FREE TO DO YOURSELF

CHASE TRACKER

CLAUDE DRAFTS. YOU DECIDE.

Claude prepares the follow-up. You decide what goes out.

THIS PACK HAS THREE FILES

1 **EXCEL TRACKER**
CHASE-TRACKER_tracker.xlsx
Your list of live chases. Excel.

2 **SET UP INSTRUCTIONS**
CHASE-TRACKER_setup-instructions.txt
For Claude. Attach it to Claude. You do not need to read it.

3 **USER GUIDE**
CHASE-TRACKER_user-guide.pdf
This guide. Attach it to Claude too. Visual summary on the last page.

YOU NEED

- A paid Claude plan: Pro or above.
- A paid Microsoft 365 business plan, with Outlook and OneDrive. A personal account does not work.
- A Windows computer that is on when you run the daily check.
- Permission from your company to use work email with AI.
- Approval from your IT admin to connect Claude to Microsoft 365, if your company needs it.

riozzie AI
PRACTICAL TRAINING
FOR NZ RESIDENTIAL BUILDERS
www.useriozzieai.com

SET IT UP

STUCK? ASK CLAUDE FOR HELP.

Paste this into Claude: **Explain that more simply and tell me my next step.** Tell Claude what you see on your screen.

YOU NEED A PAID CLAUDE PLAN

This tool does tasks for you. It needs Claude Pro or above, which also gives more usage. To upgrade, click your name at the bottom left. Click **Settings**, then **Billing**.

Tip: Click this guide. Press Windows + Left. Click Claude. Press Windows + Right.

Steps

1 Install the Claude desktop app. In your web browser, go to claude.ai/download. Click **Download**. Open the file from your Downloads folder.
2 Open the Claude app. Sign in, or create a Claude account.
3 Find the **blue cloud** near the clock at bottom right. This is your work OneDrive.

Stuck? Ask Claude for help.

4 No blue cloud? Click **Start**. Type **OneDrive** and open it. Sign in with your work email.
5 Open File Explorer (yellow folder). Find **OneDrive - [your company]** on the left.
6 In your Downloads folder, right-click **CHASE-TRACKER_pack.zip**. Click **Extract All**. Click **Extract**. A folder opens with the three files.
7 In that folder, click the Excel tracker once. Press **Ctrl** and **C** to copy it.
8 Open the OneDrive folder. Press **Ctrl** and **V** to paste the copy. Right-click the copy. Select **Always keep on this device**.
9 In Claude, click **Customize** on the left side. Click **Connectors**, then **Microsoft 365**, then **Connect**. Sign in with your work account.
10 Click **New** at the top left of Claude.
11 Click **+** at the bottom left of the message box. Select the set up instructions and this user guide from that folder.

COPY AND PASTE INTO CLAUDE

Help me set up this Chase Tracker. Read the set up instructions and the user guide. Work through the setup with me one step at a time. Ask only for information you do not have. Do not send any emails.

12 Answer Claude's questions. Claude asks for access to your OneDrive folder. Allow it.
13 Claude makes the daily check. You run it each morning with **Run now**. A set time is optional.

What done looks like

- A test chase is in the Excel tracker, on the CHASE LIST tab.
- A test email is in Outlook Drafts. Nothing is sent.
- The daily check shows under **Scheduled** on the left side.
- You clicked **Run now** once and watched it. It did not ask for folder access.

USE IT EVERY DAY

At each check, Claude reads new email about your chases. It updates the tracker and puts follow-ups in Outlook Drafts.

- Friendly confirmation: 1 working day before the due date.
- Direct chase: 1 working day after the due date.
- Escalation review: 3 working days after the due date.

Tell Claude your public holidays and your Christmas shutdown.

KEEP THE DAILY CHECK RUNNING

1. Each morning, click **Scheduled** on the left side. Click the daily check. Click **Run now**.
2. Set Windows sleep to **Never**. Go to **Settings**, then **System**, then **Power**.
3. Keep the laptop lid open. A closed lid puts the computer to sleep.
4. Keep the Claude desktop app open.
5. If OneDrive asks you to sign in, sign in again.
6. Close the Excel tracker before the check, or changes will not save.
7. In Claude, click **Scheduled** on the left side. Click the daily check. Check that **Require this computer** is on. Check that your OneDrive folder shows on the task.
8. Set a time? If no new result shows 30 minutes later, click **Run now**.

COPY AND PASTE INTO CLAUDE

Track the foundation drawing that Jo Bloggs promised today for Smith House. Show me what you saved.

COPY AND PASTE INTO CLAUDE

Show me the changes from the last check and the decisions you need from me. Do not send emails.

Check the item before you close a chase. Tell Claude the job and item. Use your own job, name and date. Send drafts from Outlook.

KEEP IT PRIVATE AND SECURE

- Get approval from your company to use email with AI. Do a Privacy Impact Assessment.
- In Claude, click **Settings**, then **Privacy**. Set **Help improve Claude** to your company rule.
- Connect only the folder and the connector that this Excel tracker needs.
- In Windows, turn on **Device encryption**: **Settings**, then **Privacy & security**. Keep Windows Update on. Lock your screen with a PIN.

Read more: Privacy Commissioner: AI | MBIE: Responsible AI guidance

THREE WAYS TO RUN IT

Promises stop living in inboxes. Every chase has a date, an owner and a draft ready when it is due, and you still decide what goes out.

Pick the way that suits how you work. Each way teaches you the method, so you can use it again in other parts of your business.

DO IT YOURSELF FREE	DO IT WITH ME PAID	DONE FOR YOU PAID
WHAT HAPPENS You have everything in this pack. Claude walks you through setup, one step at a time. You learn the method as you go. **BEST FOR** Owners who like to try it themselves first. **START** **Turn to page 2.**	**WHAT HAPPENS** I coach you through setup and everyday use. You do the work with me alongside. You learn the method, so you can use it in other parts of your business. **BEST FOR** Owners who want to learn it properly and run it themselves. **START** **Book a call.**	**WHAT HAPPENS** I set it up on your email and your jobs. Then I show you and your team how it works, so you can reuse the method. I can add features for your use, for example a lead's readiness to buy. **BEST FOR** Owners who want it running without doing the setup. **START** **Book a call.**

WANT IT DONE WITH YOU, OR FOR YOU?

Book a call: calendly.com/riozziedeb/discovery-call
Email me: deb@riozzieai.com

Deb | riozzie AI Practical Training | www.useriozzieai.com

WHERE TO LOOK

The setup on one page. Numbers match the steps on page 2 of the user guide.

YOU DO THIS

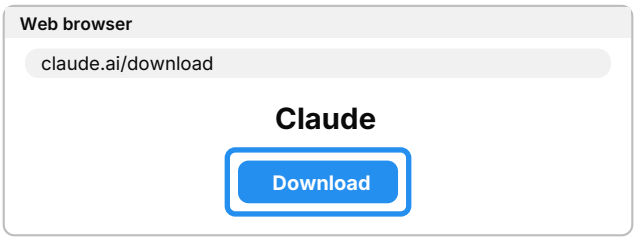
CLAUDE DOES THIS

SET IT UP

Stuck? Ask Claude for help.

1 INSTALL CLAUDE

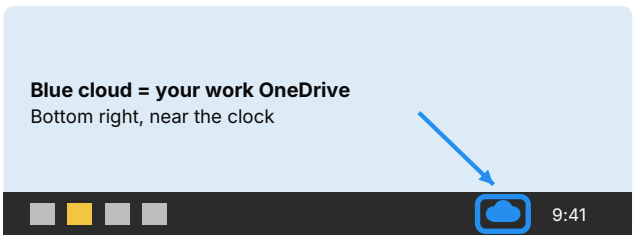
STEPS 1 AND 2 — YOU



Go to claude.ai/download. Click Download. Open the file. Sign in.

2 FIND THE BLUE CLOUD

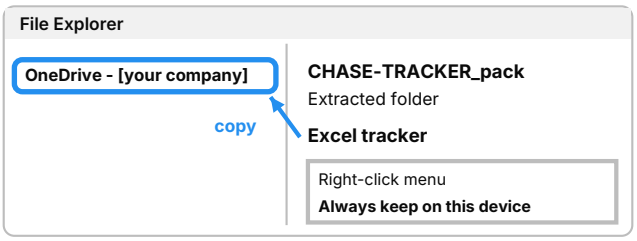
STEPS 3 AND 4 — YOU



No blue cloud? Click Start, type OneDrive and open it. Sign in with your work email.

3 EXCEL TRACKER INTO ONEDRIVE

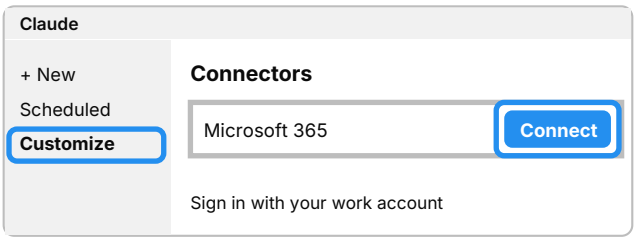
STEPS 5 TO 8 — YOU



Right-click the ZIP. Click Extract All. Click Extract. Copy the Excel tracker into OneDrive.

4 CONNECT MICROSOFT 365

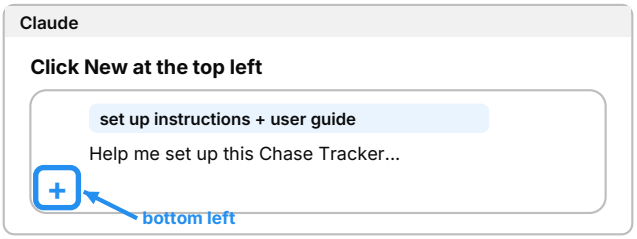
STEP 9 — YOU



Click Customize on the left side. Click Connectors, then Microsoft 365, then Connect.

5 ATTACH AND PASTE

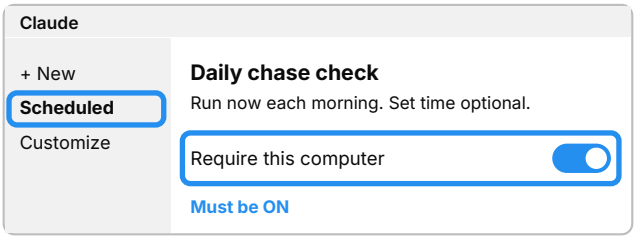
STEPS 10 AND 11 — YOU



Click New. Click + at the bottom left. Select the set up instructions and this guide. Paste the blue box.

6 CONFIRM THE DAILY CHECK

STEPS 12 AND 13 — YOU



Answer Claude's questions. Allow folder access. Click Run now each morning.

EVERY WORKING DAY

1. **Email arrives in Outlook** — OUTLOOK
2. **Claude reads it** — CLAUDE
3. **Claude updates the Excel tracker** — CLAUDE
4. **Claude puts a draft in Outlook Drafts** — CLAUDE
5. **You check it and send it** — YOU

Claude never sends an email. You decide what goes out.

Pictures are simplified. Your screen can look different. Tell Claude what you see.