

Claude x Carta Foundations Set-up Guidance

Upcoming Events

Join live sessions with startup experts, attend product education webinars, and connect with peers facing the same challenges as you.

<div><div>carta</div><div>● LEARNING LAB</div></div> <div>4. Corporate Governance</div> <div>■ PART 4 OF 4</div> <div>Thursday, Nov 5 10:00 AM - 11:00 AM PST</div> <div>Register →</div>	<div><div>carta</div><div>● LEARNING LAB</div></div> <div>1. Managing the Cap Table</div> <div>■ PART 1 OF 4</div> <div>Thursday, Sep 24 12:30 PM - 01:30 PM PDT</div> <div>Register →</div>
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Continue the conversation..

Collaborate with peers and industry experts while learning how to make Carta work for you:

- Learning Courses
- Customer chats
- Register for future **Learning Labs**

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Community

Q Search

Login

Tackle your equity, fundraising, and fund administration challenges— together.

Join Carta Community to connect with peers who use Carta like you do.

[Join the Community](#)



LIVE EVENTS

FIELD GUIDES

LEARNING PATHS

HOW TO VIDEOS

Welcome to Carta Learning

Self-paced learning resources aligned with **key company milestones**.

- Earn 50 points for each learning path course completed
- Complete all 'learning paths' and earn a Fully Vested Carta Admin badge

Start your learning path

How-to video library

Explore our field guides

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Agenda

Topic

- Introductions + Settle in
- Claude Foundations
- Build your Cap Table Home
- Equity Queries + Reporting Artifact
- Equity Issuance Demo
- Wrap up + Q&A

How to get help during the session

Type "**stuck**" or raise your hand 🖐️ in the chat.

The host will move you into a one-on-one help room.
Leave and rejoin the main session any time.

Use the Zoom desktop app, not the browser, so help rooms work.

Meet the speakers



Brianne Villamor
Customer Program Manager



Ashley Zhou
Product Team



Thiago Kühl
AI Specialist



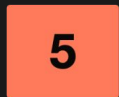
Igor Oliveira
AI Specialist

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Understanding Claude Tools

Arithmetic vs Word Calculator

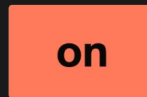
ARITHMETIC CALCULATOR



**Two numbers in →
one number out**

Always exactly 5. Every time.

WORD CALCULATOR

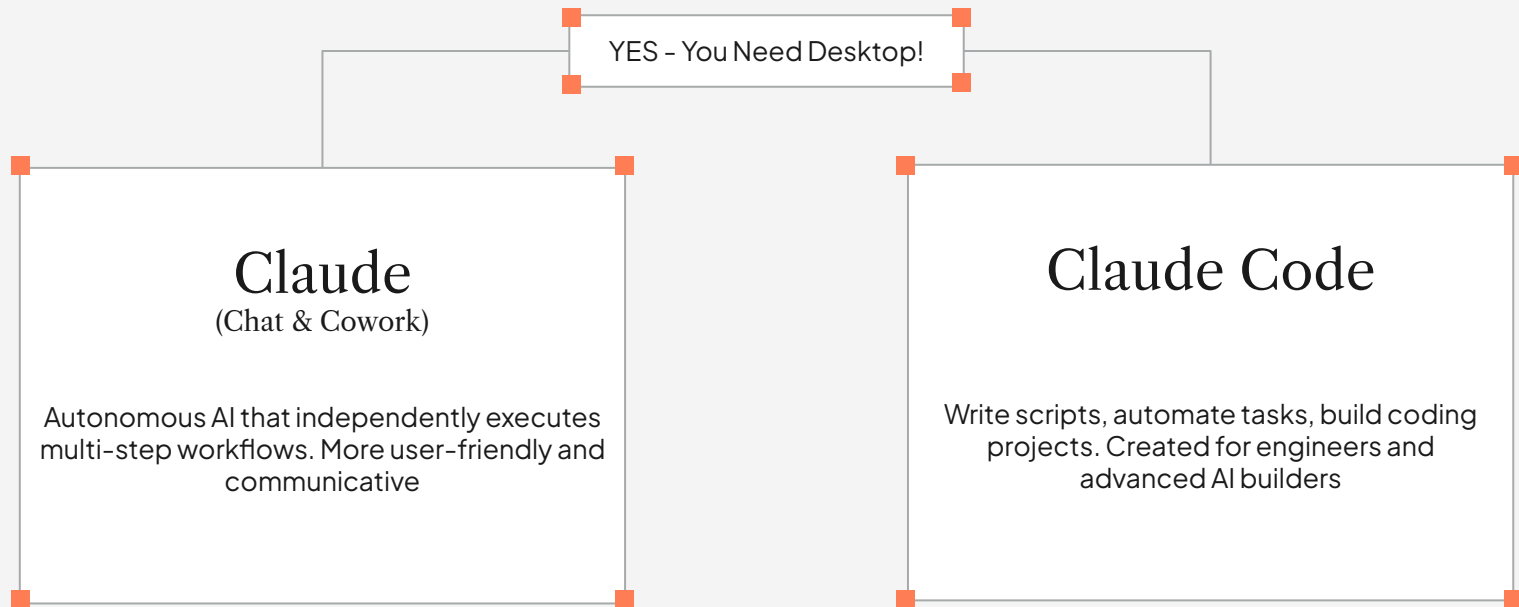


**Three words in → predicts the
most likely next word**

Probability, not arithmetic.

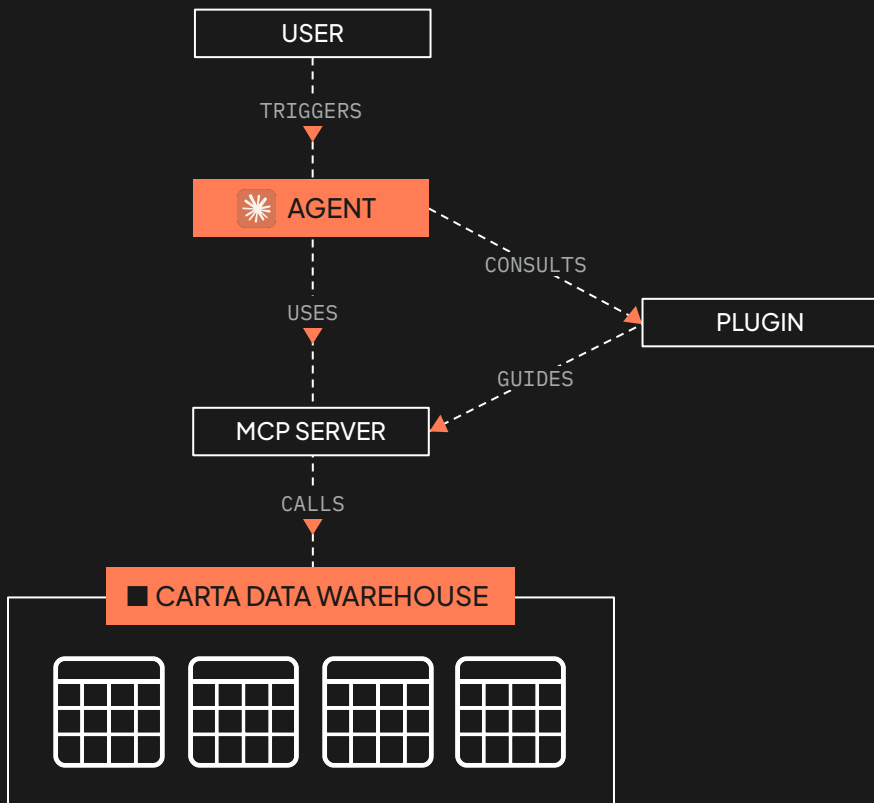
Claude Tools

Understanding the difference



What is an Agent,
MCP, plugin, skill, tool?

How does an AI agent work?



Agents: At their essence, Agents consist of two things: an LLM and a trigger. You can add context, skills, and tools to customize agents for specific use cases

Plugins: Make agents like Claude reliable by guiding them toward the right data source and more powerful with skills and artifacts out of the box

MCPs/Connectors: Superpowered data pipelines, giving Claude access to the broadest possible dataset on demand

What is a skill?

■ Skill

A saved set of instructions that combines multiple steps and tools into a reusable template. It includes folders of markdown files, code scripts, and tool calls, and is often bundled with other skills in a plugin

Skills teach Claude how to complete specific tasks in a repeatable way.

Analogy: Recipe of written steps for Claude to be used repeatedly and shared.

A **Carta skill** has been built with:

- Validated Carta data
- Permissions
- Accurate calculations
- Testing

FLUFFY FRUIT PANCAKES

With honey drizzle and fresh mint



Preparation: 10 minutes

Cooking: 15 minutes

Total: 25 minutes

★★★★☆

INGREDIENTS

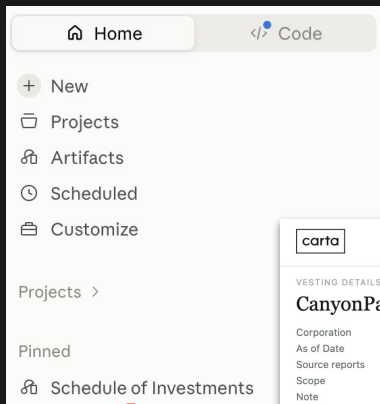
- ½ cup oat milk
- ½ cup all-purpose flour
- 1 ripe banana
- 1 tbsp maple syrup
- 1 tsp baking powder
- A pinch of cinnamon
- Mixed berries
- Mint leaves

For extra fluffy pancakes, let the batter rest for 5–10 minutes before cooking.

DIRECTIONS

- 1. Mash & mix:** In a bowl, mash the banana. Add oat milk and maple syrup, then whisk well.
- 2. Add dry ingredients:** Stir in flour, baking powder, and cinnamon until smooth. Avoid overmixing.
- 3. Rest the batter:** Let the mixture rest for 5–10 minutes.
- 4. Cook the pancakes:** Warm a non-stick pan. Pour small rounds and cook until bubbles appear. Flip and cook until golden brown.
- 5. Plate the pancakes:** Gently arrange the pancakes on serving plates matching the number of guests.
- 6. Serve with toppings:** Stack the pancakes on a plate, top with a handful of fresh berries, drizzle with honey and add mint leaves for a refreshing finish. Serve immediately while warm.

What is a live artifact?



Pin artifacts for easy access!

CONFIDENTIAL
Generated by Brianne Villamor via Claude

VESTING DETAILS, HISTORICAL TERMINATIONS, CANCELED AND RETURNED

CanyonPay

Corporation CanyonPay (4216693)
As of Date 2026-10-13
Source reports Vesting Details, Historical Terminations, Canceled and Returned (Carta Reporting)
Scope All grants, all issue dates, all stakeholders
Note SAR Terminations had 0 rows and is omitted. Some cells show (formula) where the Carta source report uses live Excel formulas.

Columns Excel export

Vesting Details: Equity Awards 141 rows

Issue Date	Stakeholder Name	Is Early Exercisable	Base Award Type	Vesting Schedule	Vesting Start Date	Awards granted
2017-03-15	Michael Torres	No	ISO	1/48 monthly, 1 year cliff	2017-03-15	—
2017-03-15	Rachel Kim	No	ISO	1/48 monthly, 1 year cliff	2017-03-15	—
2018-06-01	David Okonkwo	No	ISO	1/48 monthly, 1 year cliff	2018-06-01	—
2018-06-01	Emily Zhao	No	ISO	1/48 monthly, 1 year cliff	2018-06-01	—
2019-01-01	Nathan Brooks	No	ISO	1/48 monthly, 1 year cliff	2019-01-01	—
2019-06-01	Priya Patel	No	ISO	1/48 monthly, 1 year cliff	2019-06-01	—
2019-06-01	Thomas Whitfield	No	NSO	1/48 monthly, 1 year cliff	2019-06-01	—
2019-06-01	Linda Park	No	NSO	1/48 monthly, 1 year cliff	2019-06-01	—
2020-01-01	Andrew Foster	No	NSO	1/48 monthly, 1 year cliff	2020-01-01	—
2020-01-01	Samantha Liu	No	NSO	1/48 monthly, 1 year cliff	2020-01-01	—

Live Artifacts

Interactive views generated by Claude: dashboards, reports, tear sheets. Instead of exporting a static PDF or screenshot, you get a rich, visual output you can interact with and easily edit.

Each artifact is a structured data table with a defined use case, and should be built to quickly retrieve and analyze data you use regularly.

They are faster, more reliable, and cheaper to update than repeatedly using a skill

Analogy: Recipe of written steps for Claude to be used repeatedly and shared.

What the Carta cap table plugin can do

■ LOOK UP

Ask in plain language

409A history, unvested shares, a full picture of one employee's equity

■ BUILD

Build a cap table home or other reporting artifacts

An artifact you build once. Create your view and refresh any time.

■ ISSUE

Draft and issue directly from Claude

`/carta-issuance` uses the same defaults and validation as Carta

Where can this save you time?

■ GRANT CYCLES

Repeat work, done once

Describe who gets what or upload your spreadsheet directly to Claude

■ AUDIT PREP/REPORTING

Answers with sources

Ask Claude to cite the source and as-of date for every figure

■ MANY COMPANIES

Same skills everywhere

Run the same request across each cap table you manage

Prompting + Claude Customization

Claude prompt basics

■ 4 Requirements for a Great Prompt

Context: What Claude needs to know: source documents, connectors/plugins, existing skills

Goal: What output you want from Claude: grant information, 409a valuation data, employee specific information

Format: How you want outputs to be presented: branded PDF, spreadsheet, artifact structure

Constraints: What guidelines to follow: citing sources, context to ignore, actions it can't take

Important: Tell Claude to **ask you clarifying questions** along the way.

Use the /carta-reporting plugin to create a searchable report for CanyonPay (4216693) that includes all grant information: Vesting Details, Historical Terminations, and Canceled and Returned. I want to export custom views of this artifact to Excel. Cite the report you sourced the data from and ask any clarifying questions before building the artifact.

+

↑

Project or folder ▾

Sonnet 5.5 Medium Manual

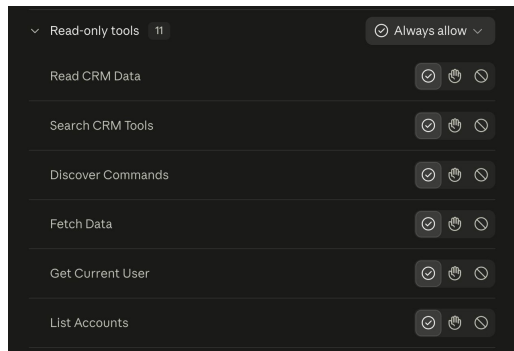
Setup and Permissions

Connector permissions

■ ALWAYS ALLOW

READ-ONLY TOOLS:

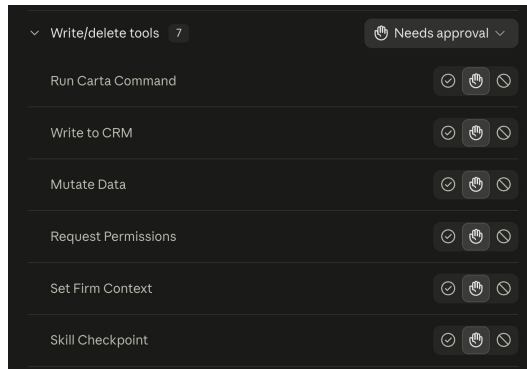
Lookups run without stopping to ask



■ NEEDS APPROVAL

ANYTHING THAT WRITES:

You see it before it happens



■ BLOCKED

OFF LIMITS:

Claude cannot use the tool

Let's try it live,
together!

Start a new chat

First, ask for authentication.
Then dive into your questions.

■ COMPANY SPECIFIC

- What's my 409A valuation history?
- Show the financing round history for [Company] and who invested in each round.
- Show me all SAFEs and convertible notes outstanding for [Company].

■ EMPLOYEE SPECIFIC

- Show me unvested shares for [Employee].
- When does [employee name]'s cliff hit, and how many shares are still unvested?
- Which awards are still awaiting acceptance?

■ THE FULL PICTURE

- Show me a full picture of [Employee]'s equity: holdings, what will vest or forfeit, or what was canceled.
- Export the full securities ledger for [Company] to Excel, sorted by issue date.
- Show me every option grant that's been granted at [Company] with its holder, quantity, and status.

Build your Cap Table Home (artifact)

1

Type `/carta-captable-home-build`

Or ask Claude to build you a cap table home, include the company name* and hit enter.

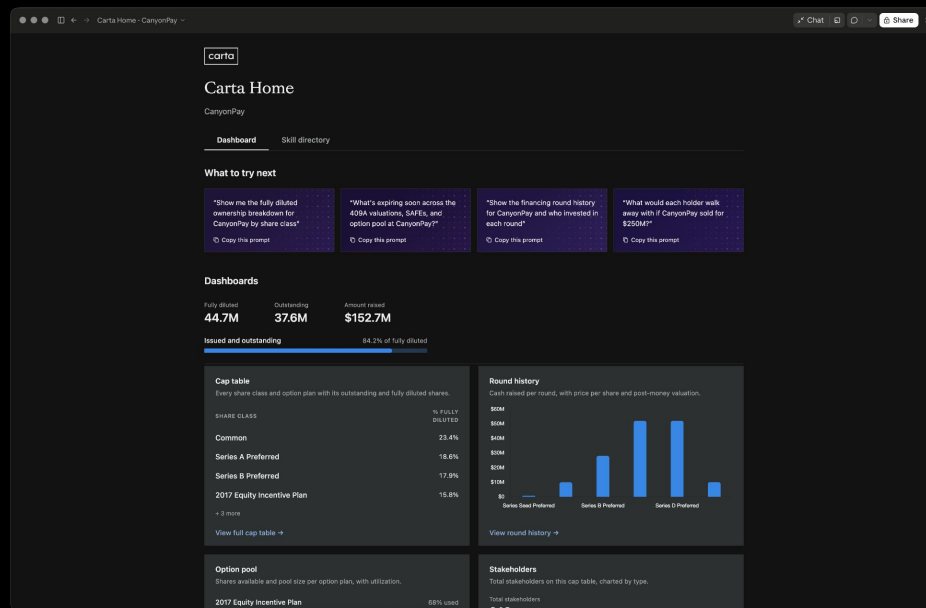
**if you have access to more than one company*

2

Your dashboard renders and pins in the sidebar.

This is an artifact: build it once, refresh it later. Use it as your launchpad and menu of skills.

Open a new chat for each question.



Reports can become artifacts

1

Ask for a report, not a single answer

Example: Use /carta-reporting to show me a report that includes all vested and unvested equity awards currently on the cap table. I

2

Keep it if you will revisit it.

These will refresh each time you interact with them.

Leave it if it was a one-off.

The screenshot shows a web browser window displaying the 'CanyonPay Grant Report' from Carta. The interface includes a top navigation bar with the Carta logo, a 'Chat' button, and a 'Share' button. The main content area is titled 'VESTING DETAILS, HISTORICAL TERMINATIONS, CANCELED AND RETURNED' and 'CanyonPay'. It lists various report sections with their respective row counts: 'Vesting Details - Equity Awards' (141 rows), 'Vesting Details - Certificates' (33 rows), 'Vesting Details' (5163 rows), 'Vesting Details - Performance Conditions' (5 rows), 'Historical Terminations - Grant Terminations' (30 rows), 'Historical Terminations - RSU Terminations' (1 row), and 'Canceled and Returned' (48 rows). A footer note states: 'Data sourced from Carta. Column selection, sorting, and display are Claude-computed best-effort analysis — not official Carta output. Verify financial data independently before relying on this report for legal or tax purposes.' A 'CARTA DATA - 2028-10-12' label is also present in the bottom right corner.

Corporation	CanyonPay (4216693)
As of Date	2026-10-13
Source: Vesting Details	Carta report 11318506, vesting_details_report, all stakeholders, all grants to date
Source: Historical Terminations	Carta report 11318507, historical_terminations_report, all stakeholders
Source: Canceled and Returned	Carta report 11318509, canceled_and_returned_report, all stakeholders, all grants to date
Note	Reports include all stakeholder types; none has a stakeholder type column

Columns Excel export

Vesting Details - Equity Awards 141 rows

Vesting Details - Certificates 33 rows

Vesting Details 5163 rows

Vesting Details - Performance Conditions 5 rows

Historical Terminations - Grant Terminations 30 rows

Historical Terminations - RSU Terminations 1 row

Canceled and Returned 48 rows

Data sourced from Carta. Column selection, sorting, and display are Claude-computed best-effort analysis — not official Carta output. Verify financial data independently before relying on this report for legal or tax purposes.

CARTA DATA - 2028-10-12

Equity issuance demo

1

Type `/carta-issuance` and describe the grant(s) or upload a spreadsheet

Example: Issue 1,000 ISOs to [Employee 1].

2

Review the draft before anything is created

Vesting, exercise price and/or items like board approval pre-fill from your company data.

The screenshot displays the Carta interface for creating an equity issuance. The title bar reads "Biscuitbyte employee options". The form includes fields for "Issue date" (09/04/2026), "Exercise price" (0.75), "Vesting template" (Standard Time-Based — 25% at 1yr cliff, then monthly), and "Grant expiration" (09/04/2036). Below these fields is a table with columns: Stakeholder, Relationship, Quantity, and Document set. The table lists seven entries for various stakeholders, including Founders and Employees, each with a quantity of 1000 and a corresponding document set (Senior Management Option Agreement or Junior Employee Option Agreement). A "Review grants" button is located at the bottom right of the table. On the right sidebar, the "Progress" section shows "Working folder", "Context" (Carta (Demo)), and "Skills" (carta-interaction-reference, carta-issuance). At the bottom of the form, a note states: "The form's up — issue date, exercise price, vesting, and per-person quantity/document set are all editable before you submit. Review and hit 'Review grants' when ready, and I'll validate everything with Carta before anything is issued."

Stakeholder	Relationship	Quantity	Document set
Irving Brady	Founder	1000	Senior Management Option Agreement
James Okafor	Employee	1000	Junior Employee Option Agreement
Margaret Hart	Founder	1000	Senior Management Option Agreement
Mei-Lin Hartley	Employee	1000	Junior Employee Option Agreement
Oliver Dragomir	Employee	1000	Junior Employee Option Agreement
Priya Nair	Employee	1000	Junior Employee Option Agreement

Wrap up: 5 principles to leave today with

1

Claude is a word calculator, don't ask it to do math

Claude is a new computer chip, using words as the input instead of numbers. Use Claude for judgment, summarization, and reasoning, and ask Claude to write scripts using traditional code for tasks requiring predictable data parsing or validation

2

Give Claude the context and goal, not the steps in between

Don't write step-by-step instructions and expect Claude to follow them in order. Instead, allow agents to find their own solution, not the solution that works best for humans. Define your objective and let Claude find the path.

3

Always have Claude cite the sources

This will help save you time and give you confidence in the answers Claude is providing for you. Pull the data first, then reason on it.

4

Use artifacts to make pulling data through Claude faster, cheaper, and more reliable

The most consistent question we get from clients is how to guarantee Claude provides accurate answers to user questions. Artifacts are one of the most effective solutions - create an artifact, check the data, know it will be right next time

5

If outputs miss the mark, ask Claude why

Moving to AI-driven processes means your first step to diagnose errors is asking Claude what it did, why, and why it got the answer wrong. Often this single question is enough to uncover or even fix the error.

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