

Before you come: 15-minute setup

For your laptop · so our session is spent on your work, not on downloads

The one idea: a chatbot (ChatGPT or Gemini in a browser) answers questions. An **agent** (Codex) works on your files: opening, editing, inserting and saving, while you watch and approve. This checklist puts the software in place, so our session goes on your work.

1 · DO AT HOME (ABOUT 15 MINUTES)

1. **Update your laptop.** Windows: Settings > Windows Update. Mac: System Settings > General > Software Update. Install everything, then restart.
2. **Get ChatGPT Plus** (about USD 20 a month, includes Codex) at chatgpt.com, on your own card. Then go to Settings > Data controls and switch **off** "Improve the model for everyone".
3. **Install the ChatGPT desktop app** and sign in: Microsoft Store on Windows, chatgpt.com/download on Mac. On Windows, do not install it "as administrator".
4. **Install the helper tools.** Open *Terminal* (Windows: right-click Start > Terminal), paste each line, and press Enter after each. Say yes to any prompt.

Windows

```
winget install --id Git.Git
winget install --id Python.Python.3.14
winget install --id OpenJS.NodeJS.LTS
winget install --id GitHub.cli
```

Mac

First install Homebrew by following the one line at [brew.sh](#), then:

```
brew install git python node gh
```

5. **Create two free accounts:** github.com and vercel.com. Signing up with your Google account is fine for both.
6. **Install Wispr Flow** (free tier) from wisprflow.ai and allow microphone access. We will tune it together.

If any step fails, skip it and screenshot the error. We will fix it in five minutes on the day.

2 · BRING ON THE DAY

- ☐ Laptop and charger.
- ☐ Your laptop password and your phone (for sign-in codes).
- ☐ **One real report** you or your staff produce, with any photos.
- ☐ The **blank template** of that report (Word or Excel).

- ☐ Rough notes for a new report. A voice memo is fine.
- ☐ A list of 5 jobs you or your staff repeat every week.
- ☐ **Only if you want WhatsApp too:** a spare SIM not on WhatsApp, plus your SSM business profile.
- ☐ Use an old or sample report, not a live confidential one.

3 · TRY IT TONIGHT (OPTIONAL)

Make a folder called **AI-Work** in your Documents and copy in two or three files you do not mind it touching. In the ChatGPT app, open **Codex**, choose that folder, and type:

"List the files in this folder and tell me what each one is. Do not change anything."

Then try: "Make a copy of the Word file with today's date in the name." Watch it ask permission and then do it. That is the difference from a chatbox.

4 · GROUND RULES WE WILL SET (SO IT IS SAFE)

- It works only inside **AI-Work**, and asks before touching anything else.
- It never deletes and never overwrites an original. It always saves a new version.
- It never sends an email or message unless you say "send".
- Every change is tracked, so anything can be undone.

Prepared by Raul Lee, Axon Avenue PLT · WhatsApp +60 12-747 8227 · raul.my