



ONBOARDING GUIDE · OCTOBER 2026

From personal Claude plans to Claude Team

What changes when your people stop paying for Claude on their own cards and start working inside one organization. Every screen shown is from a live Team org.

01 The short version

02 Same email, two accounts

03 Your data stays out of training

04 One admin console

05 Members, roles and seats

06 Billing and usage

07 Shared projects and chats

08 Connectors and skills for everyone

09 Guardrails you set once

10 Claude Code for the team

11 Moving each person's account

12 The rollout plan

13 When Team is not enough

Personal plans are built for one person. Team is built for the company.

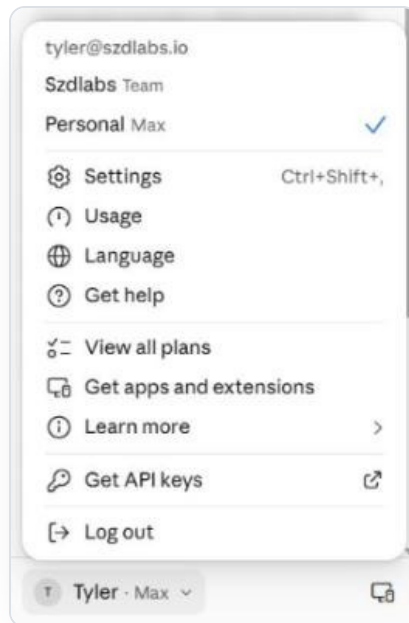
Most companies start with a few people expensing Pro or Max. It works until someone asks where the client data went, who owns the project everyone depends on, or why five people pay for the same thing five different ways. Claude Team answers those questions with one organization, one bill and one set of rules.

	PERSONAL (PRO OR MAX)	CLAUDE TEAM
Who pays	Each person, on their own card or app store	The company, one invoice
Price (USD, before tax)	Pro \$20 a month (\$17 annual). Max \$100 or \$200 a month	Standard seat \$25 a month (\$20 annual). Premium seat \$125 a month (\$100 annual)
Size	One person	2 to 150 seats
Model training on your chats	Each person's own choice, on by default unless they turn it off	Off by default, under Anthropic's Commercial Terms
Who owns the work	The individual	The organization
Admin controls	None	Admin console, roles, domain verification, SSO, org policies
Sharing	Public links	Projects and chats shared inside the org, with admin limits
Connectors and skills	Each person sets up their own	Owners turn them on for everyone
Claude Code	Included	Included in every seat, with org managed settings
Usage	Pro baseline; Max is 5x or 20x Pro	Standard about 1.25x Pro; Premium about 6.25x Pro per session. Optional usage credits

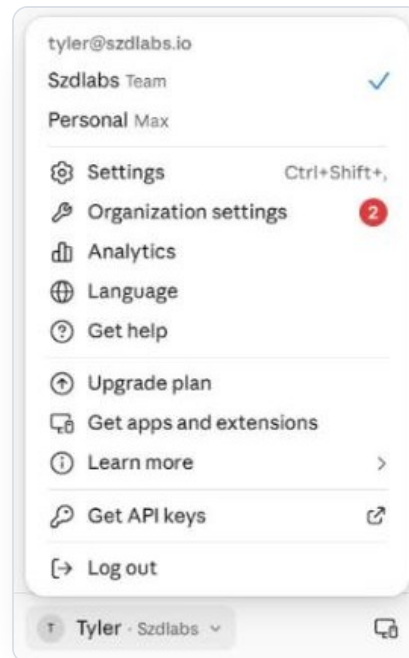
The one rule for your rollout: configure the org first, invite people second. Most of the defaults are open, and the invite link is live from day one.

Joining a Team does not erase anyone's personal account

One email can hold a personal account and an organization account at the same time. People switch between them from the account menu in the lower left corner. The blue check shows which one is active, and each account keeps its own chats.



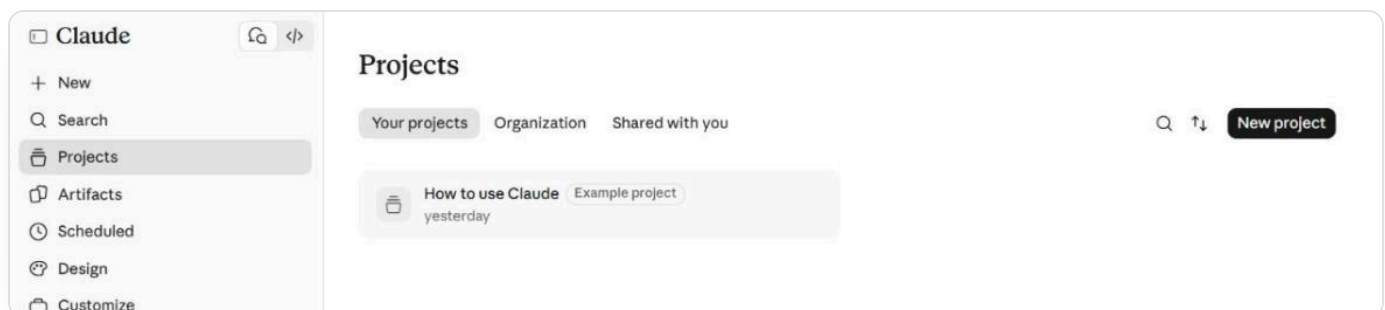
Personal account active. Settings, usage and plans. Nothing to manage beyond yourself.



Team account active. Two new entries appear: Organization settings and Analytics.

What this means for your people

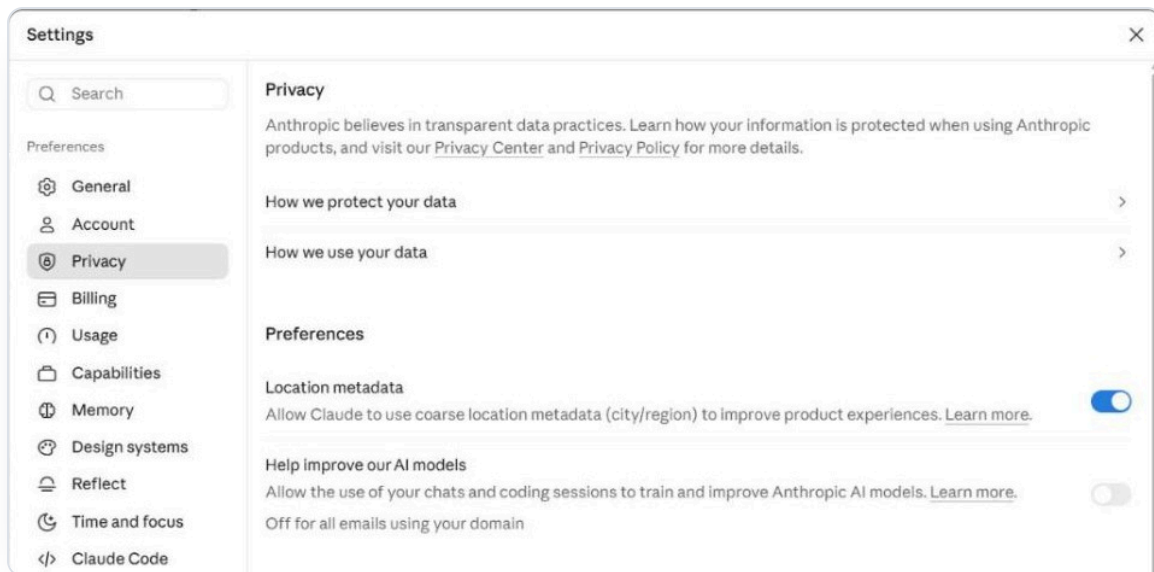
- **They decide what moves.** When they accept the invite they can keep both accounts, or move their personal history into the org. Section 11 covers the choice.
- **Work goes in the work account.** Tell people plainly: client work, company files and shared projects live in the Team account from day one.
- **Check the corner before you paste.** The most common early mistake is working in the wrong account. The name next to the avatar (here "Szdlabs" or "Max") tells you which one you are in.



Inside the Team account, Projects gains two tabs a personal plan does not have: Organization and Shared with you.

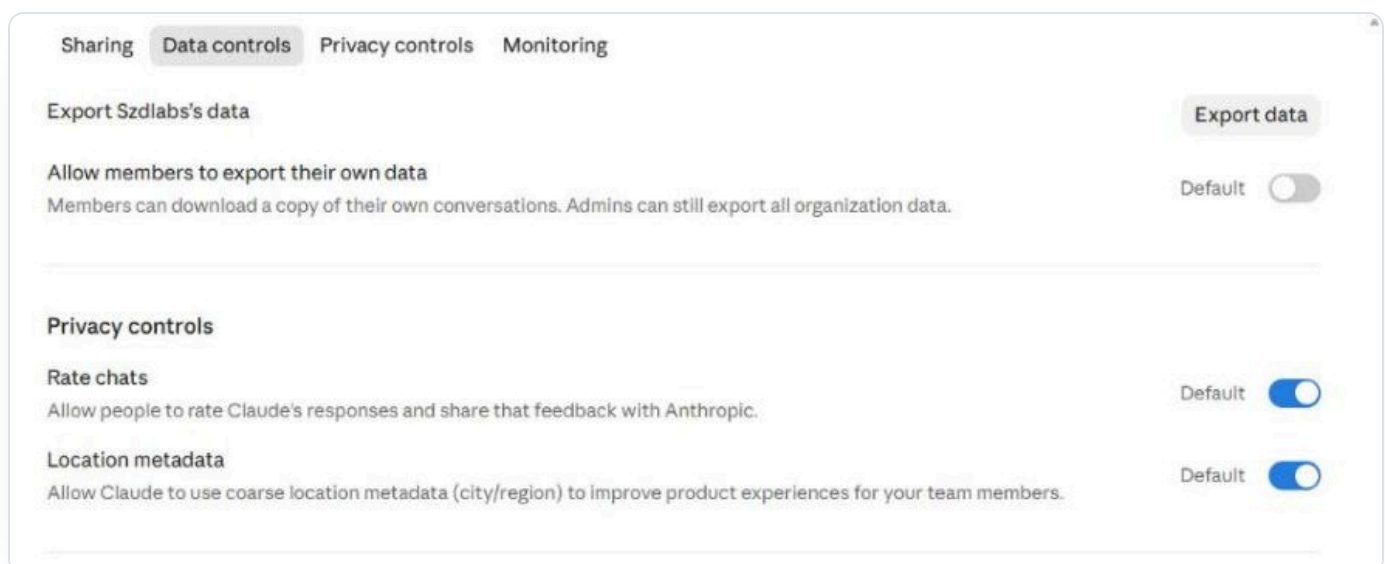
The strongest reason to move, and the easiest to miss

Since Anthropic's consumer terms update in 2025, Free, Pro and Max users choose for themselves whether their chats and coding sessions train Anthropic's models. If they allow it, Anthropic keeps that data for up to five years. Team runs under the Commercial Terms instead: by default, Anthropic does not train on Team chats or coding sessions.



Personal account, Settings, Privacy. "Help improve our AI models" is the personal training switch. Here it is locked off with the note "Off for all emails using your domain", because the Team org verified the szdlabs.io domain.

A side benefit we saw in our own org: once the company domain was verified in the Team org, the personal account on that domain showed training switched off for every email on the domain. Verify your domain early (section 12, step 4).

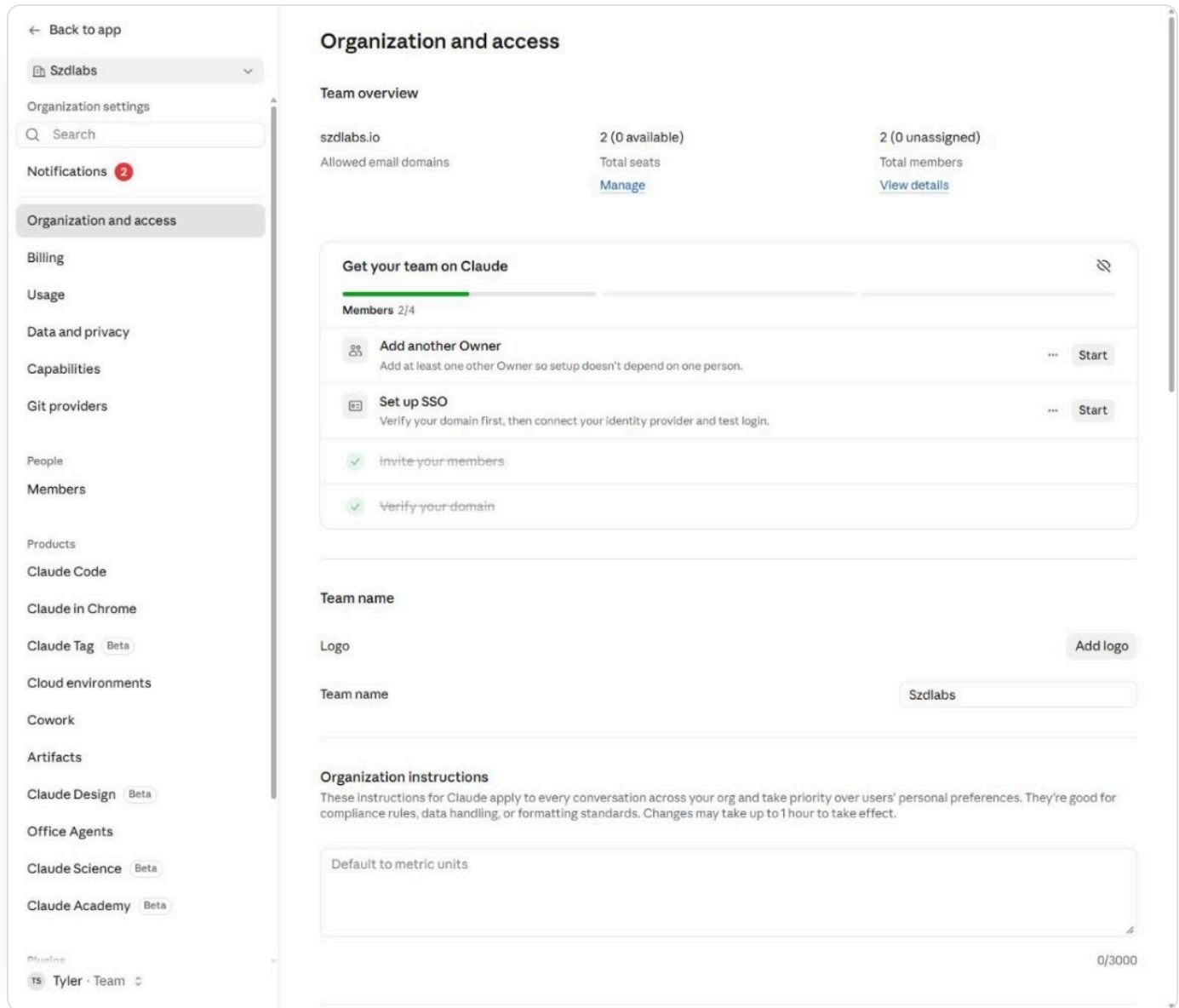


Team admin, Data and privacy. There is no training switch to flip. Admins control exports and feedback instead.

Exceptions Anthropic lists for Team: feedback people submit with thumbs up or down, an explicit opt in, and its Development Partner Program. Chats stay until deleted; deleted chats leave Anthropic's back end within 30 days. Custom retention periods are an Enterprise feature.

Every setting for the whole company, in one place

Owners and Admins open it from the account menu, Organization settings. The left rail is the map: organization, billing, usage, data and privacy, capabilities, members, then one page per product.



Organization and access. Seats and members at a glance, a setup checklist, and Organization instructions: text Claude follows in every conversation across the org, ahead of each person's own preferences.

Use Organization instructions for the few rules that should never depend on memory: how to handle client data, required disclaimers, house formatting. Changes can take up to an hour to apply.

Who can do what, and who gets the bigger seat

Members

Active

Pending

Role All

Search...

Export CSV

Add member

☐	Name	Role	Tier	
☐	Tyler Sztuka	Primary owner	Standard	
☐		User	Standard	...

Showing 1-2 of 2

Members. Each person has a role and a tier (seat type). Export CSV gives you the roster for finance.

Four roles

Primary Owner	One per org. Owns the org's data and can request a full export.
Owner	Buys seats, sets policy, manages Admins and Owners.
Admin	Invites and removes members.
User	Uses Claude.

Two seat types

Standard covers most people and includes Claude Code. **Premium** adds usage, about five times a Standard seat. Mix them freely and move people between them as their use changes. Members do not see which seat they have.

Showing 1-2 of 2

Add member

Billing charges for new team members will be prorated based on the date they are added. [Learn more](#)

By email

By invite link

Email *

Upload CSV

Type or paste in emails separated by commas or new lines

Role

Tier

User

Standard

Add member

Add member. Paste a list of emails or upload a CSV, then set role and tier for the batch. New seats are prorated and charged right away.

Watch your seat count: a pending invite holds a seat as soon as it is sent, and invites expire after 21 days. Seat reductions only take effect at renewal, with no prorated refund, so add seats as you need them rather than all at once.

Add a second Owner on day one. The setup checklist asks for it for a reason: if the only Owner is out, nobody can buy seats or change policy.

One invoice, and a plan for your heaviest users

Billing

Your plan

Current plan	Seats	Next invoice	Projected total
Team plan	2 (0 available) ↗	Nov 25, 2026	\$50 👁

Payment

Your default payment method is charged for subscription renewals, extra usage, and auto-reload.


Default
Update

Invoices

Date	Members	Total	Status	Actions
Oct 25, 2026	2	\$50	Paid	View

Cancellation

Cancel plan
Cancel

Billing. One plan, one payment method, one invoice. Two Standard seats on monthly billing come to \$50.

Settings

Search

General

Account

Privacy

Billing

Usage

Capabilities

Memory

Design systems

Reflect

Time and focus

Claude Code

Claude in Chrome

Customize

Skills

Your usage

Max (20x)

On track. You should reach Wednesday's reset with room to spare.

Current session

Resets at 7:10 PM

4% used

This week

Resets Wednesday 3:00 PM

13% used

Limit resets

No resets right now

When you get one, it shows up here with its expiry date.

Cloud session credits

Applies automatically to cloud sessions. After it's used or expires, your plan's regular usage applies.

Included credit

Expires 2:59 AM EST, November 5

\$250 of \$250 left

Usage

Usage and spend limits

Manage spending for Claude usage charges

Turn on usage credits

Users can use Claude after exceeding their rate limit with usage-based pricing

☐

Usage credit requests

Let team members request usage credits when they reach their limits. [Learn more](#)

☒

Services

Manage spending for automated services and integrations

Service	API requests	MTD spend	Spend limit
Claude Code Review	-	-	Unlimited

[Set up](#)

Team, Usage. Usage credits keep people working past their seat's limit, billed at API rates with caps you set.

Personal Max 20x usage. A five hour session limit and a weekly limit.

Your Max 20x people will notice. A Premium seat is about 6.25 times Pro per session. Max 20x is 20 times. If someone lives in Claude Code all day, turn on usage credits with a monthly cap for the org and per person, or expect complaints in week one.

Since October 7, 2026 Team plans also earn monthly API credits (\$20 per Standard seat, \$100 per Premium seat, pooled, capped at \$500 a month) once a Console organization is linked after seven days on the plan. Unused credits expire each cycle.

The project everyone depends on stops living in one person's account

On a personal plan, a great project (instructions, reference files, a working prompt) belongs to whoever built it. In a Team org it can be shared with specific people, or published to the whole company under the Organization tab.

Data and privacy

Sharing

Data controls

Privacy controls

Monitoring

Sharing

Share chats

Allow people to share chats with others in your org. Sharing chats from the new unified chat and cowork experience that have run on Anthropic's cloud also requires [Share cloud sessions](#) to be on.

Set by admin ☒

Share chats that use connectors

Allow people to share chats that use connectors with others in your org. Recipients will see Claude's response, but not the data from the connector.

Set by admin ☒

Share chats with everyone in your organization

Allow org members to share chats with everyone in your organization. When this is off, they can share only with specific people and groups.

Default ☒

Share chats externally

Allow people to invite someone outside your org to a chat by email. Recipients sign in with the invited address and get a view-only copy.

Set by admin ☐

Share cloud sessions

Allow your team to share their Claude Code cloud sessions with others in your organization. This also applies to chats in the new unified chat and cowork experience that have run on Anthropic's cloud; sharing those requires [Share chats](#) to be on as well.

Default ☒

Share projects

Let members share projects with specific people and groups in your organization. Turning this off also turns off Public projects.

Default ☒

Public projects

Let members share projects with everyone at your organization. Public projects appear in the Organization tab.

Set by admin ☒

Data and privacy, Sharing. Each kind of sharing has its own switch: chats, chats that use connectors, sharing with everyone, sharing outside the org, cloud sessions, projects and public projects.

Our default settings for a new org

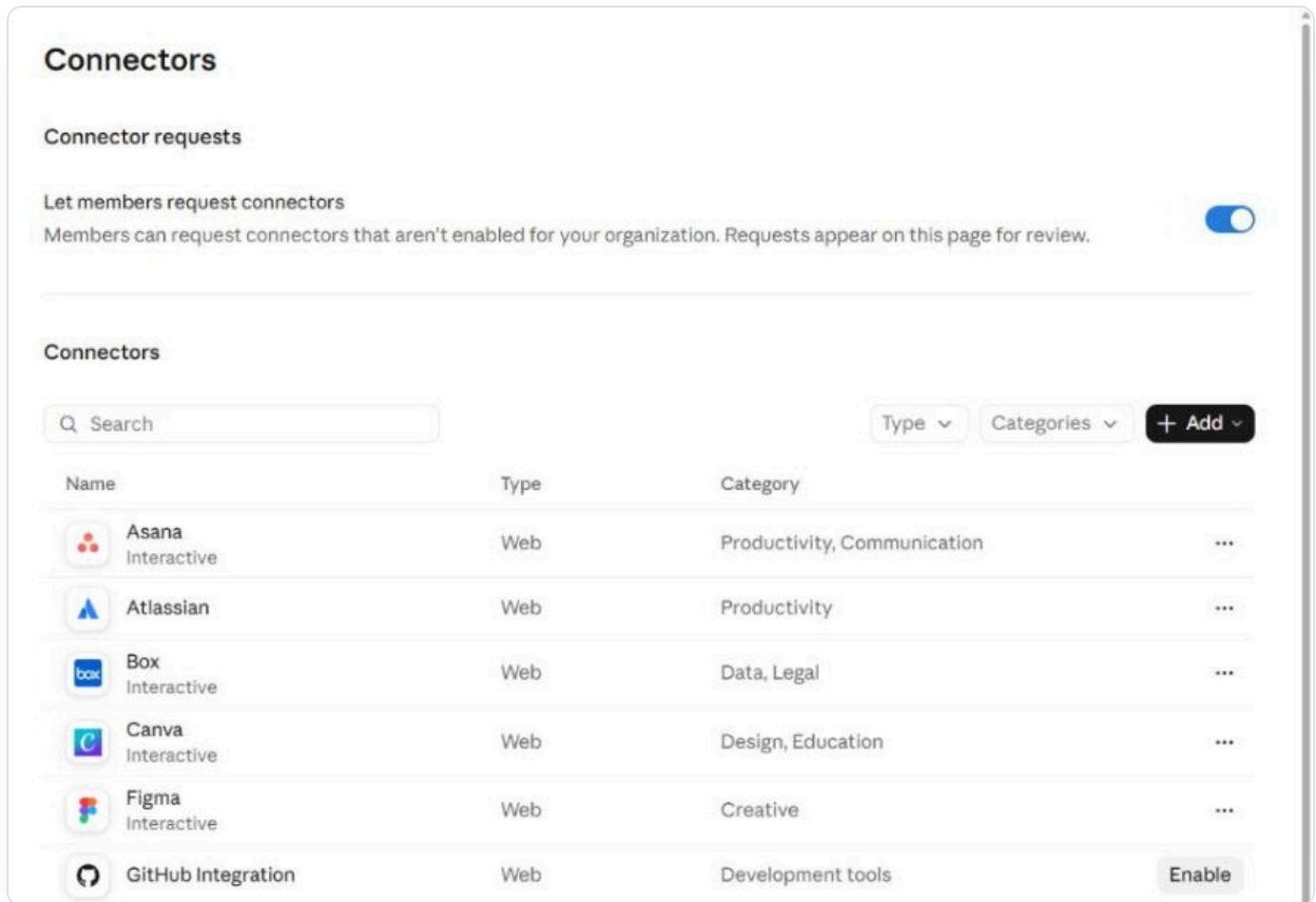
- **Share projects and Public projects: on.** This is where the value compounds. Seed two or three company projects before you invite anyone.
- **Share chats externally: off** until you have a reason. It lets people invite outsiders to a chat by email.
- **Share chats that use connectors: your call.** Recipients see Claude's answer but not the underlying connector data.



Claude Team Onboarding Guide

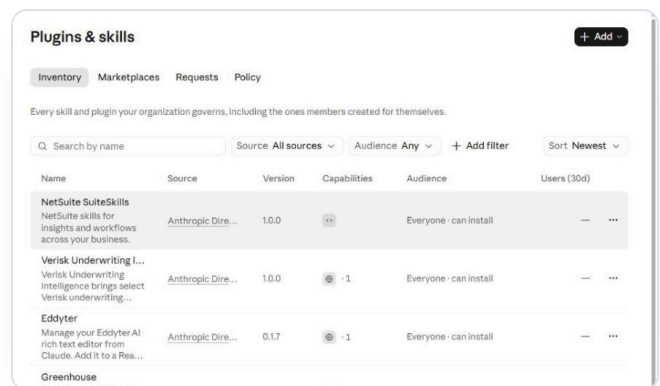
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Turn a tool on once instead of twenty times



Connectors. An Owner enables a connector (Google Drive, Gmail, Asana, GitHub and more) for the org. Each person still signs in with their own account, so they only see what they already have access to.

- **Keep "Let members request connectors" on.** Requests land on this page, which tells you what people actually need.
- **Only Owners can add custom connectors** on Team, and Owners can set each connector tool to always allowed, needs approval, or blocked.
- **Skills work the same way.** Owners upload company skills under Plugins and skills and every member gets them. Skills need code execution turned on.



Plugins and skills. One inventory of every skill and plugin the org governs, including the ones members made for themselves.

Decide how much Claude can do without asking

Capabilities is where you set the org's risk posture. These switches apply to every member, so set them before people arrive.

Tool approvals

Allow "Automatically approve" mode Chat Cowork

When enabled, users can let Claude approve actions on its own instead of approving each one—including using tools, editing files, and browsing websites. Claude pauses for anything that looks unsafe, but Claude can make mistakes. [Learn more](#)

Applies to Cowork and to the new unified chat and cowork experience. Does not apply to regular chats.

Default ☒

Start new tasks in "Automatically approve" mode Coming soon

When on, new tasks start in "Automatically approve" mode once that's the default for your plan. When off, they start in "Manually approve" mode. Members who have already picked a mode keep it for new tasks, and anyone can switch modes in a task. Scheduled tasks aren't affected.

Default ☒

Allow "Skip all approvals" mode Beta Chat Cowork

When enabled, users can let Claude act without asking for approval—including using tools, editing files, and browsing websites. This can put organizational data at risk.

Applies to Cowork, Cowork in the cloud, and, in the new unified chat and cowork experience, specifically to scheduled routines and the built-in browser. Unified chats themselves have no "Skip all approvals" mode.

Default ☐

Allow "Always allow" for connector tools Chat Cowork Code

Let members choose "Always allow" when approving connector tools. Only applies to tools that can make changes; read-only tools are not affected by this setting. This increases risk from prompt injection — content from connected apps could cause Claude to take unintended actions without per-use approval.

[Learn more](#)

Applies to Cowork, Cowork in the cloud, Claude Code cloud sessions, artifacts, and the new unified chat and cowork experience.

Default ☐

Capabilities, Tool approvals. "Automatically approve" lets Claude act on its own and pause on anything unsafe. "Skip all approvals" and "Always allow" for connector tools remove the pause entirely. Both of those ship off; leave them off until you have a use case.

Code execution

Cloud code execution and file creation Chat

Allow Claude to execute code on a server and create and edit docs, spreadsheets, presentations, PDFs, and data reports. Required for skills. Available on web and desktop. This applies to all members of your organization.

Default ☒

Allow network egress Chat Cowork

Give Claude network access to install packages and libraries in order to perform advanced data analysis, custom visualizations, and specialized file processing. Monitor chats closely as this comes with security risks.

Default ☒

ⓘ Network egress controls do not apply to web search, web fetch, or MCP connectors. Web fetch runs through Anthropic servers and is limited to URLs found in the user prompt or web search results.

Domain allowlist

Choose which domains the sandbox can access Package managers only

ⓘ Claude can access common package managers plus any additional domains you specify. [View package manager domains](#)

Additional allowed domains

example.com or *.example.com Add

Code execution and remote sessions. Network egress, a domain allowlist for the sandbox, computer access and routines.

Memory

Enable memory for your team

Each team member's Claude can remember context from their own past chats. Memory stays private to each person. [Learn more](#)

Default ☒

Sensitive topics in memory

Allow members to let Claude save details about sensitive topics like health conditions or religious beliefs to memory. Each member chooses whether to turn it on. [Learn more](#)

☐

Memory. One switch for the org. Memory stays private to each person.

Decide memory on purpose. Anthropic's notes and our live org did not agree on the default, so check the switch rather than assume.

Every seat includes Claude Code. Set the rules before the developers do.

Claude Code

Managed settings

Define permissions, allowed directories and more for your entire org. This will override user and project settings and applies to Claude Code in the CLI, IDE, and Desktop app. The marketplace allowlist and blocklist set here (`strictKnownMarketplaces` , `blockedMarketplaces`) also apply when anyone in your organization adds a marketplace from a Git repository in Chat, Cowork, or Organization settings. [Learn more](#)

Manage

Desktop

Allow your organization to code with Claude in the desktop app.

Default ☒

Browser site permissions

Control which sites Claude can act on in the built-in browser. Shared with Claude in Chrome.

Manage site permissions

Cloud sessions

Allow your organization to code with cloud sessions. Turning this off also turns off Remote Control.

Default ☒

Remote Control

Allow your team to continue local Claude Code sessions from [claude.ai/code](#) or the Claude mobile app. Sessions run on the user's machine with full access to their local filesystem, tools, and project configuration. Requires cloud sessions to be on. [Learn more](#)

Default ☐

Cloud session settings

Default environment

The environment preselected when members start a new Claude Code cloud session. Only environments shared with your organization can be the default.

No default ▾

Cloud sharing

Cloud sharing settings have moved to Data and privacy.

Manage sharing settings

Quick setup Preview

Allow your team to launch cloud sessions using their local GitHub credentials.

Default ☐

Claude Code. Managed settings, desktop and cloud sessions, Remote Control, and code review.

- **Managed settings** override user and project settings across the CLI, IDE and desktop app: permissions, allowed directories, plugin marketplaces. They need Claude Code 2.1.38 or later. One policy covers the whole org on Team, and Anthropic describes them as a client side control, not a security boundary.
- **Cloud sessions and Remote Control** let people run or continue coding sessions from the browser or phone. Remote Control gives a session full access to that person's machine, which is why it ships off.
- **Fast mode** bills from usage credits at a higher rate, so it only works once credits are on.

Three choices at the invite, and one of them is final

When someone with a personal Pro or Max plan on the same email accepts the invite, Claude asks what to do with the personal account.

CHOICE	WHAT HAPPENS	BEST FOR
Keep both	Personal account stays as it is. Nothing moves. Their personal subscription keeps billing.	People who use Claude for life outside work too
Move to the org, bring data	Personal account closes. Chats, projects and memory move into the org. Pro or Max is cancelled with a prorated refund.	Accounts used only for work
Move to the org, delete data	Personal account closes with a prorated refund. Nothing moves.	A clean start

Moving is one way. Once history moves into the org, the company owns it. Anyone who mixed personal and work use should keep both and rebuild the few work projects they need inside the org.

What moves

- Chats and the artifacts inside them
- Projects, project instructions and files
- Memory
- Some Claude Code personal settings

What does not

- Custom skills and custom connectors
- Connector and app sign ins
- Published artifacts and public share links (these stop working)
- Cloud sessions for Claude Code and Cowork

The Apple trap. Refunds are automatic for plans bought on the web or through Google Play. If someone pays through the Apple App Store, moving does not cancel it. They must cancel in their Apple ID settings, or Apple keeps charging.

People who change their mind later can still move: Settings, Account, "Close your personal account". A person can also belong to more than one Team or Enterprise org.

Configure first, invite second, lock down last

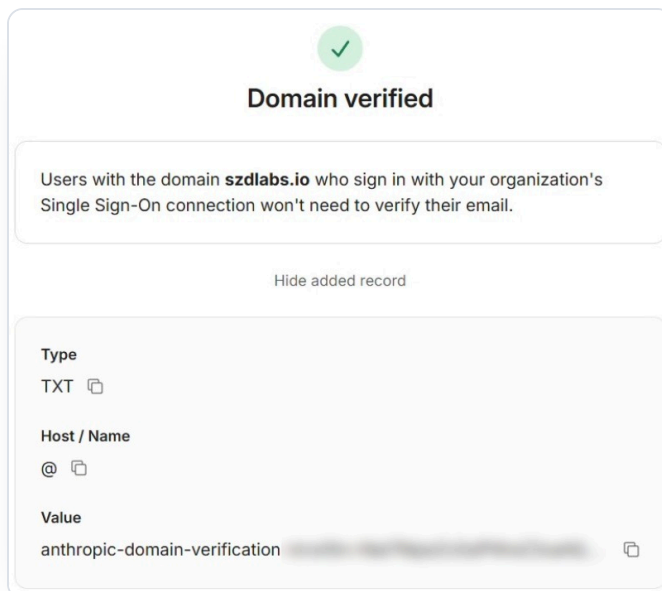
Anthropic does not publish a rollout order. This is the one we use.

Before you create the org

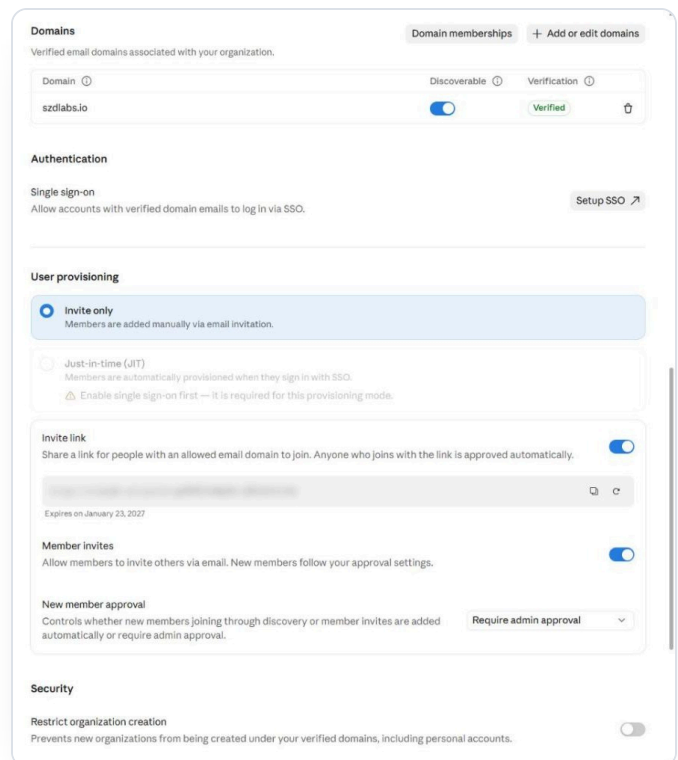
- 1 **Take inventory.** Who pays for Claude today, on which plan, through which store. Who uses Claude Code daily. Who has public links or published artifacts other people rely on.
- 2 **Pick seats.** Standard for most people. Premium for the people who hit limits on Max today.

Day one: set up the org

- 3 **Create the org** at claude.ai with a company email (Gmail and other public domains cannot create one). Choose Team, then monthly or annual billing. Buy only the seats you need this week.
- 4 **Verify your domain before anything else on it.** Anthropic gives you a TXT record; add it at your DNS host (Host @) and wait for the check to pass. SSO needs a verified domain, people on your domain who sign in through your SSO skip the email check, and in our org it also locked model training off on personal accounts on the domain. Then add a second Owner.
- 5 **Set the policy:** sharing (section 7), capabilities and memory (section 9), connectors and skills (section 8), Claude Code managed settings (section 10), Organization instructions (section 4), usage credits and caps (section 6).
- 6 **Seed two or three company projects** with the instructions and files people need on their first day.



Domain verified. One TXT record at your DNS host (token blurred here). SSO sign-ins on the domain now skip the email check.



Organization and access, lower half. Domains, SSO, provisioning, the invite link (blurred here) and approval rules.

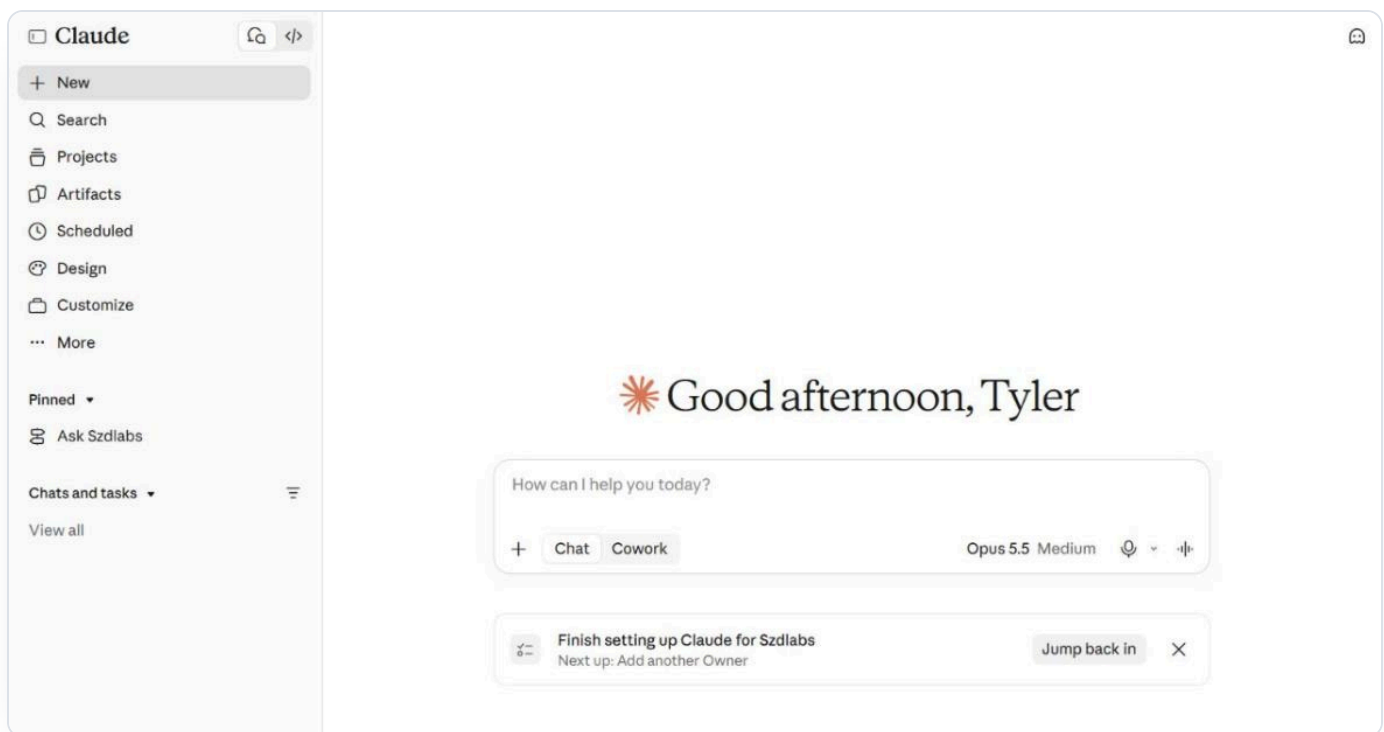
Invite with intent

Week one: invite

- 7 **Invite by email, not by link.** Email invites let you set each person's role and seat. The invite link is on by default, approves anyone with an allowed email domain automatically, and gives the lowest seat tier. Turn it off until you want it.
- 8 **Send people a one paragraph note before the invite:** which choice to pick (section 11), the Apple App Store warning, and where the company projects are.
- 9 **Rebuild what does not transfer:** each person signs back in to their connectors, re-adds any custom skills, and replaces public links that broke.

Weeks two to four: lock down and tune

- 10 **Turn on "Restrict organization creation"** so nobody starts a new personal account or side org on your domain. It does not touch accounts that already exist.
- 11 **Set up SSO when you are ready.** Add every user to the identity provider app first. Requiring SSO locks out personal accounts on your domain that are not in the app, so warn people to export anything they need.
- 12 **Review usage weekly for the first month.** Move people between Standard and Premium, adjust credit caps, and approve the connectors people request.



Team home. Until setup is done, the home screen keeps reminding Owners of the next step.

Know the line before you sign

Team covers most companies under 150 people. Look at Enterprise if you need any of these:

- More than 150 seats
- SCIM provisioning or audit logs
- The Compliance API or custom data retention
- Claiming personal accounts that already exist on your domain
- Custom roles, groups, or skills for some groups only
- IP allowlisting, customer managed encryption keys or US only inference
- HIPAA readiness with a BAA
- Usage based billing without per seat caps

A self serve upgrade from Team to Enterprise keeps chats, projects, members and roles, and cannot be reversed.

The one page checklist

- ☐ Inventory who pays for Claude today, and how
- ☐ Create the org with a company email; buy this week's seats
- ☐ Verify the domain; add a second Owner
- ☐ Set sharing, capabilities, memory, connectors, skills, Claude Code and usage policy
- ☐ Write Organization instructions; seed company projects
- ☐ Turn off the invite link; invite by email with role and seat
- ☐ Tell people which account choice to make, and warn Apple subscribers
- ☐ Rebuild connectors, skills and broken links
- ☐ Restrict organization creation; set up SSO
- ☐ Review usage weekly for a month

About SZD Labs. SZD Labs helps small and mid-sized companies put Claude to work: setup, policy and hands-on training for the people who will use it. szdlabs.io

Sources

- claude.com/pricing
- support.claude.com: What is the Team plan (9266767); Purchase and manage seats (12004354); Roles and permissions (9267276); Move your personal account to a Team or Enterprise organization (9267400); Manage members (13133750); Manage usage credits (12005970); Control project sharing (9927533); Use connectors (11176164); Provision skills (13119606); Claim and migrate accounts (14625619); Monthly API credits (17154008)
- privacy.claude.com: Model training (7996885); Data retention for organizations (7996866). anthropic.com/news/updates-to-our-consumer-terms
- code.claude.com/docs/en/server-managed-settings

SZD Labs is independent and not affiliated with Anthropic. Claude is a trademark of Anthropic. Screens from a live Team org on October 26, 2026, with names, emails, payment details and links blurred. Anthropic changes plans often; check the sources before you buy.