CHATGPT USER GUIDE

By: AI FINANCE CLUB & Nicolas BOUCHER



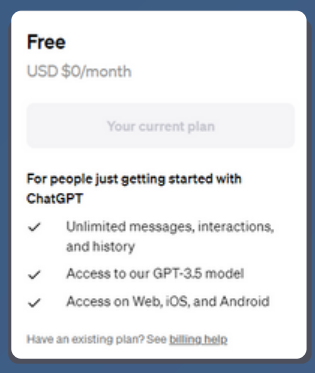
CHATGPT 3.5 VS 4

ChatGPT is available through their website or iPhone/android app.

Free Basic access offers limited features, while Plus and Professional subscriptions unlock advanced capabilities like longer chat sessions, memory retention, and fine-tuning.

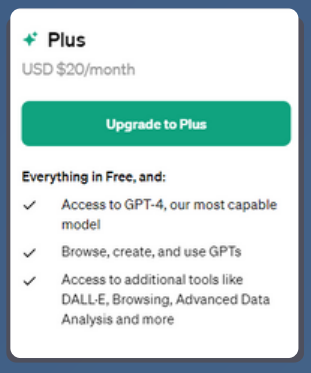
ChatGPT 3.5

Good at text generation, translation, and question answering



VS

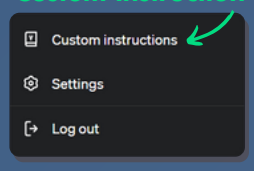
ChatGPT 4



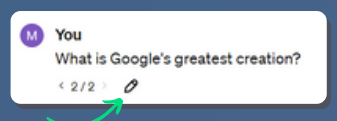
Enhanced accuracy, reasoning, & multimodal capabilities (Image recognition, upload/ download files like PDF and Excel)

FUNCTIONALITIES

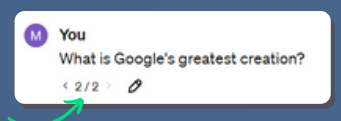
Custom Instruction



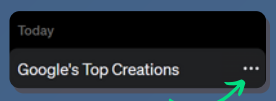
Modify Question (the pen button)



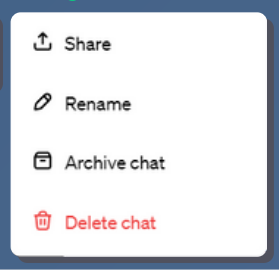
Go Through Previous Versions (if you used the pen versions)



Chat Settings



- Share Chat
- Rename Chat
- Archive Chat
- Delete Chat



Chat Action Buttons



- Copy Code Button
- Like Button
- Dislike Button
- Regenerate Button

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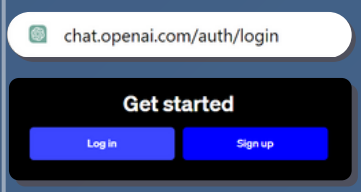
ACCOUNT CREATION

Account Creation:

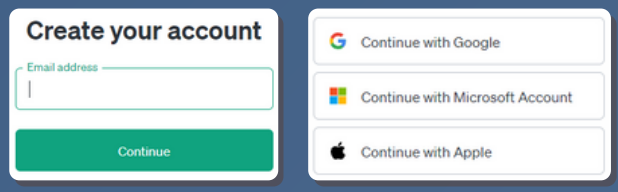
- Simple sign-up process.
- Requires basic information.

Create a free ChatGPT account at https://chat.openai.com/auth/login

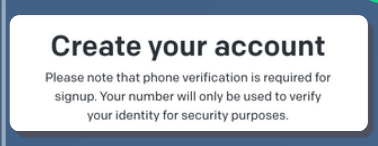
1. Browse ChatGPT then click "Sign-up"



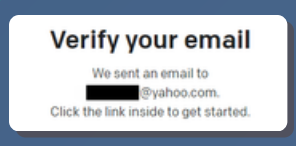
2. Use your email address or Google account, Microsoft account, or Apple account



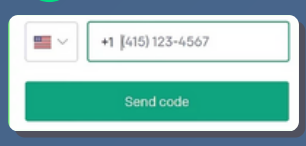
3. Create a password and click Continue



4. Head to your inbox and click the verification link



5. Verify your Phone Number



HOW TO PROMPT?

Basic Prompting

Frameworks:

Context Specific Instruction **CSI** + **FBI** Format Blueprint Identity

Precise Language:
Use specific, unambiguous terms for clarity.

Contextual Information:
Include relevant background to provide a comprehensive understanding.

Creative Phrasing:
Explore different ways to frame a question for varied perspectives.

Analogies and Examples:
Use comparisons to simplify complex financial concepts.

10 Advanced Prompting Techniques

Agent Prompting:
Framing prompts to make GPT act as an 'agent'.

Team Prompting:
Simulates a collaborative team environment using multiple agents.

Explicit Reasoning:
AI details its process or reasoning in a clear, step-by-step manner.

Socratic Prompting:
Asking questions that lead the AI to explore a topic deeply.

Chain-of-Thoughts:
Breaking down a complex query into a series of simpler, logical steps.

Fact Checking:
Using prompts to verify the accuracy and credibility of information.

Chunking:
Complex information broken down into smaller, more manageable 'chunks'.

Meta Cognition:
Prompting involves encouraging the AI to reflect on its own thought process.

Prompt Optimization & Expansion:
Start with a basic prompt and ask the AI to improve it.

Iterative Inquiry & Sequential Questioning:
AI asking you questions, instead of you asking the AI.

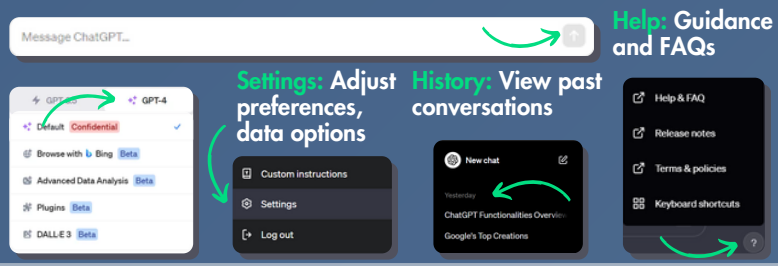
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NAVIGATING THE INTERFACE

Send Message: Submit your Query

Tools: Access Python, DALL-E, browser, etc

*Tools only available for ChatGPT-4



Settings: Adjust preferences, data options

History: View past conversations

Help: Guidance and FAQs

ADVANCED FEATURES OF GPT4

Web Browsing

ChatGPT 4 can browse the web and give you the links of the sources he used when it comes from the web

Interactive Tools

Access tools like Python to code and DALL-E to generate images

Create your own bot

With GPTs you can customize your own assistant or use assistants created by others

File Upload / Download

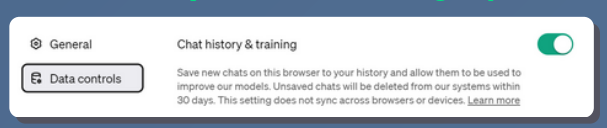
Upload Images, PDF, Excel files for analysis and you can even create Excel files

TROUBLESHOOTING

Tips for Unresponsive or Unclear Answers:	- Rephrase Your Question - Provide Context	- Use Explicit Language - Check Input Quality
How to Refine Questions:	- Break Down Complex Queries - Specify Parameters	- Ask for Clarifications
Easy Steps to Report Issues:	- Use the Feedback Option - Provide Specific Examples	- Detail Your Expectations

SAFETY & PRIVACY

Data Privacy & Data Training Option



Choice to allow or disallow data for AI training. Control your contribution to AI learning.

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