HOW TO TURN CLAUDE INTO YOUR **PERSONAL SQL EXPERT** (WHEN YOU DON'T KNOW SQL)

DAVID MERRY



THE PROBLEM

YOU INHERIT A LIBRARY OF COMPLEX SQL QUERIES

YOU NEED THE DATA

BUT YOU'RE AN ACCOUNTANT

NOT A DATABASE ENGINEER

DAVID MERRY



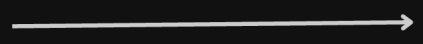
THE SOLUTION

BUILD A DEDICATED

SQL KNOWLEDGE BASE

USING CLAUDE PROJECTS

DAVID MERRY



STEP 1

CREATE A CLAUDE PROJECT

OPEN CLAUDE AND

SELECT PROJECTS IN THE SIDEBAR

CLICK “+NEW PROJECT” AND NAME IT

“FINANCE SQL EXPERT”

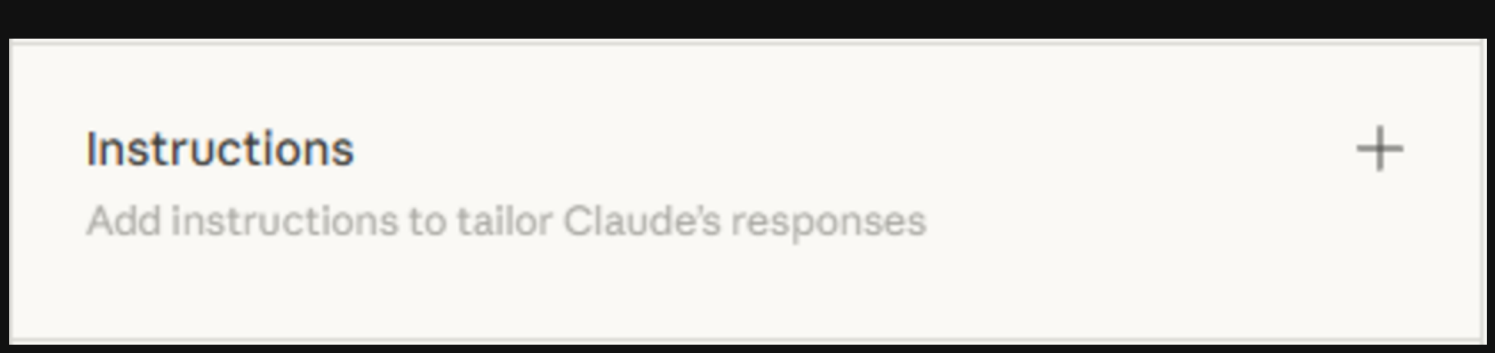


DAVID MERRY

STEP 2

ADD PROJECT INSTRUCTIONS

CLICK ON THE PLUS SIGN BESIDE
“INSTRUCTIONS” WITHIN THE PROJECT



PASTE IN YOUR SQL INSTRUCTIONS
NEXT SLIDE SHOWS YOU WHAT TO WRITE

DAVID MERRY

STEP 2 (CONT)

ADD PROJECT INSTRUCTIONS

COPY THIS INTO CLAUDE

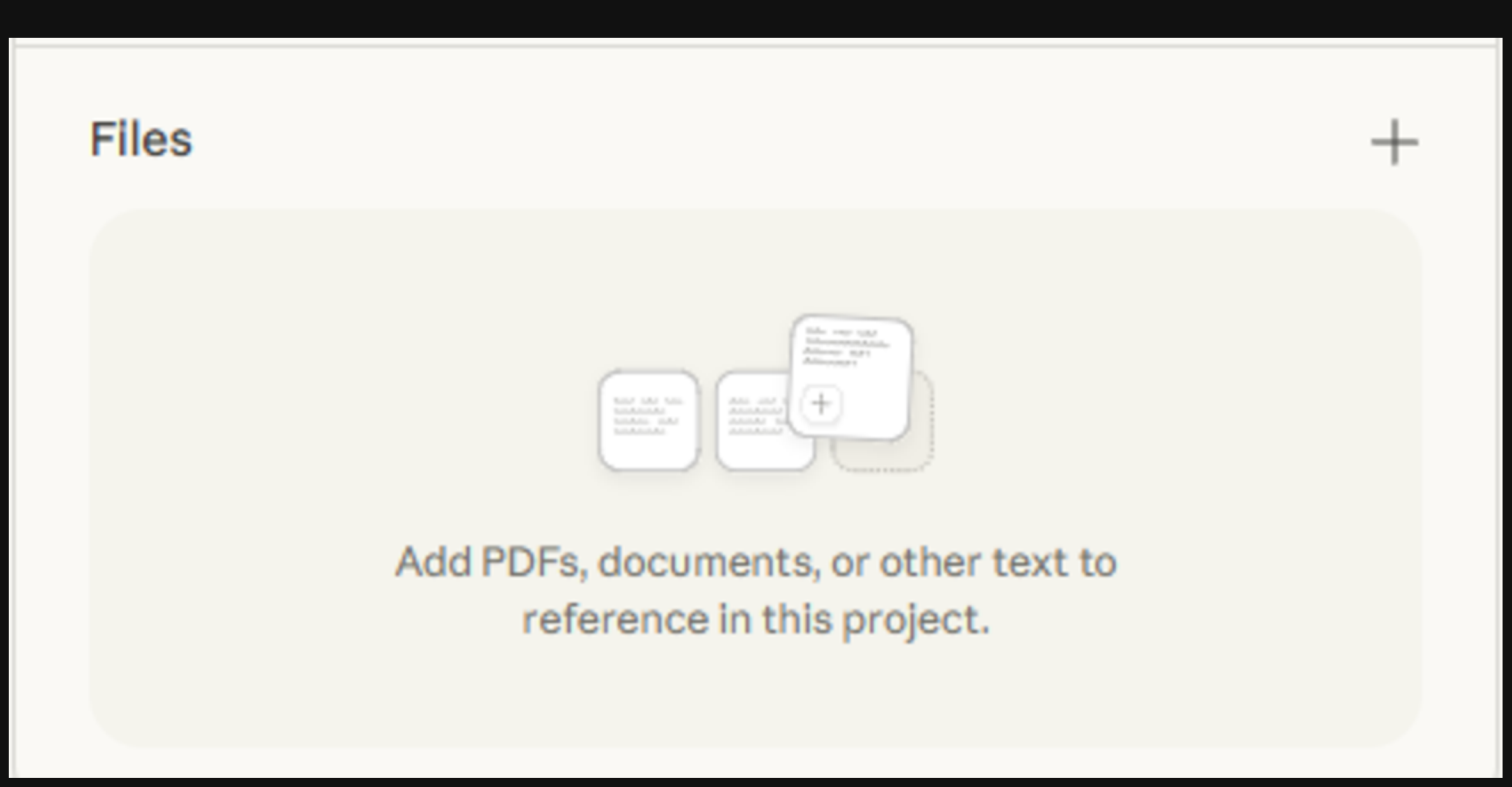
👇

YOU ARE MY SQL EXPERT. ANALYSE MY UPLOADED QUERIES AND RESULTS TO UNDERSTAND TABLE RELATIONSHIPS AND CONNECTIONS. USE THIS TO HELP ME BUILD NEW QUERIES. OPTIMISE MY EXISTING QUERIES WHERE POSSIBLE AND SUGGEST IMPROVEMENTS. EXPLAIN EACH QUERY IN PLAIN ENGLISH.

STEP 3

UPLOAD YOUR FILES TO THE PROJECT

CLICK ON THE PLUS SIGN BESIDE
“FILES” WITHIN THE PROJECT



DAVID MERRY

STEP 3 (CONT)

UPLOAD YOUR FILES TO THE PROJECT

UPLOAD YOUR EXISTING TXT FILES OR PASTE IN YOUR QUERIES DIRECTLY

UPLOAD SAMPLE QUERY RESULTS AS CSV OR EXCEL FILES

(THE MORE QUERIES AND RESULTS YOU CAN PROVIDE THE BETTER)

DAVID MERRY



STEP 4

START PROMPTING CLAUDE

EXAMPLE PROMPTS TO USE

- EXPLAIN THE [QUERY NAME] QUERY TO ME
- CREATE A QUERY BASED ON [QUERY NAME] BUT ADD TRANSACTION DATE / [INSERT REQUIRED FIELD]
- MY [QUERY NAME] TAKES A LONG TIME TO RUN. HOW CAN I OPTIMISE THIS?
- WHY IS THE [QUERY NAME] GIVING ME AN ERROR?

ARE YOU USING AI IN YOUR FINANCE ROLE?

DROP A COMMENT BELOW



DAVID MERRY

