Desktop setup

The project planner and project intake tools run as skills in your own Claude account, with the cost template beside them. Set up once at a computer, about five minutes; the tools then work from your phone as well.

You need: a computer for the setup, an email address, and a Claude account. A free account is enough to start. Menu names are as they appeared in Claude in November 2026 and may change.

1 Sign in to Claude

Go to `claude.ai` and sign in, or create an account.

2 Turn on file creation

Open **Settings**, then **Capabilities**, and switch on code execution and file creation. The tools build a claim file as they go and will not run without it.

3 Download the desktop kit

On rdbase.ca, in the Desktop row, choose **Download everything**. Unzip `RDBASE-desktop-tools.zip`. Inside are four files:

FILE	WHAT IT IS
`sred-project-planner.zip`	The planner skill, for research still to do. Leave it zipped.
`sred-project-intake.zip`	The intake skill, for research already done. Leave it zipped.
`RDBASE-cost-template.xlsx`	The cost template, for Excel or Google Sheets.
`README.txt`	These steps in short form.

4 Upload the two skills

In Claude, open **Customize**, then **Skills**, then **+**, **Create skill**, **Upload a skill**. Upload the planner .zip, then repeat for the intake .zip. One at a time.

5 Make a Project for the company

Create a Claude Project named after the company and its fiscal year end, for example *ABC Inc. FYE 2026-12-31*, and keep one claim file in it. Advisors with several clients keep one Project per client and never mix two companies in one conversation.

6 Describe what you are doing

Start a conversation inside the Project. You do not have to name a tool. For example:

"We are trying to mill 1.2 mm thin-wall aluminium housings without chatter and I want to document it for SR&ED."

Claude uses the **planner** for research still to do: it helps benchmark what is already known, quantify objectives and plan experiments. It uses **intake** for work already finished: give it your reports and notes and it builds the project structure and asks for what is missing.

7 Number your projects

Start each number with the two digits of the year the work began, then a sequence: the first two projects started in 2026 are **2601** and **2602**.

8 Attach the costs

Open `RDBASE-cost-template.xlsx` in Excel, or upload it to Google Drive and open it with Google Sheets. Start on the **Read me** sheet and use the same project numbers on the **Projects** sheet. Hours, subcontractors, materials and capital then total by project.

9 Send it for review

When the claim file and cost template are ready, send both to your SR&ED preparer.

Getting back in. Sign in to Claude. Your tools are under Customize, Skills, and your claim file is in the Project you made for the company. Nothing needs reinstalling.

What the tools do not do. They record and check. They do not decide eligibility, give tax advice or file anything; a qualified preparer reviews and signs the claim. Use dummy data unless your engagement terms already cover putting client technical material into your Claude account. Free to use for your own claims and your clients' claims; not for repackaging or redistribution.