

Your first Claude dashboard

How to turn your business numbers into live charts by asking a question in a chat. For people who have never used it.

WHAT IT IS

Charts of your own numbers, built by asking

Claude Dashboards is a new feature from Anthropic, the company that makes Claude. You connect the place where your numbers live, ask a question in plain words, and Claude builds a page of charts that answers it.

WHAT IT DOES

Finds the numbers, draws the charts, keeps them current

- **Answers a question with charts:** you ask, Claude looks up the numbers and lays them out.
- **Stays up to date:** the charts refresh when the numbers behind them change, and each one shows when it was last updated.
- **Shows its work:** behind every chart is the exact request Claude made to your data. You can open it and check it.
- **Can be shared:** it is private to you until you choose to share it.

WHAT IT IS NOT

Know these three limits before you start

- **It needs your data to be connected.** Claude cannot chart numbers it cannot reach. Step 1 covers this.
- **It is for exploring, not for your accounts.** The published advice is to use it for quick answers, not as a replacement for a full reporting system.
- **It can be wrong.** Check a number before you rely on it in a meeting or send it to a client.

WHAT IT REPLACES

Building the same chart by hand every month

Without it, answering "how did this month go?" means exporting numbers and building a chart in a spreadsheet, every time. Here you ask once, and the page keeps itself current.

BEFORE YOU START

Check that your plan has it

Dashboards is in beta, which means it is new and still being finished.

YOUR CLAUDE PLAN	DO YOU HAVE DASHBOARDS?
Free	No.
Pro, Max or Team	Yes, in beta.
Enterprise	Only after an owner of your company's account switches it on. Ask them.

→ **To check your plan:** open Claude, click your name or initials in the bottom-left corner, then **Settings**. Your plan is shown under **Billing** or next to your name.

Make your first dashboard

These are the same five steps as in the video.

1 Connect your data.

First ask yourself where you would look up last month's sales: a spreadsheet, your customer system, your shop. That is what you connect. In Claude, open **Settings** → **Connectors**. A connector is a switch that lets Claude read from another app. Find the app where your numbers live and switch it on. It will ask you to sign in to that app and approve access. This is normal: you are giving Claude permission to read, and you can switch it off again in the same place.

Reported to work: Salesforce, the connectors Claude already has, and company data stores such as BigQuery and Snowflake. One report also names a sheet in Google Drive. If your app is not in the list, see the last page.

2 Open a new chat and ask a question.

How do this month's sales compare with last month's?

Ask a question, not a command. "How do this month's signups compare with last month's?" works better than "a signups chart". You can also click **Output** in the message box and choose **Dashboards**, or open the **Artifacts** tab and pick the **Dashboards** template. All three lead to the same place.

3 Wait while Claude builds it.

Claude works out which numbers it needs, fetches them and arranges the charts. This can take a minute. If it asks which data to use, pick the source you connected in Step 1.

4 Check one number yourself.

Pick one figure on the dashboard and compare it with the same figure in your own app. Each chart shows when it was last refreshed, and lets you open the request Claude used to get the number. If the two do not match, tell Claude which number is wrong and what it should be.

5 Click Share when you want someone else to see it.

A dashboard is private to you until you share it. People you share with see only the data their own account is allowed to see. That's it.

AFTER THE FIRST VERSION

Change what it shows

Stay in the same chat and ask for changes in plain words.

IF YOU WANT	TYPE SOMETHING LIKE THIS
A different period	Show the last six months, month by month.
A breakdown	Split that by product.
One more chart	Add a chart of new customers per week.
A correction	March looks too low. Check it against the source.

These four are our examples, written in the pattern the published instructions recommend. We have not been able to test them ourselves.

GOOD TO KNOW

Connecting an app lets Claude read it. Only connect what you are comfortable with, and switch a connector off in Settings → Connectors when you are done. **Think before you share:** a dashboard can hold customer names and revenue. **It uses your plan's allowance**, like any other chat.

STARTING POINTS

Three questions to copy

Copy one, replace the parts in [square brackets], and send it. Treat these as starting points: we wrote them from the published instructions and have not tested them in Dashboards.

1 · HOW IS THIS MONTH GOING?

How do this month's [sales / bookings / signups] compare with last month's? Show the total for each month, the difference, and a chart by week.

2 · WHO ARE MY BEST CUSTOMERS?

Who were my top 10 customers by [revenue / number of orders] in the last [3 months]? Show a ranked chart and what share of the total each one is.

3 · WHERE DOES MY WORK COME FROM?

Where did my new [customers / leads] come from in the last [90 days]? Group them by [source / channel] and show which source brought in the most [revenue].

IF IT DOES NOT WORK

The two usual reasons

- **"I cannot find Dashboards."** Check your plan on page 1. If you are on Pro, Max or Team and still do not see it, the feature is rolling out in beta and may not have reached your account yet. Update the Claude app or reload the page and try again later.
- **"My app is not in the Connectors list."** Then Claude cannot reach those numbers directly yet. The reports disagree on whether a plain spreadsheet works, so try it: put your numbers in a Google Sheet, connect Google Drive, and ask your question about that sheet.

WHAT THIS GUIDE DOES NOT COVER

Connecting everything, and making it run without you

This guide gets you one working dashboard. It does not cover connecting several apps at once, cleaning up messy data so the charts are right, or having Claude send you the numbers every morning without being asked. That is a longer build, and it is easier with someone to ask when you get stuck.

Join the community. The link is on my profile. That is where the full setup is taught, step by step.

About this guide: the facts about Claude Dashboards come from published coverage of the launch, checked on 11 October 2026, not from our own use of the product. Plans, buttons and supported apps can change while it is in beta. If something on your screen differs from this guide, trust your screen.