Set up ChatGPT in one day.

Five practical steps and ready-to-copy prompts. Give ChatGPT the context and tools to help with your actual work.



A practical guide by Sam Cherkasov

5 steps · Copyable templates · Free

Your setup

01 Desktop app ↗

02 One project ↗

03 Connected apps ↗

04 One skill ↗

05 Scheduled task ↗

Read online and copy the prompts: https://www.sam-cherkasov.com/lead-magnets/chatgpt-setup-guide

Pick one task you already do every week. Use it to test each part of your setup. By the end, you'll have a workspace you can return to, a reusable workflow, and one scheduled task.

▼ Before you start

This guide follows the current ChatGPT desktop and Work experience. Features depend on your plan, platform, region, rollout, and workspace settings. You don't need every feature to start: the manual alternatives below still give you a useful workflow.

Checked against official OpenAI documentation on 7 October 2026.

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01 Put ChatGPT next to your work

Start with one real file and one small result. A meeting note, draft, or spreadsheet is enough.

1. Open the official desktop download page, choose your operating system, and sign in with your ChatGPT account.
2. Choose Chat for questions and quick edits. Choose Work for a task with several steps or a finished file.
3. Upload the file for your first task. If you want to work on local files, explicitly select the folder ChatGPT should use.

Download the desktop app ↗

> Opening the app doesn't give it access to every window, file, or account. Add the source or choose the app/browser tool the task needs.

Your first useful result

```
Read the meeting notes I attached. Create a short action list with these columns: action, owner, deadline, and source quote.

Use only the notes. If an owner or deadline is missing, write 'not specified'. End with the three questions I need to resolve next. Return the draft here for review.
```

You're ready when

You can point to the source of each action in the result.

Prefer the browser? Upload the same file at chatgpt.com and try the prompt there. Add local-folder access later.

02 Give repeated work a home

Choose one area: your content, client work, job search, or weekly planning. Keep its instructions and sources together.

1. Create a project named after the work, such as ‘My content workspace’.
2. Add a short context document and two examples of work you like. Include your audience, goals, constraints, and preferred tone.
3. Save the template below as project instructions. Fill in the brackets, then start related chats inside this project.

> A ChatGPT project uses the sources you upload or connect. A local project can use folders you attach. Project context helps you reuse information; keep important decisions in a maintained source document.

Project instructions

```
Help me with [one recurring area of work].

My role: [what I do]
My audience or clients: [who the work is for]
My current goal: [one concrete result]
My constraints: [time, budget, format, language]
My source files: [file names and what each contains]
My preferred style: [tone + two examples]

Use my source files before making assumptions. Ask up to 3 questions when missing information would change the result. Do not invent facts, results, or commitments. Separate what the sources say from your suggestions.

Return a usable draft, then list the decisions I need to make. Keep answers concise unless I ask for detail.
```

Test your project context

```
Using only this project’s instructions and sources, summarize who I’m creating work for, my current goal, and the constraints you should follow. Point to the relevant source for each. Tell me what information is still missing.
```

You’re ready when

A new chat inside the project can describe your goal and constraints without you pasting them again.

If projects aren’t available, keep these instructions in a text file and paste them with each new task.

03 Connect the app you actually need

Choose the place you keep retrieving information from. Connect that one first.

1. Open Plugins and search for a service you use, such as Gmail, Google Drive, Google Calendar, Notion, or Slack. Check which services are available in your account.
2. Open its details, install it, and complete the connection or sign-in when prompted.
3. Start a new chat. Select the connected app from the @ picker when available, and try a small request with a result you can check.

> An installed plugin may still need authentication. Access and supported actions differ by service and workspace; test the connection before building a workflow around it.

Check one connected source

```
Use my connected Google Drive to find the latest document titled [document title] in [folder, if known]. If there are several matches, show their titles and dates and ask me which one to use.

Summarize the chosen document in five bullets. Include a link to it and quote the sentence supporting each bullet. Do not edit or share the document.
```

You’re ready when

The result links to the right document, and its summary matches what you see in the source.

Can’t find or connect the service? Upload or paste the relevant content. The project and reusable instructions still work.

04 Save how you want a task done

Pick a repeatable task with a clear output. Here's a first skill for turning a rough note into five useful content ideas.

1. In ChatGPT Work, invoke @skill-creator using the skill picker. In Codex, the equivalent is $skill-creator.
2. Paste the creation brief below. Answer the creator's questions about your audience and examples.
3. Open Skills in the desktop sidebar to check the saved skill. Select it in a new task and run the test prompt.

> Standalone skills are available in the desktop app. On the web and mobile, skills can be provided through plugins. If the skill creator isn't available, save the workflow as project instructions and ask for it by name.

Create your first skill

```
Create an instruction-only skill named content-ideas. Use it when I ask to turn a rough note,
customer question, or work observation into content ideas. Do not use it for unrelated writing.

Before creating it, ask me for my audience, main topic, language, and two examples of content I like.

The workflow:
1. Read my note and any relevant project context.
2. Ask up to 3 questions if key context is missing.
3. Return exactly 5 distinct ideas. For each, include an angle, a one-sentence hook, the reader's
practical takeaway, and a suitable format.
4. Recommend one idea and explain why it fits my audience.

Use short, conversational language. Avoid vague AI hype, unsupported statistics, and invented
personal stories. Keep facts from my note separate from suggested angles. Show me the finished
instructions before saving. Do not publish or message anyone.
```

Test the saved skill

```
Use my content-ideas skill. My rough note: [paste a real observation or audience question].

Follow the saved workflow. Ask for any missing context, then give me five distinct ideas and
recommend one.
```

You're ready when

Two different notes produce the same useful structure, without you repeating the rules.

The download pack includes a starter SKILL.md. It's a reference for the creator, not an installed skill. Give it your audience and examples before testing.

05 Put one useful task on a schedule

Start with a short weekly briefing. Test the request once before asking ChatGPT to repeat it.

1. Ask for a one-off briefing on your topic. Check the sources and whether it is worth reading.
2. Use the scheduling prompt below. Replace the topic, timezone, and time. Review the saved schedule.
3. Open Scheduled to inspect runs, pause the task, or edit it. Review the first few outputs before relying on the routine.

> Cloud tasks can use uploaded context and connected tools. Tasks that need files on your computer require the computer to be on and the desktop app running. Check which environment your task uses.

Schedule a useful briefing

```
Every Monday at 08:30 in [timezone, e.g. Europe/Madrid], return to this chat and prepare a briefing on [specific topic] covering the last 7 days.

Use current, accessible primary sources. Include up to 3 meaningful developments, with the event date, source link, and a sentence on why each matters for [my work]. End with one practical thing to consider. Keep the briefing under 200 words.

If nothing relevant changed, say so instead of padding the list. If a source cannot be accessed, state the gap. Before saving, show me the schedule, timezone, and tools the task will use.
```

You're ready when

You can find the saved task in Scheduled and confirm its time, timezone, and first result.

No scheduled tasks in your account? Save the tested prompt and add a calendar reminder to run it yourself.

A quieter way to monitor something

After your first task works, try a narrow monitor. Choose one public page and one change that matters. Establish a baseline on the first run.

Try this

```
Every weekday at 09:00 in [timezone], check [one public URL] for [the specific change I care about]. Return to this chat for each check.

On the first run, record the current relevant information as the baseline and confirm it once. On later runs, compare with the last successful check. Notify me only if [clear change condition] happens or access fails. Stay quiet when nothing actionable changes.

When reporting a change, show what changed, the previous value, the new value, the source URL, and the check time. Do not interpret a failed page load as a change. Show me the schedule and baseline approach before saving.
```

> Check the first two runs to confirm that the task retains its comparison context and respects your notification preference. Scheduling is periodic checking, not continuous monitoring.

Make it work as one routine

Return to your project with a real note. Use your skill to turn it into a draft, check the source, and keep the useful output. Let your scheduled briefing bring in the next thing to consider.

1. One place for your work
2. Context you can reuse
3. A connected source you have tested
4. A workflow with a consistent structure
5. A scheduled task you have reviewed

Start with one workflow you'll use next week. Add the rest when the need is real.

If something doesn’t work

▼ My menus look different.

Update the app and check which experience you’re using: Chat, Work, or Codex. Some accounts show connected services under Apps or Settings; the current Work experience uses Plugins. Follow the labels in your account and check the official docs below.

▼ ChatGPT can’t see my file.

Upload it to the chat or project, or attach the folder to a local project. Ask ChatGPT to identify the sources it can access before giving it the task.

▼ The answer ignored my instructions.

Check that the chat is inside the right project and the skill was selected. Ask it to list the rules it used, compare the output with your examples, and update the saved instructions.

▼ The scheduled task didn’t run.

Check its status, time, timezone, tools, and last run in Scheduled. For local work, keep the computer and app running. Test the prompt manually with the same sources.

▼ Do I need to upgrade first?

Start with the features visible in your account. Plans and workspace settings affect access and usage. You can use uploaded files, pasted instructions, and a manual calendar reminder while you test whether the workflow is useful.

Keep the setup

Save the guide and templates. Replace every [bracketed field] before using a prompt.

The complete guide	PDF ↓
All prompts in one text file	TXT ↓
Starter content-ideas skill	MD ↓

Official instructions, when you need them

Checked against official OpenAI documentation on 7 October 2026.

Desktop setup and Chat / Work ↗

Projects and shared context ↗

Plugins and connected tools ↗

Creating and using skills ↗

Scheduled tasks and local requirements ↗

Feature availability ↗