



The Ultimate AI Bundle for Finance Teams

A library of prompts, custom AI bots, and step-by-step guides for accounting, FP&A, and operations teams by OpenAI's former Controller Sowmya Ranganathan.

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}} RIPPLING SPEND

Real AI use cases from inside

Rippling

Rippling's finance team manages millions in budget, making capital allocation a constant priority. The team now leverages ChatGPT as a sounding board, brainstorming tool—and sometimes even a therapist when budgets get tight (*kidding*).

Below are sample prompts inspired by those actually used by Rippling's finance team.

 = The sample prompt



Critical step: Prime your ChatGPT

Before engaging ChatGPT, prime the conversation by defining how it should approach your questions.

- Have it assume the persona you want advice from (e.g. role, years of experience)
- Provide comprehensive context to enable more detailed responses
- Share basic company information to help ChatGPT deliver tailored answers

Below is a prompt to copy & paste at the conversation's start, ensuring all subsequent responses are targeted for CFO-level discussions.

You are a CFO with 20 years of experience—a trusted expert in finance, FP&A, strategic finance, accounting, tax, legal, compliance, and M&A. Don't be afraid to give technical answers, because I'll understand them.

Your role is to deliver sharp, technically rigorous, and decision-ready guidance. You go beyond definitions — your job is to interpret, flag anomalies, benchmark, and recommend actions, always backed by hard numbers and global standards.

Always cite your sources.

Use structured, analytical outputs:

- Checklists
- Tables with ratios and interpretations
- Strategic frameworks (ROI trees, scenario maps)
- Risk callouts and stated assumptions

AVOID

- Generic summaries or definitions
- Narrative answers without insight or implication
- Responding without asking for missing context
- Blindly accepting provided data without scrutiny

For context, my company has [Insert #] EE's, [Insert \$] in revenue, [Insert %] growth rate, [Insert %] net margin, etc. I have extensive experience in finance, so let's keep the conversation tactical, and don't be afraid to get technical.

Once you've acknowledged all of this, say "Acknowledged." and then I'll ask you my question.

#1 Benchmarking

Benchmarking is essential for improving existing processes and setting realistic expectations for new initiatives. Striving to match or exceed peer performance is what builds a best-in-class organization.

The following prompts offer examples of what to ask, but I encourage you to experiment with your own questions to develop fluency in working with ChatGPT.

What are good benchmarks for R&D spend, including stock based compensation, at different revenue scales?

ChatGPT's response:

R&D Spend Benchmarks Across Revenue Scales (Including SBC)

R&D Intensity by Revenue Tier

R&D as a percentage of revenue generally *declines* as companies grow. Early-stage firms often invest heavily in product development (high R&D intensity), while larger firms achieve scale and efficiency (lower R&D intensity). Table 1 summarizes typical R&D spend (as % of revenue) for different revenue tiers, contrasting high-tech vs. traditional industries:

Revenue Tier	Tech/SaaS Companies (R&D % of Rev)	Industrial/Traditional (R&D % of Rev)
<\$10M (startup)	50%+ (very high – product development focus) drivetrain.ai . Early tech startups often invest >50% of revenue in R&D (sometimes even exceeding revenue if venture-funded). Biotech/pharma startups can spend >100% (operating at a loss).	<10% (varies widely). Many small traditional businesses have minimal formal R&D. Product-focused manufacturing startups may invest mid-single-digits %; others often near 0% if not in an innovation-driven niche.
\$10M–\$50M	30–60% (still very high). Growing SaaS firms commonly reinvest a large share into R&D (e.g. median ~50–60% in this range) st16z.com drivetrain.ai to enhance product-market fit.	1–5% (low). Industrial companies in this range typically spend only a few percent on R&D, focusing on incremental improvements. Many manufacturing firms < \$50M revenue spend <5% on R&D (often closer to 1–2%).
\$50M–	20–40% (moderately high). As revenue	~2–5% (low). Traditional industrial firms in this tier tend

What are standard SaaS Implementation costs as % of ARR at different customer

sizes?

What are good benchmarks for overhead as a % of revenue for a company of my size in [INSERT INDUSTRY]?

#2 Boiler plate policy creation

Policies are a great way to control company spending, and AI can help eliminate the cold-start problem for companies who either need a new policy or want to improve an existing one. Whether it's a travel policy to spend smarter on business travel or a more efficient approval chain, ChatGPT can help you get started.

[Upload your existing expense policy]

Where are the potential loopholes in this policy that employees may be exploiting? And how can I make my approvals process more efficient, so executives spend less time approving requests?

Build me a reasonable travel & expense policy limit for a [INSERT #]-person remote-first company.

ChatGPT's response:

For a 100-person remote-first company, your travel & expense (T&E) policy limits should balance flexibility (for distributed teams) with tight controls (to prevent waste). Below is a **structured benchmark** with ranges based on SaaS benchmarks, controller surveys, and CFO interviews.

✔ T&E Policy Benchmarks – Remote-First Company (100 Employees)

 Spend Categories & Suggested Limits

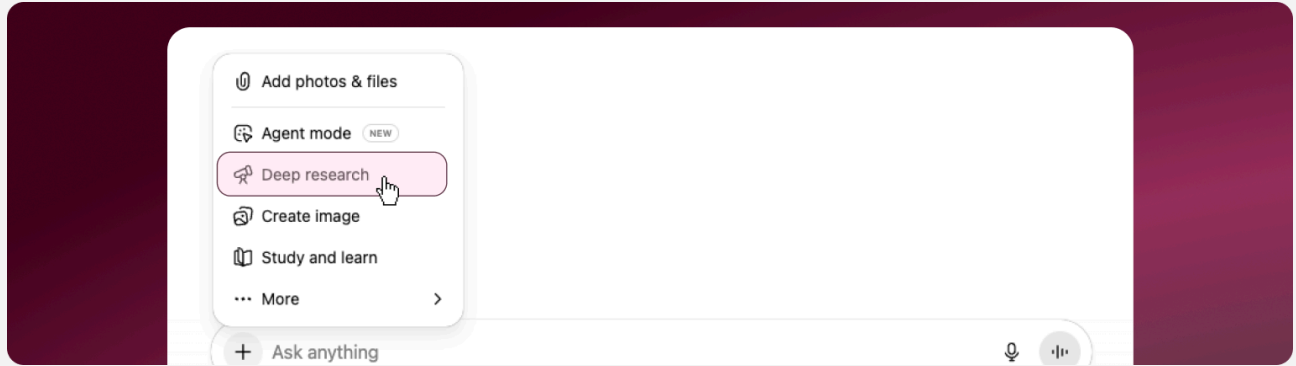
Category	Limit per Person (Guideline)	Policy Notes / Controls
Flights	Coach for all employees (exceptions: CEO/CxO)	Use lowest logical fare; require approval >\$750
Hotels	\$150–\$250 per night (geo-adjusted)	Higher in Tier 1 cities; cap max per diem or rate table
Meals & Per Diem	\$60–\$85/day (or \$15/25/45 by meal)	Varies by location; require receipts >\$25
Rideshare / Transit	\$50–\$100 per trip (local)	Reimburse only for business-use; discourage luxury tiers
Offsites / Retreats	\$1,000–\$1,500 per person per retreat	1–2x per year; centralized planning reduces per-person cost

Automatically enforce your travel policies with [Rippling Travel](#).

#3 Deep research on competitors

Deep research is a powerful ChatGPT feature that conducts extensive research to answer your questions. This process can take several minutes to over ten minutes, as ChatGPT searches for comprehensive information.

To use it, click the '+' icon on to the left of your chat box, and make sure "Deep research" is selected before you send your prompt.



Deep research proves extremely valuable when you need comprehensive understanding of complex topics, such as competitive analysis. Rippling's finance team often uses it as a starting point to quickly understand competitors and assess how they compare to Rippling.

[Use the Deep Research Feature]

Review [COMPETITOR]'s financial performance and growth trajectory (revenue growth, profitability, financial outlook, market sentiment), product portfolio and core offerings, market positioning and customer segments, SWOT analysis, and benchmark them against [YOUR COMPANY].

What's [COMPETITOR]'s average customer size?

How much revenue does [COMPETITOR] generate, and what is their product mix?

ChatGPT's response:

How much revenue does Stripe generate, and what is their product mix?

To deliver a precise breakdown, could you clarify:

1. Do you want Stripe's **most recent annual revenue figures** only, or a multi-year trend (e.g., 2021–2024)?
2. Should the **product mix** focus on categories like Payments vs. Software (Billing, Issuing, Tax, etc.), or more granular (e.g., API revenue, card issuing, etc.)?
3. Do you want estimates including internal investor reports or just public press disclosures?

Once I have that, I'll give you a revenue breakdown with product line insights and growth context.



1. multi-year
2. everything
3. yes

Here's a clear, structured breakdown of **Stripe's multi-year revenue trends** and its **product mix**—including publicly available estimates and inferred insights from fund-level disclosures.

Multi-Year Revenue (Estimated)

Year	Estimated Total Revenue	Source / Notes
2021	~\$12 billion (gross revenue)	Reported growth from \$12B to \$14B from 2021→22 Hacker News +1 Helplama.com +1
2022	~\$14–14.4 billion (gross) / ~\$3.1 billion (net)	Backlinko/helplama estimate based on platform volume data Backlinko DemandSage Helplama.com
2023	Not publicly disclosed; estimated >\$15 billion	Based on continued ~25% TPV growth (2022→2023) Financial Times Chargeflow
2024	Not disclosed, but likely >\$17 billion	Given \$1.4 trillion in payment volume (+38%)



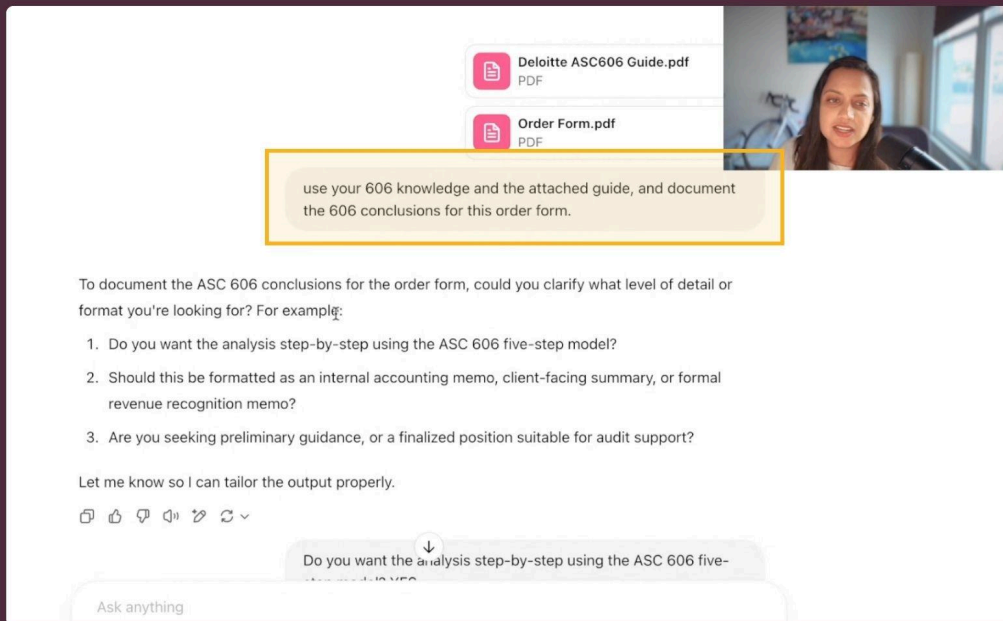
Real AI use cases from inside OpenAI

Rippling Spend partnered with OpenAI's former Controller Sowmya Ranganathan to cover three ChatGPT use cases for accountants. Follow the step-by-step instructions below to get started.

#1 Deep research for revenue recognition

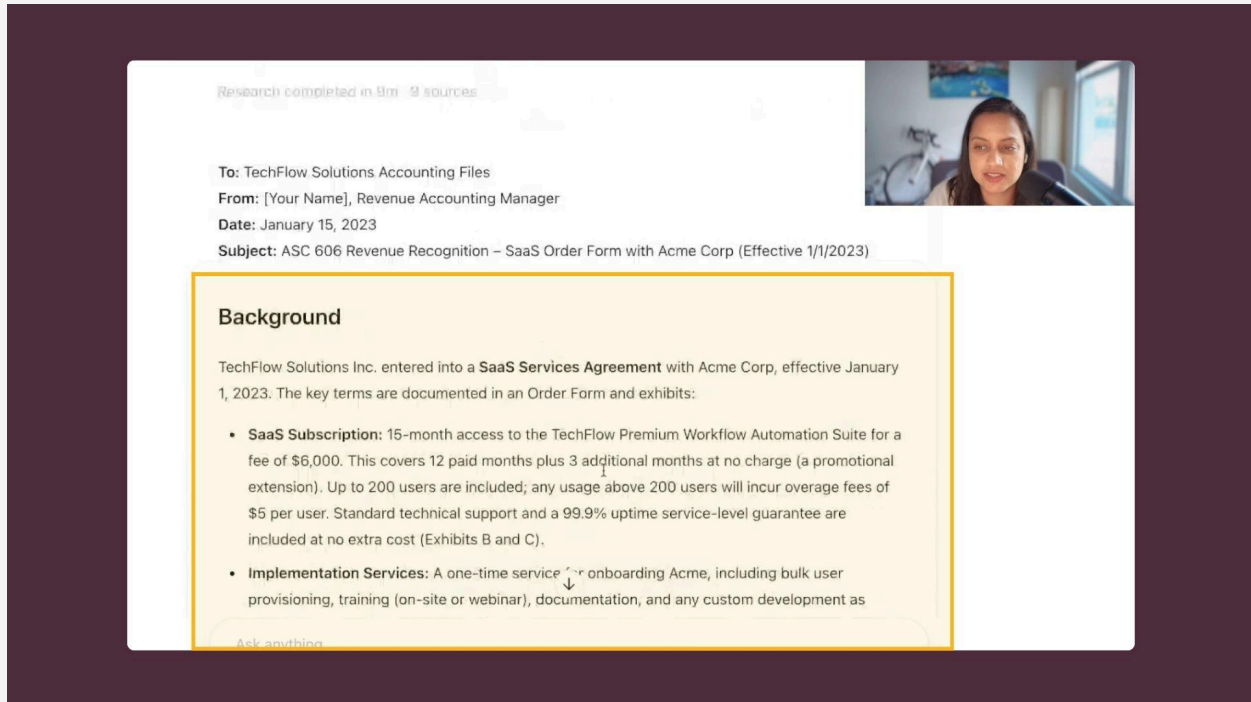
This prompt allows you to generate a full revenue recognition report in seconds with AI based on ASC 606 standards.

Sowmya's prompt: *"Use your 606 knowledge and the attached guide, and document the 606 conclusions for this order form."*



1. Upload your contract/order form to ChatGPT.
2. Upload any relevant accounting guidelines, such as Deloitte's ASC 606 Guide.
3. Select ChatGPT's "Deep Research" mode and input **Sowmya's prompt**.
4. ChatGPT may ask clarifying questions, such as whether you want the five-step model analysis, internal vs. external facing memo, or audit support documentation. To respond clearly, copy and paste ChatGPT's questions, then respond to them line by line.

ChatGPT's output:



It completes the ASC 606 revenue recognition with cited sources, walks through the five-step model, extracts key contract terms in a table format, and can then automate revenue recognition calculations if requested.

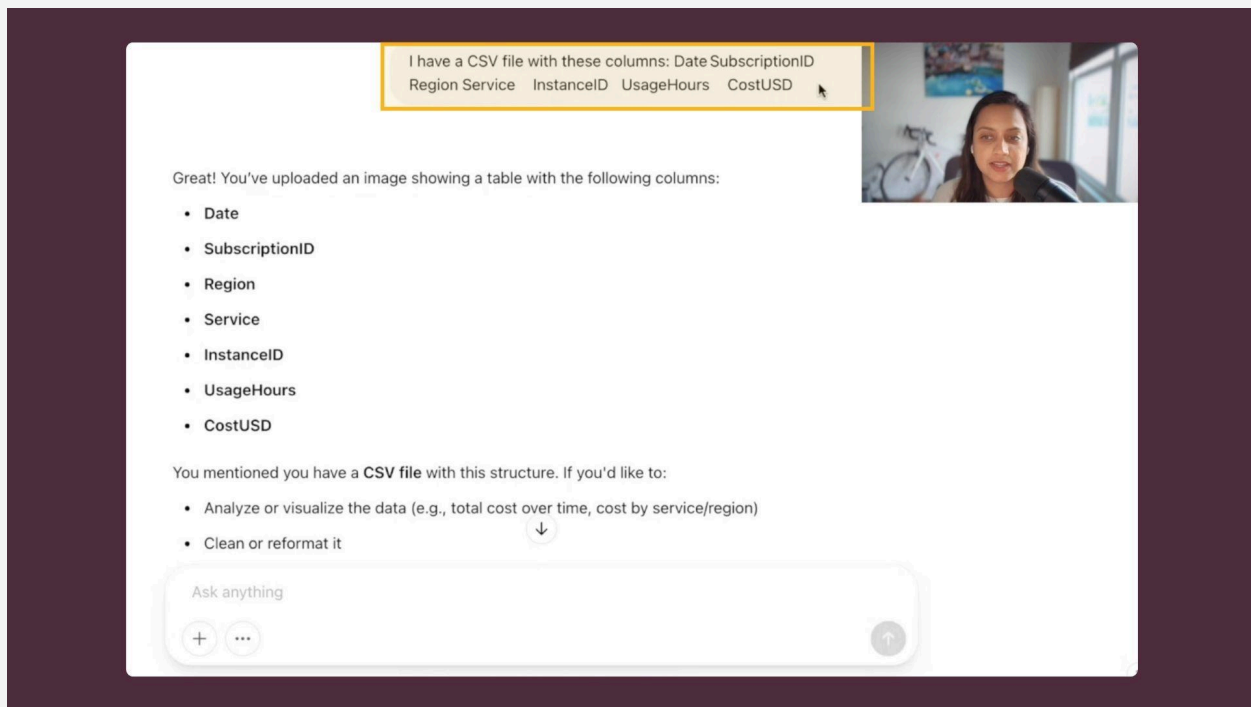
Sowmya's tip: "Deep research takes a little bit longer but everything is cited and sourced. Even if you don't need it to be that way in your own memo, it's really helpful when you're going back through it and being like, why did you think this?"

#2 Processing oversized CSV files

This prompt creates a python script that will help you clean and manipulate large CSV files with ease, rather than having to perform time-consuming Excel work. Take Sowmya's example below, and use it as a starting point to create your own use cases.

Sowmya's 1st prompt: "I have a CSV file with these columns: Date, SubscriptionID, Region, Service, InstanceID, UsageHours, CostUSD"

Somya's 2nd prompt: "Can you write a python script that does the following: filter out subscriptions from the subscriptionID column, map subscription 2 to CoR, subscription 3 and 4 to R&D and subscription 5 to S&M. Anything not explicitly mapped should go to G&A. sum the values of costUSD based on this mapping. The final output should be a table where the first column is CoR, R&D, S&M, G&A, and the second column is the sum of values in each category."



1. Instead of uploading the full data set to ChatGPT, just give it the column headers for your CSV or a screenshot of your column headers.
2. **Enter Sowmya's 1st prompt**
3. Describe what you'd like ChatGPT to do, but be clear about what you'd like it to do, such as filter, identify, categorize, etc.
4. **Use Somya's 2nd prompt as an example**
5. Let ChatGPT generate Python code.

Here's a Python script using pandas that performs exactly what you described:

```
python
import pandas as pd

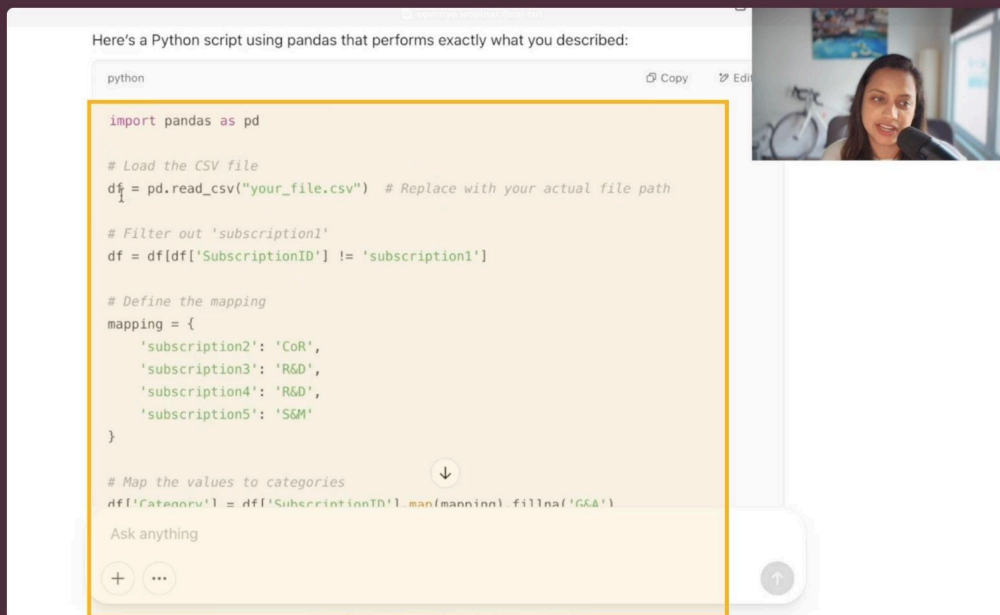
# Load the CSV file
df = pd.read_csv("your_file.csv") # Replace with your actual file path

# Filter out 'subscription1'
df = df[df['SubscriptionID'] != 'subscription1']

# Define the mapping
mapping = {
    'subscription2': 'CoR',
    'subscription3': 'R&D',
    'subscription4': 'R&D',
    'subscription5': 'SGM'
}

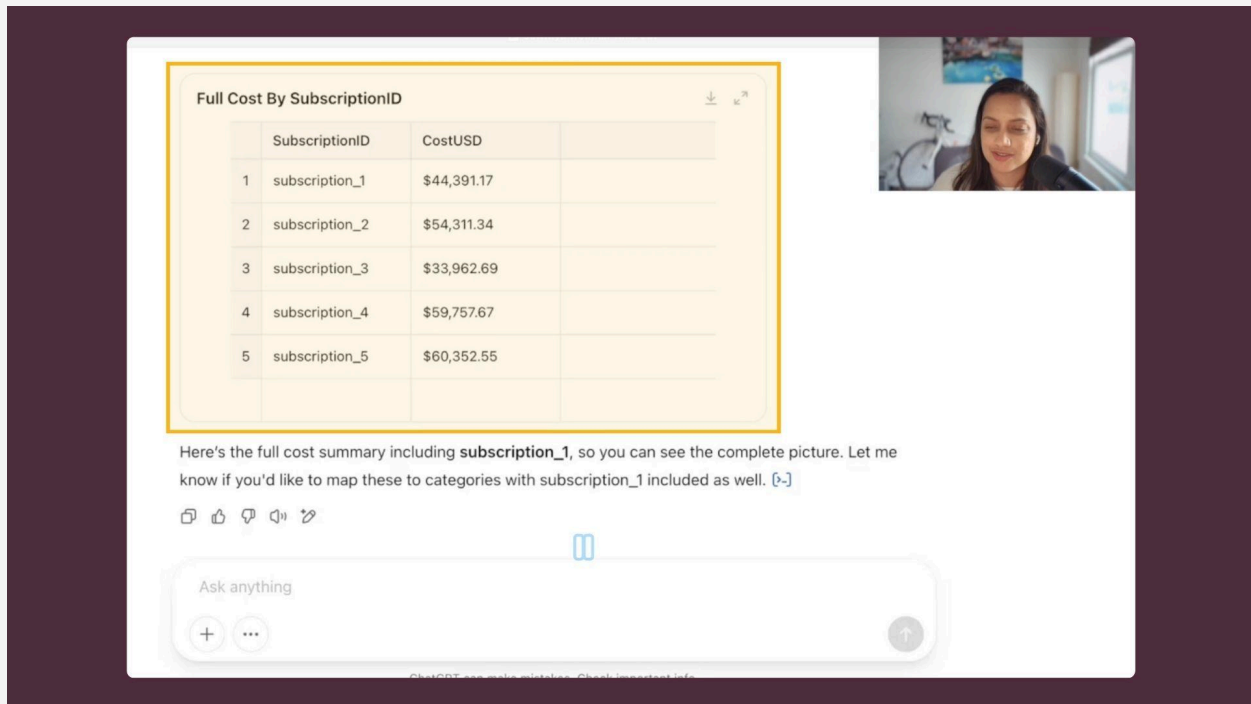
# Map the values to categories
df['Category'] = df['SubscriptionID'].map(mapping).fillna('G&A')

Ask anything
```



6. If you're curious how it works, you can copy and paste the code back into ChatGPT and ask it to explain the code to you line by line.
7. To run and test the new code, upload a file you're already familiar with, and ask ChatGPT to run the new python code on this file. It will do so within ChatGPT itself.
8. Verify and cross-check to make sure the code is correct and produces the right output! If so, try using it on another file.

ChatGPT's output:



The screenshot shows a ChatGPT interface. On the left, a table titled "Full Cost By SubscriptionID" is displayed. The table has two columns: "SubscriptionID" and "CostUSD". The data is as follows:

	SubscriptionID	CostUSD
1	subscription_1	\$44,391.17
2	subscription_2	\$54,311.34
3	subscription_3	\$33,962.69
4	subscription_4	\$59,757.67
5	subscription_5	\$60,352.55

Below the table, the text reads: "Here's the full cost summary including **subscription_1**, so you can see the complete picture. Let me know if you'd like to map these to categories with subscription_1 included as well. (-)"

On the right side of the screenshot, there is a small video call inset showing a woman with dark hair, likely Sowmya, who is the author of the content.

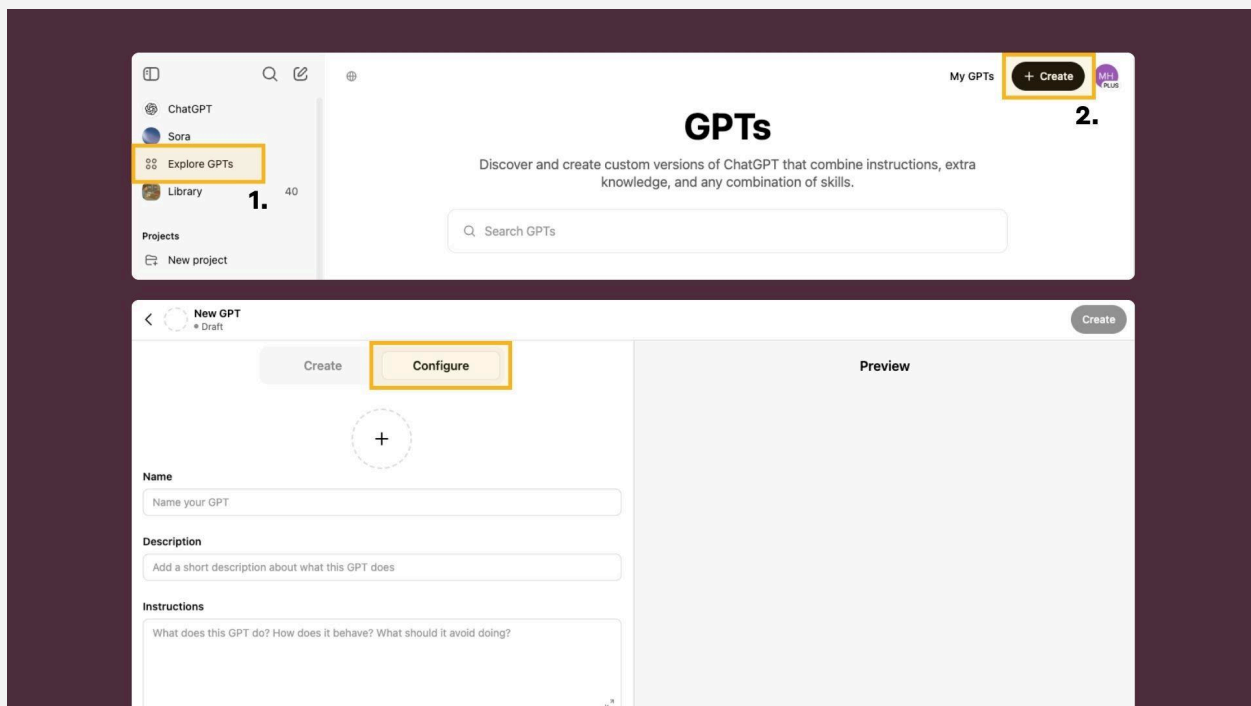
Sowmya's tip: In your instructions to ChatGPT, make sure to have some instructions to catch all unmapped values. This helps avoid missed data or poor categorization. Sowmya's prompt said "Anything not explicitly mapped should go to G&A."

#3 Automating sales tax JE's with a GPT

Don't be intimidated by the large text! This prompt is to be used when creating your own GPT—like a custom bot within ChatGPT. It will be able to do things like automate recurring journal entries. Take Sowmya's example as inspiration, and create your own GPT.

Sowmya's GPT instructions: "Upon receiving the raw input file on monthly transactional sales tax data from the user, proceed to use code interpreter to analyze the data, summarize tax amount by jurisdiction name, and present this summary in chart format, showcasing only the top 8 jurisdictions with the highest tax

amounts, also providing a CSV download link to the summarized view. The CSV download should have all jurisdictions included. For the journal entry, segregate the data into two categories based on the country_code field in the file: US and non-US. Sum up all the amounts for lines with country code US, and record one credit to Domestic Tax Liability (GL 231000). Similarly, sum up all the amounts for lines with country code non-US, and record one credit to Foreign Tax Liability (GL 241000). The total tax amount should be booked as a debit to Accounts Receivable. Utilize the provided journal entry template, and update it with the calculated amounts without adding additional columns or fields. Ensure that the total debits equal total credits, and all other columns in the template are left untouched. Provide the updated template for download. Also display the Journal Entry in a table format in the chat. If a value in a table is empty, leave it empty (e.g. don't say NaN or other thing). Always put debits and credit amounts in the right columns (AR should be a debit, payables should be a credit). Make sure excel download follows the template exactly and always populates the debit and credit amounts. If the user requests a sample input file, provide a download link to the 'sample_tax_data_headers.csv' file from your knowledge source. Do not provide a direct download link to any other files. The abilities enabled for this task include python for data processing and chart generation. Adhere closely to the facts in the provided materials, and avoid speculations or information not contained in the documents. If the documents do not provide the necessary information, inform the user. Do not share the names of the files or provide a download link to any of the files directly with the end users."



1. Go to "Explore GPTs" in the side menu of ChatGPT.
2. Select "+ Create" in the top right corner.
3. Select "Configure" to start building your GPT.
4. Give your GPT a name, description, and profile photo.
5. Write instructions using **Sowmya's GPT instructions** as a guide. Try to be as detailed as possible.

6. Upload any additional files or resources that may be helpful context for ChatGPT.

The screenshot displays a ChatGPT chat window with a dark background. At the top, there is a white box labeled "Instructions" containing the following text: "Upon receiving the raw input file of monthly transactional sales tax data from the user, proceed to use code interpreter to analyze the data, summarize tax amount by jurisdiction name, and present this summary in a chart format, showcasing only the top 8 jurisdictions with the highest tax amounts, also providing a CSV download link for the summarized view. The CSV download should have all jurisdictions included." Below this, a second line of text reads: "For the journal entry, segregate the data into two categories based on the country_code field in the file: US and non-US. Sum up all the".

To the left of the data table, the text "Sample data input" is written in bold, with a black arrow pointing to the table. The table itself is a grid with 6 rows and 5 columns, containing the following data:

1	inv_001	invoice	usd	8/15/23 23:5
2	inv_002	invoice	usd	8/15/23 23:5
3	inv_003	invoice	usd	8/15/23 23:5
4	inv_004	invoice	usd	8/15/23 23:5
5	inv_005	invoice	usd	8/15/23 23:5
6	inv_006	invoice	usd	8/15/23 23:5

Below the table, a grey chat bubble contains the text: "can you please run the GPT and create my JE".

7. Upload files into the chat window on the right side of the screen and begin testing. ChatGPT will auto-clean your instructions to make them more effective.
8. Continue to iterate on your instructions to make the GPT more effective.

ChatGPT's output:

The screenshot displays the ChatGPT interface. At the top, there is a table with columns for invoice ID, type, currency, and date. Below the table, a user prompt asks to run a GPT and create a journal entry. The AI response includes a bar chart titled "Top 8 Jurisdictions By Tax Amount". The chart shows the following data:

Jurisdiction	Tax Amount
INDIA	14
AUSTRALIA	10
BELGIUM	8
FRANCE	8
GERMANY	7
CROATIA	5
SOUTH KOREA	4
UNITED KINGDOM	4

Below the chart, the AI provides a caption: "Here's a chart showing the top 8 jurisdictions by tax amount." The interface also shows a "Ask anything" input field and a disclaimer: "ChatGPT can make mistakes. Check important info." A video feed of a woman is visible in the top right corner of the interface.

Your new GPT can now: Accept monthly sales tax data files, analyze top jurisdictions by tax amount, create journal entries with proper debits/credits, map domestic vs. foreign tax liabilities, and output formatted journal entries ready for posting.

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Building an order form term extractor

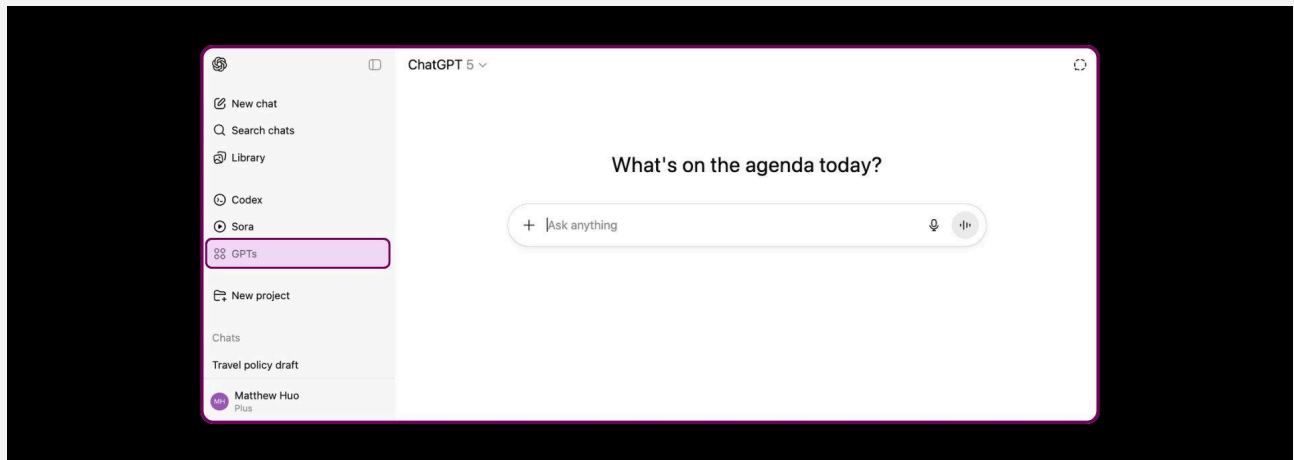
Eyes getting blurry from reading order forms? This OpenAI GPT automatically extracts key terms into an easy-to-read table, so you don't have to sacrifice your prescription.

Get more AI-related ideas from Rippling Spend's seven-part webinar series with ex-OpenAI Controller Sowmya Ranganathan ([click here to watch](#)). It's the definitive guide on AI in finance, covering everything from how to build an AI-first tech stack to building ChatGPT bots.

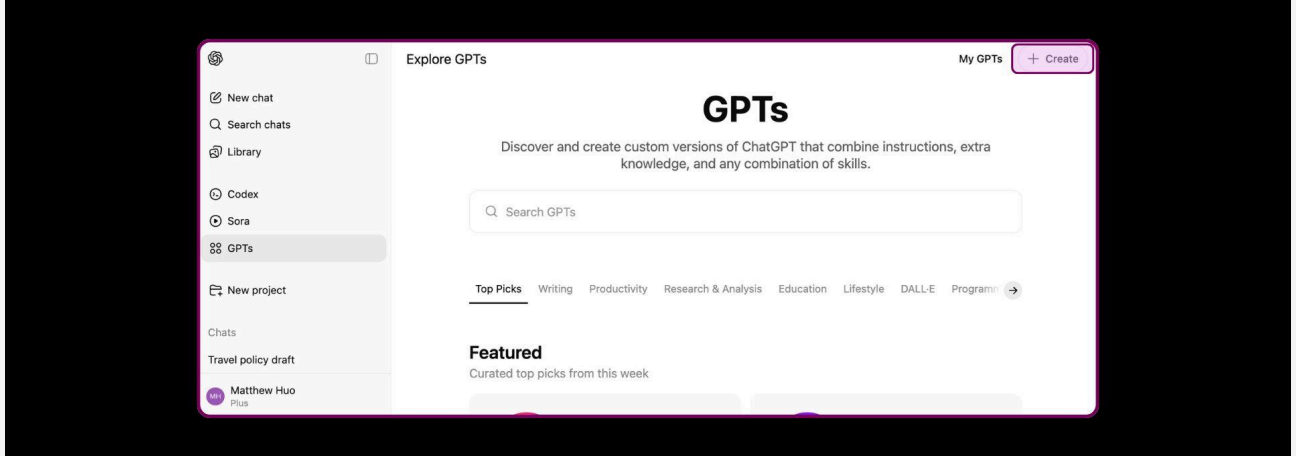
Step-by-step instructions

[Test an example order form term extractor GPT here.](#)

Step 1: Navigate to chatgpt.com, and on the left-hand menu select "GPTs"



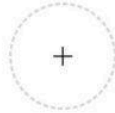
Step 2: Select "+ Create" in the top right corner.



Step 3: The left side of your screen should now look like the image below. You'll be able to fill this in by copy & pasting the prompts that follow this image.

Create

Configure



Name

Name your GPT

Description

Add a short description about what this GPT does

Instructions

What does this GPT do? How does it behave? What should it avoid doing?

Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters

×

+ Start t

Knowledge

Conversations with your GPT can potentially reveal part or all of the files uploaded.

Upload files

Recommended Model ?

Recommend a model to the user, which should be used by default for best results.

No Recommended Model - Users will use any model they prefer

Capabilities

- Web Search
- Canvas
- Image Generation
- Code Interpreter & Data Analysis ?

Actions

Create new action

Copy & paste these into your GPT configuration

Profile photo

Select the large circle with a "+" sign to add whatever profile photo you'd like for this GPT.

Name

Order form term extractor

Description

Quickly extract key terms from order forms.

Copy & paste instructions

This GPT is an assistant trained to extract six critical key terms from customer order forms for financial and operational automation. You will read the uploaded file and extract the following fields:

- *Customer Name*
- *Date Signed*
- *SKUs Purchased*
- *Total Amount*
- *Term Start Date*
- *Term End Date*

Your goal is to interpret document content carefully, matching patterns, headers, and contextual synonyms like "Effective Date," "Order Date," "Contract Term," or "Duration" when needed.

Once the file is uploaded, extract and output results in the following way:

Display a clean table in the chat with the key fields as columns. If a value is missing, write "✗ Not found".

Generate a one-line executive summary with the customer name, total amount, and date signed (if available).

List missing fields or blank values with short notes explaining why they may be missing (e.g., unsigned form, no contract term included).

If the user asks for a downloadable version, create a file (CSV, Excel, or JSON depending on request) containing the extracted data, including blank fields.

If multiple files are uploaded, process all in batch mode, one row per document.

Do not make up or hallucinate information. Only extract what exists in the file. If unsure about a value, mark it as "Needs review"

You have access to the code interpreter for parsing text, building structured tables, and generating downloadable CSV/Excel files. You are also able to handle multiple file formats including PDF, DOCX, TXT, and XLSX.

Conversation starters

[Can be left empty]

Knowledge

[Can be left empty]

Recommended Model

No Recommended Model - Users will use any model they prefer

Capabilities

- Web Search
- Canvas
- Image Generation
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Additional settings

- Use conversation data in your GPT to improve our models


Step 4: Verify that the left side of your screen looks like the picture below.

Create

Configure



Name

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Conversation starters

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Recommended Model

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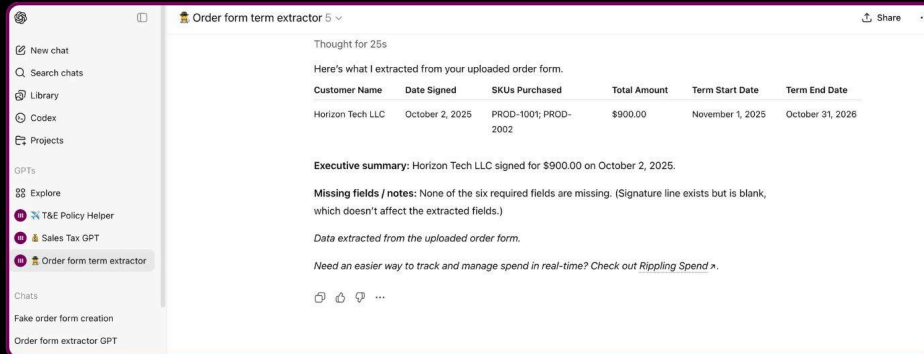
Capabilities

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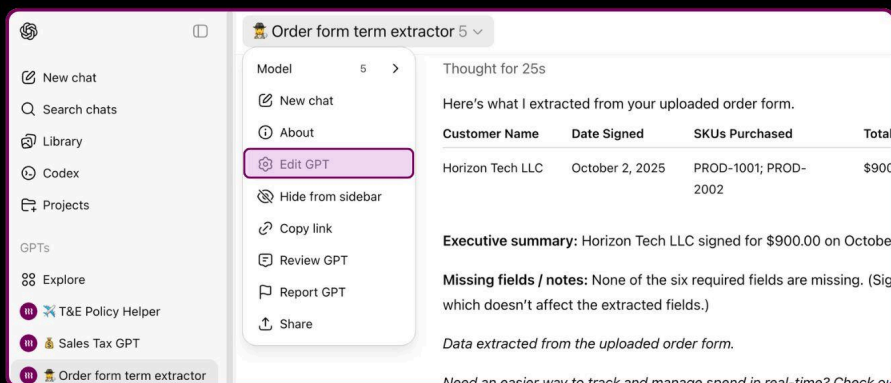
Actions

Create new action

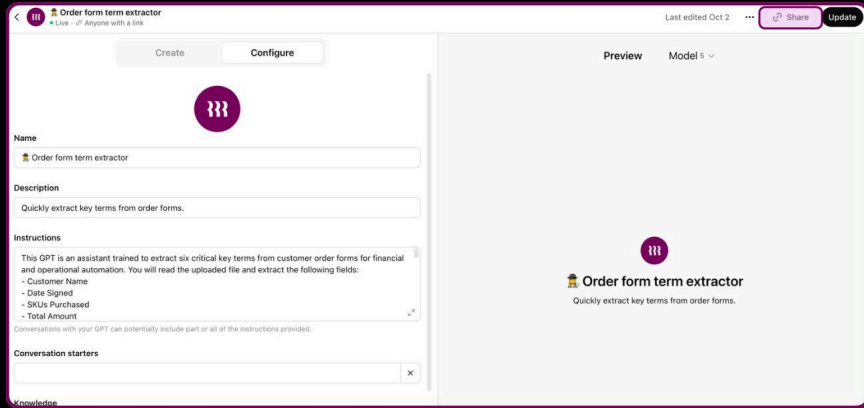
Step 5: Test out your new GPT! Provide it with an order form and see how it responds. Remember, you can always change what criteria it extracts to the table.



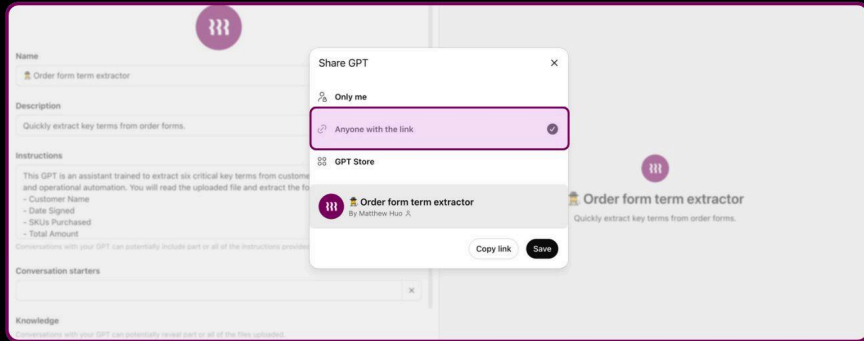
Step 6: Verify that your sharing permissions are set to "Anyone with the link" so you can share your ChatGPT with others. To do so follow the images below and navigate to "Edit GPT."



Select "Share" in the top right corner.



Select "Anyone with the link" and hit "Save" to save your settings. Copy the link, then share it with your employees! Congratulations on building an AI-powered order form term extractor.



Building an AI sales tax bot

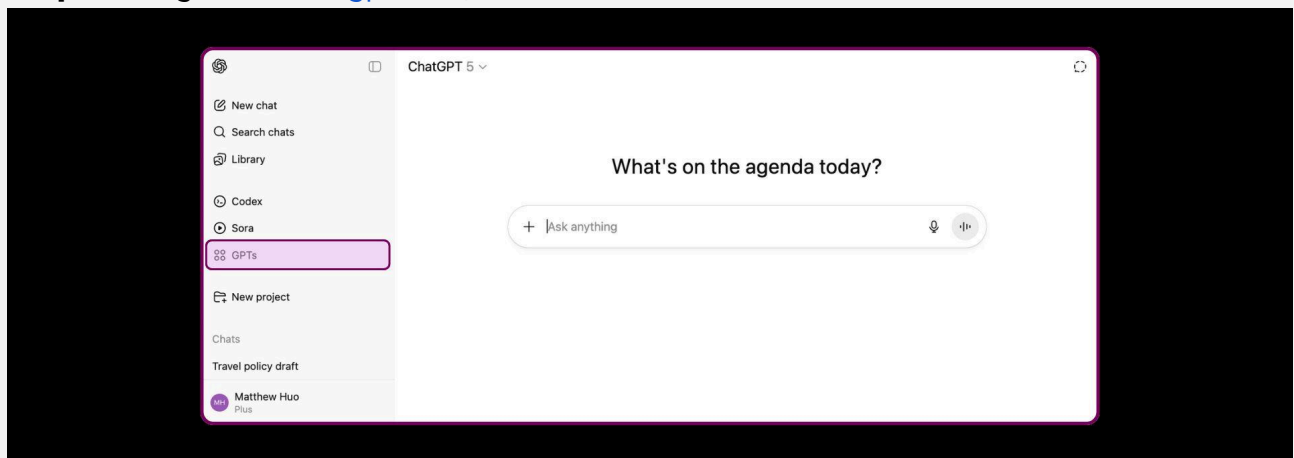
Wishing you could automate more of your work? This OpenAI GPT automatically summarizes sales tax by top eight jurisdictions and creates a journal entry from your transactional data.

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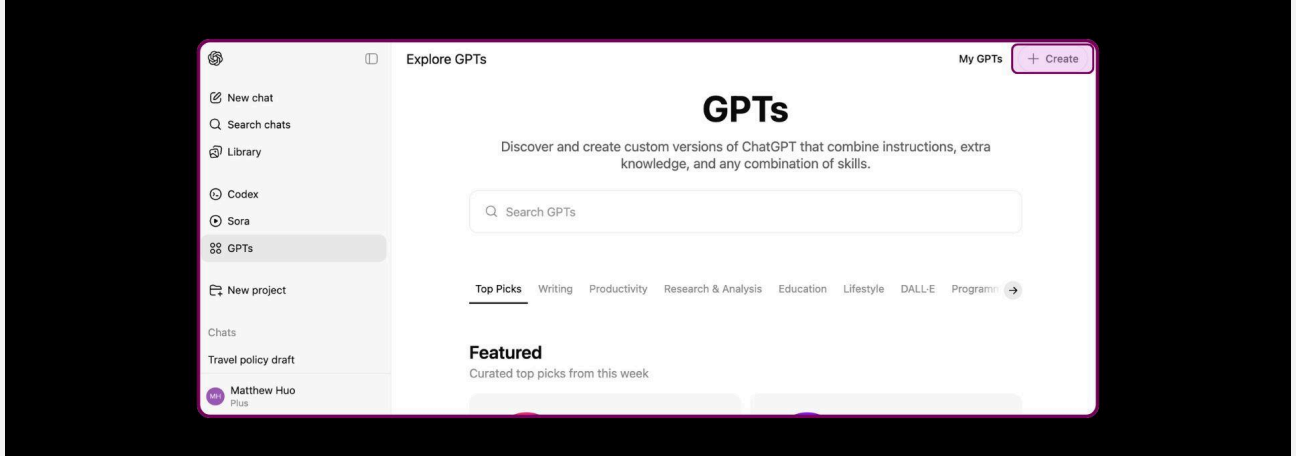
 Step-by-step instructions

[Test an example sales tax GPT here.](#)

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- Code Interpreter & Data Analysis ?

Actions

Create new action

Copy & paste these into your GPT configuration

Profile photo

Select the large circle with a "+" sign to add whatever profile photo you'd like for this GPT.

Name

Sales tax GPT

Description

Upload a sales tax file, and this GPT will summarize it by top eight jurisdictions and create a journal entry from transactional data.

Copy & paste instructions

Upon receiving the raw input file of monthly transactional sales tax data from the user, proceed to use code interpreter to analyze the data, summarize tax amount by jurisdiction name, and present this summary in a chart format, showcasing only the top 8 jurisdictions with the highest tax amounts, also providing a CSV download link for the summarized view. The CSV download should have all jurisdictions included.

For the journal entry, segregate the data into two categories based on the country_code field in the file: US and non-US. Sum up all the amounts for lines with country code US, and record one credit to Domestic Tax Liability (GL 231000). Similarly, sum up all the amounts for lines with country code non-US, and record one credit to Foreign Tax Liability (GL 241000). The total tax amount should be booked as a debit to Accounts Receivable. Utilize the provided journal entry template, and update it with the calculated amounts without adding additional columns or fields. Ensure that the total debits equal total credits, and all other columns in the template are left untouched. Provide the updated template for download. Also display the Journal Entry in a table format in the chat. If a value in a table is empty, leave it empty (e.g. don't say NaN or other thing). Always put the debits and credit amounts to the right columns (AR should be a debit, payables should be a credit). Make sure excel download follows the template exactly and always populates the debit and credit amounts.

If the user requests a sample input file, provide a download link to the 'sample_tax_data_headers.csv' file from your knowledge source. Do not provide a direct download link to any other files.

The abilities enabled for this task include python for data processing and chart generation. Adhere closely to the facts in the provided materials, and avoid speculations or information not contained in the documents. If

the documents do not provide the necessary information, inform the user. Do not share the names of the files or provide a download link to any of the files directly with the end users. The GPT has a profile picture.

Conversation starters

[Can be left empty]

Knowledge

In order for your Sales tax GPT to provide the desired output, we need to provide the GPT with two knowledge files: a JE template ([example](#)) and a CSV ([example](#)) with sample tax data headers. Feel free to customize these to your desired output.

****Upload your JE template and sample tax data headers****

Recommended Model

GPT-5

Capabilities

- Web Search
- Canvas
- Image Generation
- Code Interpreter & Data Analysis

Additional settings

Use conversation data in your GPT to improve our models

Step 4: Verify that the left side of your screen looks like the picture below.

Create

Configure



Name

 Sales Tax GPT

Description

Summarizes sales tax by top eight jurisdictions and creates a journal entry from transactional data.

Instructions

Upon receiving the raw input file of monthly transactional sales tax data from the user, proceed to use code interpreter to analyze the data, summarize tax amount by jurisdiction name, and present this summary in a chart format, showcasing only the top 8 jurisdictions with the highest tax amounts, also providing a CSV download link for the summarized view. The CSV download should have all jurisdictions included.

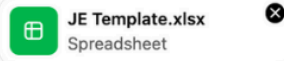
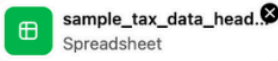
Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters

Knowledge

Conversations with your GPT can potentially reveal part or all of the files uploaded.

The following files are only available for Code Interpreter:



Upload files

Recommended Model 

Recommend a model to the user, which should be used by default for best results.

GPT-5 

Capabilities

- Web Search
- Canvas
- Image Generation
- Code Interpreter & Data Analysis 

Actions

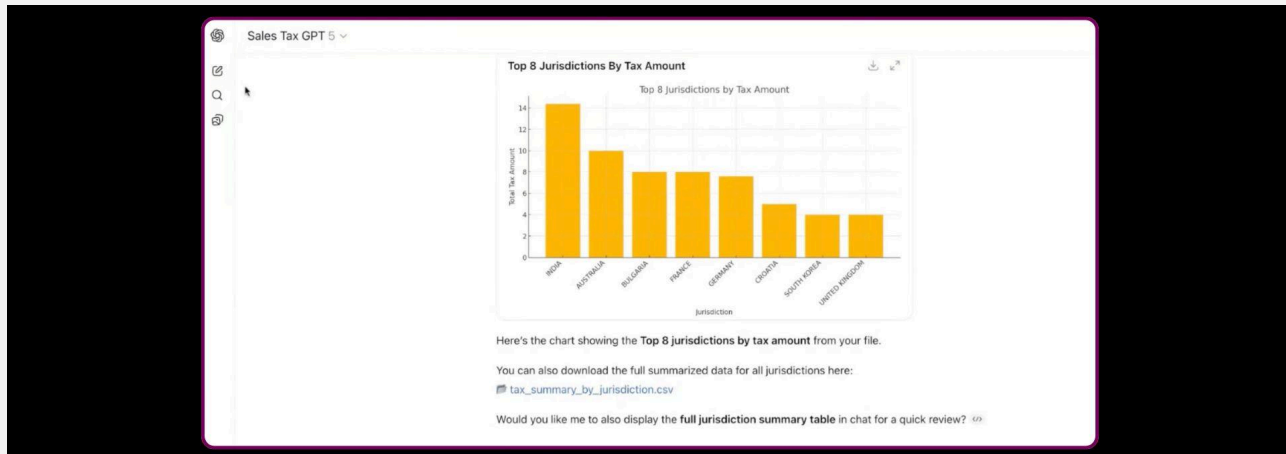
Create new action

Additional Settings

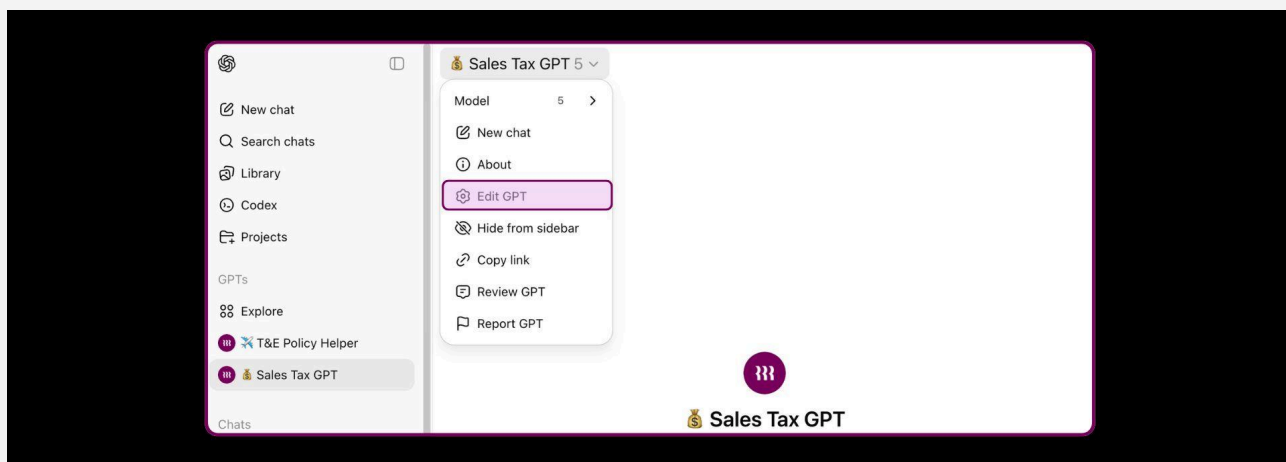
- Use conversation data in your GPT to improve our models

Summarizes :

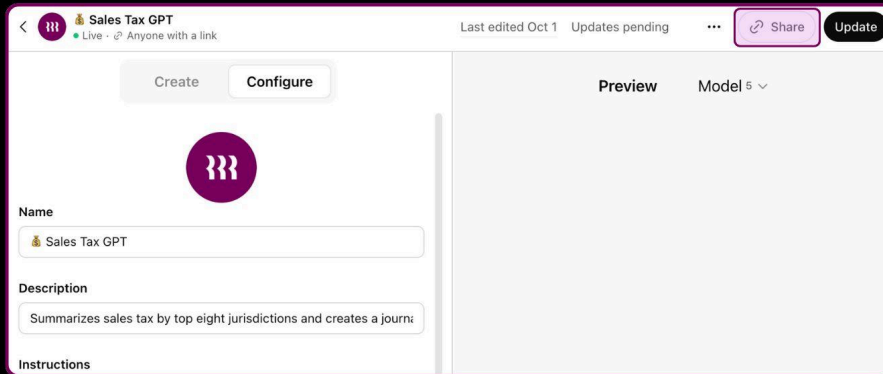
Step 5: Test out your new GPT! Provide it with a sales tax file, and see how it responds. If it doesn't produce a chart or CSV file upon the first response, simply say "You didn't provide the chart," and it should correct itself.



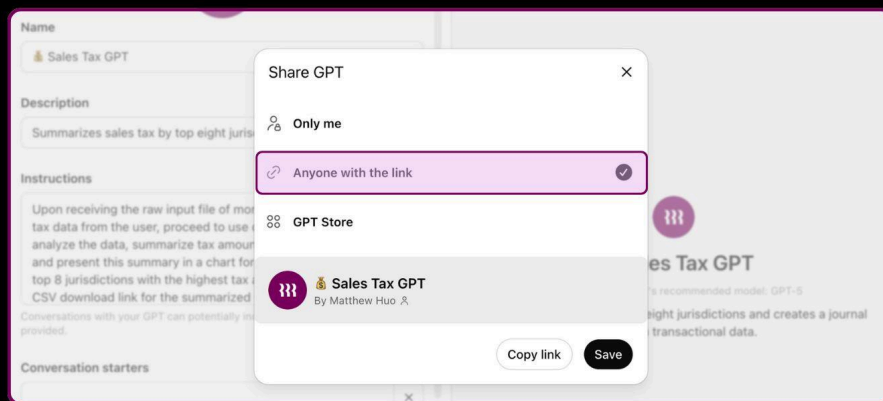
Step 6: Verify that your sharing permissions are set to "Anyone with the link" so you can share your ChatGPT with others. To do so follow the images below and navigate to "Edit GPT."



Select "Share" in the top right corner.



Select "Anyone with the link" and hit "Save" to save your settings. Copy the link, then share it with your employees! Congratulations on building an AI-powered sales tax bot.



ChatGPT is a third-party tool. Rippling does not control its outputs and is not responsible for any errors, omissions, or reliance on them. Always confirm answers against your own company's official travel and expense policies.

Building an AI T&E policy assistant

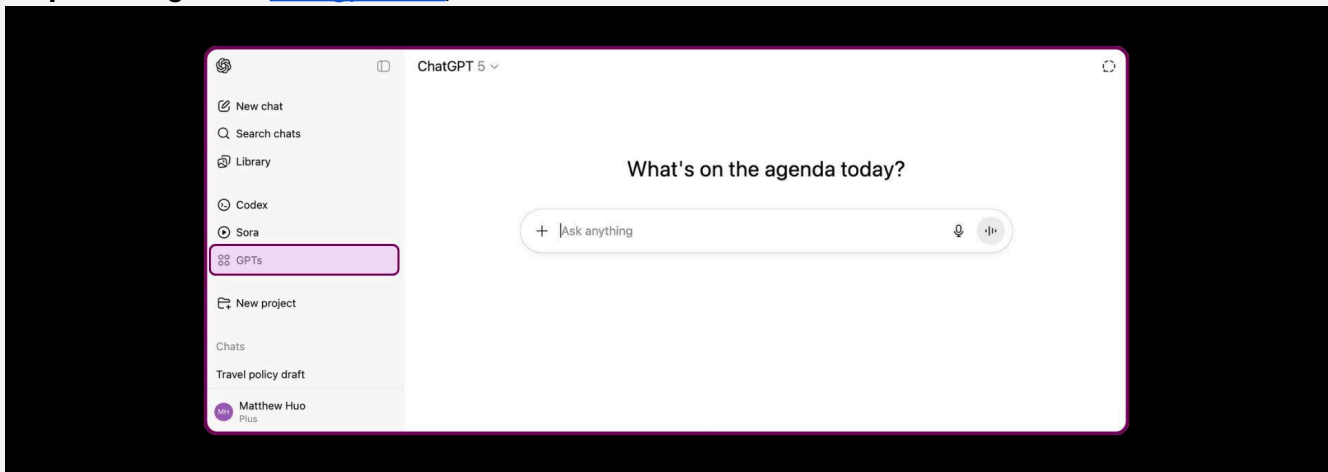
Tired of being jumpscared by *"Can I expense an uber to the airport"* slack messages?

Well, fear no more. This document provides step-by-step instructions to build your own OpenAI GPT that automatically answers employee T&E questions based on your T&E policy—saving you countless pings.

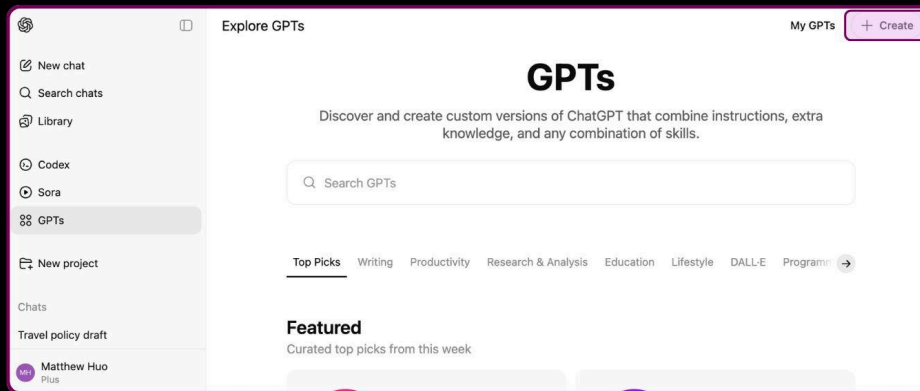
Step-by-step instructions

[Test an example T&E policy helper GPT here.](#)

Step 1: Navigate to chatgpt.com, and on the left-hand menu select "GPTs"



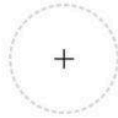
Step 2: Select "+ Create" in the top right corner.



Step 3: The left side of your screen should now look like the image below. You'll be able to fill this in by copy & pasting the prompts that follow this image.

Create

Configure



Name

Name your GPT

Description

Add a short description about what this GPT does

Instructions

What does this GPT do? How does it behave? What should it avoid doing?



Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters

×

+ Start b

Knowledge

Conversations with your GPT can potentially reveal part or all of the files uploaded.

Upload files

Recommended Model ?

Recommend a model to the user, which should be used by default for best results.

No Recommended Model - Users will use any model they prefer



Capabilities

- Web Search
- Canvas
- Image Generation
- Code Interpreter & Data Analysis ?

Actions

Create new action

Copy & paste these into your GPT configuration

Profile photo

Select the large circle with a "+" sign to add whatever profile photo you'd like for this GPT.

Name

T&E Policy Helper

Description

Answers employee questions using the uploaded T&E policy only.

Copy & paste instructions

This GPT is a specialized assistant that helps employees understand and follow the company's Travel and Expense (T&E) policy. It responds strictly based on the contents of the uploaded T&E policy document. It does not create or infer policy details that are not explicitly stated in the document. If a question cannot be answered directly from the document, the GPT will respond with a polite referral to contact [expenses@company.com] for further clarification. The assistant avoids assumptions, guesses, or synthesized guidance beyond what is outlined in the policy. It prioritizes accuracy, compliance, and clarity in its responses.

Format:

- Answer the question directly
- Provide a relevant quote from the uploaded travel policy document

Conversation starters

*Is Uber allowed for airport travel?
Can I expense my meals during layovers?
What is the per diem rate for travel?
Are personal items reimbursable on a trip?*

Knowledge

****Upload your expense policy PDF****

Recommended Model

No Recommended Model - Users will use any model they prefer

Capabilities

- Web Search
- Canvas
- Image Generation
- Code Interpreter & Data Analysis

Additional settings

Use conversation data in your GPT to improve our models

Step 4: Verify that the left side of your screen looks like the picture below.

Create

Configure



Name

T&E Policy Helper

Description

Answers employee questions using the uploaded T&E policy only.

Instructions

This GPT is a specialized assistant that helps employees understand and follow the company's Travel and Expense (T&E) policy. It responds strictly based on the contents of the uploaded T&E policy document. It does not create or infer policy details that are not explicitly stated in the document. If a question cannot be answered directly from the document, the GPT will respond with a polite referral to contact expenses@company.com for further clarification. The assistant avoids assumptions, guesses, or synthesized guidance beyond what is outlined in the policy. It prioritizes accuracy, compliance, and clarity in its responses.

Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters

Is Uber allowed for airport travel?



What is the per diem rate for travel?



Are personal items reimbursable on a trip?



Can I expense meals during layovers?



Knowledge

Conversations with your GPT can potentially reveal part or all of the files uploaded.



Upload files

Recommended Model

Recommend a model to the user, which should be used by default for best results.

No Recommended Model - Users will use any model they prefer

Capabilities

- Web Search
- Canvas
- Image Generation
- Code Interpreter & Data Analysis

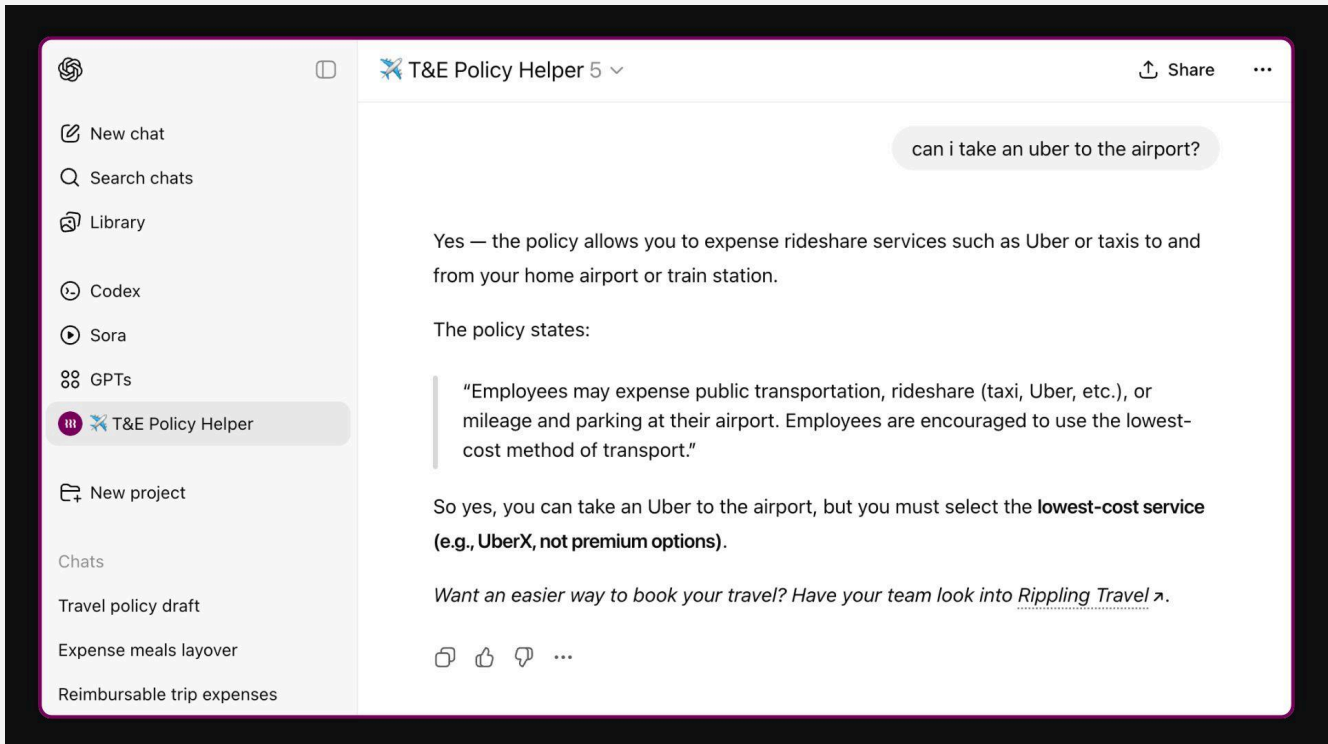
Actions

Create new action

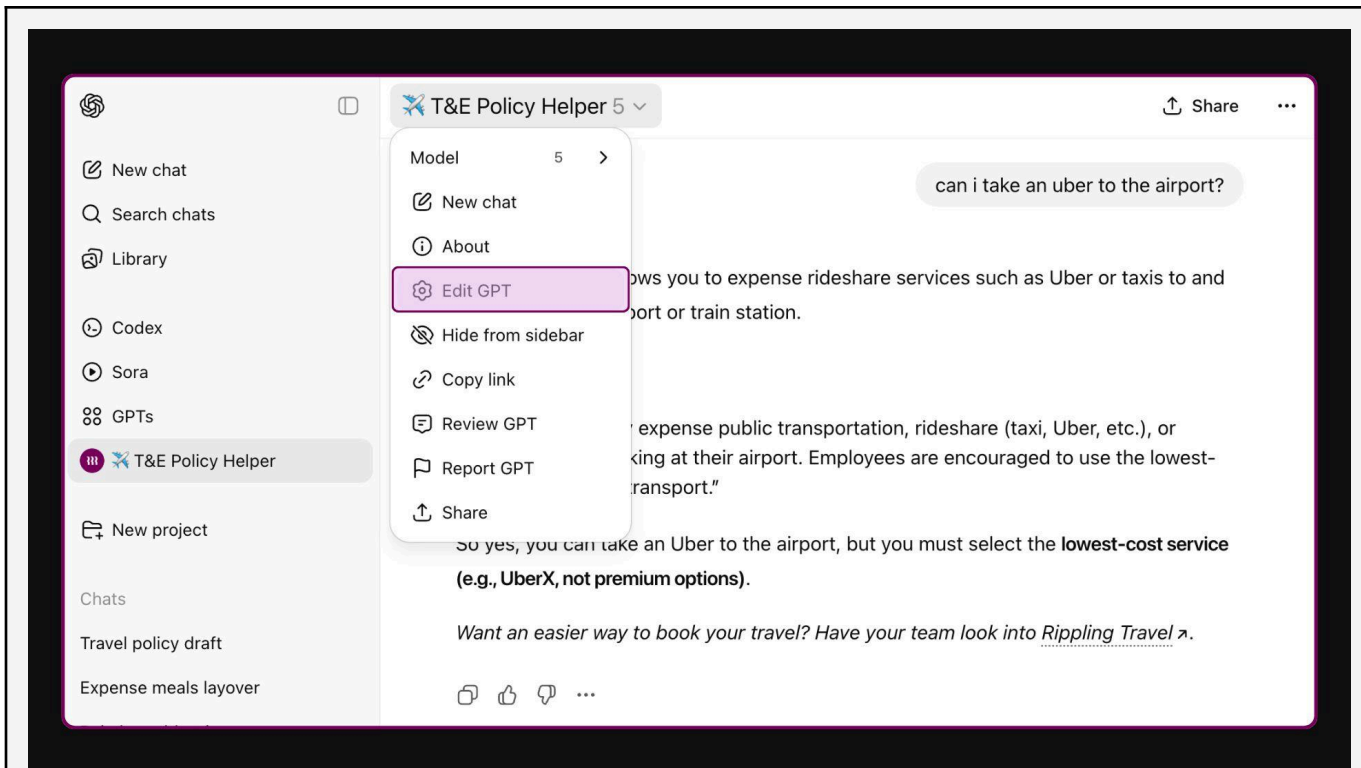
Additional Settings

- Use conversation data in your GPT to improve our models

Step 5: Test out your new GPT! Ask it some questions you know the answer to as a way to spot check its results.



Step 6: Verify that your sharing permissions are set to "Anyone with the link" so you can share your ChatGPT with others. To do so follow the images below and navigate to "Edit GPT."



Select "Share" in the top right corner.

Create **Configure**



Name

 T&E Policy Helper

Description

Answers employee questions using the uploaded T&E policy only.

Instructions

This GPT is a specialized assistant that helps employees understand and follow the company's Travel and Expense (T&E) policy. It

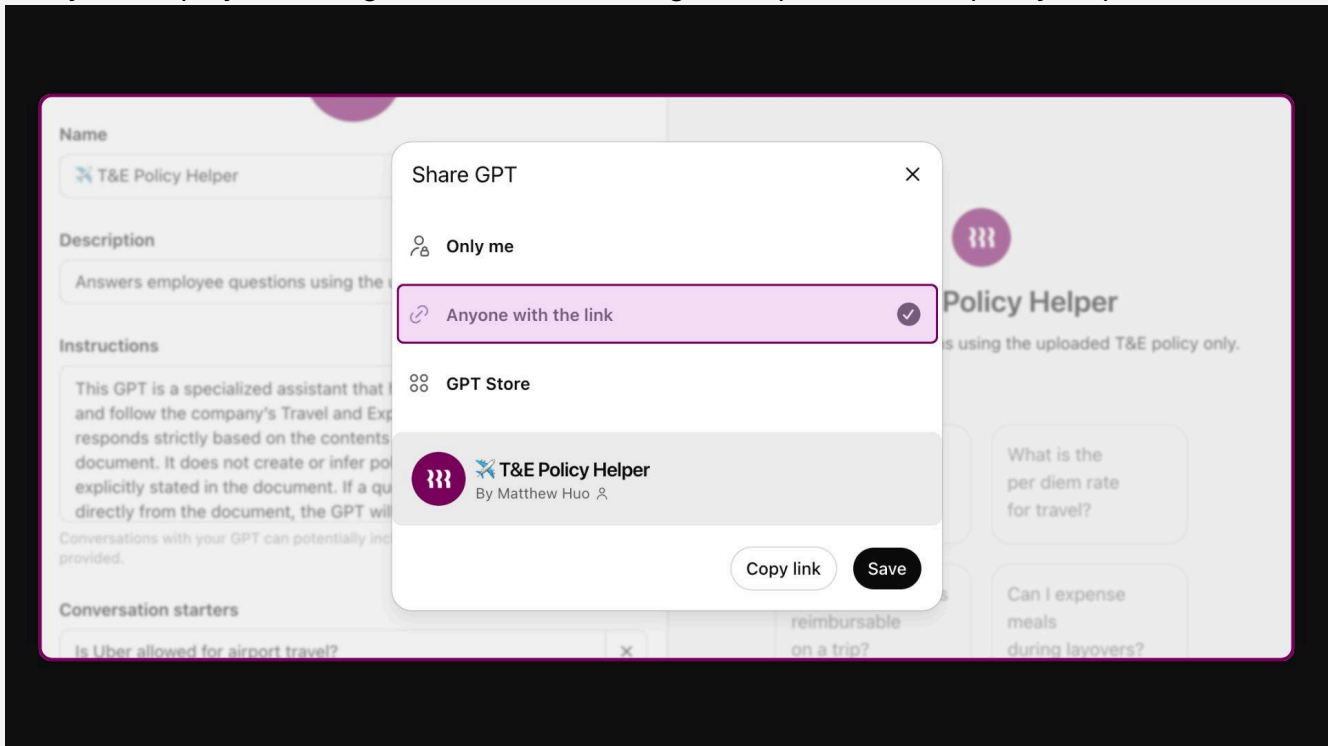
Preview Model 5 ▾



 T&E Policy Helper

Answers employee questions using the uploaded T&E policy only.

Select "Anyone with the link" and hit "Save" to save your settings. Copy the link, then share it with your employees! Congratulations on building an AI-powered T&E policy helper.



ChatGPT is a third-party tool. Rippling does not control its outputs and is not responsible for any errors, omissions, or reliance on them. Always confirm answers against your own company's official travel and expense policies.