ChatGPT Setup Guide

Install your broker skills in ChatGPT

Your TBT Skills Pack works with ChatGPT too.
This guide shows you three ways to install:

1. Custom GPT (best — all skills loaded at once)
2. ChatGPT Projects (upload as knowledge files)
3. Copy-paste into any chat (quick & simple)

Pick whichever method suits your workflow.
Setup takes about 5 minutes.

Best for: Loading all your broker skills at once so they're always available

Requires: ChatGPT Plus, Team, or Enterprise plan

1 Open the GPT Builder

Go to chatgpt.com and click your name (bottom-left) then "My GPTs"
Click "+ Create a GPT" to open the GPT Builder
You'll see two tabs: Create (guided) and Configure (manual). Click Configure.

2 Set Up Your Broker GPT

Name: "Broker Skills" (or whatever you like)
Description: "Australian mortgage broker AI assistant with compliance, growth, productivity, and integration skills built in."
Instructions: Paste the contents of your master SKILL.md file here. For the Complete Bundle, paste all 4 master files one after another.

3 Upload Knowledge Files

Scroll down to "Knowledge" and click "Upload files".
Upload all the individual skill .md files (06 through 25).
Also upload the prompt library files and CRM spreadsheet.

4 Save & Use

Click "Save" (top-right) and choose "Only me" or "Anyone with a link".
Your Broker Skills GPT now appears in your sidebar — click it to start chatting.

Tip: You can create separate GPTs for each pack

e.g., one GPT for Compliance skills, another for Growth. This keeps each GPT focused. Or just load everything into one GPT — ChatGPT handles it fine.

Method 2: ChatGPT Projects

Best for: Organising skills by project. Requires ChatGPT Plus/Team/Enterprise.
ChatGPT Projects work similarly to Claude Projects — upload files as knowledge.

1 Create a New Project

In ChatGPT, click "Projects" in the sidebar, then "+ New Project".
Name it "Broker Skills" and add a description.

2 Add Your Skills as Files

Click "Add files" and upload your SKILL.md master files + individual skill files.
These become the project's knowledge base — available in every chat within it.

3 Start Chatting

Open a new chat inside the project. Ask anything — ChatGPT will use the skills.

Method 3: Copy-Paste (Any Plan)

Works on any ChatGPT plan including Free. No setup needed — just paste and go.
Best for: Quick one-off tasks, or if you're on the free plan.

1 Open the Prompt Library

Find the prompts file for your pack (e.g., Compliance-Pack-Prompts.md).
Open it in any text editor — Notepad, TextEdit, VS Code, etc.
Pick the prompt you want to use.

2 Paste Into ChatGPT

Copy the full prompt text and paste it into any ChatGPT conversation.
Fill in the [bracketed placeholders] with your client's details. Hit Enter.

What Works the Same

+ All 20 individual skill files (.md) work identically — just paste or upload
+ All prompt library files work as-is — copy, paste, fill in details
+ The CRM field-mapping spreadsheet is universal
+ Make.com and Zapier blueprints are platform-independent
+ The CreditPolicy MCP guide covers ChatGPT setup too (one-click connector)

Key Differences

Claude Feature	ChatGPT Equivalent	Notes
Claude Projects	ChatGPT Custom GPTs or Projects	Same concept, different name
Project Knowledge	GPT Knowledge / Project Files	Upload .md files the same way
Claude Desktop Skills	Custom Instructions	Paste skill text into Custom Instructions
Claude Code	Not available in ChatGPT	CLI tool — Claude only
Cowork Mode	Not available in ChatGPT	Desktop automation — Claude only

Pro Tips for ChatGPT Users

Use Custom GPTs for daily work

Create one GPT with all your skills loaded. Pin it to your sidebar. Every conversation inside it has access to all 20 skills automatically.

Attach documents directly

ChatGPT lets you attach PDFs, spreadsheets, and images right in the chat. Attach your client's documents and ask the skill to process them.

Connect CreditPolicy MCP

Go to ChatGPT Settings > Connectors > Add. Paste https://creditpolicy.ai/api/mcp and sign in. Lender policy is now available in every chat.

Use the prompt library for quick wins

Don't want to set up a Custom GPT? Just grab a prompt from the prompt library, paste it into any chat, and fill in the details.

Works with both ChatGPT and Claude

Your TBT Skills Pack is platform-independent. The skills, prompts, automations, and templates work wherever you prefer to work.

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