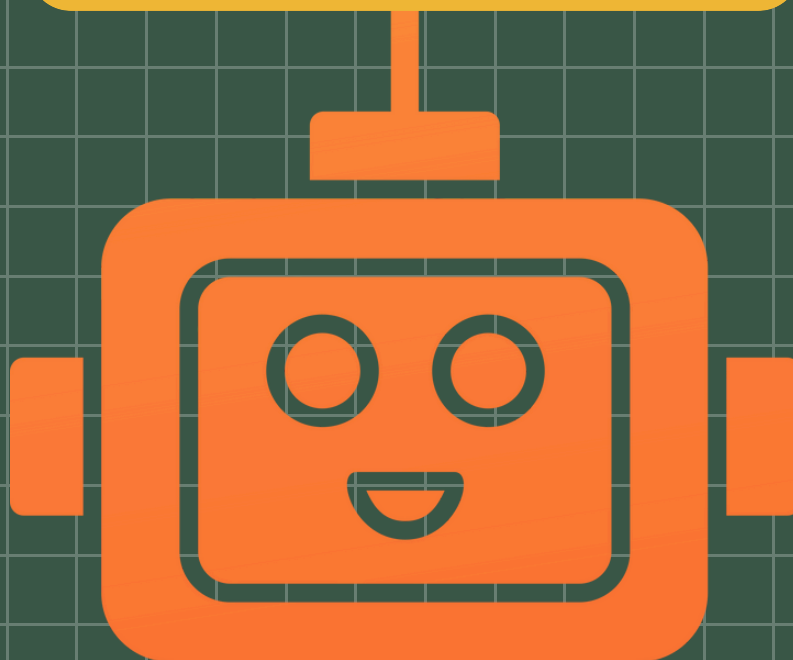


HOW TO SET-UP CHATGPT FOR TASKS

Put your AI Assistant to work!

YOUR CHATGPT TOOLKIT



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HOW TO SET-UP CHATGPT FOR TASKS

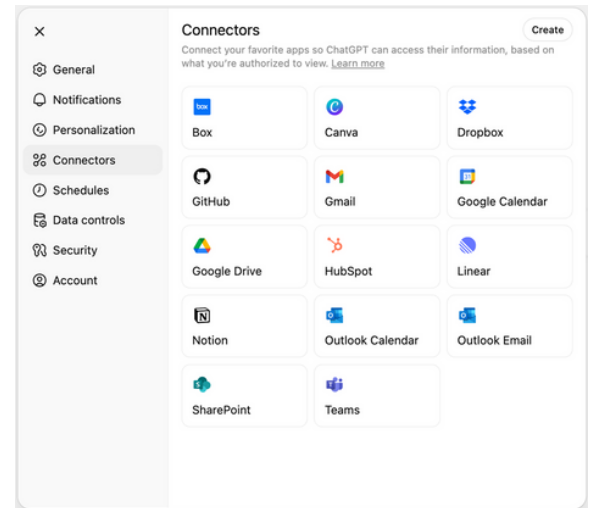
1) CONNECT YOUR SOURCES (DRIVE, GMAIL, CALENDAR, ETC.)

Bring your tools and data into ChatGPT so you can search, reference, and work faster - all without leaving the conversation.

Where: Settings → Connectors → connect Google Drive (and others).

Use: In chat, choose **Tools → Use connectors** (or allow auto-use for Gmail/Calendar/Contacts).

PRO TIP: Keep Drive tidy with a simple structure, e.g. Company > Dept > Year > Campaign > Files



2) SCHEDULE TASKS (LIGHT AUTOMATIONS)

Let ChatGPT run helpful routines and ping you with results.

How: In any chat, say what + when (e.g., “Every weekday 9am, summarize top 3 industry headlines with links”).

Confirm the proposed schedule.

Manage: Profile → Settings à Notifications → Manage tasks (edit, pause, delete).

EXAMPLES: daily briefing, prep for a 1:1, reminders....

“Every weekday at 7:30 AM, compile a concise 5-bullet summary of competitor news, market shifts, and regulatory updates with links and a 2-sentence ‘Why it matters.’”

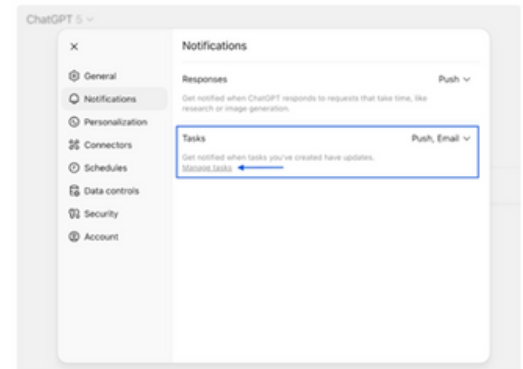
“Fridays at 3:00 PM, draft a weekly digest from this week’s chat notes including highlights, blockers, upcoming deadlines, and team priorities in <200 words.”

Best practices:

- Be explicit about timing & timezone, specify the timezone in the instruction if needed (e.g. NZST).
- Name the output shape. Tables, bullets, headings, or a specific template.
- Pin or attach references. Link the docs, data, or resources a task should use.
- Add guardrails. Limit length, include sources, or ask for confirmation before actions.
- Iterate in place. After a run, reply with tweaks (e.g., “Make it 3 bullets and add competitor news”).

How to manage your Tasks

- Open tasks: Profile > Notifications > Manage tasks



- Edit from "Manage tasks": Use the ✏ icon to edit, pause, or delete your task.
- Edit from chat: Follow up in the original conversation with a new schedule or edits (e.g., “make this weekly on Fridays at 4pm”).