

# Claude Projects: instructions, project knowledge and one better rule

A Claude project gives one business or job its own instructions and files, so every chat inside it starts out knowing your work. Bright Path Landscaping is a made-up company.

## Set it up

1. Click **Projects** in the sidebar, then **New project**.
2. Fill in **What are you working on?** and **What are you trying to achieve?**
3. Click **Add** next to **Instructions**: who Claude helps, the tone, the sign-off and your policies. Click **Save instructions**.
4. Click **Add** next to **Context**, then **Upload from device** and pick the files (hold **Ctrl**, or **Cmd** on a Mac, for more than one).

## Instructions or knowledge?

### Instructions

How Claude behaves: "Quote only from the price sheet. Quotes are good for 30 days. Never promise a start date."

### Context

What Claude knows: the price sheet and warranty policy. Swap a file when prices change.

### Memory

Fills in after a few chats with what Claude learned about this work. It stays in the project.

## Chat inside the project

A customer, [NAME], emailed: "[PASTE EMAIL]". Write my reply with a quote.

No prices, policies or tone needed. Then open the line above the reply to see where each number came from.

## Check, then fix at the source

- Add it up:  $\$285 + \$570 + \$260 = \$1,115$ ; a 25% deposit is **\$278.75**.
- Read what Claude flagged, like a shrub size the customer didn't give.
- Fixing the same thing twice? Click **Edit** next to **Instructions** and add one rule.
- Upload only the files the work needs. Leave out complaints, schedules and private details.

**Remember:** Put how Claude should behave in Instructions and the facts in files, then fix the instructions, not the chat.

Practice it free: Claude Projects for Your Business: Instructions, Knowledge and Quotes at [learn.ynteractive.com/modules/claude-projects](https://learn.ynteractive.com/modules/claude-projects). This sheet: [learn.ynteractive.com/content/cheat-sheets/claude-projects](https://learn.ynteractive.com/content/cheat-sheets/claude-projects). Bright Path Landscaping is a made-up business from the lesson. By Robert Breen, October 20, 2026.