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FREE GUIDE

Claude Sheets and Whiteboards: the first-try checklist

A one-page checklist: who gets it, the prompt that builds a sheet on your own numbers, the beta limits, when to keep Excel, and the twenty minute first try.

WHAT THIS ADDS

Most coverage repeats the launch post. This guide reads Anthropic's two help articles line by line (opened November 11, 2026), pulls out the limits that matter for a small business (no live data, no PDF export, no pivot tables, mobile read-only, no HIPAA in beta), separates what is confirmed about Claude Meetings from what is only reported, and turns it into a twenty minute first try an owner can run today.

Who gets it

The Sheets help article says Claude Sheets is in beta on the Pro, Max, Ultra, Team and Enterprise plans. It is on by default on Team plans and off by default on Enterprise plans until it is turned on in **Organization settings › Artifacts**. Only Owners and Primary Owners can switch it on or off. Whiteboards follows the same pattern. The free plan is not listed. Sheets and whiteboards count toward your plan's usage limits.

Create your first sheet

From any chat, ask Claude for a sheet (the help article's examples include a campaign tracker, a hiring budget and a deal forecast). Or open the **Artifacts** tab, select the **Sheets** tile, and describe the sheet or start blank.

The help article's main tip: tell Claude what the sheet is for and give it your existing numbers, so it is built on your data and not on placeholders. An example prompt for a small business:

Build me a monthly cash flow sheet for a photography studio, with one tab for income by client, one tab for expenses by category, and a summary tab that shows profit per month.
Then paste last month's real numbers. Every sheet is saved in the Artifacts tab.

The limits in the beta

- Up to 100,000 cells per sheet.
- Charts: bar, line and pie.

- Not available yet: pivot tables, protected ranges, find and replace, sorting by more than one column, filter views, multi-select dropdowns.
- Not supported: macros, VBA, Power Query, DAX, print layout.
- No live data from connected apps: you import or paste.
- Mobile: basic read-only access.
- During the beta, HIPAA, customer managed keys (CMEK) and zero data retention (ZDR) are not supported. Do not put client health information in it.

Claude Sheets or Excel?

Anthropic's help page answers this itself: Claude Sheets is a light, shared sheet you build with Claude. If your file already lives in Excel or Google Sheets, or you need their full feature set, it points you to Claude for Excel or Claude for Google Workspace instead. The announcement says the functionality is basic for now, and for full Excel features you should export or use Claude for Excel.

My split (opinion): use Claude Sheets to start something new fast, like a launch tracker, a price comparison or a small budget you want to talk through. Keep bookkeeping, payroll and anything with macros or pivot tables where it already is.

A twenty minute first try

1. Open the Artifacts tab in Claude and check you see the Sheets and Whiteboard tiles. On Enterprise, ask an Owner to turn them on in Organization settings › Artifacts.
2. Export one real report from your current tool as a CSV, like last month's sales or expenses.
3. Start a sheet, import the CSV, and tell Claude what the sheet is for. Ask for a summary tab and one chart.
4. Click three totals and check the formulas yourself.
5. Start a whiteboard, talk through next month's plan for two minutes, and ask Claude to turn it into a timeline with owners.
6. Share both with one teammate, and export the sheet as .xlsx so you have a copy outside Claude.

Honest limits

- Based on Anthropic's announcement and help pages as of November 11, 2026.
- These are beta features; limits, plans and defaults can change.
- Claude Meetings was not tested; the details come from a news report.
- Everything you build counts toward your plan's usage limits.

DO THIS

If you already pay for Claude, try it this week on one real report. Build the sheet from your own numbers, click the totals to check the formulas, export an .xlsx copy, and keep anything sensitive out while it is in beta. Use the whiteboard for the next plan you would normally scribble on paper. Treat it as a fast starting point, not your system of record.

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 running the business around the spreadsheet: one portal for your contacts, calendar, quotes, invoices and email, with AI that runs on your own key. Fynl is not made by Anthropic and is not connected to Claude Sheets or Whiteboards.

Sources

- Anthropic: Introducing Claude Whiteboards, Claude Sheets, and Claude Data (Nov 10, 2026) — https://claude.com/resources/articles/sheets-whiteboards-data
- Anthropic: More ways to work with Claude (Sheets, Whiteboards and interactive connectors) — https://claude.com/resources/articles/more-ways-to-work-with-claude-sheets-whiteboards-and-interactive-connectors
- Claude Help Center: Get started with Claude Sheets — https://support.claude.com/en/articles/18324300-get-started-with-claude-sheets
- Claude Help Center: Get started with Claude Whiteboards — https://support.claude.com/en/articles/18324319-get-started-with-claude-whiteboards
- TechCrunch: Anthropic launches Claude Meetings (Nov 10, 2026) — https://techcrunch.com/2026/11/10/anthropic-launches-claude-meetings-to-turn-workplace-discussions-into-plans-and-tasks/
- Claude pricing — https://claude.com/pricing