

M A V E R I C K A I

FIVE THINGS TO DO WHEN YOU START USING CHATGPT

YOUR COMPLETE SETUP CHECKLIST

A few setup choices can make ChatGPT much more useful for your everyday work. Give it the right mode, the tools you use, and clear instructions about you. Then put the setup to work on a real task.

Choose Work and get a finished output

Connect the tools you actually use

Review data controls and personalize your instructions

Enable the browser and understand its sign-ins

Nine copyable prompts and a checklist you can use today

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Start Here: Your Five-Part Setup

THE PLAN

1. Choose Work for tasks with a finished deliverable.
2. Install and connect the plugins you actually need.
3. Turn off Improve the model for everyone.
4. Add your background and preferences in Personalization.
5. Enable the built-in browser and try a small task.

Before you start

Account: Sign in to ChatGPT. Features can depend on your account, region and workspace settings.

Device: Use the desktop app for the built-in browser step. Use the web for the account data-control setting.

Time: Allow about 15 to 20 minutes, plus any app sign-ins. You do not need to connect every account today.

If you came from the SETUP video, this is the full checklist. Follow the five steps in order, then use one of the starter prompts near the end to check that the setup is useful.

Work handles tasks with several steps and an output you can review. Plugins connect useful tools and services. Data controls govern choices about use of your information. Personalization gives ChatGPT context and preferences. Browser access lets it work with websites.

These are separate controls. Connecting Gmail does not write your custom instructions. Adding instructions does not turn off model training. Enabling a browser does not automatically connect every website account.

Start with one thing you want done

Choose a result you can judge: a project tracker, a one-page document, a shortlist or a weekly plan. It is easier to tell whether the setup works when you have a real job for it.

TIP

You can start with a task that needs no connected accounts. The project-tracker prompt in Step 1 is a simple first test.

Copy This First: Your Setup Helper

Paste this into a ChatGPT conversation if you want help choosing what to connect and what to put in your instructions. It gathers your answers together and turns them into a short setup plan.

PROMPT 1 | COPY & PASTE

Help me set up ChatGPT for the way I actually work.

Ask up to eight useful questions together about what I do, who I work with or create for, my recurring tasks, the apps I use, the outputs I want, my preferred writing style, my comfort with technical explanations, and actions I want to approve myself.

After I answer, give me:

1. A concise custom-instructions draft I can review and paste into Personalization. Use only facts I supplied and keep it under 1,300 characters.
2. Up to three plugins worth connecting first, with one practical use for each. Check current availability where you can and label anything you cannot verify.
3. One first task that takes advantage of Work and produces a useful file or document.
4. A short checklist covering Work, plugins, data controls, personalization and the browser.

Do not claim you changed a setting, connected an account or saved a memory unless the action actually happened and can be verified. Do not ask for passwords or other login secrets. If you cannot inspect my interface, say which instruction is based on my description or documentation.

Make the answers specific

Instead of "I want help with work," try "I coordinate three client projects and spend too much time turning meeting notes into action lists." Instead of "write better," try "keep it warm, direct and short, with an obvious next action."

You can skip the interview and use the ready-to-edit custom-instructions template in Step 4. Both routes give you a useful starting point.

Step 1: Choose ChatGPT Work

Open [ChatGPT](#). At the top, use the Chat / Work switch and select Work. In the desktop app, select ChatGPT first if the app is showing Codex, then choose Work in the switcher.

Use Work when you want a finished result such as a spreadsheet, document, presentation or researched shortlist. Give it the outcome, the material to use and a way to check the result. You can still use Chat for quick questions and short back-and-forth conversations.

Try a task that needs no extra accounts

PROMPT 2 | COPY & PASTE

Build me a simple, editable project-tracking spreadsheet.

Include columns for task, project, owner, priority, status, due date and next action. Add five clearly labeled fictional sample tasks so I can see how to use it. Include a summary showing total tasks, completed tasks and overdue unfinished tasks. Use formulas where appropriate.

Make it easy to read, check that the summary works, and give me the spreadsheet itself with a short explanation of how to update it. Do not just describe how I could build it. If you cannot create a file in this chat, say so and offer a copyable table instead.

Check the result

Open the actual output. Change one sample task to completed and check that the summary updates. Confirm that an overdue completed task is not counted as unfinished. Replace the sample rows with your own tasks when you are happy with the structure.

Work can carry a task through multiple steps, but missing access or information can still interrupt it. A response saying "done" is not a substitute for opening and checking the finished result.

TIP

Tell it the deliverable explicitly: "Give me the spreadsheet" or "Create the document." Then describe what makes that deliverable useful to you.

Step 2: Connect the Plugins You Use

Click Plugins in the left sidebar. If it is grouped under Customize, open Customize → Plugins. Choose a plugin you want to use, open its details and select Install or Install plugin, depending on the label shown. If it uses an external account, complete the Connect sign-in and review the requested access.

Start with tools you already use. Gmail and Google Calendar can be useful for email and schedule work. Indeed is relevant if you are looking for a job. Catalog availability and what each plugin can do may differ by account or workspace.

Pick a plugin for a real job

Tool from the video	A useful starting request
Gmail	Summarize a named email thread and list the decisions.
Google Calendar	Review tomorrow's events and list preparation tasks.
Indeed	Find relevant roles using a specific title, location and criteria.

Installing a plugin and connecting an account are separate steps when sign-in is required. Make sure you choose the account you actually want ChatGPT to use, especially if you have both personal and work accounts.

Verify one connection

PROMPT 3 | COPY & PASTE

Use my connected [app] for this small read-only task: [specific thread, date, item or search].

First tell me if the connection is available in this chat. Use the actual source and give me a short result with enough detail or a link for me to check it. If you cannot access it, tell me exactly what is missing rather than inventing the contents.

Do not send, edit, delete or schedule anything. I am checking the connection.

If a tool you expected is absent, check that it is installed and the required account is connected. If your workspace restricts it, use an allowed alternative or supply the relevant material yourself.

TIP

Connect the two or three tools that support your next task. You can add more when there is a reason to use them.

Step 3: Review Your Data Controls

For this account-level setting, open [ChatGPT on the web](#) using the same account.

1. Open your profile menu in the bottom-left corner.
2. Select Settings.
3. Select Data controls.
4. Open Improve the model for everyone and turn it off. If a confirmation or save control is shown, finish that step.
5. Reopen the setting and confirm it remains off.

What you are changing

This is your model-improvement preference. Leave it off if you do not want to contribute conversations to improving the model. Review the explanation beside the setting for the terms that apply to your account. Chat deletion and connected apps have separate controls.

Keep the setting separate from memory and account access. You can decide what personal context to use in Step 4 and which apps to connect in Step 2. Do not assume that one toggle controls all three.

Make the input fit the task

You can often get useful help without uploading everything. A few relevant rows may be enough to fix a spreadsheet formula. A specific email thread may be enough to prepare for a meeting. Give ChatGPT the information it needs and inspect the result before using it.

If your organization manages the account, its policies and available controls may differ. A missing switch does not tell you what the organization's data policy is.

TIP

Do this before your first substantial upload. You can still complete the fictional project-tracker exercise without sharing personal records.

Step 4: Add Your Custom Instructions

Open Settings → Personalization. Use Custom instructions to enter your background and working preferences. Replace the brackets in the template below and remove anything that does not apply. If your screen separates information about you from response preferences, split the text between those fields.

PROMPT 4 | COPY & PASTE

About me: My name is [name]. I am [role or what you do]. I help or work with [people]. My main priorities are [two or three priorities]. I regularly use [tools]. Assume I have [beginner/intermediate/advanced] knowledge of [topic].

How to help: Use clear, direct language. Start with the useful answer, then add the detail I need. Use [preferred spelling, units and date format]. For writing, use a [tone] voice. For complex work, ask the questions that would materially change the result together, then work toward a usable finished output.

Accuracy: Do not invent facts, sources, personal experiences or completed actions. Check current information when it matters. Tell me what is uncertain. If my idea has a problem, explain it and suggest a better option.

Actions: Draft and prepare freely within my request. Ask for my approval before sending messages, publishing, buying anything, deleting important material or changing account access. Show me the exact proposed action first.

Save using the control shown on your screen, then reopen the section to check the text. Start a new chat with a normal request and see whether the response follows the preferences.

Instructions and memory are different

Custom instructions are directions you deliberately write. Memory carries useful context across conversations when that feature is enabled. Writing your role into custom instructions does not mean every conversation detail has become a saved memory.

Use the available memory controls in Settings → Personalization to review what is enabled. Do not rely on a message saying "I'll remember" as proof that an important preference was saved in the place you intended.

TIP

Put stable preferences here. Give a temporary project's deadline, files and special requirements in that project's conversation instead of making them permanent instructions.

Step 5: Enable the Built-In Browser

Use the ChatGPT desktop app for this step.

1. Open Settings from the bottom-left menu.
2. Select Browser.
3. Turn on Let ChatGPT control the built-in browser if it is not already enabled.
4. Start a Work conversation. Type @Browser and select the browser mention, then give it a specific website and task.

If your version shows browser setup through the bundled Browser plugin, complete that setup. In Settings → Browser → Agent permissions, you can review the default website, download and upload permissions available to you.

Test it on a public page

PROMPT 5 | COPY & PASTE

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@Browser open https://learn.chatgpt.com/docs/browser and read the section about the desktop built-in browser. Explain in three bullets how it differs from my regular browser. Tell me if the page could not be opened. Do not change any settings or sign in to anything.
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What happens with sign-ins?

The built-in browser has its own browser profile. It does not automatically share the tabs or signed-in session from your regular Chrome or other browser. Sign in directly when a task needs that website account.

A site may keep you signed in for later use, but sessions can expire and some sites ask you to sign in again. Enabling browser control is not a guarantee that you will never need to log in again.

If you want ChatGPT to use the browser profile where you already work, use the optional extension route on the next page.

TIP

A browser is useful when the task depends on a website's interface. A connected plugin may be the simpler route when it already supports the job.

Optional: Use Your Existing Chrome Session

This is an alternative to the built-in browser, not a sixth required setup step. Use it when you want ChatGPT to work in a supported browser where you are already signed in.

Connect the browser extension

1. In the desktop app, open Settings → Computer Use.
2. Select Google Chrome. If Chrome is not shown, expand More browsers. Follow a required plugin-install prompt if one appears.
3. Select Install beside the browser to open the extension store page. Install the ChatGPT extension and review its requested permissions.
4. Return to Settings → Computer Use and confirm Chrome shows Manage. Use the Chrome profile where you installed the extension.
5. In a new Work conversation, select @Chrome from the mention menu and name the tab or site you want to use.

The official [browser extension setup guide](#) also covers supported alternatives. If Chrome is absent from the mention menu, check its toggle in Computer Use and make sure the active browser profile has the extension.

Try one small task

PROMPT 6 | COPY & PASTE

Use @Chrome to read the page I have selected: [name or mention the tab]. Summarize its main point and list three useful details. Use only what you can actually read on that page. Do not click a purchase button, submit a form or change anything.

Know which browser you picked

@Browser means ChatGPT's built-in browser. @Chrome means the connected Chrome browser. Naming the right one helps avoid the frustrating situation where you are signed in on one screen while ChatGPT is looking at another.

TIP

You do not need to enable advanced developer settings for this checklist.

Put the Setup to Work

Choose a task you already do regularly. Name the result, source material, constraints and what you want to review. These examples are requests to try, not claims that every account has the same tool access.

Turn your notes into a finished document

PROMPT 7 | COPY & PASTE

Turn the notes below into a clear one-page project brief I can share after reviewing it.

Include the goal, audience, deliverables, timeline, responsibilities, open questions and next actions. Keep the writing direct. Use only the facts in my notes and mark anything missing as "To confirm." Create an editable document if available and show me the finished content. Do not send or publish it.

My notes: [paste notes]

Prepare for tomorrow

PROMPT 8 | COPY & PASTE

Using my connected Google Calendar, review tomorrow's events in [timezone]. Create a short preparation plan with each event's time, purpose when stated, and anything I should bring or prepare.

If I also have Gmail connected, read only the relevant threads I identify here: [thread names or links]. Add supported decisions and open questions. Do not assume access to either app. Tell me if a connection or source is missing. Keep uncertain details labeled, and do not change events or send messages.

Review the result before using it

Open the document or verify the event times against your calendar. Check names, dates, calculations and source links. If a tool was unavailable, make sure the answer says so instead of quietly filling in invented details.

TIP

Once a prompt works for you, save a copy with the context it needs. A reusable prompt plus the right inputs is easier to repeat than a vague request to "do the usual."

Common Mistakes and Easy Fixes

If this happens	Try this
You get advice instead of a finished file	Choose Work and name the actual output you want.
A plugin is installed but cannot read your account	Open its connection setup and complete the required account sign-in.
A plugin uses the wrong account	Check which account was authorized before requesting more work.
You cannot find the data-control setting on desktop	Use the same account on the web: profile menu → Settings → Data controls.
Personalization feels generic	Add your real role, recurring tasks, audience and preferred output style.
The instructions are too long	Ask for a shorter version that preserves the important facts and preferences.
You expected custom instructions to save all memories	Review the separate memory controls instead.
A site asks you to log in again	Check whether you selected @Browser or @Chrome. Their sessions are separate.
Chrome is missing from the mention menu	Check Settings → Computer Use, its toggle and the active extension profile.
A feature is absent or blocked	Check the supported surface and workspace restrictions. Do not treat access as confirmed.

Ask for help with the exact screen

PROMPT 9 | COPY & PASTE

I am trying to complete [setup step]. I am using [web/desktop] on [device], and this is what I see: [describe the screen or attach a screenshot with private details removed].

Help me identify the next control using the labels actually visible. If you need current documentation, check it. Do not guess a button or claim you can see my screen when you cannot. Tell me if this looks like a different version, missing connection or account restriction.

Do not change several unrelated settings just to get past one problem. Identify the missing connection, wrong surface or unavailable feature first.

Quick Reference: Your Setup Checklist

Check	Done looks like this
1. Work	Work is selected and you have opened one finished output.
2. Plugins	Your chosen tools are installed, required accounts connected, and a small read works.
3. Data controls	Improve the model for everyone is off when you reopen the setting.
4. Personalization	Your reviewed instructions are saved and a new chat follows them.
5. Browser	Browser control is enabled and @Browser opens the page you requested.

The five routes from the video

Work: Top Chat / Work switch → Work.

Plugins: Left sidebar → Plugins → choose the plugin → Install → connect its account if required.

Data controls: Web profile menu at bottom left → Settings → Data controls → Improve the model for everyone → off.

Custom instructions: Settings → Personalization → Custom instructions.

Built-in browser: Desktop Settings → Browser → Let ChatGPT control the built-in browser → on.

DO THIS TODAY

Complete the five checks, save a short set of personal instructions, and ask Work to make one useful output. Open it, check it and make one improvement. You will finish with a setup you have actually used, not just a list of switches you turned on.

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Set it up once. Give it a real task. Make the result useful.