

Your first Claude chat: model picker, attach a file, a four-part prompt, pin and rename

One real task in your first Claude chat: reply to an unhappy customer's email. Bright Path Landscaping and Linda Carver are made up.

Pick a model and effort

Model picker

Under the message box, on the right. It shows the model and effort, like **Opus 5.5 Medium**.

The models

Fable for the toughest jobs, **Opus** for complex and everyday work, **Sonnet** for simpler tasks, **Haiku** fastest. The Free plan shows fewer.

Effort

How hard Claude thinks. Higher takes longer and uses more of your limit. **Medium** is recommended.

Attach the file

1. Click **+** at the bottom left of the message box.
2. Click **Upload or add files** and pick the file.
3. Claude reads PDFs, Word files, spreadsheets, text files and images.

Write a four-part prompt

Role: You're the office manager at **[BUSINESS]**.
Context: [WHAT HAPPENED, WHAT'S ATTACHED, WHAT YOU CAN OFFER].
Task: Write my reply, plus a short checklist for me.
Format: Under 150 words, warm and plain, with a subject line.

Leave out anything private the reply doesn't need.

Read, follow up, keep it

- Click the line above the reply to see how Claude thought it through.
- Read what it flagged, like a refund request, instead of letting it promise anything.
- Ask for changes in the same chat: "Shorter, two mornings to pick from, a 10% credit." Claude keeps what worked.
- Click the **three dots** on the chat to **Pin** it, then **Rename** it to something you'll find later.

Remember: Give Claude a role, context, a task and a format, then read every reply before you use it.

Practice it free: Your First Chat with Claude: Models, Files and a Great First Prompt at learn.ynteractive.com/modules/claude-first-chat. This sheet: learn.ynteractive.com/content/cheat-sheets/claude-first-chat. Bright Path Landscaping is a made-up business from the lesson. By Robert Breen, October 20, 2026.