*Organization settings* > *Connectors*) before anyone can sign in.

Safety: by default Claude asks for your approval before each action. The help page says Claude can send, reply to and forward emails "only with your explicit approval by default". Keep that on for the first month. Free accounts can add one custom connector, and Anthropic has not verified custom connectors, so connect only servers you trust.

Step 6: schedule a task

Scheduled tasks are on all paid plans (Pro, Max, Team, Enterprise). In Claude Cowork, click *Scheduled* in the left sidebar, then *New task*. Choose *Create with Claude* and describe the job, or set it up manually with a name, a prompt, an approval mode and a frequency: hourly, daily, weekly, weekdays only, or on demand.

The help page says most scheduled tasks run on their cadence even when your computer is asleep or the Claude Desktop app is closed, but tasks that need local files or apps only run on your computer. It also says a new Claude experience that combines chat and Cowork is rolling out, and if your message box no longer shows Chat and Cowork options, some steps may look different.

Two good first tasks: every weekday morning, summarize unread customer emails and list the three that need a reply today; every Friday, turn the week's calendar into an invoice reminder list.

Step 7: know where your data goes

Anthropic's post on its consumer terms (published August 28, 2025) says the training choice applies to Claude Free, Pro and Max accounts, including Claude Code used from them. It does not apply to services under the Commercial Terms, which includes Claude for Work (Team and Enterprise). You can change your choice in Privacy Settings. The post says that if you allow training, data is kept for five years, and if you do not, the existing 30-day retention period continues. The pricing page lists "no training on your content by default" for Team.

That post is more than a year old, so check the current wording in your own settings. Whatever the plan, do not paste anything you could not defend showing a customer.

The ten-minute checklist

1. Pick Pro if it is only you, Team if it is 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. Open your privacy settings and make the training choice on purpose.
7. Connect Gmail and Calendar, and leave approvals on.
8. Ask for three draft replies to real customer emails, and edit them.
9. Schedule one weekday morning summary.
10. After one week, read what Claude saved and fix it.

Honest limits

- This was not tested by running a business through Claude.
- Prices, plan features and menu names change, and the help pages themselves change. Check them before you pay. The pricing page itself says Claude Cowork is now just Claude, rolling out to Pro and Max.
- Claude drafts and you stay responsible for what goes out.
- This is not legal advice. If you handle health or financial records, ask a professional before you upload them.

DO THIS

Before you switch on a single feature, build one Project with your price list, policies and five lines of instructions. Then add memory, Gmail and Calendar with approvals on, and one scheduled summary.

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 for the rest of the job: one portal for your contacts, calendar, quotes, invoices and email, with AI that runs on your own key. Claude is one of the AI tools you can bring to it, and the Project you build here is the same one-page brief that makes any AI tool more useful.

Sources

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- Anthropic: Updates to Consumer Terms and Privacy Policy (Aug 28, 2025) — <https://www.anthropic.com/news/updates-to-our-consumer-terms>
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