AI2718

Getting started with AI

What would 10× productivity look like for your business?

AI can help you do work you used to put off and try things you didn't know how to do. You can start with an idea, ask for help, and learn while you build. Before beginning a task, ask: "Could AI help me do this?"

Follow the steps in order. Send each shaded prompt, then wait for the reply before continuing.

☐ 1. Open Codex on your computer

Use the desktop setup guide to install the ChatGPT desktop app for your computer. Open it, sign in with your ChatGPT account, then choose Codex from the ChatGPT dropdown.

Check your account's plans and limits. You can type or speak. If stuck, ask: "I am a beginner. Explain what to click and give me only the next step."

☐ 2. Create your business folder and project

In Documents on your computer, create a folder named company-brain. In the Codex app, open Projects and create a local project with the same name. Open its menu → Edit project → Add folder and select that folder. Start a new Codex chat from this project.

A project keeps related chats and files together. Your company brain will be text files in this folder. Files ending in .md are readable notes; AGENTS.md gives Codex its working instructions. Project setup

> Create company.md for my offer and customers, brand.md for colour and writing style, goals.md for goals, and actions.md for decisions. Leave unknown facts empty. In AGENTS.md, instruct yourself to read these files before tasks, ask about missing facts, save only what I confirm, separate suggestions from facts, and preserve earlier decisions when updating files. Show me links to the five files.

Click the file links to open them. If they are missing, ask Codex to check that the files were saved in your company-brain folder.

☐ 3. Connect Chrome and read your website

Open Settings → Computer Use → Chrome. If hidden, expand More browsers. Follow the plugin prompts, click Install and add the ChatGPT browser extension. Back in settings, check that Chrome shows Manage and its toggle is on.

Open your website in that Chrome profile. In your project chat, type @ and select Chrome. Send the address with this prompt. Browser setup

> Open this site in Chrome. Describe its offer and customers. Ask me to correct your summary, then save only the facts I confirm in company.md. Suggest one way to make the homepage clearer.

If Chrome is missing from @, check its toggle and browser profile, then start a new chat. If it still fails, paste the website text instead. Without your own site, try another business's site and tell Codex not to save its facts.

☐ 4. Add your offer and brand

> Read company.md. Ask one question at a time about any missing offer or customer details, then my brand colour and writing style. Help me choose a colour if needed. Show me the details to confirm, save them in company.md and brand.md, and link both files.

Answer the questions. Open both files and check the details. If you are unsure, you can start with blue and a friendly, direct writing style.

☐ 5. Build and open your page

A landing page describes one offer and gives visitors a next step. This exercise makes a local preview on your computer.

> Read my company brain. Ask which offer to use and where the contact button should lead. Build a landing page using my saved colour and writing style. Save one self-contained index.html file in this project. Keep it local. Show a preview and link the file so I can open it.

Give an offer and a contact address. Click the preview, or find index.html in Documents → company-brain, right-click it and choose Open with → your browser. Check your offer and colour and click the contact button.

If the preview fails, paste the error into the chat and ask Codex to fix it and reopen the page.

AI2718

Reuse what you have saved

You now have business notes and a page you can open. Keep using the company-brain project for the steps below.

☐ 6. Change your colour in a new chat

> Help me choose a different brand colour. Save the colour I choose in brand.md and keep a note of the previous colour.

Choose a colour and check brand.md. Open your company-brain project and start a new chat. Leave the colour out of your message:

> Read brand.md and update index.html to use the saved colour. Show me the local preview.

Refresh the preview or reopen index.html. Compare it with brand.md. If the old colour remains, ask Codex to check the saved file and refresh the preview. Ask it to restore the previous colour in both files if you prefer.

☐ 7. Choose a goal and your next action

For example, you might want three sales calls in the next month. Ask:

> Read my company brain. Help me choose one goal for the next 30 days. Ask how much time I have. Agree a deadline and a way to measure success, then save it in goals.md. Suggest three actions, explain their effort and recommend one. Wait for my choice, then save the action and due date in actions.md.

Answer the questions and choose an action. Ask for links to goals.md and actions.md, open them and check what was saved.

☐ 8. Connect Gmail and draft a reply

MCP is a standard for connecting AI to tools and data in other services. A plugin provides the connection. Here, Gmail supplies an email and your business notes supply the facts and writing style for a reply.

Open Plugins in the desktop app. Find Gmail, open its details and click the plus button to install it. When prompted, connect your Google account and review the requested access. Start a new chat in your company-brain project.

> Use Gmail. Ask which contact I want to look up, then find their latest email. Summarise what they need. Read my company brain and draft a reply here in my writing style. Ask about missing facts. Do not send anything or change my mailbox.

Give the sender's name or address. Compare the summary with the original email, then check the draft. If Gmail is unavailable, paste one email into the chat and ask for the same reply. Gmail setup

☐ 9. Save a skill and use it on another offer

Your business notes hold facts. A skill holds instructions you want to reuse, such as the structure of your landing pages.

> Use $skill-creator to create my-landing-page for this project. It should read my company brain, use my brand and follow this structure: headline, customer problem, offer, benefits, common questions, contact button. Use confirmed facts only. Save each page as a self-contained HTML file and show a local preview. Show me where you saved the skill.

Open Skills in the sidebar and look for my-landing-page. If missing, restart the app. If it is still missing, ask Codex to check the saved skill and make it available. Then start a new chat in the same project:

> Use $my-landing-page for another offer. First confirm you found the skill and read its instructions. Ask which offer to use, then create a separate page so the first stays unchanged.

Open the new preview and check its colour and page structure. Skill guide

For your next task, return to this project. Tell Codex what changed, ask it to update your notes, and use them to write a customer reply or revise your offer.

You can ask me questions here: LinkedIn · Thomas Dahlmann | Instagram · @tda_autor

I write about AI news in my AI2718 Field Notes.