ChatGPT setup checklist

Use with Exercise E02-01 and the walkthrough in Section 2.7. Tick each box as you go.

Exercise E02-01 · Interface scavenger hunt

Figure 2.2

- [ ] Sidebar
  New chat, Search, Projects, Recents
- [ ] Library or Space
  Where uploaded and created files are saved
- [ ] Chat and Work switch
  At the top of the window
- [ ] Composer
  + button, model picker, microphone, voice, Send
- [ ] Answer buttons
  Copy, regenerate, rate, share
- [ ] Settings
  In your profile menu

Walkthrough Step 1 · Sign in where you'll use ChatGPT

- [ ] Signed in on the web at chatgpt.com
- [ ] Installed the app on my most-used device and signed in with the same account
- [ ] A chat started on one device appears on the other

Walkthrough Step 2 · Secure your account

Settings > security section

- [ ] Multi-factor authentication is on
- [ ] Reviewed active sessions and signed out of devices I don't use

Walkthrough Step 3 · Decide your data settings

Settings > Data controls

"Improve the model for everyone" is: On Off

- [ ] I know where to export my data

Menu names can change between versions. If you can't find an item, search for it in Settings or check OpenAI's help center.

ChatGPT setup checklist

Continue the walkthrough, then finish with Exercises E02-03 and E02-04.

Walkthrough Step 4 · Two personalization basics

Settings > Personalization

Layout and Visuals: Default Simple

- [ ] Left custom instructions and memory for Chapter 4

Walkthrough Step 5 · Find the model picker

Composer

Circle the effort levels your plan shows:

Instant Think Medium High Extra High Pro

- [ ] Picker left on Instant as my everyday default

Walkthrough Step 6 · Run your first planning prompt

Prompt P02-05

- [ ] Ran P02-05 as written (Sam's version)
- [ ] Ran it again with my own three uses, and saved the list

My use 1: _____

My use 2: _____

My use 3: _____

Exercise E02-03 · Test a temporary chat

Prompt P02-06

- [ ] Temporary chat tested: it does not appear in my history

Exercise E02-04 · Check your plan against today's facts

Prompt P02-07

- [ ] Checked one price and one feature on the official pricing page myself

Plan I'm on: _____

Price checked: _____

Date of page: _____

My decision: _____

Done? Your workspace is ready for Chapter 3.

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