# **GPT for Work Help**

**User Guide for Microsoft Excel & Word** 

2025-10-22



# Overview of GPT for Work

#### What is GPT for Work?

GPT for Work is a set of add-ons, developed by Talarian, that integrate the power and intelligence of generative AI directly into Microsoft Excel and Word and Google Sheets and Docs. GPT for Work supports models from Anthropic, Azure, DeepSeek, Google, Mistral, OpenAI, OpenRouter, Perplexity, and xAI. GPT for Work also supports open-source models through Ollama and any OpenAI-compatible API endpoint.

GPT for Work allows you to:

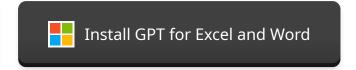
- Apply AI prompts in bulk on spreadsheet data. Use your favorite AIs to generate, rewrite, translate, categorize, extract, and otherwise process text at machine-powered scale and speed in Microsoft Excel and Google Sheets.
- Author documents with a personal writing assistant. Use your favorite AIs to edit, rewrite, correct, review, translate, summarize, draft, write, and more in Microsoft Word and Google Docs.

GPT for Work comes in the following flavors:

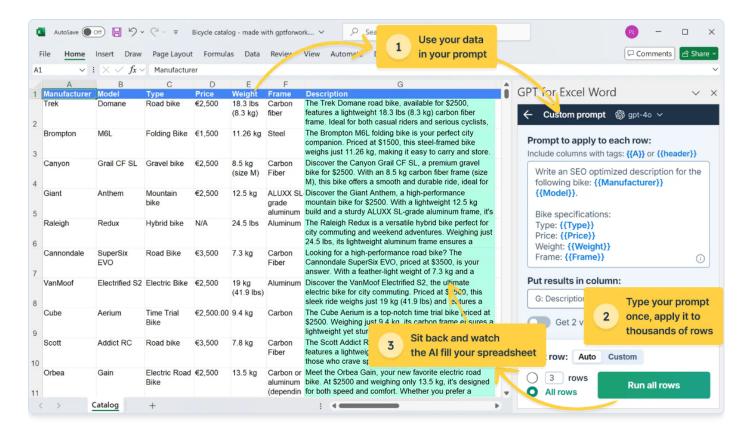
- GPT for Excel and Word: Microsoft Office add-in that bundles together GPT for Excel and GPT for Word.
- GPT for Sheets and Docs: Google Workspace add-on that bundles together GPT for Sheets and **GPT for Docs.**



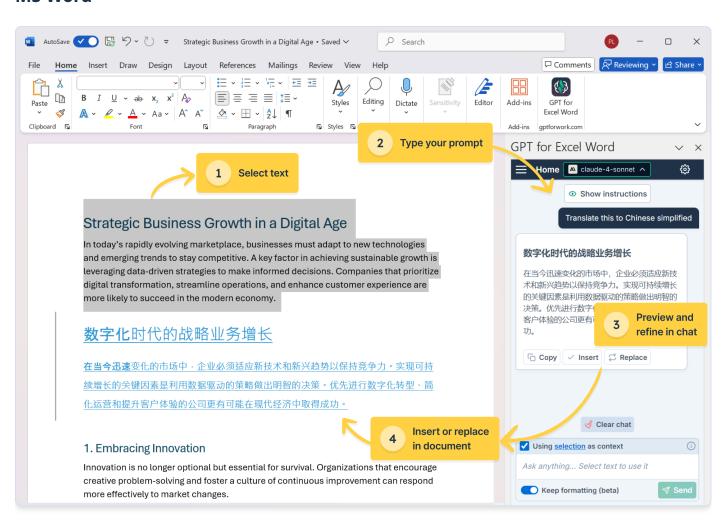
Install GPT for Sheets and Docs



#### **MS Excel**



#### **MS Word**



### **Get started**

For a quick walkthrough of each add-on from installation to trying out key features, see our quickstart guides:

- Quickstart for spreadsheets
- Quickstart for documents

# **Compatibility**

#### **Microsoft Office**

The following table lists the **minimum versions of Microsoft Excel** compatible with the GPT for Excel add-in on different Microsoft Office platforms.

Windows	Мас	Online
Microsoft 365 subscription:  Version 2002 (Build 12527.20092)  Retail perpetual:  Version 2002 (Build 12527.20092)  Volume-licensed perpetual:  Excel 2021: Version 2108 (Build	Version 16.35 (Build 20030802)	Supported on:  • Google Chrome (latest version)  • Microsoft Edge (latest version)
12527.20092)		

## Which version of Excel am I using?

The following table lists the **minimum versions of Microsoft Word** compatible with the GPT for Word add-in on different Microsoft Office platforms.

	Windows	Мас	Online
	Microsoft 365 subscription:		
	Version 2205 (Build 15202.10000)		Supported on:
W	Retail perpetual:	Version 16 61 (Puild	<ul> <li>Google Chrome (latest version)</li> <li>Microsoft Edge (latest version)</li> </ul>
_	Version 2205 (Build 15202.10000)	Version 16.61 (Build 22040100)	
	Volume-licensed perpetual:		
	Word 2024: Version 2205 (Build 15202.10000)		

# Which version of Word am I using?

# **Google Workspace**

GPT for Sheets and Docs works with Google Sheets and Google Docs on Google Chrome (latest version).

# What's next

- Try out example spreadsheet use cases for different <u>business applications</u> and <u>product</u> capabilities.
- Browse the AI providers and models supported by GPT for Work.
- Learn how to use the add-ons:
  - GPT for Excel
  - GPT for Sheets
  - GPT for Word
  - GPT for Docs
- Learn about pricing and billing.

# **Quickstart for spreadsheets**

**GPT for Work** integrates the power and intelligence of generative AIs directly into **Microsoft Excel** and Google Sheets. Use your favorite AI to generate, rewrite, translate, categorize, extract, and otherwise process text in bulk – at machine-powered scale and speed.

GPT for Work contains two spreadsheet add-ons: **GPT for Excel** and **GPT for Sheets**.

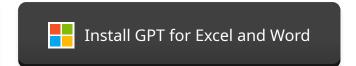
This guide gives you a quick walkthrough of the add-ons from installation to trying out their key features.

# Install the add-on

To use GPT for Work in Excel or Sheets, install the appropriate add-on:



C Install GPT for Sheets and Docs



For detailed installation instructions, see Install GPT for Work add-ons.

#### **EXCEL IS BETTER THAN SHEETS**

If you have a choice between using Excel or Sheets, choose Excel. Excel is generally faster at processing data, provides a smoother user experience, and can reliably handle bigger spreadsheets (200 000 rows and above) than Sheets.

- GPT for Excel can execute up to 1,000 prompts per minute and reliably process up to a million rows in one go
- GPT for Sheets can execute up to 360 prompts per minute and reliably process up to 200,000 rows in one go.

#### USE AN API KEY

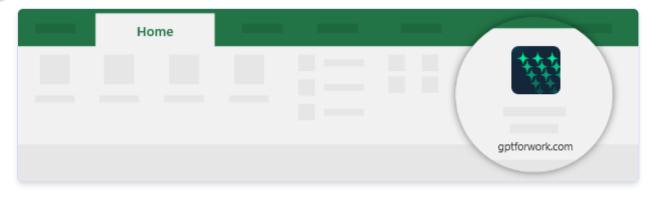
To get more AI models, more control, and more privacy, use an API key. For more information, see Select a model.

# Open the add-on

#### **MS Excel**

1 Download our <u>quickstart example template</u>, and open it in Excel as a new workbook. You'll need the workbook for the example tasks below.

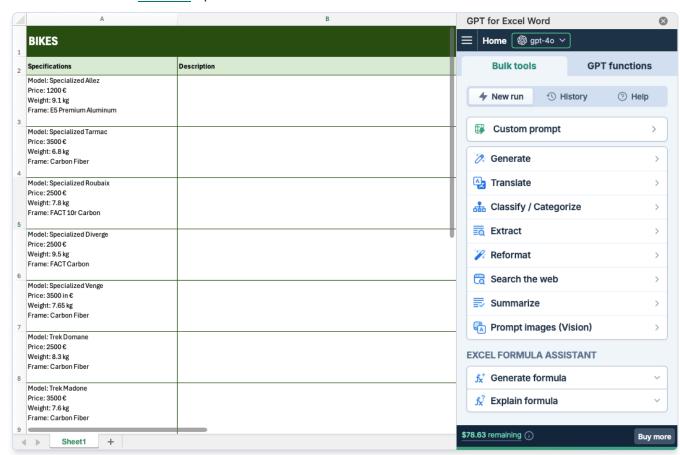




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You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

The GPT for Excel sidebar opens.



#### Use a bulk AI tool

<u>Bulk AI tools</u> allow you to run prompts on an entire spreadsheet column at once without writing any formulas. You configure and run bulk tools from the add-on sidebar.

Let's generate some text with the **Custom prompt** bulk tool:

#### **MS Excel**

- 1 In the sidebar, select **Bulk AI tools** if not already selected.
- 2 Click Custom prompt.
- 3 Define the following settings:
  - **Header row**: Select **2**. The bulk tool will process all rows with content below this row.
  - **Prompt to run for each row**: Enter the following prompt for the AI:

Write a short SEO-optimized product description for a bike based on its specifications: {{Specifications}}

- Put results in column: Select B.
- Leave all other settings to their default values.
- 4 Run the bulk tool:
  - 1 Select **All rows**
  - 2 Click **Run all rows**.

The bulk tool executes the prompt for every row with content, starting from row 2, and puts the responses generated by the AI in column C.

The following video shows the entire process.

# **Use a GPT function**

<u>GPT functions</u> are custom <u>spreadsheet functions</u> that allow you to prompt AI from inside spreadsheet cells. GPT functions work exactly like native functions in that you can use them on their own or combine them with other functions when creating formulas.

Let's use the **GPT\_TRANSLATE** function to translate the first few product descriptions you generated above to French:

#### **MS Excel**

1 In the sheet, select cell **C3**.

2 Enter the following formula in the cell:

```
=GPT_TRANSLATE(B3, "French")
```

The function generates a translation of the content in cell **B3**.

3 Drag the formula from cell C3 across to cell C7. The function is copied to each cell in the range, which automatically generates a dedicated translation for each row.

The following video shows the entire process.



You can also use the **Translate** bulk tool to translate text. If you're working with up to a few hundred cells, **GPT\_TRANSLATE** is fine. However, if you're working with thousands or more rows, or if you don't want to write formulas, use the **Translate** bulk tool.

# Use the formula assistant

The formula assistant allows you to **generate** spreadsheet formulas based on plain-language descriptions of what you want to achieve. You can also use the formula assistant to explain existing formulas (in English).

Let's both generate and explain a formula:

#### **MS Excel**

- 1 In the sidebar menu, select **Formula assistant**.
- 2 In **Describe your goal**, enter the following prompt:

Return the difference in number of characters between cells B3 and C3.

- 3 Click **Generate formula**. The assistant generates the formula.
- 4 Click **Copy**. This copies the generated formula to the clipboard.
- 5 Expand **Explain formula**.
- 6 In **Formula**, paste the generated formula from the clipboard.
- 7 Click **Explain formula**. The assistant generates an explanation of what the formula does.

The following video shows the entire process.

You're done with the quickstart! You've successfully dipped your toe in GPT for Excel. 🤎

# What's next

#### **MS Excel**

- Learn more about GPT for Excel.
- Get going with bulk AI tools.
- Get going with GPT functions.
- Try out different AI models.
- Try out example use cases for different <u>business applications</u> and <u>product capabilities</u>.

# **Quickstart for documents**

<u>GPT for Work</u> turns generative AIs into your personal writing assistants available directly in <u>Microsoft Word</u> and <u>Google Docs</u>. Think of it as ChatGPT inside Word and Docs. Use your favorite AI to edit, rewrite, correct, review, translate, summarize, draft, write, and more.

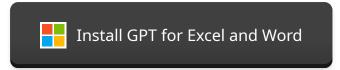
GPT for Work contains two document add-ons: GPT for Word and GPT for Docs.

This guide gives you a quick walkthrough of the add-ons from installation to trying out one of their key features.

# Install the add-on

To use GPT for Work in Word or Docs, install the appropriate add-on:





For detailed installation instructions, see <u>Install GPT for Work add-ons</u>.

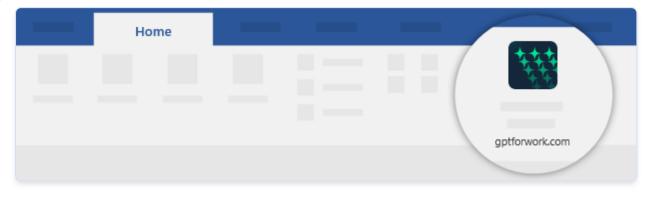


To get more AI models, more control, and more privacy, use an API key. For more information, see Select a model.

# Open the add-on

#### **MS Word**

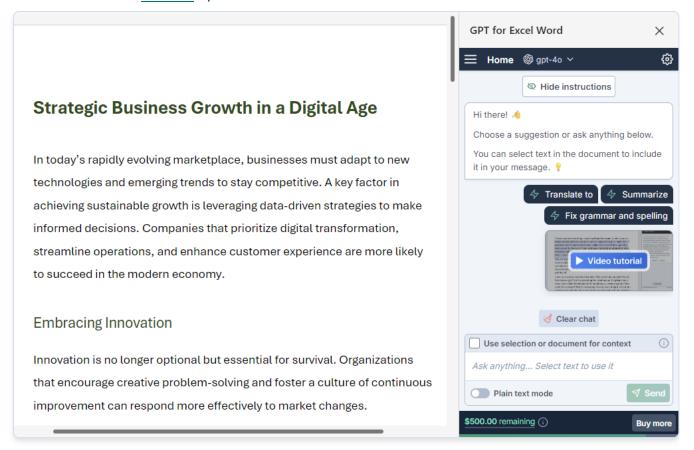
- 1 Download our <u>quickstart example template</u>, and open it in Word as a new document.
- 2 In the **Home** tab, click **GPT for Excel Word**.



(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

The GPT for Word sidebar opens.



# Try out the add-on

#### **MS Word**

GPT for Word allows you to prompt an AI as you would in ChatGPT or another AI chatbot, but from inside Word. You can then use the AI responses directly in your document, without needing to copy-paste anything between the document and an external chatbot.

Let's translate some text and replace the original with the translation:

- 1 In the document, select some text to translate. For example, select the first heading and paragraph.
- 2 In the sidebar, above the prompt field, select **Use selection or document for context**. The option changes to **Using selection as context**.
- 3 Enter the following prompt:

Translate to French

- 4 Below the prompt field, make sure **Plain text mode** is disabled. We want to maintain text formatting.
- 5 Click **Send**. GPT for Word generates a translation of the selected text and displays the translation in the sidebar chat.
- 6 Click **Replace**. GPT for Word replaces the selected text with the translation while maintaining the original text formatting.

The following video shows the entire process.

You're done with the quickstart! You've successfully dipped your toe in GPT for Word. 💙



#### What's next

#### **MS Word**

- Learn more about GPT for Word.
- Start authoring text.
- Learn how to use GPT for Word effectively through practical examples.
- Try out different AI models.

# AI providers & models supported by GPT for Work

GPT for Work supports models from Anthropic, Azure, DeepSeek, Google, Mistral, OpenAI, OpenRouter, Perplexity, and xAI. GPT for Work also supports open-source models through Ollama and any OpenAI-compatible API endpoint. The tables below show which models you can use with and without an API key, in which GPT for Work add-ons, and at what price.



Space admins can control model availability (Microsoft accounts only). Learn more.

# Models you can use without an API key

You can use models from OpenAI, Google, Anthropic, and Perplexity.



Reasoning models, vision models, and web search models typically cost much more than regular, text-only models. Learn more.

#### SEE THE CURRENTLY SUPPORTED MODELS

Models that support prompt caching get a 75% discount on cached input tokens.

# Models you can use with an API key

You can use models from OpenAI, Perplexity, Google, Anthropic, OpenRouter, DeepSeek, Mistral, Azure, xAI, and open-source models through Ollama and any OpenAI-compatible API endpoint.



Reasoning models, vision models, and web search models typically cost much more than regular, text-only models. Learn more.

#### SEE THE CURRENTLY SUPPORTED MODELS

You pay the API cost directly to the AI provider.

Models available through dedicated API endpoints (Azure, Ollama, other local servers and cloud-based platforms) do not consume credits, but require a positive balance or a valid subscription.

#### **Notes**

# **Reasoning models**

Reasoning models are trained to think before they answer, producing an internal chain of thought before responding to a prompt. Reasoning models generate two types of tokens:

- **Completion tokens** make up the model's response.
- **Reasoning tokens** make up the model's internal chain of thought.

You are billed for both types of tokens.

#### Vision models

Vision models can process images as input. The following features support vision models:

- Custom prompt bulk AI tool
- Prompt images (Vision) bulk AI tool
- GPT\_VISION function

Image inputs are measured and charged in <u>tokens</u>, just like text inputs. How images are converted to text tokens depends on the model. You can find more information about the conversion in the OpenAI documentation and Anthropic documentation.

#### Web search models

Web search models can gather the latest information from the web and use it as **context** when generating responses. The larger the context, the more information a model can retrieve from each web source, producing richer and more detailed responses. For some models, you can select the context size in the model settings.

How web search model pricing works:

- Cost without an API key: Token cost + search cost
- Cost with an API key: Token cost

For more information about token cost and search cost, see <u>Models you can use without an API</u> key and Models you can use with an API key. The search cost varies by AI provider and context size.

# **API endpoints**

You can use any OpenAI-compatible API endpoint with GPT for Work. You can connect to two main types of services:

- Cloud-based LLM platforms provide access to models over the internet with no software installation or setup required on your part. Popular examples include Anyscale, Fireworks AI, and Together AI. The available models vary from platform to platform.
- Local LLM servers run on a local machine, such as your own computer or another computer on a local network. Popular examples include LM Studio, LocalAI, and Open WebUI. The available models depend on what's installed on the server you're using.

# What's next

- AI models
- Cost estimator
- Price evolution



The tables on this page were created with Awesome Table Apps.

# **Security and privacy FAQ**

In this article, we (Talarian, maker of GPT for Work) aim to answer the most frequent questions about the security and privacy measures we implement and our compliance with global regulations like the GDPR. For more details, check the Talarian security portal.

# **Compliance**

# Is your organization ISO 27001 certified?

Yes, we are certified under the ISO 27001 standard. The certificate is available through the <u>Talarian</u> security portal.

# Do you comply with GDPR and other privacy regulations?

Yes, we comply with GDPR. As a data controller, we process personal data in a fair, transparent and secure way in accordance with our <u>Privacy Policy</u>. As a data processor, we process personal data according to our Data Processing Agreement.

# Security

# Do you conduct independent third-party security testing?

Yes, we rely on annual third-party security assessments. The resulting reports are available through the <u>Talarian security portal</u>. Also, our infrastructure is hosted on <u>Google Cloud Platform</u>, which undergoes its own independent security audits.

We are certified under the CASA Tier 3 certification for Google, ensuring GPT for Work meets Google's standards for security and privacy. Additionally, we have completed the <u>Microsoft publisher attestation</u> for the Microsoft 365 App Compliance Program.

# Is my data encrypted at rest and in transit?

Yes. We rely on <u>Google's encryption-at-rest mechanism</u> (which is based on the AES algorithm with a key size of 256 bits). Google Cloud Platform's security infrastructure uses a common cryptographic library called Tink, which includes the FIPS 140-2 validated module (named BoringCrypto) to implement encryption consistently across Google Cloud.

For data in transit, we exclusively use TLS 1.2 and TLS 1.3 to ensure secure transmission. The following data is also encrypted when in use: API keys, bulk tools configuration history (when GPT for Work is used with Google Sheets and Excel spreadsheets) and GPT functions cache (when GPT for Work is used with Google Sheets and cache is enabled).

# What measures are in place to prevent unauthorized access to customer data?

We restrict and monitor access to production data on an as-needed basis. We use a robust access control policy with quarterly admin rights reviews. We enforce stringent password security policies and enforce Multi-factor Authentication (MFA) for all our personnel.

## How do you ensure secured user identification?

We offer Single Sign-On (SSO) access to GPT for Work with Microsoft 365 (for GPT for Excel Word) or Google Workspace (for GPT for Sheets and Docs). User identification security levels are therefore those provided by either Microsoft or Google.

# How do you handle software and hardware vulnerabilities?

With respect to the devices used to develop our application: hardware and software provided to our employees are controlled under a centralized Mobile Device Management (MDM) solution. This allows us to control our fleet and its usage. In this respect, critical software (such as antivirus and vulnerability management solutions) are deployed on personnel's devices and strictly controlled via our MDM solution.

With respect to the hosting of our application: we rely on the infrastructure provided by Google Cloud Platform (GCP) and on its vulnerability and patch management programs.

Finally, the GPT for Work application is subject to our software development lifecycle (SDLC) process where security by design is key, from the product initiative stage until the product delivery stage. Through our continuous integration and continuous delivery (CI/CD) process, every new piece of application code is subject to state-of-the-art code security scanning (which includes detecting public vulnerabilities and ensuring compliance with frameworks such as OWASP Top10).

# How do you ensure data center physical security?

As our application is hosted within data centers provided by Google, the physical security of our infrastructure is managed by Google Cloud Platform. Additional information can be found in Google Cloud Platform's security documentation available at: https://www.google.com/about/datacenters/data-security/.

# Do you have a formal incident response plan?

Yes, as part of our ISO 27001 compliance framework, Talarian has security incident management procedures in place. The customer notification process in the event of a data incident involving personal identifiable information is set forth in our <u>Data Processing Agreement</u>.

# **Data & Privacy**

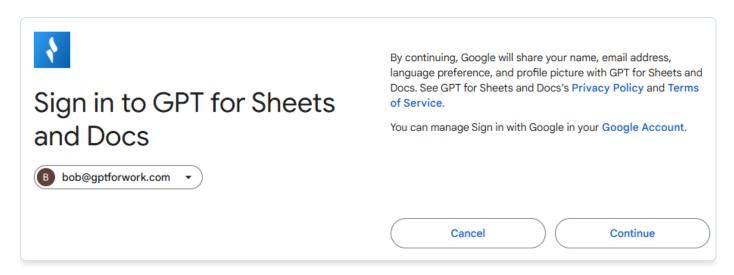
# What permissions are needed to use GPT for Work?

GPT for Work includes add-ons for Google Sheets and Google Docs (GPT for Sheets and Docs) as well as add-ins for Microsoft Excel and Microsoft Word (GPT for Excel Word). GPT for Work requires permissions to interact with these Google and Microsoft applications. Only the authorization scopes necessary for GPT for Work's performance are requested.

## **Google permissions for GPT for Sheets and Docs**

#### **Authorization scope**

When you install GPT for Sheets and Docs from the marketplace, you are asked to allow the following:





# **GPT for Sheets and Docs**

# wants to access your Google Account

B bob@gptforwork.com

#### This will allow GPT for Sheets and Docs to:

- View and manage documents that this application has (i) been installed in
- View and manage spreadsheets that this application has been installed in
  - Connect to an external service (i)
- Display and run third-party web content in prompts and sidebars inside Google applications

#### Make sure you trust GPT for Sheets and Docs

You may be sharing sensitive info with this site or app. Learn about how GPT for Sheets and Docs will handle your data by reviewing its **terms of service** and **privacy policies**. You can always see or remove access in your **Google Account**.

Learn about the risks

Cancel

Allow

#### (i) INFO

By clicking 'Allow' or 'Continue', you indicate your acceptance of the <u>Terms of Service</u> and Privacy Policy of GPT for Work.

Authorization scopes	Why does GPT for Work need it
See your primary Google account email address	Peguired to identify the user and fatch their associated
See your personal info, including any personal info you've made publicly available	Required to identify the user and fetch their associated metadata.
View and manage documents that this application has been installed in	Allows GPT for Work to fetch the user-selected Google Docs content in accordance with requests launched by the user on the application. Also allows GPT for Work to insert data in Google Docs in response to a user's request.
View and manage spreadsheets that this application has been installed in	Allows GPT for Work to fetch the user-selected Google Sheets data in accordance with requests launched by the user on the application. Also allows GPT for Work to insert data in Google Sheets in response to a user's request.

Authorization scopes	Why does GPT for Work need it
Connect to an external service	Required to allow GPT for Work add-on to send/retrieve information from its backend.  Even if this authorization is described as an 'external service', it still stays within the Google environment because GPT for Work is hosted on Google Cloud Platform.
Display and run third-party web content in prompts and sidebars inside Google applications	Required to display GPT for Work sidebars inside Google Sheets and Google Docs.

When you enable the 'Bulk Tools' functionality, you are asked to allow the following:



# GPT for Sheets and Docs wants additional access to your Google Account

B bob@gptforwork.com

When you allow this access,

GPT for Sheets and Docs will be able to

 See, edit, create, and delete all your Google Sheets spreadsheets. Learn more

GPT for Sheets and Docs already has some

See the <u>3 services</u> that GPT for Sheets and Docs has some access to.

#### Make sure you trust GPT for Sheets and Docs

You may be sharing sensitive info with this site or app. Learn about how GPT for Sheets and Docs will handle your data by reviewing its terms of service and privacy policies. You can always see or remove access in your Google Account.

Learn about the risks

Cancel

Continue

Authorization scopes	Why does GPT for Work need it
See, edit, create, and delete all your Google Sheets spreadsheets	Allows GPT for Work to write results from AI providers into the user's spreadsheets in response to an asynchronous user request (through bulk tool runs).  There is unfortunately no way to limit that scope to specific spreadsheets with the way that the Google Sheets API works. However, GPT for Work never reads from or writes to spreadsheets you didn't launch the add-on in.

# How to review or revoke permissions

At any point in time, you can review the permissions you have granted for GPT for Sheets and Docs. See more details <u>here</u>.

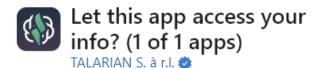
#### **Microsoft Permissions for GPT for Excel Word**

## <u>Authorization scope</u>

When you install GPT for Excel Word from the marketplace, you are asked to allow the following:



#### bob@gptforwork.com



#### GPT for Excel Word needs your permission to:



GPT for Excel Word will be able to read your primary email address.

# View your basic profile GPT for Excel Word will be

GPT for Excel Word will be able to see your basic profile (name, picture, user name).

# Maintain access to data you have given GPT for Excel Word access to

Allows GPT for Excel Word to see and update the data you gave it access to, even when you are not currently using the app. This does not give GPT for Excel Word any additional permissions.

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. You can change these permissions at https://microsoft.com/consent. Show details

Cancel

Accept

## (i) INFO

By clicking **Accept**, you indicate your acceptance of the <u>Terms of Service</u> and <u>Privacy Policy</u> of GPT for Work.

Authorization scopes	Why does GPT for Work need it
User's email address	
User basic profile information (including name, surname, preferred username)	Required to identify the user and fetch their associated metadata.
OpenID (user's unique identifier and token)	

Authorization scopes	Why does GPT for Work need it
offline_access	Required to keep the user signed-in. The offline_access scope allows GPT for Work to receive refresh tokens from the Microsoft identity platform token endpoint.

#### How to review or revoke permissions

At any point in time, you can review the permissions you have granted for GPT for Excel Word. See more details here.

## How is my data processed?

Here are some details as to the customer data used by GPT for Work, and which of this data is being stored on GPT for Work's infrastructure (i.e., Google Cloud Platform).

#### **User identification**

This includes the following stored data: username, account email address, basic profile information, GoogleID or MicrosoftID (as applicable). No other user identification data is stored.

## **Documents, Inputs, Outputs and Configurations**

First, let's introduce three key concepts used in this paragraph:

- **Documents** mean the spreadsheets (Google Sheets or Microsoft Excel) and documents (Google Docs or Microsoft Word) in which the GPT for Work add-on is used;
- Inputs are the information you submit through GPT for Work. This includes:
  - the prompts and custom instructions you give (e.g. generating text, summarizing data or analyzing content). When using the 'Bulk AI tools' functionality in Google Sheets or Excel, you can configure these prompts and instructions, and these configurations are saved in your history for easy reuse (Configurations); and
  - the portion of the Documents submitted along with these prompts and instructions (e.g. relevant cells of your spreadsheets and parts of your documents) (**Submitted Document Portions**). To avoid any doubt, Configurations do not contain any Submitted Document Portions; and
- **Outputs** are the results generated by AI providers based on your Inputs.

Here is how GPT for Work uses your Documents, Inputs, Outputs and Configurations:

#### **Documents**

- Except when you are using the 'Agent' functionality, GPT for Work does not read or store any data from your Documents that you do not use as an Input in your prompt.
- When using the 'Agent' functionality, GPT for Work automatically selects the relevant parts of the Document that are necessary to respond effectively to your request. As of July 21, 2025, the 'Agent' feature is available in Beta mode to a select number of users only in Google Sheets and operates exclusively via Talarian's own API key(s) (OpenAI's model).
- GPT for Work sends your Inputs to the relevant AI provider's API or custom endpoint and writes the resulting Outputs in your Document.

#### **Inputs & Outputs**

- If you use a <u>custom endpoint</u> (as opposed to a model with API keys), such as on-premise inference servers (e.g., Ollama) or an Azure endpoint, the Inputs submitted and Outputs received do not go through our infrastructure, as the GPT for Work add-ons directly call the set endpoint. The use of custom endpoints therefore constitutes the most private option currently available.
- If you use a model <u>with</u> an API key, GPT for Work does not log any of the Inputs submitted or Outputs received. By using an API key, your AI provider usage (e.g. data retention, rate limits, cost, moderation) is bound by the terms you negotiated with your AI provider.
- If you use a model <u>without</u> an API key, we log all the Inputs and Outputs for support purposes for a duration of 30 days. We also store them for product improvement purposes (excluding the training of any language model) for no longer than 1 year. Outputs and Inputs may be stored for up to 5 years and can only be accessed on an *ad hoc* and as-needed basis by the authorized personnel.
- In Google Sheets only, and only if cache is enabled, Inputs and Outputs of executions made through GPT functions are cached encrypted for a short period of time (30 days) to prevent unexpected costs and loss of data due to Google Sheets automated recalculations. This caching occurs regardless of whether you use a model with or without an API key.

#### **Configurations**

- When you use the 'Bulk AI tools' functionality in Google Sheets or Excel, your bulk tools Configurations are securely stored in encrypted form for a limited period (90 days) to support the history feature.
- Examples of data that may be contained in Configurations include your desired translation glossary (if you are using the 'translate' tool) or your tailored classification instructions (if you are using the 'classify/categorize' tool). To avoid any doubt, Configurations do not contain any Submitted Document Portions.

## **Settings**

These include the name of the model and the AI provider, the temperature (i.e., the setting that controls the creativity of a model's response), and any custom instruction you decide to insert to

provide context and shape how the chosen model responds.

#### **Metadata relating to your Documents**

GPT for Work stores the following additional data from your Document:

- Google Sheets: spreadsheets ID (identifier of the spreadsheet), sheet IDs (identifier of the sheet within a specific spreadsheet), sheet name; and
- Google Docs: Google Doc ID.

#### **Usage metadata**

These are data events corresponding to the different actions of GPT for Work users (e.g., user clicking on the 'Run' button).

#### **API** keys and custom endpoints

If you set up API keys for AI providers or use custom endpoints, they will be stored encrypted in transit, at rest and in use on Google Cloud Platform.

When <u>setting up a team</u>, space owners and admins can choose whether team members are allowed to use their own API keys and, in GPT for Excel Word, their own custom endpoints. In other words, space owners and admins have complete control over which AI providers and models are available to their space members.

#### **Subscription data**

This includes the following stored data: current plan details, transaction details (amount, invoice ID and payment date), details of the invoiced person or company (customer email and customer ID). We do not store payment card credentials on Talarian's infrastructure and always rely on Stripe, a third-party PCI-DSS-compliant payment processor, for payment card processing.

# Is my data used by GPT for Work to train models?

No. Whether you use a model with or without an API key, Talarian does not use your Inputs and Outputs to train language models. Also, according to their terms as of July 21, 2025, the AI provider APIs we rely on (when using GPT for Work through Talarian's own API key(s)) currently do not use your Inputs and Outputs to train their models.

To check the AI provider's models available with or without an API key, please see our <u>list of</u> supported models.

#### Who owns Inputs and Outputs?

As between you and Talarian, you retain all rights in your Inputs and Outputs. More details are available in GPT for Work terms of service.

# What do you do with my API Key and custom endpoints, when I use them within GPT for Work add-ons?

If you set up API keys for AI providers or use custom endpoints, they will be stored encrypted in transit, at rest and in use on Google Cloud Platform.

## Do you store payment card information?

We don't store payment card credentials. Payments are processed through Stripe (<a href="https://stripe.com/en-fr">https://stripe.com/en-fr</a>). They are a PCI Service Provider Level 1 organization. Using Stripe means we don't need to store your payment card credentials.

You can read more about security at Stripe here: https://stripe.com/docs/security/stripe.

## Where is my data located?

The Google Cloud Platform datacenters on which your data is stored are located in the United States - us-central1 region (Iowa). More details on Google Cloud Platform's region are available here.

# Do you sell any of my data?

No, we never sell data.

# Do you use third-party service providers?

Yes. GPT for Work relies on or interacts with several service providers in order to operate. They fall within 2 different categories:

# Talarian's third-party service providers

These are service providers with which we hold a contractual relationship. They help us with various services including cloud hosting, generative AI provision or support ticket management.

Whenever we share data with these service providers, we make sure that they use it in compliance with data protection legislation, and that the personal data processing they carry out is covered by a specific data processing contract. They are of two sorts:

#### <u>Talarian's subprocessors</u>

They process personal data for which we are a processor, following our instructions. This processing is carried out as part of the services you have subscribed to. You will find details of our subprocessors in our Data Processing Agreement.

Service provider	Purpose
Google LLC or any of its affiliates	Data hosting, Generative AI <sup>*</sup>
Zendesk, Inc.	Support
OpenAI OpCo, LLC or any of its affiliates	Generative AI <sup>*</sup>
Anthropic, PBC or any of its affiliates	Generative AI*
Perplexity, Inc.	Generative AI <sup>*</sup>
Functional Software, Inc. (d/b/a Sentry)	Error Monitoring

<sup>\*</sup> Google LLC, OpenAI OpCo, LLC, Anthropic, PBC, and Perplexity, Inc. are engaged for Generative AI purposes only to the extent (i) you are using GPT for Work through Talarian's own API key(s) and (ii) choose any such third-party service provider as AI provider.

#### Talarian's processors

They process data for which we act as the controller, and therefore act as processors.

Service provider	Purpose
SalesForce, Inc.	CRM
Sendinblue, SAS (d/b/a Brevo)	Transactional and marketing email
Slack Technologies Limited	Internal communication tool
Google Ireland Limited (Google Workspace)	Collaboration tool
Microsoft Corporation (Microsoft Clarity)	Front end analytics
Retool, Inc.	Admin dashboards for customer support

#### Other third-party service providers

These are third-party service providers with which you hold directly a contractual relationship. These can be of various types, notably:

- AI providers that you use by creating and setting up API keys or via a custom endpoint. The full list of these AI providers are set forth in section "Models you can use with an API key" of the following page: https://gptforwork.com/help/ai-providers-and-models.
- *Payment processor.* Payments are processed through Stripe (<a href="https://stripe.com/en-fr">https://stripe.com/en-fr</a>), which is a PCI Service Provider Level 1 organization. By purchasing GPT for Work you accept to be bound by the Stripe terms and conditions (<a href="https://stripe.com/en-fr/legal/consumer">https://stripe.com/en-fr/legal/consumer</a>).

## Can I have my data deleted?

Yes, you can.

As long as your GPT for Work account is active, we retain your data in accordance with our <u>Privacy policy</u> and <u>Data Processing Agreement</u>. Upon deletion of your GPT for Work account, we may archive your data only for a specified period of time in accordance with our internal data retention policy, and in any case no longer than legally permitted.

To request all your data to be deleted following deletion of your GPT for Work account, submit your request via our contact form and write '*Data Deletion request*' as the subject line.

Deleting your data will interrupt GPT for Work's functionality. Signing up again with the same Google or Microsoft account will not restore the deleted data.

# How can I send you a privacy complaint?

For privacy complaints, you can reach us at: <u>legal@talarian.io</u>.

# Create a team

You can create a team in GPT for Work so that all team members can use the add-ons with shared billing and optionally shared API keys.

To set up your team:

- 1 Create a GPT for Work account (if you don't already have one).
- 2 Set up your space.
- 3 Invite users to your space.

#### Create a GPT for Work account

(i) INFO

If you already have a GPT for Work account, skip to Set up your space.

#### **Microsoft**

- 1 Open the <u>GPT for Work dashboard</u>.
- 2 Click **Sign in with Microsoft**.
- 3 Choose the Microsoft account you want to associate with the GPT for Work account.
- 4 Click **Continue** to sign in with your Microsoft account.

You have created the GPT for Work account. The account comes with a space that you own.

# Set up your space

Before inviting users, set up your space to provide access to the necessary models:

- Manage API keys for your space.
- Control whether users can set up their own API endpoints.
- Set up the model switcher, and set a default model.

# Invite users to your space

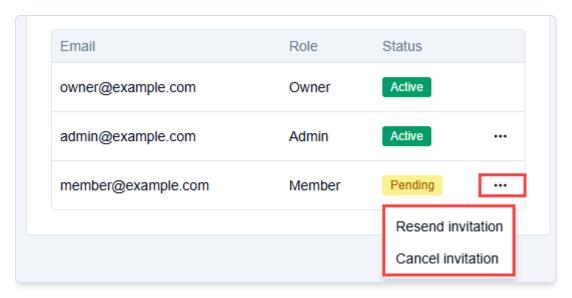
Prerequisites

You are the owner or an admin of the space.

#### **Microsoft**

- 1) Sign in to the GPT for Work dashboard with your Microsoft account.
- 2 In the sidebar, select **Users**.
- 3 Click **Invite users**.
- 4 Enter the email addresses of the users you want to invite, separated by commas or spaces.
- 5 Click **Send invitations**.

You have successfully invited users to your space. You can resend or cancel an invitation while its status remains **Pending**.



# What's next

- <u>Install the add-ons</u> on your domain or have your team members install the add-ons individually.
- Manage <u>API keys</u>, <u>API endpoints</u>, and <u>models</u> for your space.
- Manage users in your team.

# Manage available models for your team

As a space owner or admin, you can centralize AI model access and billing for your team by setting API keys, configuring API endpoints, and enabling and disabling individual models for your space. This allows you to create a curated set of models available to your team.

#### Manage API keys

Manage space API keys and control whether users can set their own API keys from the GPT for Work dashboard.

#### **Manage API endpoints**

Manage space API endpoints and control whether users can set their own API endpoints from the GPT for Work dashboard.

#### Manage models

Configure which AI models are available to users in your team space from the GPT for Work dashboard.

# Manage API keys for your space

As a space owner or admin, you can manage <u>API keys</u> for your team by setting shared space keys and controlling whether users can set their own keys. This allows users to access <u>models</u> without providing their own keys, gives you control over which models are available, and centralizes billing.

## **Set space API keys**

Set a space API key to give users access to additional models without extra cost to them. Users can still use their own keys to access models, unless you disallow this.

#### Prerequisites

You are the owner or an admin of the space.

#### **Microsoft**

- 1 Create an API key, or request an API key from your AI provider platform admin. Learn more.
  - (i) INFO

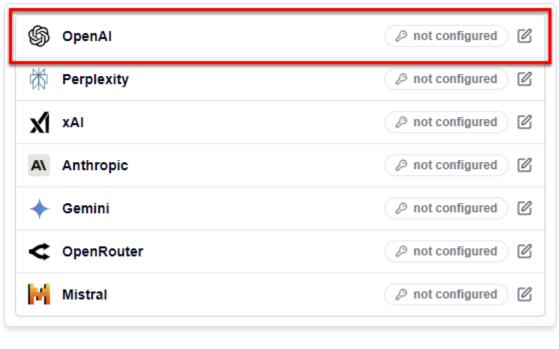
Make sure your keys belong to an organization or project with the following rate limits:

- RPM (requests per minute) ≥ 1,000
- o TPM (tokens per minute) ≥ 1,000,000

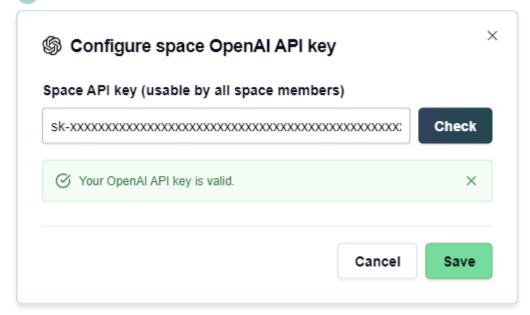
The actual limits required depend on your team's workload requirements.

- 2 Sign in to the GPT for Work dashboard with your Microsoft account.
- 3 In the sidebar, select **API keys**.
- 4 Select Configure space API keys.

5 Click the AI provider whose API key you want to set.



- 6 Set the API key:
  - 1 In the text field, enter the key.
  - 2 Click **Check** to verify that the key is valid.
  - 3 Click **Save**.



You have set a space API key. All space users can now use any model available with the key in GPT for Excel or GPT for Word.

# Control whether users can set API keys

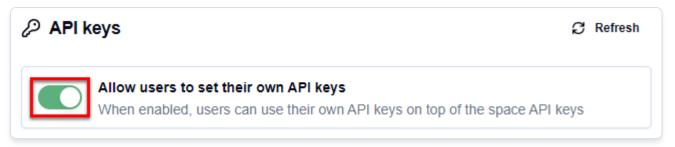
Choose whether space users can set their own API keys. If you enable this option, users can override a space key with their own key for any AI provider. If you disable this option, users can only use models that do not require API keys or models available through space API keys.

#### Prerequisites

You are the owner or an admin of the space.

#### **Microsoft**

- 1 Sign in to the GPT for Work dashboard with your Microsoft account.
- 2 In the sidebar, select **API keys**.
- 3 Use the toggle to allow or disallow space users to use their own API keys.



# What's next

#### **Microsoft**

- Manage API endpoints for your space.
- Manage models for your space.
- Invite users to your space.
- Manage users in your team.

# Manage API endpoints for your space

As a space owner or admin, you can make additional models available to your team by setting up API endpoint connections for your space. You can also control whether users can set up their own endpoints.



This feature is available only for Microsoft accounts.

# **Connect to Azure OpenAI**

GPT for Excel and Word can connect to Azure AI to use OpenAI models.

#### Prerequisites

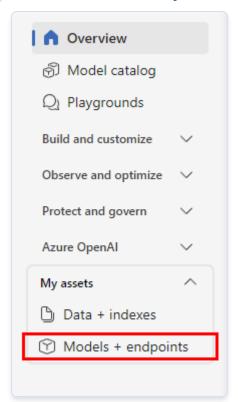
- You are the owner or an admin of the space.
- You have an Azure subscription with Azure AI service access.
- You have deployed a model in an Azure OpenAI resource.

# **Get your Azure OpenAI endpoint details**

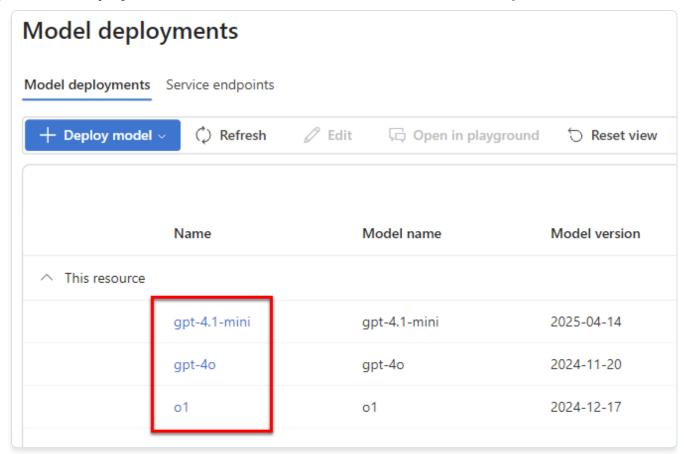
To connect to Azure AI from GPT for Excel and Word, you need the endpoint URL, name, and API key for the Azure OpenAI model you want to use.

- 1 Sign in to <u>Azure AI Foundry</u>.
- 2 Select the Azure OpenAI resource that has the model you want to use.

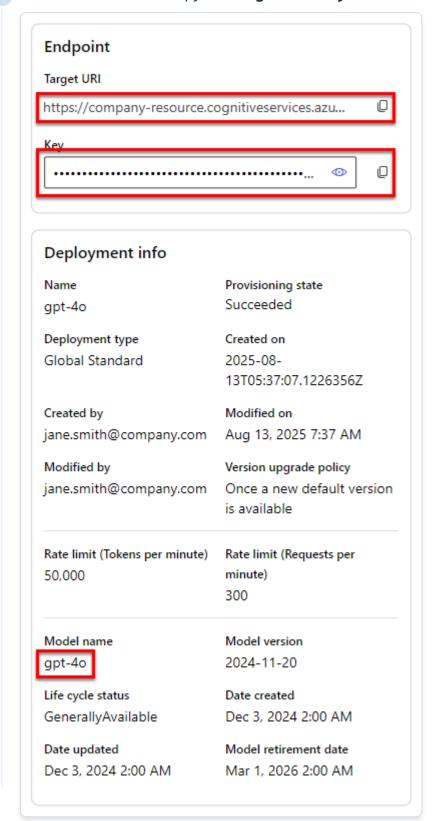
3 In the sidebar, select My assets > Models + endpoints.



4 In **Model deployments**, in the models list, click the name of the model you want to use.



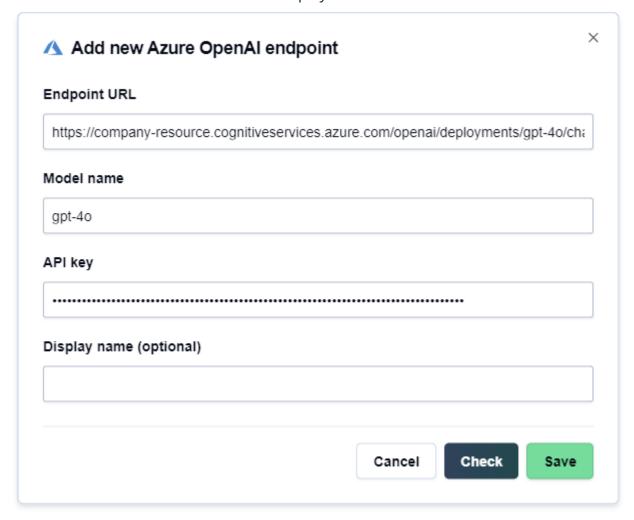
5 In the model details, copy the **Target URI**, **Key**, and **Model name**.



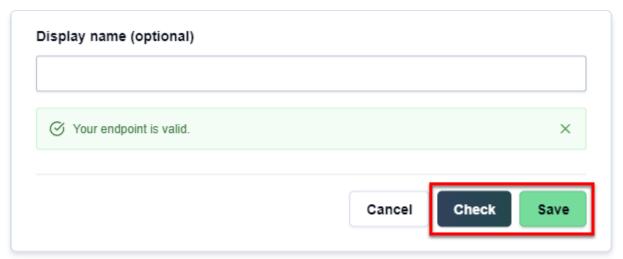
## Set up the Azure OpenAI endpoint

- 1 Sign in to the GPT for Work dashboard with your Microsoft account.
- 2 In the sidebar, select API endpoints.
- 3 Click Azure OpenAI endpoints.

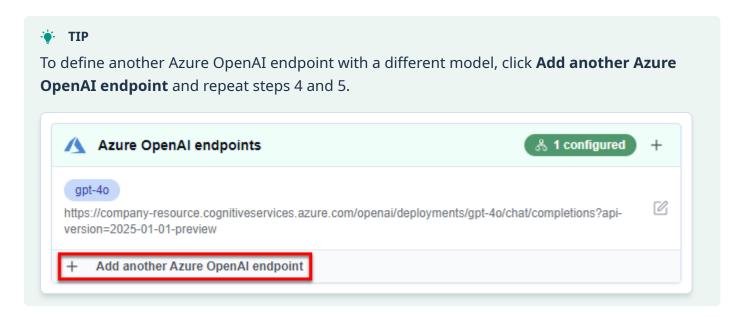
- 4 Define the endpoint settings:
  - **Endpoint URL**: Enter the endpoint URL for the model.
  - Model name: Enter the model name.
  - **API key**: Enter the API key for accessing the endpoint.
  - **Display name** (optional): Enter a custom display name for the model. If not set, the model switcher uses **Model name** as the display name.



5 Click **Check** to validate the settings, and click **Save**.



You have set up the Azure OpenAI endpoint. All space users can now use the endpoint model in GPT for Excel and Word.



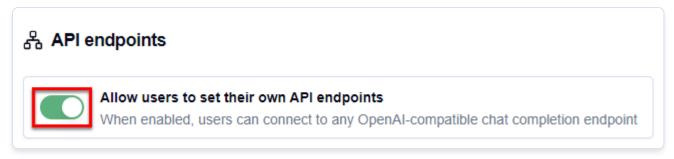
## Control whether users can set up API endpoints

Choose whether space users can set up their own API endpoints. If you enable this option, users can connect to their own endpoints from GPT for Excel and Word. If you disable this option, users are limited to the endpoints you set up for the space.

### Prerequisites

You are the owner or an admin of the space.

- 1 Sign in to the GPT for Work dashboard with your Microsoft account.
- 2 In the sidebar, select API endpoints.
- 3 Use the toggle to allow or disallow space users to set up their own API endpoints.



- Manage API keys for your space.
- Manage models for your space.

• Manage users in your team.

# Manage models for your space

As a space owner or admin, you can control which AI models are available to your team. This standardizes model access for your team and allows you to control costs.

(i) NOTE

This feature is available only for Microsoft accounts.

#### Prerequisites

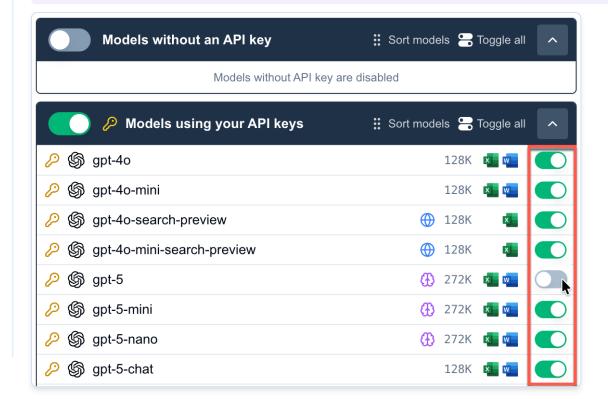
You are the owner or an admin of the space.

#### **Enable or disable models**

You can enable or disable individual models for your team. This controls which models are available to your team in the add-in.

- 1 Sign in to the GPT for Work dashboard with your Microsoft account.
- 2 In the sidebar, select **Models**.
- 3 Use the toggle next to a model to enable or disable the model.
  - (i) NOTE

Models without an API key are not available with your subscription.



Your team can only select the enabled models in the add-ins.

### Set a default model

You can choose which model is selected by default for new users. This allows you to standardize the model that users start with when they open the add-in for the first time.

- 1 Sign in to the GPT for Work dashboard with your Microsoft account.
- 2 In the sidebar, select **Models**.
- 3 Find the model you want to set as the default, and click Make default for the model.



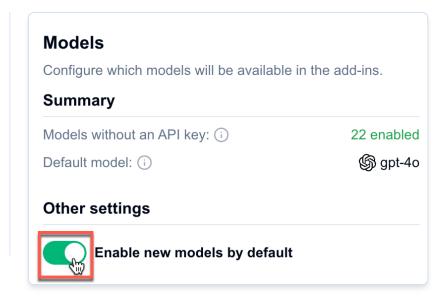
The model is automatically selected as the default model for new users who open the add-in for the first time.

## Manage access to future models

You can choose whether newly integrated models are automatically available to your team. Disabling automatic access to new models allows you to evaluate them before making them available to your team.

- 1 Sign in to the GPT for Work dashboard with your Microsoft account.
- 2 In the sidebar, select **Models**.
- 3 In the **Other settings** section, use the **Enable new models by default** toggle to enable or disable automatic access to new models.
  - **i** NOTE

When this setting is disabled, new models remain unavailable to your team until you manually enable them.



This setting now applies to all future models for your team.

- Invite users to your space.
- Manage users in your team.

# Manage users in your team

Once you have created a team by inviting users to your space, you can perform several operations to manage your team. You can add new users or remove existing ones, grant admin privileges to trusted team members to help with space management, and transfer ownership to another user when needed.

#### Add / Remove users

Add or remove users from your GPT for Work space to ensure only the right people have access to your space's shared billing and API keys.

#### **Promote users to admins**

Promote a user to admin in a team space in GPT for Work to give them access to all the dashboard features.

#### **Transfer ownership**

Transfer the ownership of your team space to another user in GPT for Work.

## Add / Remove users

As your team grows and changes, you can add or remove users from your GPT for Work space to ensure only the right people have access to your space's shared billing and API keys.

#### Prerequisites

You are the owner or an admin of the space.

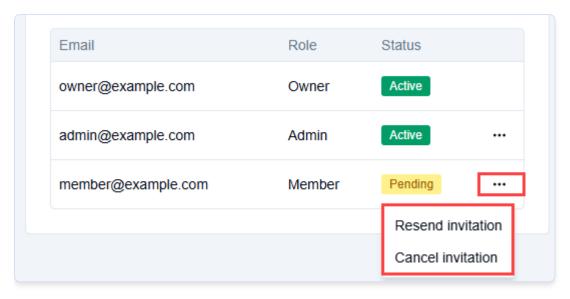
## Add users to your team

You can add users to your team at any time by inviting them to your space in GPT for Work.

#### Microsoft

- 1 Sign in to the GPT for Work dashboard with your Microsoft account.
- 2 In the sidebar, select **Users**.
- 3 Click **Invite users**.
- 4 Enter the email addresses of the users you want to invite, separated by commas or spaces.
- 5 Click **Send invitations**.

You have successfully invited users to your space. You can resend or cancel an invitation while its status remains **Pending**.



## Remove users from your team

You can remove users from your team at any time by removing them from your <u>space</u> in GPT for Work.

When you remove a user from a GPT for Work team space, they can still use the add-ons. However, they are no longer able to use the space balance or subscription, or the space API keys.



The space owner cannot be removed. If you want to remove the space owner from the team, you must transfer ownership to another user first.

#### **Microsoft**

- 1 Sign in to the GPT for Work dashboard with your account.
- 2 In the sidebar, select **Users**.
- 3 Click the three horizontal dots (...) next to the user you want to remove, then select **Remove user**, or **Cancel invitation** if the user hasn't accepted the invitation to the space.

You have successfully removed the user from the space. When they next sign in to the dashboard, they only see their personal space, not your team space.

- Promote a user to admin.
- Transfer the ownership of a team space.

## Promote users to admins

You can promote a user to admin in a team space in GPT for Work to give them access to all the dashboard features. Admin users can do everything the owner can do, except transfer the ownership of a space.

#### Prerequisites

You are the owner or an admin of the space.

#### **Microsoft**

- 1 Sign in to the GPT for Work dashboard with your Microsoft account.
- 2 In the sidebar, select **Users**.
- 3 Click the three horizontal dots (...) next to the user you want to promote, then select **Set as** admin.

You have successfully promoted the user to admin. They can now access all the dashboard features.

#### **i** INFO

You can revoke admin permissions at any time by clicking the three horizontal dots (...) in the admin user's row, then selecting **Remove admin role**.

- Remove a user from your team space.
- Transfer the ownership of your team space.

# Transfer the ownership of your team space

As the space owner, you can transfer the ownership of your team space in GPT for Work to any other user in the team. After the transfer, the new owner takes full control of the space, and you remain in the space as an admin.

#### Prerequisites

You are the owner of the space.

#### **Microsoft**

- 1 Sign in to the GPT for Work dashboard with your Microsoft account.
- 2 In the sidebar, select **Settings**.
- 3 In the **Transfer ownership** section, select the user to whom you want to transfer the ownership.
- 4 Click **Save** to confirm.

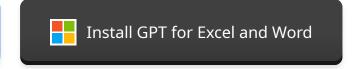
You have successfully transferred the ownership of the space to the user. You remain in the space as an admin.

- Manage users in your team.
- Manage API keys, API endpoints, and models for your space.

## **Install GPT for Work add-ons**



(C) Install GPT for Sheets and Docs



For detailed installation instructions, see below.

#### Microsoft

To use GPT for Work in Microsoft Excel or Microsoft Word, you need to install the GPT for Excel Word add-in. One installation covers both applications and environments.

#### Prerequisites

## **Excel: Compatible versions by platform**

The following table lists the **minimum versions of Microsoft Excel** compatible with the GPT for Excel add-in on different Microsoft Office platforms.

X	Windows	Мас	Online
	Microsoft 365 subscription:	Version 16.35 (Build 20030802)	Supported on:  • Google Chrome (latest version)  • Microsoft Edge (latest version)
	Version 2002 (Build 12527.20092)		
	Retail perpetual:  Version 2002 (Build		
	12527.20092)  Volume-licensed perpetual:		
	Excel 2021: Version 2108 (Build 12527.20092)		

Which version of Excel am I using?

## Word: Compatible versions by platform

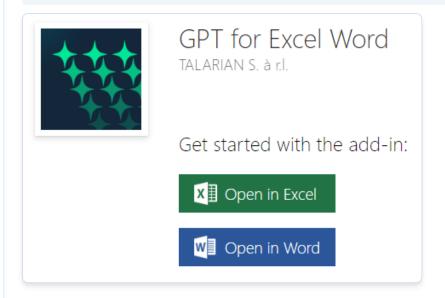
The following table lists the **minimum versions of Microsoft Word** compatible with the GPT for Word add-in on different Microsoft Office platforms.

w	Windows	Мас	Online	
	Microsoft 365 subscription:	Version 16.61 (Build 22040100)		
	Version 2205 (Build			
	15202.10000)		Supported on:	
	Retail perpetual:		Google Chrome (latest version)	
	Version 2205 (Build			
	15202.10000)		Microsoft Edge	
	Volume-licensed perpetual:		(latest version)	
	Word 2024: Version 2205 (Build 15202.10000)			

## Which version of Word am I using?

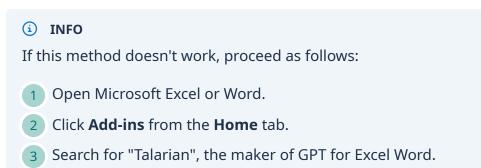
- 1 Go to the <u>installation page</u>.
- 2 Click **Open in Excel** or **Open in Word**.
  - i INFO

The add-in will be installed on your Microsoft account for both Excel and Word.



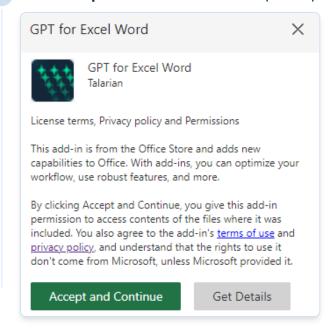
A pop-up appears at the top of the window, requesting your permission to proceed.

3 Confirm to open the Microsoft Excel or Word desktop app.

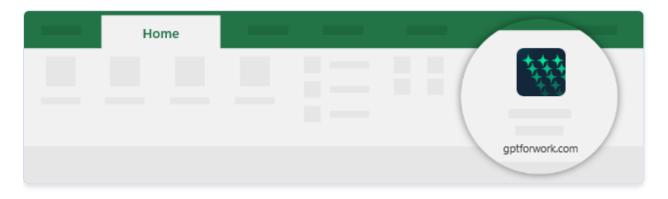


4 In the search results, click **Add** for **GPT for Excel Word**.

4 Click **Accept and Continue** to accept the permissions.



You have installed GPT for Excel Word on your Microsoft account. The add-in is now available from the *Home* tab on the desktop app and the Web version of Excel and Word. If you don't see it, go to **Home** > **Add-ins** > **My add-ins** > **GPT for Excel Word**.



## What's next

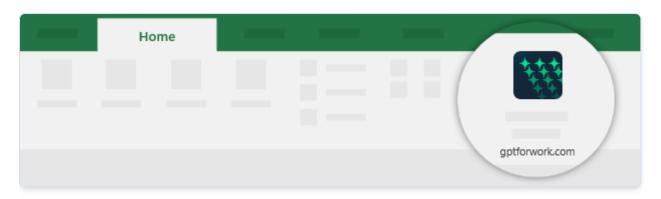
### **Microsoft**

- Open GPT for Excel / GPT for Word.
- Learn about <u>GPT for Excel</u> / <u>GPT for Word</u>.
- Select a model in <u>GPT for Excel</u> / <u>GPT for Word</u>.
- Start using <u>bulk AI tools</u> and <u>GPT functions</u> in GPT for Excel.
- Start authoring text with GPT for Word.

# **Open GPT for Work add-ons**

#### **MS Excel**

In the **Home** tab, click **GPT for Excel Word**.



(i) INFO

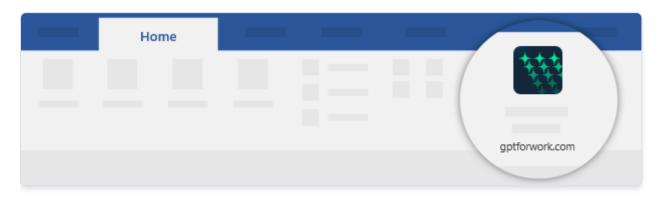
You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

## What's next

- <u>Sign in with Microsoft.</u>
- If you run into issues, see our troubleshooting guide.

#### **MS Word**

In the **Home** tab, click **GPT for Excel Word**.



(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

#### What's next

• Sign in with Microsoft.

• If you run into issues, see our <u>troubleshooting guide</u>.

# Sign in to GPT for Work

Whether you're using Google Sheets or Docs, or Microsoft Excel or Word, this section explains how GPT for Work authenticates your user account, how to check which account you're using, and how to switch between accounts or sign out if needed.

#### Sign in with Google or Microsoft

How to sign in to GPT for Work via Google and Microsoft authentication systems.

#### Check which account you are using

How to check which Google or Microsoft account GPT for Work is using.

#### Switch to another account

Use a different Google or Microsoft account with GPT for Work.

#### Sign out from GPT for Excel and Word

How to sign out from GPT for Work when using Microsoft Excel and Word.

# Sign in with Google or Microsoft

- You need a Google account to use GPT for Sheets and Docs.
- You need a Microsoft account to use GPT for Excel and Word.

#### **Microsoft**

When you launch the GPT for Excel Word add-ins:

- **From a web version of Excel or Word**: You need to sign in with your Microsoft account when you first launch the add-in.
- From a desktop version of Excel or Word:
  - If you're already signed in with your Microsoft account, the add-in automatically uses that account.
  - If you're not signed in or using multiple accounts, the add-in prompts you to choose an account.

If you have multiple Microsoft accounts, such as a personal account and a work account, you can switch between them to ensure you are using the correct account in GPT for Work.

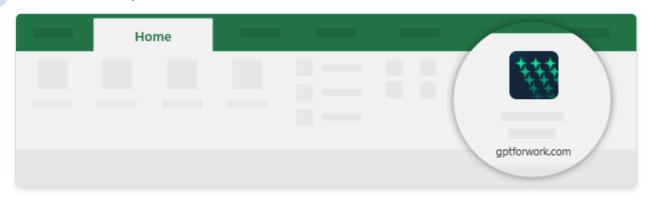
- Check which account is used by GPT for Work.
- If needed, switch to another account.

# Check which account you are using

To check which Google or Microsoft account you are using in GPT for Work:

#### Microsoft

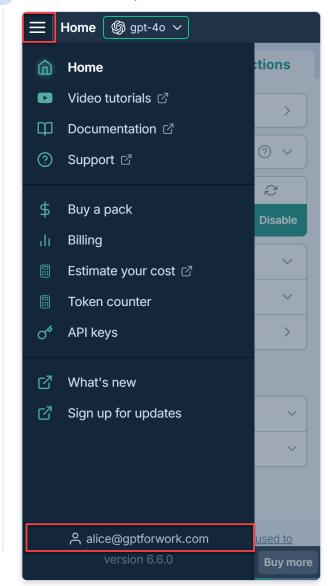
- 1) Open a Microsoft Excel workbook or Word document.
- 2 In the **Home** tab, click **GPT for Excel Word**.



(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

3 In the sidebar, open the main menu. Your account is displayed at the bottom of the menu.



## What's next

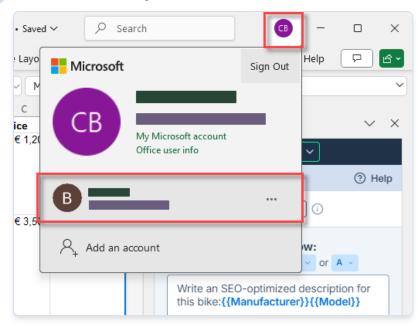
• If needed, switch to another account.

# Switch to another account

If the account currently used by GPT for Work is not the one you want to use, switch to another account:

#### **Microsoft**

- 1 Launch Excel or Word.
- 2 In the upper-right corner of the application, click your account icon or picture.
- 3 Select the account you want to switch to.



i INFO

If the account you want to switch to is not in the list, click to add a new account and complete the sign-in process.

4 If you are using the desktop version of Excel or Word, close the application and reopen it.

You have switched to another account. You can now launch and use GPT for Work with the new account.

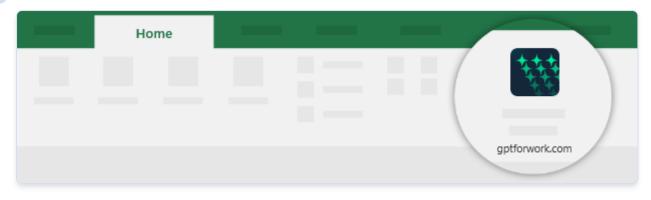
TIP

If you signed in with the wrong account during installation, <u>contact support</u> to request an account transfer.

# Sign out from GPT for Excel and Word

To sign out from GPT for Excel and Word:

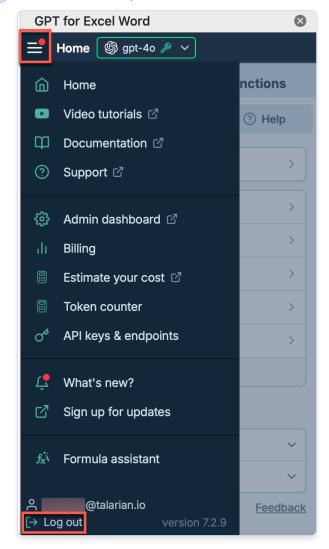
- 1 Open a Microsoft Excel workbook or Word document.
- 2 In the **Home** tab, click **GPT for Excel Word**.



(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

3 In the sidebar, open the main menu. Then, select **Log out**.





Signing out from GPT for Excel also signs you out from GPT for Word since they use the same Microsoft account session.

You have signed out from GPT for Excel and Word. You'll need to sign in again when you next launch the add-in.

## What's next

Sign in with Google or Microsoft

## AI models

<u>Models</u> are the engines that power <u>GPT for Work</u>. Which model is the right one depends on your specific needs in terms of response quality, speed, privacy, and cost. GPT for Work supports models from <u>Anthropic</u>, <u>Azure</u>, <u>DeepSeek</u>, <u>Google</u>, <u>Mistral</u>, <u>OpenAI</u>, <u>OpenRouter</u>, <u>Perplexity</u>, and <u>xAI</u>. GPT for Work also supports open-source models through <u>Ollama</u> and <u>any OpenAI-compatible API endpoint</u>.

#### (i) NOTE

As a space owner or admin (Microsoft accounts only), you can control which models are available to users in your space through the Models section of the dashboard.

The following table summarizes the different kinds of models available in GPT for Work from zero set up to more advanced options:

Use	Setup	When	Available for
Models without an API key	None.  Use the default model or select a different model.	You want to get started quickly without setting up API keys.  Available models	Excel, Sheets, Word, Docs

Use	Setup	When	Available for
	AI provider models:  Set an API key for an AI provider.	<ul> <li>You want to benefit from the terms of service you have with an AI provider, such as cost, privacy, and rate limits.</li> <li>You want to use a model that is not available without an API key.</li> <li>You want more control.</li> </ul> Available models	Excel, Sheets, Word, Docs
Models with an API key 🔑	OpenRouter models:  Set an API key for OpenRouter.	<ul> <li>managing multiple API keys.</li> <li>You want to use models that are only available through</li> </ul>	
	OpenAI Assistants:  Create an OpenAI  Assistant and set an OpenAI API key.	<ul> <li>You need to add custom capabilities to a model.</li> <li>You want to upload your own files as knowledge for the AI.</li> </ul>	Excel, Sheets
Models from	Azure OpenAI models:  Set up an Azure OpenAI endpoint.	<ul> <li>Your company is already using         Azure with a consumption         commitment. Using Azure OpenAI         counts towards that commitment.</li> <li>You want to use models that are         available through Azure OpenAI.</li> <li>Available models</li> </ul>	Excel, Word
endpoints	OpenAI-compatible models:  Set up an OpenAI-compatible platform endpoint.	<ul> <li>You want to use models available on a cloud-based LLM platform such as <u>Anyscale</u> or <u>Fireworks AI</u>.</li> <li>You need a fast and powerful inference infrastructure that scales to your performance needs.</li> </ul>	Excel, Word

Use	Setup	When	Available for
	OpenAI-compatible models:  Set up an OpenAI-compatible server endpoint.	<ul> <li>You want to use models available on a local LLM server such as LM Studio.</li> <li>You want to run models on a local machine.</li> <li>You do not want to send or receive any prompt or response data over the internet.</li> </ul>	Excel, Word
Local models	Ollama models:  Set up an Ollama endpoint.	<ul> <li>You want to use models available through Ollama.</li> <li>You want to run models on a local machine.</li> <li>You do not want to send or receive any prompt or response data over the internet.</li> </ul> Available models	Excel, Word

## What's next

Get started with the option that works best for you:

- Select a model.
- Set and manage your API keys.
- Use OpenRouter models.
- Use OpenAI Assistants.
- Use OpenAI-compatible models through API endpoints.
- Use Ollama models.

## Select a model

<u>GPT for Work</u> supports a range of <u>models</u> that you can use for your AI work. To help you find the model that offers the best balance of accuracy, speed, and cost for your use case, see our recommended models.

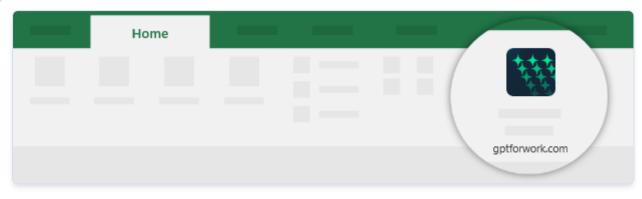
The available models depend on:

- **The GPT for Work add-on you're using.** For a list of supported models by add-on, see <u>AI</u> providers & models.
- **The API keys you've set, if any.** Each add-on gives you access to a default set of models available without an API key. To access additional models, <u>set an API key for one or more AI</u> providers.
- Your space admin's model settings (Microsoft accounts only). If you're using GPT for Work as part of a Microsoft team space, your space admin can control which models are available in the add-ins. Learn more.

## Select a model without an API key

#### **MS Excel**

- 1 Open a Microsoft Excel workbook.
- 2 In the **Home** tab, click **GPT for Excel Word**.



**i** INFO

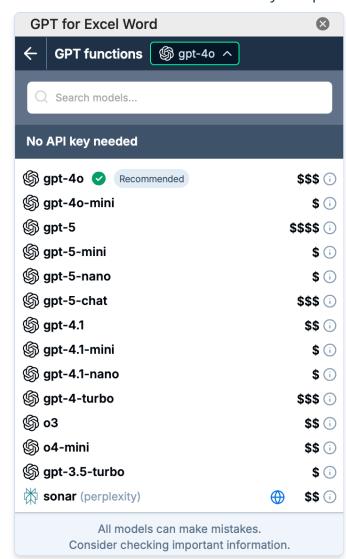
You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

3 Expand the model switcher.



4 Select a model.

Models that are available without any setup are listed under **No API key needed**.



GPT for Excel uses the selected model to generate all responses.

#### i INFO

• When <u>cache</u> is enabled, existing GPT formulas will not automatically update to the new model when you re-execute them.

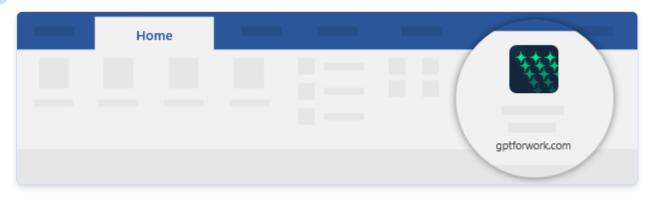
To re-execute an existing formula with the new model:

- 1 Set the model as a parameter in the formula.
- 2 Press Enter to re-execute the formula.
- The GPT\_MATCH function uses text-embedding-ada-002, not the model you select.

#### **MS Word**

1 Open a Microsoft Word document.

2 In the **Home** tab, click **GPT for Excel Word**.



i INFO

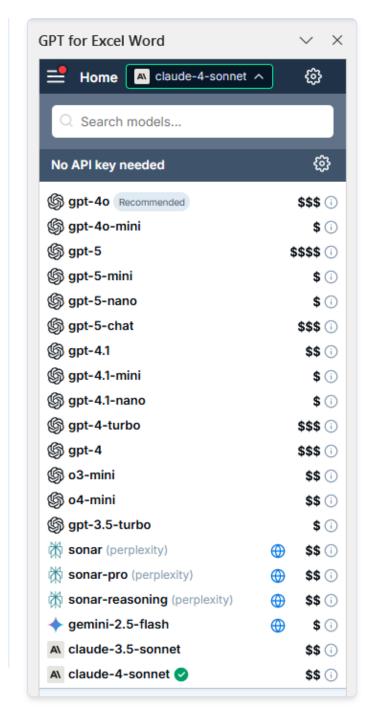
You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

3 Expand the model switcher.



4 Select a model.

Models that are available without any setup are listed under **No API key needed**.



GPT for Word uses the selected model to generate all responses.

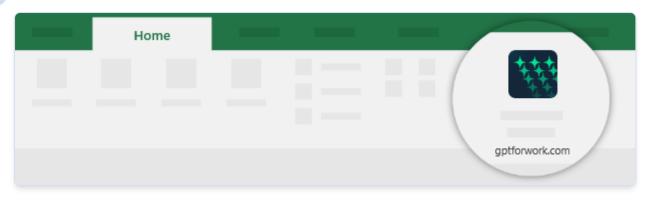
## Select a model with an API key

## Prerequisites

- You have set an API key for the AI provider whose model you want to use.
- In Excel and Word, if you want to use an Azure model or an OpenAI-compatible model from an API endpoint, you have set up the <u>correct endpoint</u>.

#### **MS Excel**

- 1 Open a Microsoft Excel workbook.
- 2 In the **Home** tab, click **GPT for Excel Word**.



i INFO

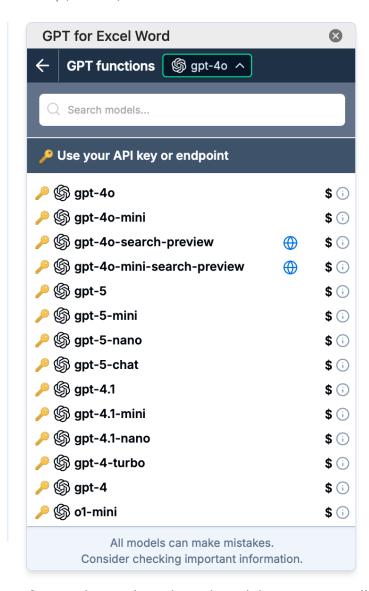
You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

3 Expand the model switcher.



4 Select a model with a key icon.

Models that are available with an API key are listed under **Use your API key or endpoint** and have a key icon in front of their name.



GPT for Excel uses the selected model to generate all responses.

## i INFO

• When <u>cache</u> is enabled, existing GPT formulas will not automatically update to the new model when you re-execute them.

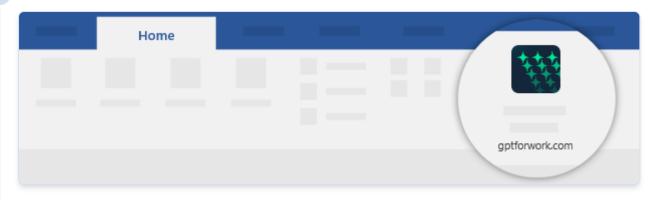
To re-execute an existing formula with the new model:

- 1 Set the model as a parameter in the formula.
- 2 Press Enter to re-execute the formula.
- The GPT\_MATCH function uses text-embedding-ada-002, not the model you select.

#### **MS Word**

1 Open a Microsoft Word document.

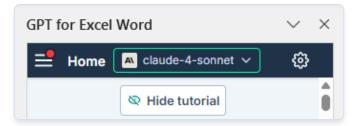
2 In the **Home** tab, click **GPT for Excel Word**.



i INFO

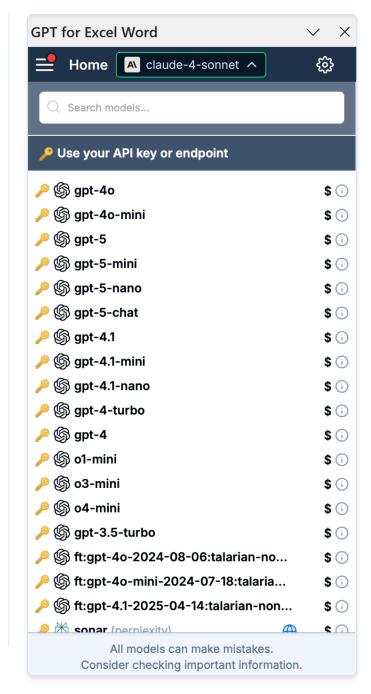
You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

3 Expand the model switcher.



4 Select a model with a key icon.

Models that are available with an API key are listed under **Use your API key or endpoint** and have a key icon in front of their name.



GPT for Word uses the selected model to generate all responses.

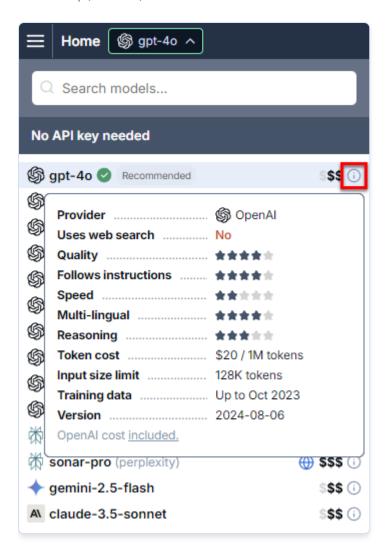
### **Recommended models**

As a general rule, OpenAI models are more reliable and less likely to decline prompts than models from other providers.

The following table lists our recommended models available without an API key. For more information about which add-on supports which models, see AI providers & models.

Model	Provider	Description	
gpt-4o	OpenAI	Best overall balance of easy prompting, speed, quality, reliability, and cost. <b>Recommended for most use cases.</b>	
gpt-4.1-mini	OpenAI	Fast, cost-effective model with strong reasoning and language capabilities. Follows instructions closely.	
gpt-5-mini	OpenAI	Fast, cost-effective reasoning (with low or medium reasoning effort). Great for analysis tasks.	
gpt-4.1	OpenAI	Exceptionally strong at image understanding. <u>Learn more</u> about vision models.	
claude-4- sonnet	Anthropic	Great at content creation, summarization, and nuanced reasoning across a wide range of tasks. <b>Recommended with GPT for Word.</b>	
gemini-2.5- flash	Google	Cost-effective model ideal for lightweight tasks and rapid responses. Supports reasoning, web search, and web scraping (enabled from the model settings).	
sonar	Perplexity	Cost-effective search model optimized for simple queries. Grounded in recent web search data.	
sonar- reasoning	Perplexity	Advanced search model designed for complex queries. Grounded in recent web search data with enhanced reasoning for more accurate answers.	

To learn more about a model, hover over the model name in the model switcher. A tooltip opens with detailed information about the model.



## What's next

Learn more about models:

- List of supported models
- LiveBench (a good model benchmark)

Put your selected model to use:

#### **MS Excel**

- Use <u>bulk AI tools</u> to run prompts on entire spreadsheet columns at once without writing any formulas.
- Use GPT functions to run prompts from inside spreadsheet cells.

#### **MS Word**

• Author text with AI.

## **Set and manage API keys**

Using API keys offers several benefits:

- **More models.** Access a <u>wider range of models from a bigger pool of AI providers</u> than what is available without API keys.
- **More control.** Monitor and manage your AI usage and costs directly on the AI provider's platform.
- **Improved privacy.** We do not log inputs and outputs when you use a model with an API key. For more information, see our security and privacy FAQ.
- Reduced costs. If you're on <u>usage-based pricing</u>, using an API key reduces costs. You pay the
  model usage fees directly to the AI provider, while paying a reduced service fee for GPT for
  Work.

If you're on a <u>subscription plan</u>, using an API key is mandatory since you do not have access to models without a key.

## **API** key levels

API keys in GPT for Work can be set at two different levels:

- **For a specific user:** When you set API keys for your own use, they work only for you. Only *you* have access to models associated with the keys, and only *you* can set and manage the keys.
- **For all space users:** When you set API keys for your <u>space</u>, they work for all users in the space. Space users automatically have access to models associated with the keys, but only the space owner and admins can set and manage the keys. Billing for a space key reflects its usage by all space users. Learn more.

If keys are set at both levels for the same AI provider, the specific user key overrides the space key.

## **Create API keys**

INFO

Make sure your keys belong to an organization or project with the following rate limits:

- RPM (requests per minute) ≥ 1,000
- TPM (tokens per minute) ≥ 1,000,000

The actual limits required depend on your workload requirements.

To create an API key, go to the AI provider's platform and follow their instructions:

2025-10-22

- OpenAI Platform for GPT models, fine-tuned models, and OpenAI Assistants
- Anthropic Console for Claude models
- DeepSeek Platform for DeepSeek models
- Google AI Studio for Gemini models
- Mistral AI for Mistral models
- OpenRouter for access to various models from different AI providers using a single API key
- Perplexity for Perplexity models
- xAI Cloud Console for xAI models

## Set your own API keys

(i) NOTE

You can set your own API keys only if your space allows it.

TIP

If you want to share an API key with your space users, set it at space level.

#### **MS Excel**

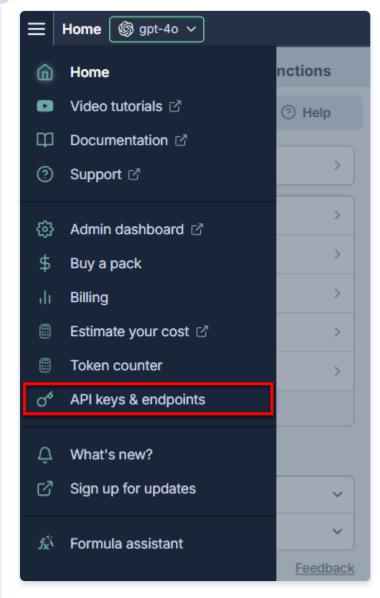
- 1 Open a Microsoft Excel workbook.
- 2 In the **Home** tab, click **GPT for Excel Word**.



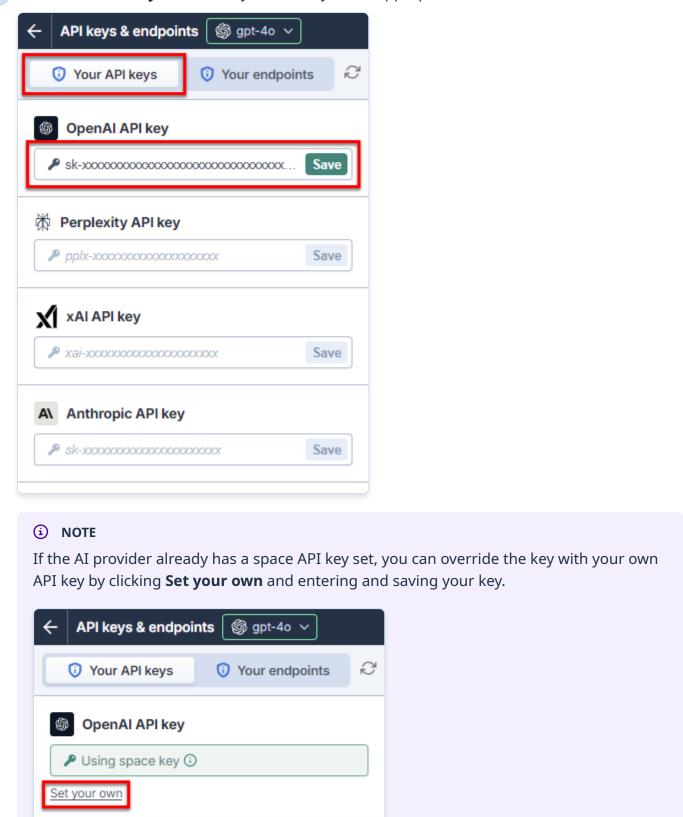
(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

3 In the sidebar menu, select API keys & endpoints.



4 In the **Your API keys** tab, enter your API key in the appropriate field and click **Save**.

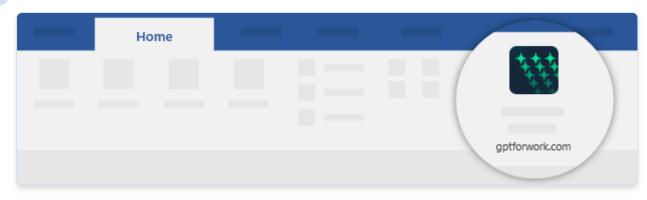


You have set the API key. You can now use any model available with the key in GPT for Excel.

#### **MS Word**

1 Open a Microsoft Word document.

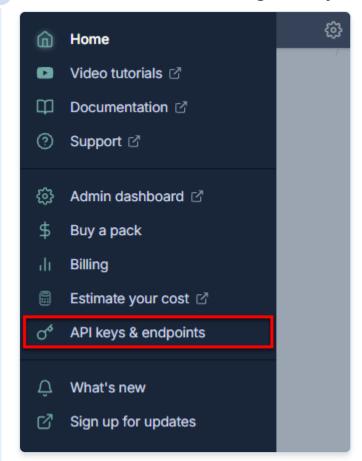
2 In the **Home** tab, click **GPT for Excel Word**.



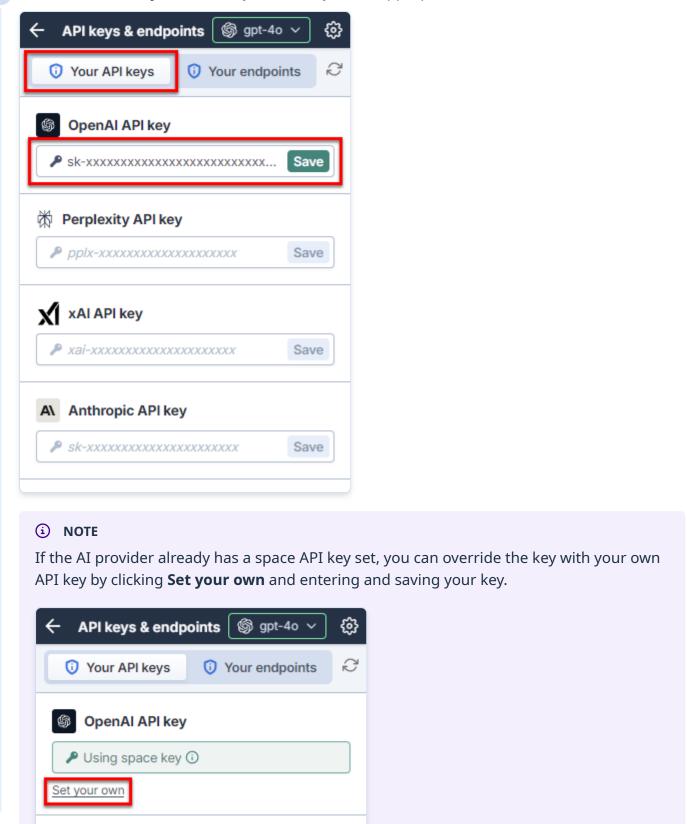
(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

3 In the sidebar menu, select **Manage API keys**.



4 In the **Your API keys** tab, enter your API key in the appropriate field and click **Save**.



You have set the API key. You can now use any model available with the key in GPT for Word.

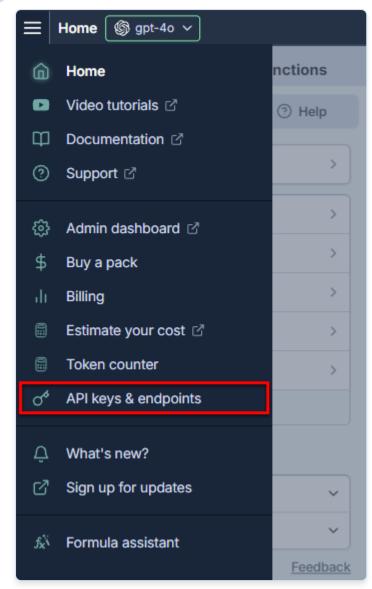
## **Manage API keys**

### Check which level of API key you're using

You can check whether you're using your own API key or a space API key for a specific AI provider.

#### **MS Excel**

1 In the sidebar menu, select API keys & endpoints.

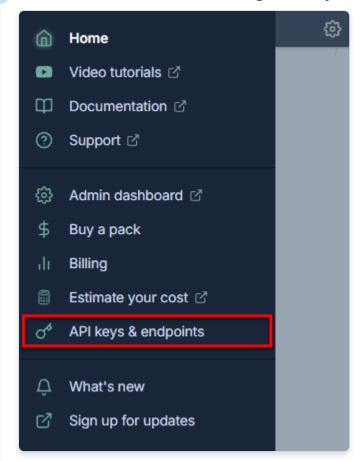


2 Check the text in the AI provider's API key field:

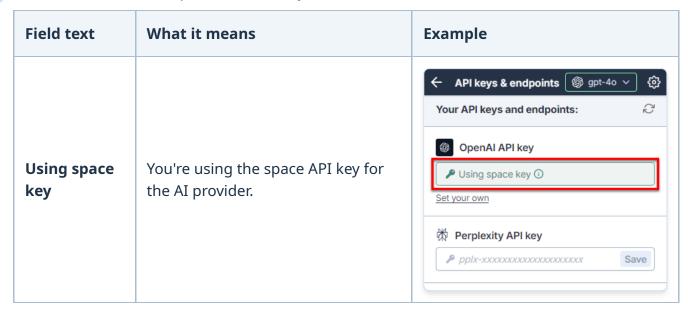
Field text	What it means	Example	
Using space key	You're using the space API key for the AI provider.	Your API keys & endpoints	
xxxxx	You're using your own API key for the AI provider.	Your API keys & endpoints	

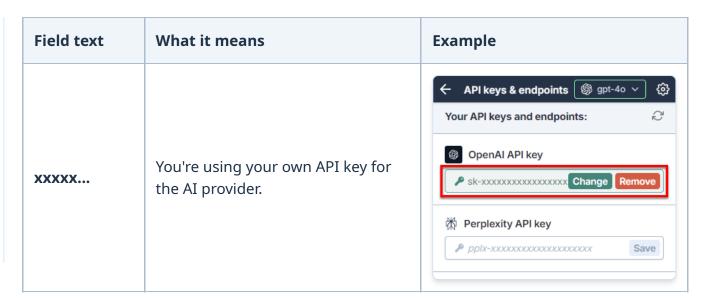
#### **MS Word**

1 In the sidebar menu, select Manage API keys.



2 Check the text in the AI provider's API key field:





### Switch to a space API key

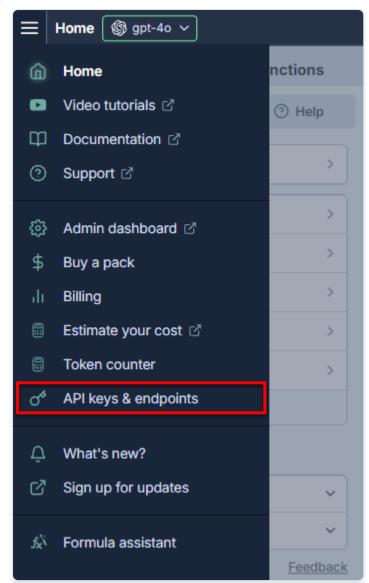
#### Prerequisites

The space owner has <u>set the space API key</u>.

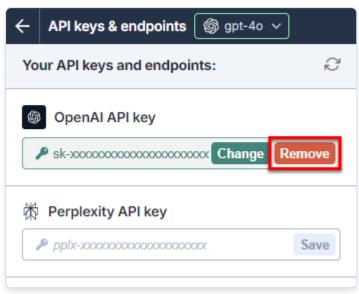
If you're currently using your own API key for an AI provider but want to switch to using the space API key for the same provider, delete the your own key from GPT for Work.

#### **MS Excel**

1 In the sidebar menu, select API keys & endpoints.

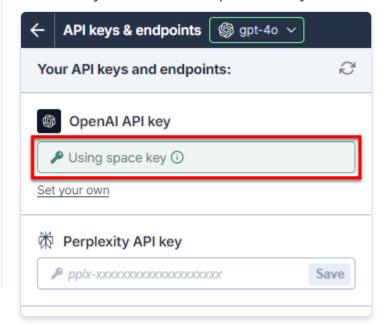


2 Click **Remove** for the API key you want to delete.



3 Click **Remove API key** to verify.

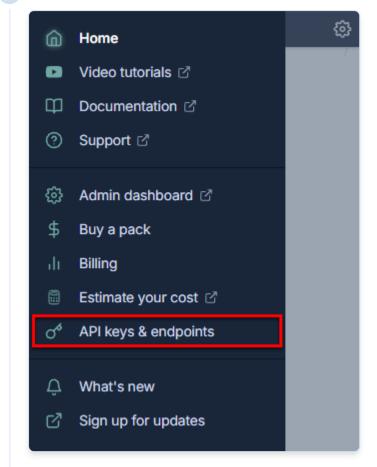
The API key defaults to the space API key.



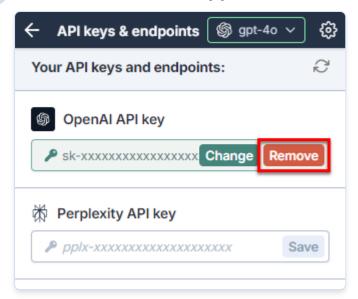
You're now using the space API key for the AI provider.

#### **MS Word**

1 In the sidebar menu, select Manage API keys.



2 Click **Remove** for the API key you want to delete.



3 Click **Remove API key** to verify.

The API key defaults to the space API key.



You're now using the space API key for the AI provider.

## Switch to your own API key

If you're currently using the space API key for an AI provider but want to switch to using your own API key for the same provider, simply set the your own key in GPT for Work. A user key always overrides a space key.

## **Troubleshoot OpenAI API keys**

You can use our API key checker to verify that your OpenAI API key is working.

1 Open the <u>OpenAI API key checker</u> and click **Use template**.

Google Sheets creates a copy of the spreadsheet in your Google drive and opens the spreadsheet for editing.

2 Enter your OpenAI API key in cell **B12**.

The results show the status of your OpenAI API key and the <u>models</u> and <u>Assistants</u> available through the key.

	А	В	С
11	API KEY CHECKER		
12	API KEY	sk-proj-nyRnc1vNsi5FW3xsyzYxrQtFOPrg9yGtBg	
13	ORG (optional)	org-xxx	
14	RESULT	Status:	VALID
15		HTTP code:	200
16		OpenAl response:	{ "id": "chatcmpl-AKIh0cueRvb97vt6Yb0XLMGJtfv7n".
17	Models	Assistants	
18	gpt-4-turbo	Talarian Security Oracle	
19	gpt-4-turbo-2024-04-09	YAMM Oracle	
20	tts-1		
21	tts-1-1106		
22	chatgpt-4o-latest		
23	dall-e-2		
24	whisper-1		
25	gpt-4-turbo-preview		
26	gpt-4o-audio-preview		
27	gpt-4o-2024-08-06		

If your API key is not working, check on the <u>OpenAI Platform</u> that the key's permissions aren't restricted. The following permissions are required:

Permission	Description	
Models	List available models.	
Model capabilities	Use model capabilities, such as chat completion.	
Assistants	Connect OpenAI Assistants to Google Sheets or Microsoft Excel.	
Fine-tuning	Connect OpenAI fine-tuned models to Google Sheets or Microsoft Excel.	
Files	Use OpenAI Assistants with <u>file search</u> .	

### What's next

- Check which models you can use with an API key.
- Select a model with an API key.

• Need to use your own LLM service endpoint for models?

- Connect to an OpenAI-compatible endpoint.
- Connect to an Ollama server.

## Connect to Azure OpenAI from Excel and Word

GPT for Excel and Word can connect to <u>Azure AI</u> to use <u>OpenAI models</u>. You can connect to and use a single model at a time.

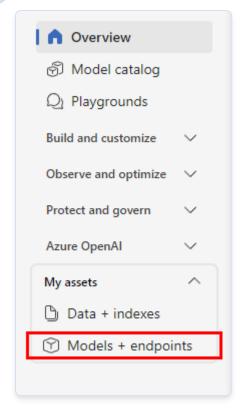
#### Prerequisites

- Your space allows users to set up their own API endpoints.
- You have an Azure subscription with Azure AI service access.
- You have deployed a model in an Azure OpenAI resource.

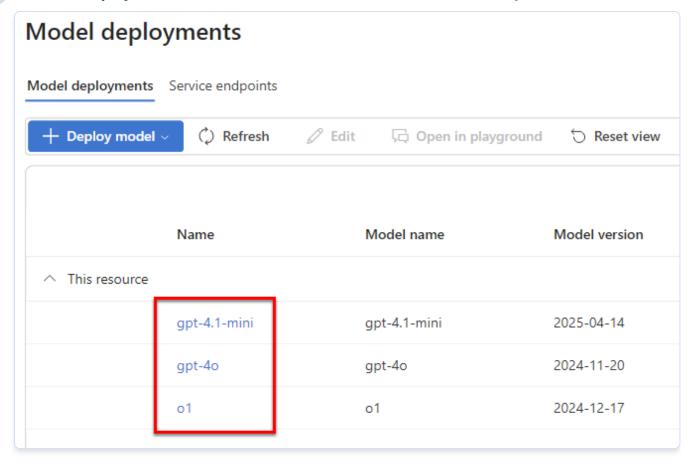
## **Get your Azure OpenAI endpoint details**

To connect to Azure AI from GPT for Excel and Word, you need the endpoint URL, name, and API key for the Azure OpenAI model you want to use.

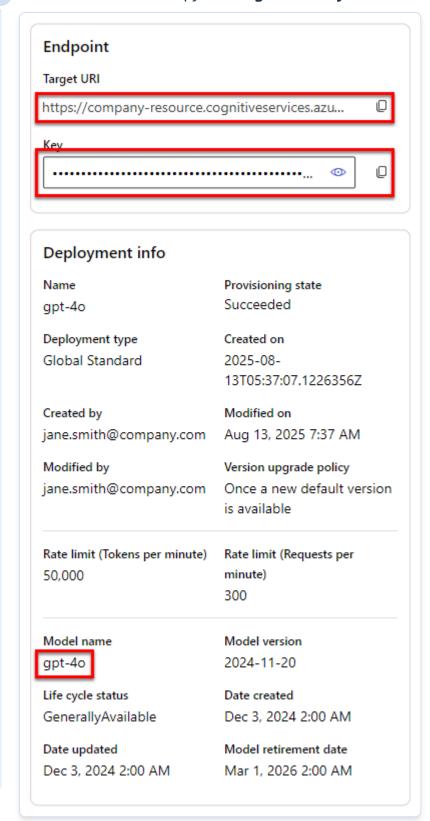
- 1 Sign in to Azure AI Foundry.
- 2 Select the Azure OpenAI resource that has the model you want to use.
- 3 In the sidebar, select My assets > Models + endpoints.



4 In **Model deployments**, in the models list, click the name of the model you want to use.



5 In the model details, copy the **Target URI**, **Key**, and **Model name**.

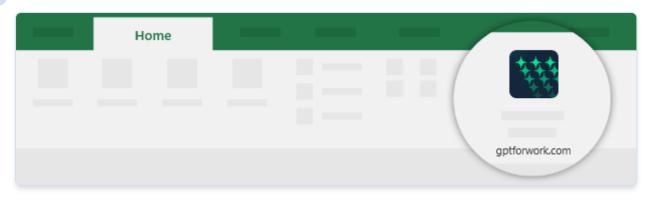


## Set up the Azure OpenAI endpoint

#### **MS Excel**

1 Open a Microsoft Excel workbook.

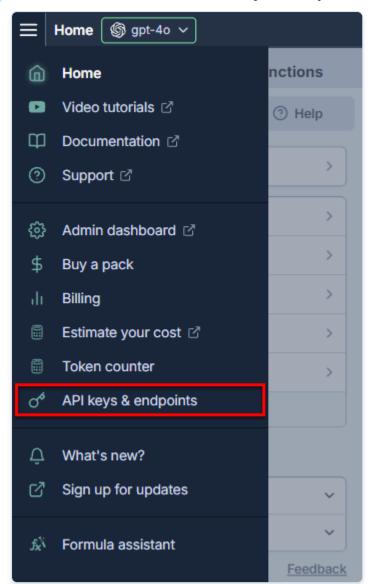
2 In the **Home** tab, click **GPT for Excel Word**.



(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

3 In the sidebar menu, select **API keys & endpoints**.



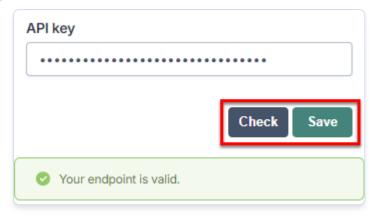
4 Select the endpoints tab.



- 5 In the **Azure endpoint** section, define the endpoint settings:
  - **Endpoint URL**: Enter the endpoint URL for the model.
  - **Model ID**: Enter the model name. GPT for Excel uses the name as the model's display name in the model switcher.
  - **API key**: Enter the API key for accessing the endpoint.



6 Click **Check** to validate the settings, and click **Save**.



You have set up the Azure OpenAI endpoint in GPT for . You can now select the model available through the endpoint.

#### **MS Word**

1 Open a Microsoft Word document.

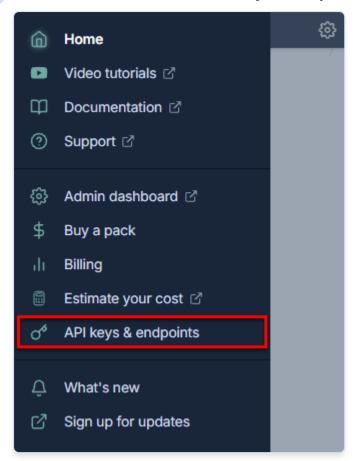
2 In the **Home** tab, click **GPT for Excel Word**.



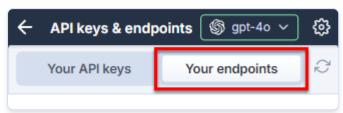
(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

3 In the sidebar menu, select **API keys & endpoints**.



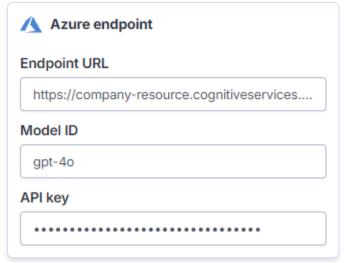
4 Select the endpoints tab.



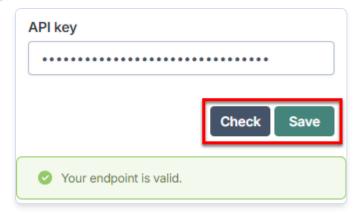
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  - **Endpoint URL**: Enter the endpoint URL for the model.

• **Model ID**: Enter the model name. GPT for Word uses the name as the model's display name in the model switcher.

• **API key**: Enter the API key for accessing the endpoint.



6 Click **Check** to validate the settings, and click **Save**.

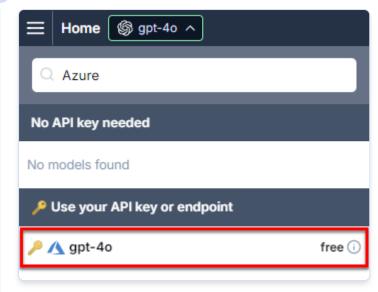


You have set up the Azure OpenAI endpoint in GPT for . You can now select the model available through the endpoint.

## Select the Azure OpenAI model

#### **MS Excel**

1 Expand the model switcher. You can find the model under Use your API key or endpoint.

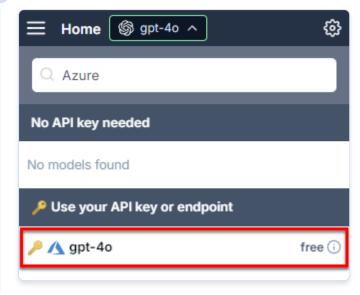


2 Select the model.

GPT for Excel now uses the selected model to generate all responses.

#### **MS Word**

1) Expand the model switcher. You can find the model under Use your API key or endpoint.



2 Select the model.

GPT for Word now uses the selected model to generate all responses.

## Connect to OpenRouter from Excel, Sheets, and Word

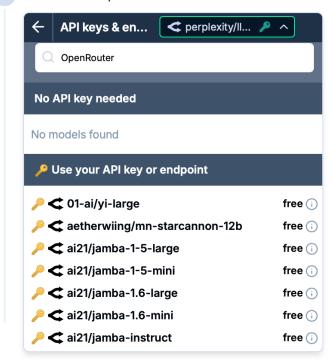
Connecting GPT for Excel, GPT for Sheets, or GPT for Word to <u>OpenRouter</u> allows you to access a wide range of AI models without having to manage multiple API keys from different providers.

## **Create your OpenRouter API key**

- 1 Sign in to your OpenRouter account.
- 2 Open the API Keys page.
- 3 Click Create Key.
- 4 Enter a key name and click **Create**.
- 5 Copy and save the key.

## Use an OpenRouter model in GPT for Work

- 1) Set your OpenRouter API key in GPT for Excel, GPT for Sheets, or GPT for Word.
- 2 Select the OpenRouter model in the model switcher.



The GPT for Work add-on now uses OpenRouter for executing bulk tools and GPT functions. You can access a wide range of AI models from different providers through your OpenRouter account.



Visit the <u>OpenRouter playground</u> to test different models and compare their capabilities before using them in your spreadsheets.

## Connect to OpenAI Assistants from Excel and Sheets

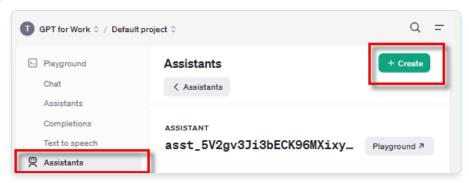
**OpenAI Assistants** provide a powerful way to customize OpenAI models for specific tasks.

This guide shows how to create an Assistant if you don't have one yet, and how to use it in GPT for Excel or GPT for Sheets.

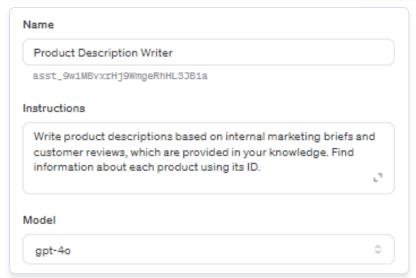
## **Create an OpenAI Assistant**

The following steps show how to create an Assistant from scratch. If you already have an Assistant, you can skip to Use an Assistant in GPT for Work.

1 Go to the OpenAI platform and click Create.



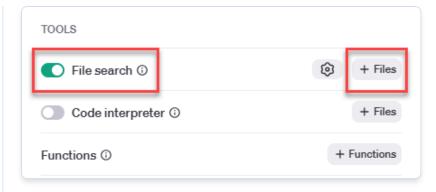
- 2 Configure your Assistant:
  - **Name**: Give your Assistant a name that describes its purpose.
  - Instructions: Provide detailed instructions for the Assistant's behavior and capabilities.
  - Model: Choose an appropriate model, typically gpt-4o. <u>Learn more.</u>



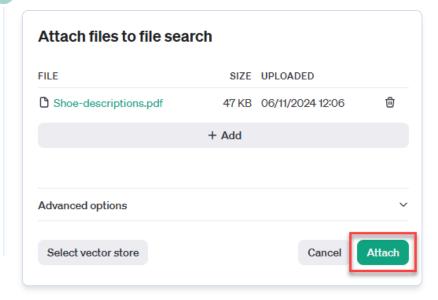
3 If you want your Assistant to use specific files for reference, use the File search feature to

#### attach them:

1 Enable File search and click Files.



2 In the file attachment screen, select the files and click **Attach**.



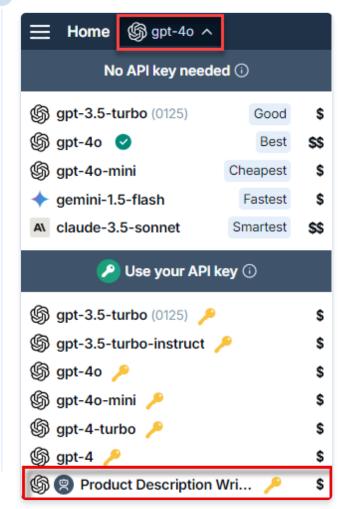
You have created an Assistant. You can now use the Assistant in GPT for Work.

## **Use an OpenAI Assistant in GPT for Work**

After you've created your Assistant, you can use it in GPT for Work.

1 Set your OpenAI API key in GPT for Excel or GPT for Sheets.

2 Select the Assistant in the model switcher.



The GPT for Work add-on now uses your Assistant for executing bulk tools and GPT functions. The **Instructions** as well as **Temperature** and **Top P** settings defined during the Assistant creation are taken into account in GPT for Work.

#### What's next

Train GPT for Work on your files.

## Connect to custom GPTs from Sheets and Excel

While <u>custom GPTs</u> are only available inside ChatGPT, you can easily replicate a custom GPT as an <u>OpenAI Assistant</u>, which you can then use outside ChatGPT. The only difference between custom GPTs and Assistants is that Assistants cannot search the web.

This guide shows you how to create an Assistant that replicates your custom GPT, and use it in GPT for Excel or GPT for Sheets.

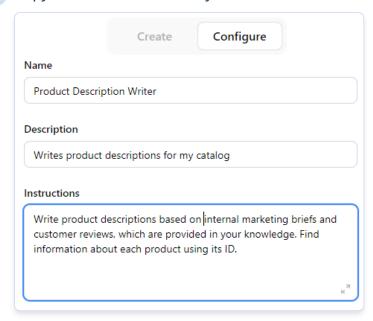
#### Create an Assistant based on a custom GPT

To use a custom GPT configuration in GPT for Work, you need to recreate it as an Assistant.

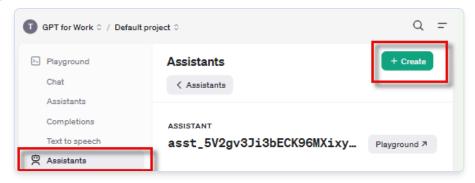
1 Edit your custom GPT in ChatGPT.



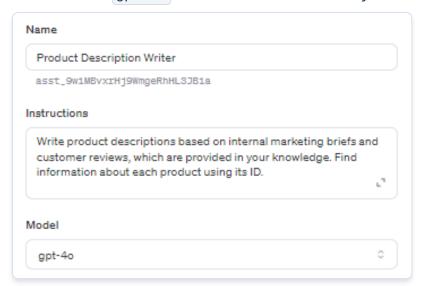
2 Copy the instructions from your custom GPT.



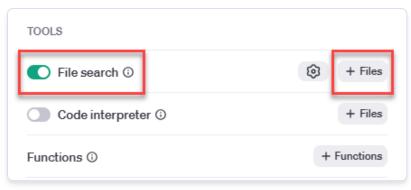
3 Go to the OpenAI platform and create a new Assistant.



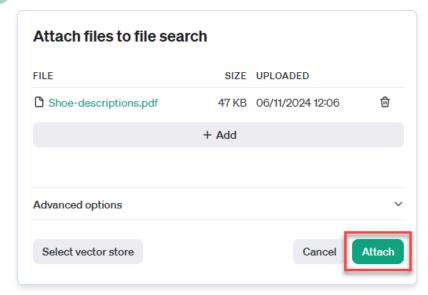
- 4 Configure the Assistant:
  - Name: Enter your custom GPT name.
  - **Instructions**: Enter your custom GPT instructions.
  - **Model**: Select gpt-40, which is the model used by all custom GPTs.



- 5 If your custom GPT uses knowledge files, upload the same files for the Assistant:
  - Enable File search and click Files.



2 In the file attachment screen, select the files and click **Attach**.



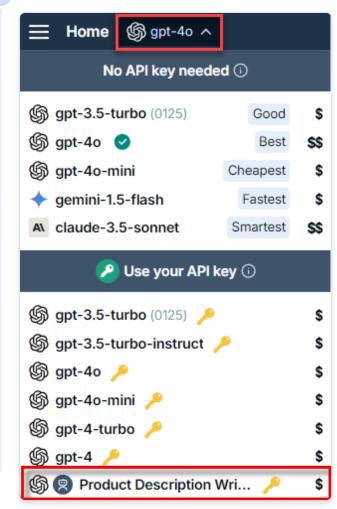
You have created an Assistant that replicates your custom GPT configuration. You can now use the Assistant in GPT for Work.

## Use an Assistant in GPT for Work

After you've created your Assistant, you can use it in GPT for Work.

1 Set your OpenAI API key in GPT for Excel or GPT for Sheets.

2 Select the Assistant in the model switcher.



The GPT for Work extension now uses your Assistant for executing bulk tools and GPT functions, with the same instructions and knowledge as your original custom GPT.

#### What's next

Train GPT for Work on your files.

# Connect to OpenAI-compatible API endpoints from Excel and Word

On Microsoft Excel and Word, GPT for Work can connect to any LLM service that provides an <a href="OpenAI-compatible API endpoint">OpenAI-compatible API endpoint</a>. You can connect to two main types of services: <a href="color: cloud-based">cloud-based</a> <a href="platforms">platforms</a>, which provide access to models over the internet with no software installation or setup required on your part, and <a href="local servers">local servers</a>, which you run on a local machine, such as your own computer or another computer on a local network. Once connected, all models available through the service become available to use in GPT for Excel and Word.

Here are some popular services that provide an OpenAI-compatible API endpoint:

#### • Cloud-based platforms:

- Anyscale
- Fireworks AI
- Together AI
- Local servers:
  - LM Studio
  - LocalAI
  - Open WebUI

Connecting to an OpenAI-compatible API endpoint in GPT for Work means configuring the endpoint and selecting one of the models available through the endpoint.

#### Prerequisites

- Your space allows users to set up their own API endpoints.
- You have an endpoint URL and, if needed, an API key for accessing the service.
- The endpoint must support the following OpenAI-compatible API resource paths:
  - o /v1/models
  - o /v1/completions

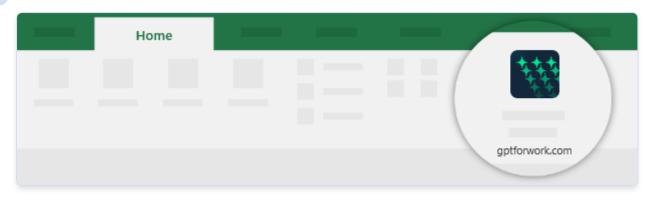
#### (i) NOTE

Depending on the model you use, the model settings defined in GPT for Work (temperature (creativity), top-p, frequency penalty, and presence penalty) may not work as expected. If you get bad results, try tweaking the settings.

# Set up the API endpoint

## **MS Excel**

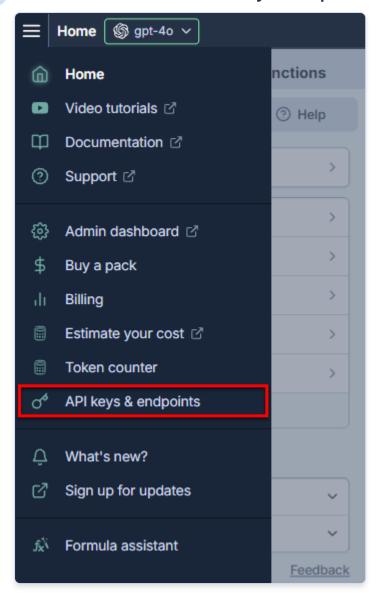
- 1 Open a Microsoft Excel workbook.
- 2 In the **Home** tab, click **GPT for Excel Word**.



(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

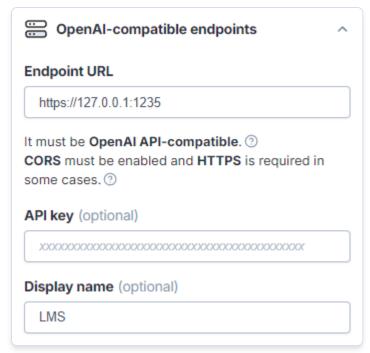
3 In the sidebar menu, select API keys & endpoints.



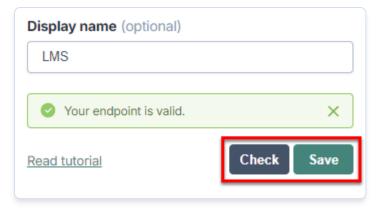
4 Select the endpoints tab.



- 5 In the **OpenAI-compatible endpoints** section, define the endpoint settings:
  - **Endpoint URL**: Enter the URL of the service that provides the endpoint.
  - **API key** (optional): If required, enter the API key for accessing the service.
  - **Display name** (optional): Enter a short name that is prefixed to the model names in the model switcher. By default, the model names are prefixed with "custom".



6 Click **Check** to validate the settings, and click **Save**.



TIP

If you get an error saying that the URL is invalid, make sure that the endpoint supports:

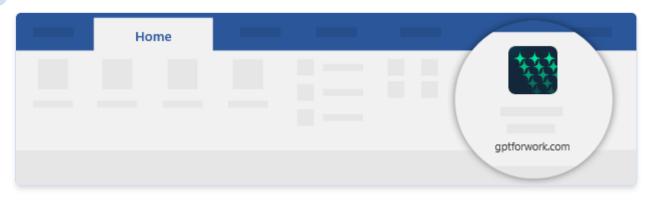
- Cross-origin resource sharing (CORS). See the LM Studio setup instructions for macOS or Windows.
- **HTTPS (needed with Safari and with Microsoft Office for Mac).** See the LM Studio setup instructions for <u>macOS</u>.

You have set up the endpoint in GPT for . You can now select models available through the endpoint.

#### **MS Word**

1 Open a Microsoft Word document.

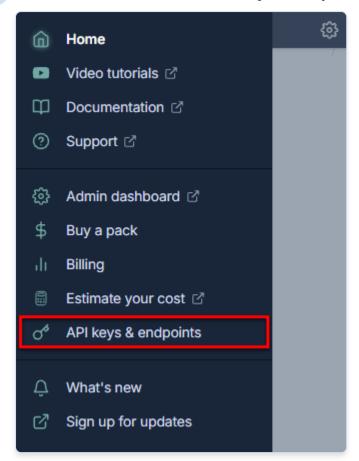
2 In the **Home** tab, click **GPT for Excel Word**.



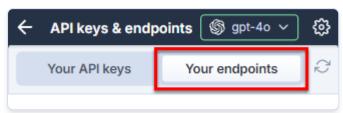
(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

3 In the sidebar menu, select **API keys & endpoints**.

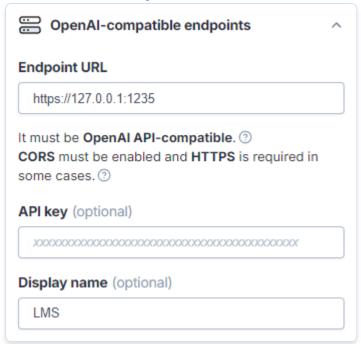


4 Select the endpoints tab.

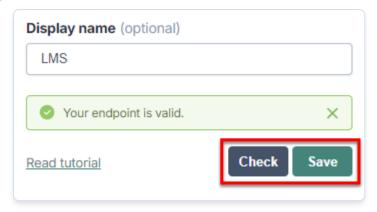


- 5 In the **OpenAI-compatible endpoints** section, define the endpoint settings:
  - **Endpoint URL**: Enter the URL of the service that provides the endpoint.

- **API key** (optional): If required, enter the API key for accessing the service.
- **Display name** (optional): Enter a short name that is prefixed to the model names in the model switcher. By default, the model names are prefixed with "custom".



6 Click **Check** to validate the settings, and click **Save**.





If you get an error saying that the URL is invalid, make sure that the endpoint supports:

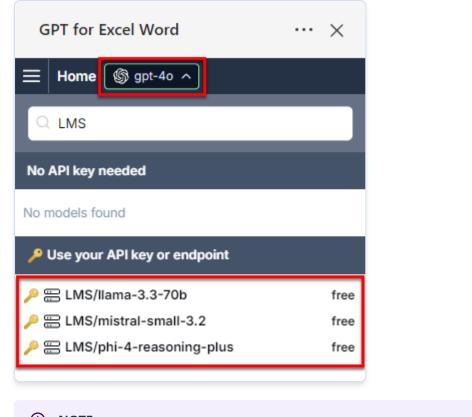
- Cross-origin resource sharing (CORS). See the LM Studio setup instructions for macOS or Windows.
- HTTPS (needed with Safari and with Microsoft Office for Mac). See the LM Studio setup instructions for macOS.

You have set up the endpoint in GPT for . You can now select models available through the endpoint.

# Select a model

#### **MS Excel**

1 Expand the model switcher. You can find the available models under **Use your API key or** endpoint.



**i** NOTE

The available models depend on the models provided by the service.

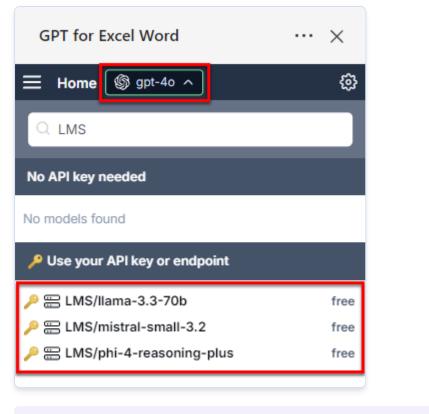
2 Select a model.

GPT for Excel now uses the selected model to generate all responses.

#### **MS Word**

1) Expand the model switcher. You can find the available models under **Use your API key or** 

# endpoint.



(i) NOTE

The available models depend on the models provided by the service.

2 Select a model.

GPT for Word now uses the selected model to generate all responses.

# Set up LM Studio on macOS

This guide walks you through the main steps of setting up <u>LM Studio</u> for <u>use in GPT for Work</u> on macOS.

This guide assumes that you use GPT for Work on the same machine that hosts LM Studio.

### Prerequisites

- System requirements
- Mac user account with administrator (sudo) privileges
- Installed software:
  - curl (ships with macOS)
  - Homebrew
  - OpenSSL (ships with macOS)

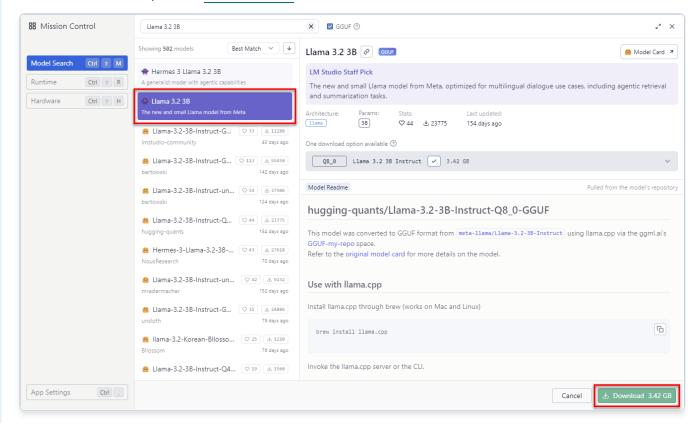
To set up LM Studio on macOS:

- 1 Install LM Studio and download a model.
- 2 Start and configure the LM Studio server.
- 3 (Optional) Enable HTTPS for the LM Studio server.

# Install LM Studio and download a model

- 1 Download and run the <u>macOS installer</u>. Follow the on-screen instructions to complete the installation.
- 2 Run LM Studio.
- 3 On the welcome screen, click **Skip onboarding**.
- 4 In LM Studio, in the sidebar, select **Discover**.
- 5 Find and select the model you want to use, and click **Download**. For example, to get started

with a small model, select Llama 3.2 3B.

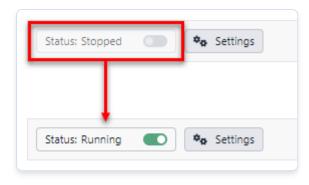


After the download completes, the model is available for prompting in LM Studio.

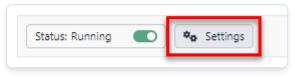
You have installed LM Studio and downloaded your first model. For more information about working with models, see the LM Studio documentation.

# Start and configure the LM Studio server

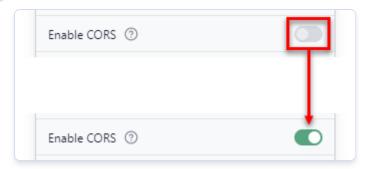
- 1 In LM Studio, in the sidebar, select **Developer**.
- 2 Click the **Status** toggle to change the status from **Stopped** to **Running**. You have started the LM Studio server.



3 Click **Settings**.



4 Click the **Enable CORS** toggle to enable the setting.



#### (i) NOTE

By default, the LM Studio server only accepts <u>same-origin requests</u>. Since GPT for Work always has a different origin from the LM Studio server, you must enable <u>cross-origin resource sharing (CORS)</u> for the server.

5 To verify that the /v1/models endpoint of the LM Studio server works, open http://127.0.0.1:1234/v1/models.

GPT for Work uses the endpoint to fetch a list of models installed on the server. If the endpoint works, the server returns a JSON object with a data property listing all currently installed models:

You have started and configured the LM Studio server.

#### (i) WHAT'S NEXT

You have completed the minimum setup required to access LM Studio from GPT for Work on the same machine. You can now set <a href="http://127.0.0.1:1234">http://127.0.0.1:1234</a> as the <a href="endpoint URL">endpoint URL</a> in GPT for Work provided the add-in is not running on Safari or on Microsoft Excel or Word.

If you use GPT for Work on Safari, or on Microsoft Excel or Word, <u>enable HTTPS for the LM</u> Studio server.

# **Enable HTTPS for the LM Studio server**

The LM Studio server uses HTTP to serve models, while GPT for Work runs on HTTPS. By default, therefore, any request from GPT for Work to the server is a <u>mixed-content request</u> (HTTP vs. HTTPS). Modern web browsers do not allow mixed content, as a rule. The only exceptions are mixed-content requests to <a href="http://localhost">http://localhost</a>, which most browsers treat as safe and therefore allow. Safari, however, blocks mixed-content requests even on the current machine.

To avoid mixed content, you must make the LM Studio server accessible over HTTPS if you use GPT for Work from:

- Excel Online or Word Online on Safari
- Excel for Mac (uses Safari)
- Word for Mac (uses Safari)

You make the LM Studio server accessible over HTTPS by setting up a <u>reverse proxy</u> that hides the server behind an HTTPS interface. This guide uses <u>nginx</u> to set up the reverse proxy.



You can also use <u>Cloudflare Tunnel</u>, <u>ngrok</u>, or a similar cloud-based tunneling service to set up HTTPS with minimal configuration. Note that with a cloud-based service your traffic will be routed through an external service over the internet.

To set up the reverse proxy:

1 Install nginx:

```
brew install nginx
```

- 2 Create a self-signed SSL certificate for the LM Studio server:
  - 1) Change to the nginx configuration directory (varies based on your Mac version):

```
# Mac with an Apple silicon processor
cd /opt/homebrew/etc/nginx

# Mac with an Intel processor
cd /usr/local/etc/nginx
```

2 Generate the certificate:

```
openssl req \
-x509 \
-newkey rsa:2048 \
```

2025-10-22

```
-nodes \
  -sha256 \
  -days 365 \
  -keyout lm-studio.key \
  -out lm-studio.crt \
  -subj '/CN=127.0.0.1' \
  -extensions extensions \
  -config <(printf "
[dn]\nCN=127.0.0.1\n[req]\ndistinguished_name=dn\n[extensions]\nsubjectAl</pre>
```

The command generates two files in the current directory:

- lm-studio.crt : Public self-signed certificate
- lm-studio.key: Private key used to sign the certificate
- 3 Add the certificate to trusted root certificates:

```
sudo security add-trusted-cert -d -r trustRoot -k
/Library/Keychains/System.keychain ./lm-studio.crt
```

- 3 Create a site configuration for the LM Studio server:
  - 1 Open the nginx.conf file in your preferred text editor. The file is in the nginx configuration directory:

```
# Mac with an Apple silicon processor
/opt/homebrew/etc/nginx/nginx.conf

# Mac with an Intel processor
/usr/local/etc/nginx/nginx.conf
```

2 Replace the content of the file with the following configuration:

```
proxy_http_version 1.1;
    proxy_set_header Connection '';
}
}
```

The configuration uses port 1235 for HTTPS. Requests to https://127.0.0.1:1235 are forwarded to the LM Studio server running at http://127.0.0.1:1234.

- 3 Save and close the file.
- 4 Test the nginx configuration:

```
sudo nginx -t
```

Response if the configuration is valid:

```
nginx: the configuration file /opt/homebrew/etc/nginx/nginx.conf
syntax is ok
nginx: configuration file /opt/homebrew/etc/nginx/nginx.conf test is
successful
```

5 Start nginx:

```
sudo nginx
```

4 Verify that the /v1/models endpoint of the LM Studio server works over the HTTPS connection:

```
curl -k https://127.0.0.1:1235/v1/models
```

GPT for Work uses the endpoint to fetch a list of models installed on the server. If the endpoint works, the server returns a JSON object with a data property listing all currently installed models:

```
{
   "data": [
        {
            ...
        },
        ],
        "object": "list"
}
```

You have enabled HTTPS for the LM Studio server.

## **(i)** WHAT'S NEXT

You have completed the setup required to access LM Studio from GPT for Work on the same machine. You can now set <a href="https://127.0.0.1:1235">https://127.0.0.1:1235</a> as the <a href="endpoint URL">endpoint URL</a> in GPT for Work, including when the add-in is running on Safari or on Microsoft Excel or Word.

# **Set up LM Studio on Windows**

This guide walks you through the main steps of setting up <u>LM Studio</u> for <u>use in GPT for Work</u> on Windows.

This guide assumes that you use GPT for Work on the same machine that hosts LM Studio.

## Prerequisites

- System requirements
- Windows user account with administrator privileges
- Installed software:
  - curl (ships with Windows)
  - PowerShell 7

To set up LM Studio on Windows:

- 1 Install LM Studio and download a model.
- 2 Start and configure the LM Studio server.

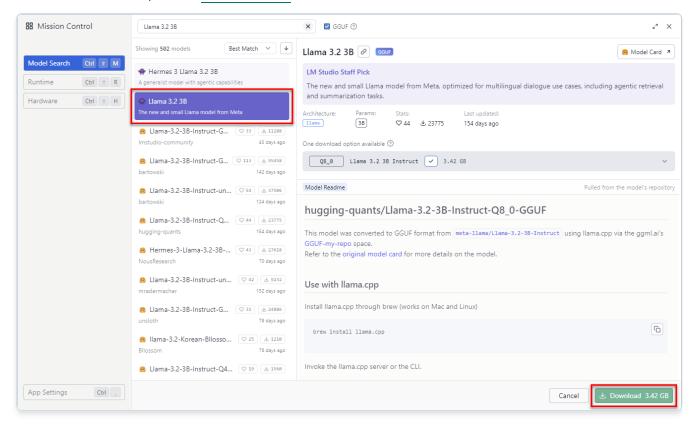
# **Install LM Studio and download a model**

1 Download and run the <u>Windows installer</u>. Follow the on-screen instructions to complete the installation.

The installer sets LM Studio to start automatically as a background service on system boot.

- 2 Run LM Studio.
- 3 On the welcome screen, click **Skip onboarding**.
- 4 In LM Studio, in the sidebar, select **Discover**.
- 5 Find and select the model you want to use, and click **Download**. For example, to get started

with a small model, select Llama 3.2 3B.

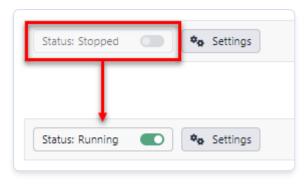


After the download completes, the model is available for prompting in LM Studio.

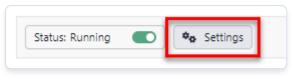
You have installed LM Studio and downloaded your first model. For more information about working with models, see the LM Studio documentation.

# Start and configure the LM Studio server

- 1 In LM Studio, in the sidebar, select **Developer**.
- 2 Click the **Status** toggle to change the status from **Stopped** to **Running**. You have started the LM Studio server.

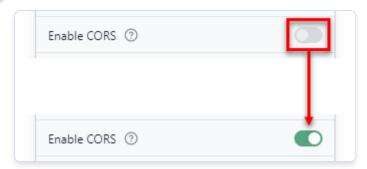


3 Click **Settings**.



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4 Click the **Enable CORS** toggle to enable the setting.



#### (i) NOTE

By default, the LM Studio server only accepts <u>same-origin requests</u>. Since GPT for Work always has a different origin from the LM Studio server, you must enable <u>cross-origin</u> resource sharing (CORS) for the server.

5 To verify that the /v1/models endpoint of the LM Studio server works, open http://127.0.0.1:1234/v1/models.

GPT for Work uses the endpoint to fetch a list of models installed on the server. If the endpoint works, the server returns a JSON object with a data property listing all currently installed models:

You have started and configured the LM Studio server.

#### (i) WHAT'S NEXT

You have completed the setup required to access LM Studio from GPT for Work on the same machine. You can now set <a href="http://127.0.0.1:1234">http://127.0.0.1:1234</a> as the <a href="endpoint URL">endpoint URL</a> in GPT for Work.

# Connect to Ollama from Excel and Word

On Microsoft Excel and Word, GPT for Work can connect to an <u>Ollama server</u> to use <u>locally running open-source models</u>. Ollama is an open-source platform that allows you to easily install, run, and serve models from a local machine, keeping your prompting entirely offline. You can use any model from the Ollama library.

### (i) NOTE

GPT for Work Help (Microsoft)

Depending on the model you use, the model settings defined in GPT for Work (temperature (creativity), top-p, frequency penalty, and presence penalty) may not work as expected. If you get bad results, try tweaking the settings.

Connecting to Ollama in GPT for Work means setting the URL for the Ollama server and selecting one of the models available on the server.

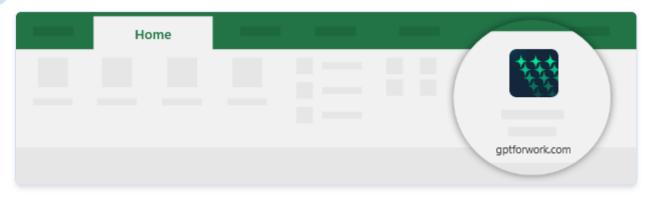
## Prerequisites

- Your space allows users to set up their own API endpoints.
- You have an Ollama server running with one or more models. For instructions on how to set up the server, see:
  - Set up Ollama on macOS
  - Set up Ollama on Windows

# Set up the Ollama endpoint

#### **MS Excel**

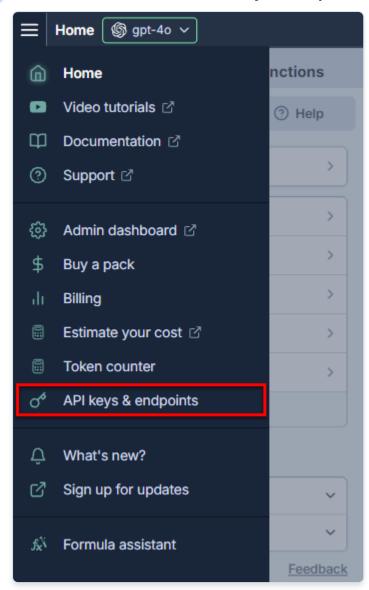
- 1 Open a Microsoft Excel workbook.
- 2 In the **Home** tab, click **GPT for Excel Word**.



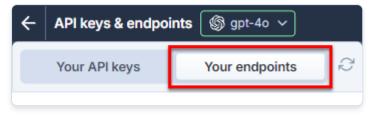
(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

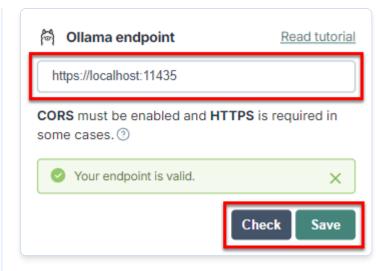
3 In the sidebar menu, select API keys & endpoints.



4 Select the endpoints tab.



- 5 In the **Ollama endpoint** section:
  - 1 Enter the URL of the Ollama server.
  - 2 Click **Check** to validate the URL, and click **Save**.



TIP

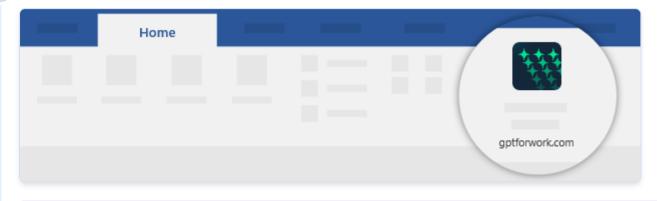
If you get an error saying that the URL is invalid, make sure that the Ollama server supports:

- Cross-origin resource sharing (CORS). See the LM Studio setup instructions for macOS or Windows.
- **HTTPS (needed with Safari and with Microsoft Office for Mac).** See the LM Studio setup instructions for macOS.

You have set up the Ollama endpoint in GPT for . You can now select Ollama models.

#### **MS Word**

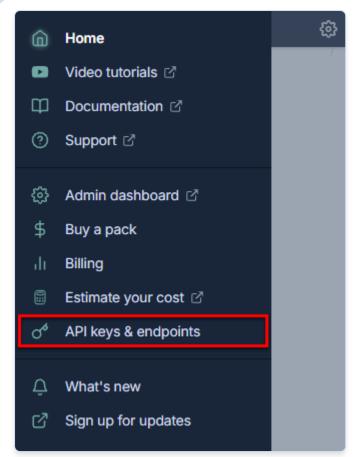
- 1 Open a Microsoft Word document.
- 2 In the **Home** tab, click **GPT for Excel Word**.



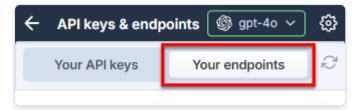
i INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

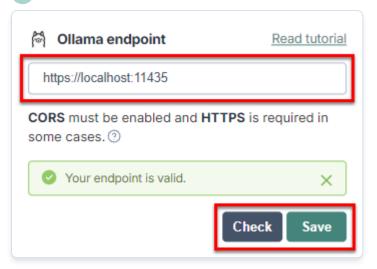
3 In the sidebar menu, select **API keys & endpoints**.



4 Select the endpoints tab.



- 5 In the **Ollama endpoint** section:
  - 1 Enter the URL of the Ollama server.
  - 2 Click **Check** to validate the URL, and click **Save**.





If you get an error saying that the URL is invalid, make sure that the Ollama server supports:

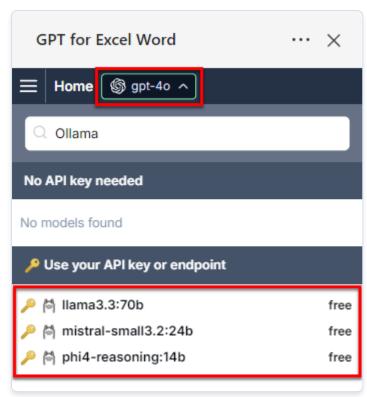
- **Cross-origin resource sharing (CORS).** See the LM Studio setup instructions for macOS or Windows.
- HTTPS (needed with Safari and with Microsoft Office for Mac). See the LM Studio setup instructions for macOS.

You have set up the Ollama endpoint in GPT for . You can now select Ollama models.

## Select an Ollama model

#### **MS Excel**

1 Expand the model switcher. You can find the available models under **Use your API key or** endpoint.



# (i) NOTE

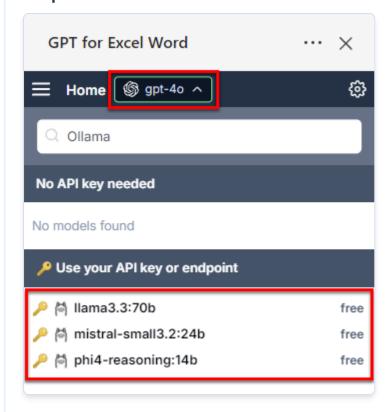
The available models depend on the models installed on the Ollama server. If an <u>Ollama model</u> you need is not available, <u>install it</u>.

2 Select a model.

GPT for Excel now uses the selected model to generate all responses.

### **MS Word**

1 Expand the model switcher. You can find the available models under **Use your API key or** endpoint.



(i) NOTE

The available models depend on the models installed on the Ollama server. If an <u>Ollama model</u> you need is not available, <u>install it</u>.

2 Select a model.

GPT for Word now uses the selected model to generate all responses.

# Set up Ollama on macOS

This guide walks you through the main steps of setting up an <u>Ollama</u> server for <u>use in GPT for</u> Work on macOS.

This guide assumes that you use GPT for Work on the same machine that hosts Ollama.

### Prerequisites

- Local machine with enough processing power and memory to run LLMs (see the <u>Ollama</u> documentation for recommendations)
- macOS 11 Big Sur or newer
- Mac user account with administrator (sudo) privileges
- Installed software:
  - curl (ships with macOS)
  - Homebrew
  - OpenSSL (ships with macOS)

To set up the Ollama server on macOS:

- 1 Install the server.
- 2 Install a model on the server.
- 3 Enable CORS for the server.
- 4 (Optional) Enable HTTPS for the server.

## Install the Ollama server

1 Download and run the <u>macOS installer</u>. Follow the on-screen instructions to complete the installation.

The installer starts the Ollama server in the background and sets the server to start automatically on system boot. The installer also installs the Ollama desktop application for easily starting and stopping the server.



You can manually start a new instance of the Ollama server in a terminal by running ollama serve. However, to avoid port conflicts, make sure no other Ollama server instances are running at the same time.

2 Open Terminal and verify that the server is running:

```
curl http://localhost:11434
```

Response if the server is running:

```
Ollama is running
```

You have installed the Ollama server.

# Install a model

1 Install a model from the Ollama library:

```
ollama pull <model-name>
```

For example, to install the <u>Llama 3.2 3B</u> model:

```
ollama pull llama3.2
```

After the installation completes, the model is available for prompting on the Ollama server.

2 Verify that the model works:

```
curl http://localhost:11434/api/generate -d '{ "model": "llama3.2",
   "prompt": "Who are you?", "stream": false }'
```

The above request asks the server to generate a response for the specified prompt with the specified model and to return the response in a single reply. If the model works, the server returns a JSON object containing the response and metadata about the response.

You have installed the model on the Ollama server. For more information about working with models, see the Ollama documentation.

# **Enable CORS for the Ollama server**

By default, the Ollama server only accepts <u>same-origin requests</u>. Since GPT for Work always has a different origin from the Ollama server, you must enable <u>cross-origin resource sharing (CORS)</u> for the server using the <u>OLLAMA\_ORIGINS</u> environment variable.

To enable CORS for the Ollama server:

1 Set OLLAMA\_ORIGINS with the origins that are allowed to access the server:

```
# Set a single origin
launchctl setenv OLLAMA_ORIGINS "<ORIGIN>"

# Set multiple origins
launchctl setenv OLLAMA_ORIGINS "<ORIGIN_1>, <ORIGIN_2>, ..."
```

#### For example:

• Allow any origin to make requests to the server:

```
launchctl setenv OLLAMA_ORIGINS "*"
```

• Allow only GPT for Work to make requests to the server:

```
launchctl setenv OLLAMA_ORIGINS "https://excel-addin.gptforwork.com"
```

- 2 Restart the server for the variable to take effect.
- 3 Verify that the /api/tags endpoint of the server works:

```
curl http://localhost:11434/api/tags
```

GPT for Work uses the endpoint to fetch a list of models installed on the server. If the endpoint works, the server returns a JSON object with a models property listing all currently installed models:

You have enabled CORS for the Ollama server.

#### (i) WHAT'S NEXT

You have completed the minimum setup required to access the Ollama server from GPT for Work on the same machine. You can now set <a href="http://localhost:11434">http://localhost:11434</a> as the <a href="http://localhost:11434">Ollama server</a> <a href="http://localhost:11434">URL in GPT for Work</a> provided the add-in is not running on Safari or on Microsoft Excel or Word.

If you use GPT for Work on Safari, or on Microsoft Excel or Word, <u>enable HTTPS for the Ollama</u> server.

# **Enable HTTPS for the Ollama server**

The Ollama server uses HTTP to serve models, while GPT for Work runs on HTTPS. By default, therefore, any request from GPT for Work to the server is a <u>mixed-content request</u> (HTTP vs. HTTPS). Modern web browsers do not allow mixed content, as a rule. The only exceptions are mixed-content requests to <a href="http://localhost">http://localhost</a>, which most browsers treat as safe and therefore allow. Safari, however, blocks mixed-content requests even on the current machine.

To avoid mixed content, you must make the Ollama server accessible over HTTPS if you use GPT for Work from:

- Excel Online or Word Online on Safari
- Excel for Mac (uses Safari)
- Word for Mac (uses Safari)

You make the Ollama server accessible over HTTPS by setting up a <u>reverse proxy</u> that hides the server behind an HTTPS interface. This guide uses <u>nginx</u> to set up the reverse proxy.



You can also use <u>Cloudflare Tunnel</u>, <u>ngrok</u>, or a similar cloud-based tunneling service to set up HTTPS with minimal configuration. Note that with a cloud-based service your traffic will be routed through an external service over the internet.

To set up the reverse proxy:

1 Install nginx:

```
brew install nginx
```

- 2 Create a self-signed SSL certificate for the Ollama server:
  - 1 Change to the nginx configuration directory (varies based on your Mac version):

```
# Mac with an Apple silicon processor
cd /opt/homebrew/etc/nginx

# Mac with an Intel processor
cd /usr/local/etc/nginx
```

2 Generate the certificate:

```
openssl req \
-x509 \
-newkey rsa:2048 \
```

2025-10-22

```
-nodes \
  -sha256 \
  -days 365 \
  -keyout ollama.key \
  -out ollama.crt \
  -subj '/CN=localhost' \
  -extensions extensions \
  -config <(printf "
[dn]\nCN=localhost\n[req]\ndistinguished_name=dn\n[extensions]\nsubjectAl</pre>
```

The command generates two files in the current directory:

- ollama.crt: Public self-signed certificate
- ollama.key: Private key used to sign the certificate
- 3 Add the certificate to trusted root certificates:

```
sudo security add-trusted-cert -d -r trustRoot -k
/Library/Keychains/System.keychain ./ollama.crt
```

- 3 Create a site configuration for the Ollama server:
  - 1 Open the nginx.conf file in your preferred text editor. The file is in the nginx configuration directory:

```
# Mac with an Apple silicon processor
/opt/homebrew/etc/nginx/nginx.conf

# Mac with an Intel processor
/usr/local/etc/nginx/nginx.conf
```

2 Replace the content of the file with the following configuration:

```
proxy_http_version 1.1;
    proxy_set_header Connection '';
}
}
```

The configuration uses port 11435 for HTTPS. Requests to https://localhost:11435 are forwarded to the Ollama server running at http://localhost:11434.

- 3 Save and close the file.
- 4 Test the nginx configuration:

```
sudo nginx -t
```

Response if the configuration is valid:

```
nginx: the configuration file /opt/homebrew/etc/nginx/nginx.conf
syntax is ok
nginx: configuration file /opt/homebrew/etc/nginx/nginx.conf test is
successful
```

5 Start nginx:

```
sudo nginx
```

4 Verify that the <u>/api/tags</u> endpoint of the Ollama server works over the HTTPS connection:

```
curl -k https://localhost:11435/api/tags
```

GPT for Work uses the endpoint to fetch a list of models installed on the server. If the endpoint works, the server returns a JSON object with a models property listing all currently installed models:

You have enabled HTTPS for the Ollama server.

## **(i)** WHAT'S NEXT

You have completed the setup required to access the Ollama server from GPT for Work on the same machine. You can now set <a href="https://localhost:11435">https://localhost:11435</a> as the <a href="https://localhost:11435">Ollama server URL in GPT for Work</a>, including when the add-in is running on Safari or on Microsoft Excel or Word.

# **Set up Ollama on Windows**

This guide walks you through the main steps of setting up an Ollama server for use in GPT for Work on Windows.

This guide assumes that you use GPT for Work on the same machine that hosts Ollama.

### Prerequisites

- Local machine with enough processing power and memory to run LLMs (see the Ollama documentation for recommendations)
- Windows 10 or newer (see the Ollama documentation for detailed system requirements)
- Windows user account with administrator privileges
- Installed software:
  - curl (ships with Windows)
  - PowerShell 7

To set up the Ollama server on Windows:

- 1 Install the server.
- 2 Install a model on the server.
- 3 Enable CORS for the server.

# **Install the Ollama server**

1) Download and run the Windows installer. Follow the on-screen instructions to complete the installation.

The installer starts the Ollama server in the background and sets the server to start automatically on system boot. The installer also installs the Ollama desktop application for easily starting and stopping the server.



You can manually start a new instance of the Ollama server in a terminal by running ollama serve. However, to avoid port conflicts, make sure no other Ollama server instances are running at the same time.

2 Open PowerShell as an administrator and verify that the server is running:

curl http://localhost:11434

Response if the server is running:

```
① NOTE

Make sure you're using curl and not an aliased command, such as Invoke-WebRequest:

Remove-Item alias:curl
```

If curl has an alias, the command removes it for the current terminal session, ensuring

You have installed the Ollama server.

For more information about installing and managing the server on Windows, see the <u>Ollama</u> documentation.

that subsequent | curl | commands in this guide work as expected.

# Install a model

1 Install a model from the Ollama library:

```
ollama pull <model-name>
```

For example, to install the Llama 3.2 3B model:

```
ollama pull llama3.2
```

After the installation completes, the model is available for prompting on the Ollama server.

2 Verify that the model works:

```
curl http://localhost:11434/api/generate -d '{ "model": "llama3.2",
   "prompt": "Who are you?", "stream": false }'
```

The above request asks the server to generate a response for the specified prompt with the specified model and to return the response in a single reply. If the model works, the server returns a JSON object containing the response and metadata about the response.

You have installed the model on the Ollama server. For more information about working with models, see the Ollama documentation.

# **Enable CORS for the Ollama server**

By default, the Ollama server only accepts <u>same-origin requests</u>. Since GPT for Work always has a different origin from the Ollama server, you must enable <u>cross-origin resource sharing (CORS)</u> for the server using the OLLAMA\_ORIGINS environment variable.

To enable CORS for the Ollama server:

1 Set OLLAMA\_ORIGINS with the origins that are allowed to access the server:

```
# Set a single origin
setx OLLAMA_ORIGINS "<ORIGIN>"

# Set multiple origins
setx OLLAMA_ORIGINS "<ORIGIN_1>, <ORIGIN_2>, ..."
```

#### For example:

• Allow any origin to make requests to the server:

```
setx OLLAMA_ORIGINS "*"
```

• Allow only GPT for Work to make requests to the server:

```
setx OLLAMA_ORIGINS "https://excel-addin.gptforwork.com"
```

(i) NOTE

By default, the setx command sets a user variable. If you want to set a system variable, which applies to all users of the current machine, run the command (as an administrator) with the /m parameter. For example:

```
setx OLLAMA_ORIGINS "*" /m
```

- 2 Start the server from the Windows Start menu.
- 3 Verify that the /api/tags endpoint of the server works:

```
curl http://localhost:11434/api/tags
```

GPT for Work uses the endpoint to fetch a list of models installed on the server. If the endpoint works, the server returns a JSON object with a models property listing all currently installed models:

```
{
    "models": [
```

```
{
    ...
}

1
}
```

You have enabled CORS for the Ollama server.

### **(i)** WHAT'S NEXT

You have completed the setup required to access the Ollama server from GPT for Work on the same machine. You can now set  $\boxed{\text{http://localhost:11434}}$  as the  $\boxed{\text{Ollama server URL in GPT}}$  for Work.

# **Train GPT for Work on your files**

(i) INFO

Currently, only GPT for Excel and GPT for Sheets support this method.

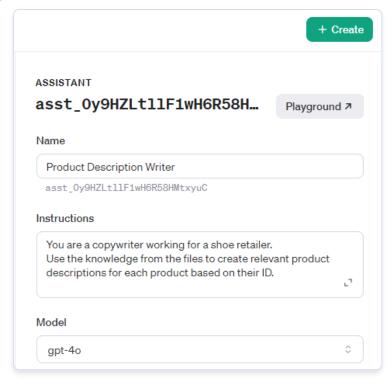
<u>OpenAI Assistants</u> can be used as <u>models</u> in GPT for Work to tailor your results based on specific instructions and data.

This guide shows how to generate product descriptions using customer reviews and marketing briefs uploaded to an Assistant.

# Create and set up an Assistant

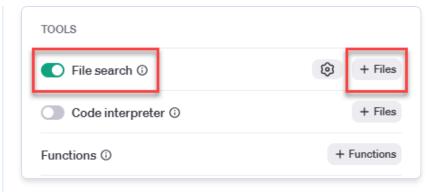
To create and set up an Assistant to use your files as context for generating responses:

1 On the OpenAI platform, click **Create** to create an Assistant.

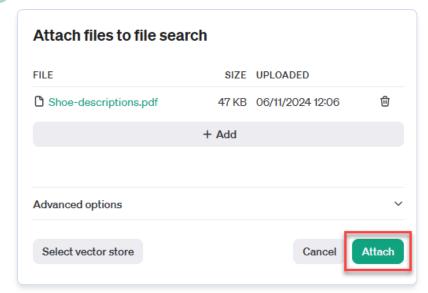


2 Upload the files that you want the Assistant to use as context when generating responses:

1 Enable File search and click Files.



2 In the file attachment screen, select the files and click **Attach**.



You have created an Assistant and set it up to use your files as context for generating responses.

i INFO

We recommend trying executions in the <u>OpenAI Playground</u> to understand the cost before using it massively.

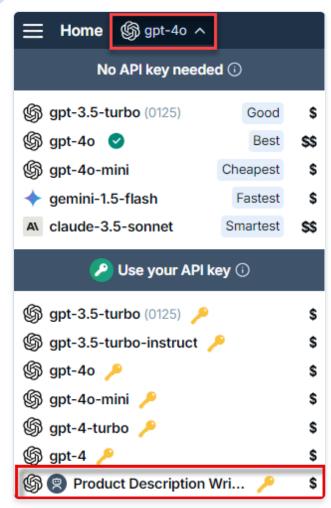
# **Prompt an Assistant from GPT for Work**

Prerequisites

You have set your OpenAI API key in GPT for Excel or GPT for Sheets.

To prompt an Assistant from GPT for Work:

1 In GPT for Excel or GPT for Sheets, select the Assistant in the model switcher.

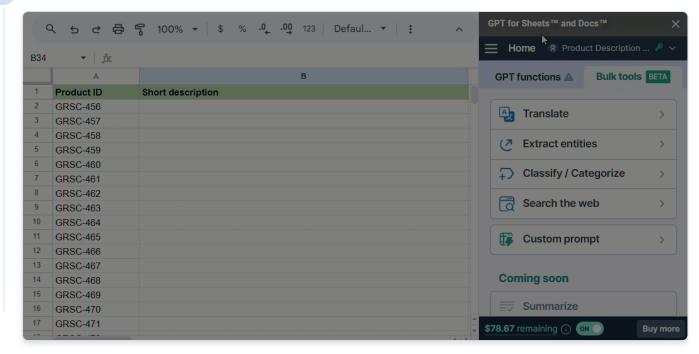


- 2 Select **Bulk AI tools**, and click **Custom prompt**.
- 3 Enter the following prompt:

Write a description for this product:  $\{\{A\}\}$ 

4 In **Put results in column**, select B.

### 5 Click **Run rows**.



The Assistant searches for information in the files uploaded and uses it to generate content in the selected column. The **Instructions** as well as **Temperature** and **Top P** settings defined during the Assistant creation are taken into account in GPT for Work.

# **GPT for Excel**

Use GPT for Excel to integrate the power and intelligence of generative AIs directly into Microsoft Excel.

To get started with GPT for Excel, see Quickstart for spreadsheets.

#### **Overview**

GPT for Excel is a Microsoft Excel add-in that integrates the power and intelligence of generative AIs directly into the Excel user interface.

#### **Agent**

Describe your task in plain language, and the Agent analyzes your spreadsheet data and executes the task.

#### **Bulk AI tools**

Run any operation on a whole column at once, or on a specific section of your data.

#### **GPT functions**

Use GPT functions to prompt AI from inside spreadsheet cells in Microsoft Excel.

#### Configuration

Save GPT for Excel parameters along with your workbook.

#### Search the web

Learn how to use web search models to get up-to-date information from the web.

#### **Use images in prompts**

Include images in prompts using bulk AI tools or GPT functions in Microsoft Excel.

# Troubleshooting

Troubleshoot common issues in GPT for Excel.

#### **FAQ**

How do I install GPT for Excel? ...and other questions.

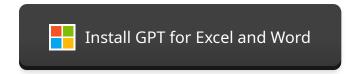
#### **Remove Microsoft account access**

Remove Microsoft account access from the GPT for Excel Word add-in.

#### Uninstall

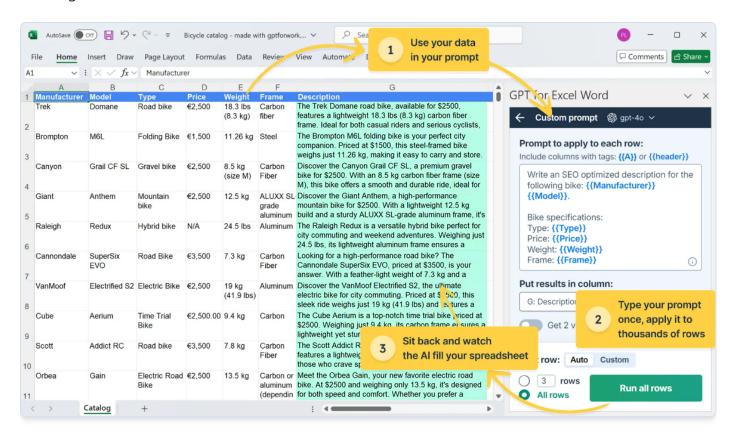
Remove the GPT for Excel add-in from Microsoft Excel.

# Overview of GPT for Excel



GPT for Excel is a Microsoft Excel add-in that integrates the power and intelligence of generative AIs directly into the Excel user interface. Use your favorite AI to generate, rewrite, translate, categorize, extract, and otherwise process text in bulk – at machine-powered scale and speed.

GPT for Excel can execute up to 1,000 prompts per minute and reliably process up to a million rows in one go.



## **Use cases**

Here are a few common use cases that you can easily handle with GPT for Excel:

- **Analyze** customer sentiment by categorizing reviews and support requests based on criteria relevant to you.
- **Clean up** your customer relationship management (CRM) data with deduplication, recategorization, and reformatting.
- Generate SEO-optimized product descriptions from product specifications.
- **Grade, score, and qualify** sales leads in a consolidated prospecting spreadsheet.

- **Rewrite** website copy to conform to copywriting best practices.
- **Translate** product descriptions to multiple target languages while observing appropriate localization conventions.
- Write and understand spreadsheet formulas like a pro.

### **Features**

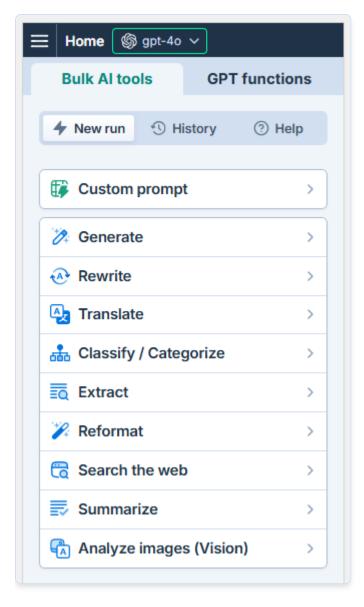
GPT for Excel provides the following main features for using AI in spreadsheets:

- Bulk AI tools
- GPT functions
- Formula assistant

#### **Bulk AI tools**

Bulk AI tools allow you to run prompts on an entire spreadsheet column at once without writing any formulas. You configure and run bulk tools from the add-in sidebar.

GPT for Excel provides dedicated bulk tools for selected use cases, such as classification, generation, and translation, as well as a generic bulk tool for custom prompts.



Use bulk AI tools if:

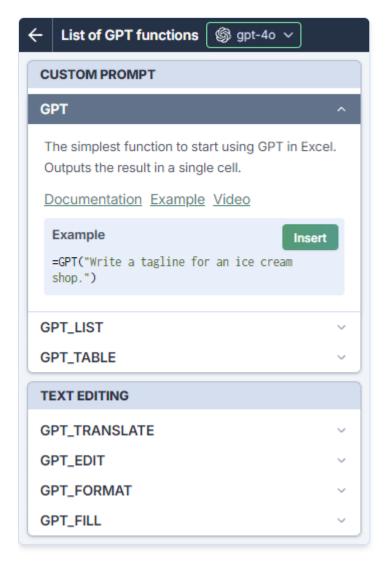
- You want AI responses saved as plain text in cells.
- You want better tracking information about the progress of AI requests.
- Your formulas regularly become stuck in the #BUSY! state.
- You do not want to write formulas.

The following video shows you how to translate text with the **Translate** bulk tool. You simply select the column you want to translate, enter the target language, and select the column where you want to place the translations. You do not need to define any other settings if the default setup meets your needs.

#### **GPT functions**

GPT functions are custom <u>spreadsheet functions</u> that allow you to prompt AI from inside spreadsheet cells. GPT functions work exactly like native functions in that you can use them on their own or combine them with other functions when creating formulas.

GPT for Excel provides dedicated GPT functions for selected use cases, such as classification, summarization, translation, and web search, as well as a generic GPT function for all other use cases. You can define function-specific parameters to further refine how the AI generates responses. You can find a list of all available functions with usage examples in the add-in sidebar.



Use GPT functions if:

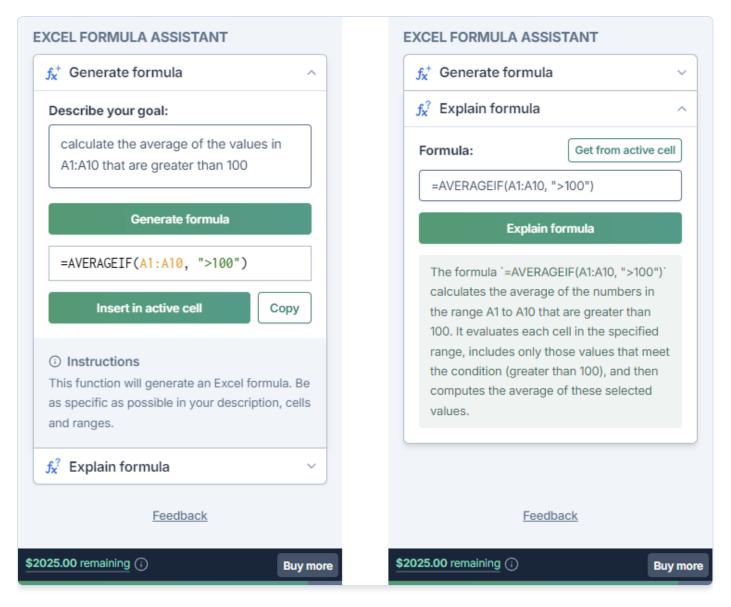
- You're comfortable using spreadsheet formulas and functions.
- You're experimenting and exploring what you can do with GPT for Excel.
- You're working with up to a few hundred cells.
- You need the precise control provided by the GPT function parameters.
- You need the flexibility of nested formulas or of combining GPT functions with native functions.

The following video shows you how to translate text in bulk with the **GPT\_TRANSLATE** function.

#### Formula assistant

The <u>formula assistant</u> allows you to **generate** spreadsheet formulas based on plain-language descriptions of what you want to achieve. You can also use the formula assistant to **explain** existing formulas (in English).

The formula assistant is available in the add-in sidebar, both under **Bulk AI tools** and **GPT functions**.



Use the formula assistant if:

- You need help with creating formulas.
- You want to understand what an existing formula does.

## **Benefits**

- **Prompt AIs directly from inside your spreadsheets.** No more copy-pasting between Excel and AI chatbots like ChatGPT.
- **Run prompts in bulk, at scale, and at lightning speed.** Execute up to 1,000 prompts per minute and reliably process up to a million rows in one bulk operation.
- Apply ready-made tools to specific use cases. Translate, classify, extract, reformat, and more.

- **Choose from a large selection of AI models.** Use models from OpenAI, Anthropic, Google, xAI, Perplexity, or OpenRouter. You can also use your own OpenAI Assistants and even connect to local models with Ollama or any LLM server that provides an OpenAI-compatible API.
- **Bring an API key to get more features at reduced cost.** You do not need an API key to use GPT for Excel, but using a key gives you access to more models, affords you more control and privacy, and you pay a reduced service fee.

### What's next

- Install GPT for Excel if you have not already.
- Select an AI model that best meets your needs.
- Get going with bulk AI tools.
- Get going with GPT functions.
- Try out example use cases for different business applications and product capabilities.

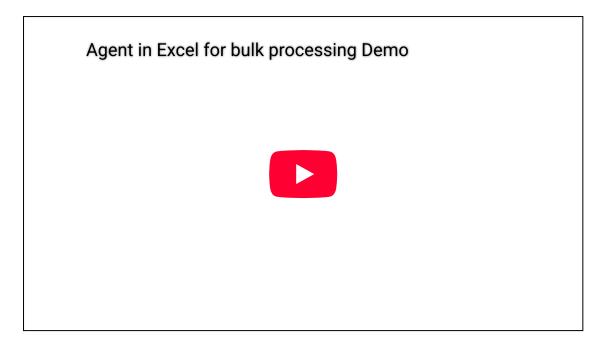
# **Agent in GPT for Excel**

The **Agent** is an AI-powered chat interface that helps you accomplish spreadsheet tasks at scale. Just describe what you need in plain language, and the Agent analyzes your spreadsheet data and executes the task automatically.

You can use the Agent to perform **bulk tasks** like:

- Translate to multiple languages
- Search the web
- Generate and autofill formulas

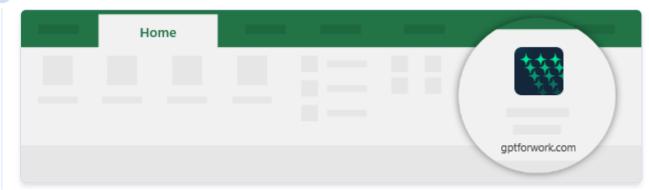
Learn more about what the Agent can and cannot do.



# How to use the Agent

To use the Agent in GPT for Excel:

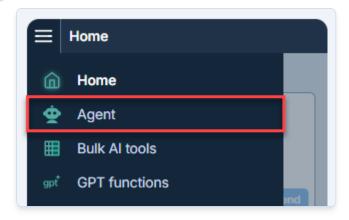
1 In the **Home** tab, click **GPT for Excel Word**.



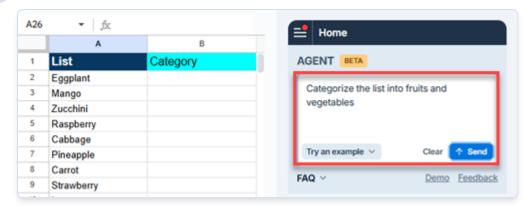
(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

2 In the sidebar menu, select **Agent**, if not already selected.



3 Type your prompt and click **Send**.

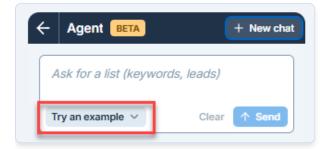


Next, the Agent:

- 1 Analyzes your request and drafts a plan.
- 2 Processes the data in the current sheet according to the plan.

# **Examples**

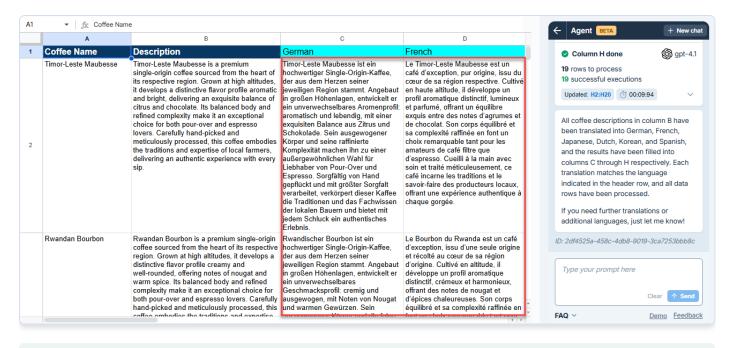
Find out what the Agent can do with the examples below. You can try these examples, and many more, directly from the sidebar.



### Translate to multiple languages

Translate spreadsheet content to multiple languages in bulk.

Translate the descriptions in column B to the languages provided in row 1



TIP

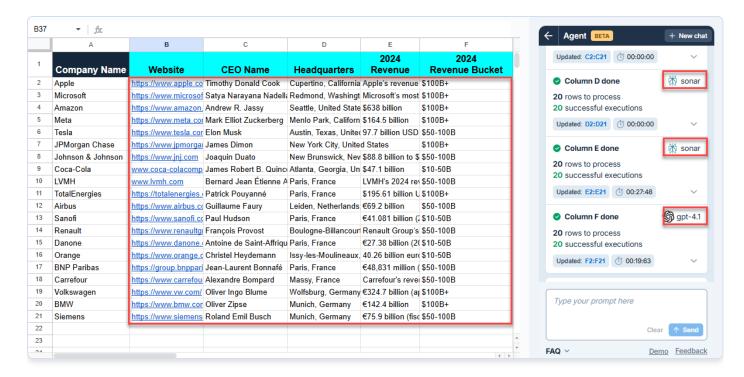
The Agent can also use a glossary to stick to your brand's language and conventions.

Translate into French, using the following glossary: "Macchiato:
Macchiato (Café noisette), Espresso: Expresso, Latte: Café crème (Latte)"

#### Search the web

When necessary, the Agent searches the web to find the information you need. Learn more about the models used by the Agent.

Fill out this table



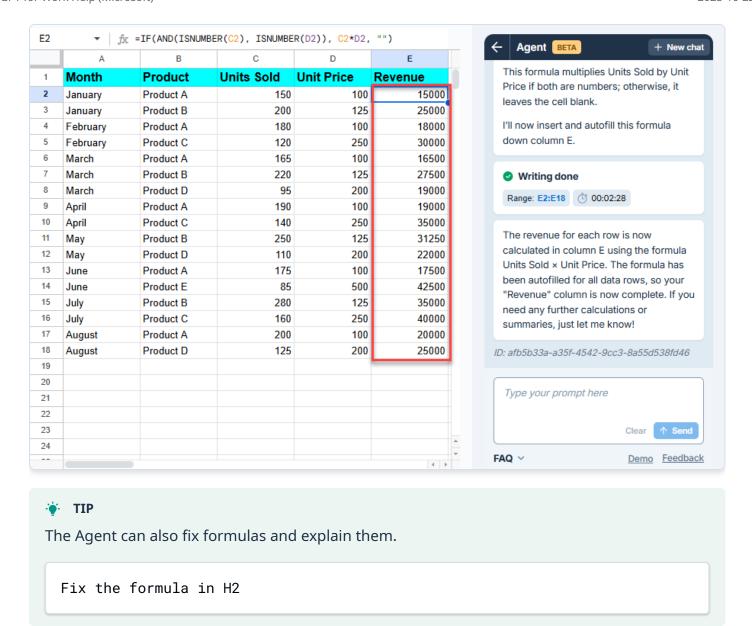


The Agent can also scrape specific URLs, using Gemini 2.5 models with URL context.

#### Generate and autofill formulas

Describe what you need in natural language, and the Agent generates the appropriate Excel formula, inserts it in the starting cell, and autofills the formula across the range.

Calculate the revenue for each row



# What the Agent can and cannot do

The Agent excels at data processing and analysis tasks. You can use it to:

- Process data in bulk: Translate, categorize, tag, or prep your data across multiple rows.
- **Enrich your data:** Search the web to fill in missing information or gather additional context.
- **Generate content:** Generate or rewrite text, generate lists or tables.
- Analyze and summarize: Summarize multiple cells at once.
- Work with formulas: Create, fix, or explain spreadsheet formulas using natural language.

The Agent cannot yet:

- Apply formatting (such as colors or text formatting).
- Create visual elements like charts, pivot tables, or dashboards.

- Modify spreadsheet structure (add/remove columns or rows).
- Take images or documents as input.

# **FAQ**

#### How much does it cost?

On average, the Agent consumes **7 cents of your balance per message**, excluding the cost of the bulk tools used to perform the task.

# What models does the Agent use?

By default, the Agent uses different models for different tasks. You can configure the model used for some tasks.

Task	Default model	Model configuration
Read and plan	gpt-4.1 without an API key	To use gpt-4.1 with an API key, contact support.
Apply the plan	gpt-4o without an API key	Set the default model in the GPT for Work dashboard.
Search the web	sonar without an API key	Set the default web search model in the GPT for Work dashboard.

# **Bulk AI tools**

Run any type of operation on an entire spreadsheet column at once, or on a specific section of your data.

#### **Custom prompt**

Run high-volume prompts directly in Microsoft Excel.

#### Generate

Generate multiple entities at once from each cell in a column.

#### **Rewrite**

Rewrite text in each cell in a column.

#### **Translate**

Translate an entire column based on your instructions and glossary.

### **Classify / Categorize**

Classify all cells in a column according to the specified categories and instructions.

#### **Extract**

Extract multiple entities at once from each cell in a column.

#### Reformat

Convert text in a column into a consistent format.

# **Prompt images**

Prompt images in Excel using AI vision.

### **Select which rows to process**

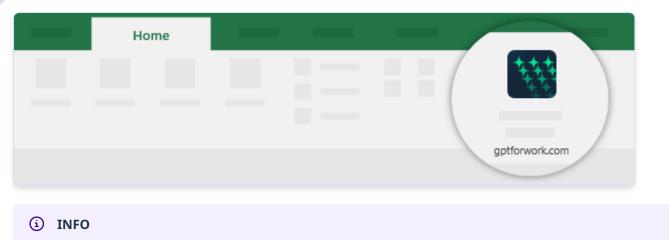
Let GPT for Excel process only the relevant rows in your spreadsheet, or target a specific section of your data.

# **Custom prompt bulk tool in Excel**

Use <u>GPT for Excel</u> to perform high-volume prompting directly in Microsoft Excel. For example, if you have product specifications in one column, you can generate a unique product description for each row based on the specification column value for that row.

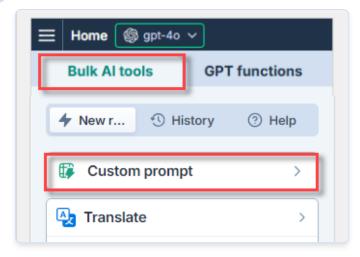
### Run the bulk tool

1 In the **Home** tab, click **GPT for Excel Word**.

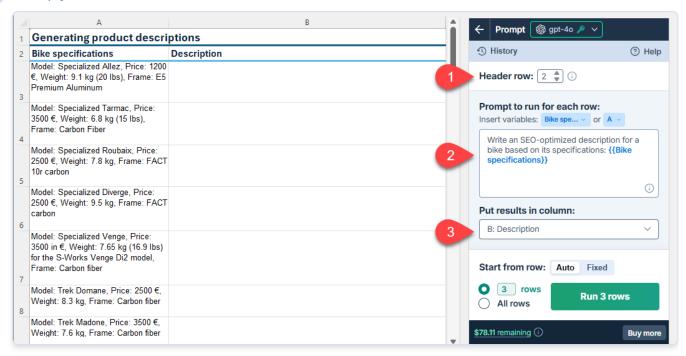


You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

2 In the sidebar, select **Bulk AI tools**, and click **Custom prompt**.

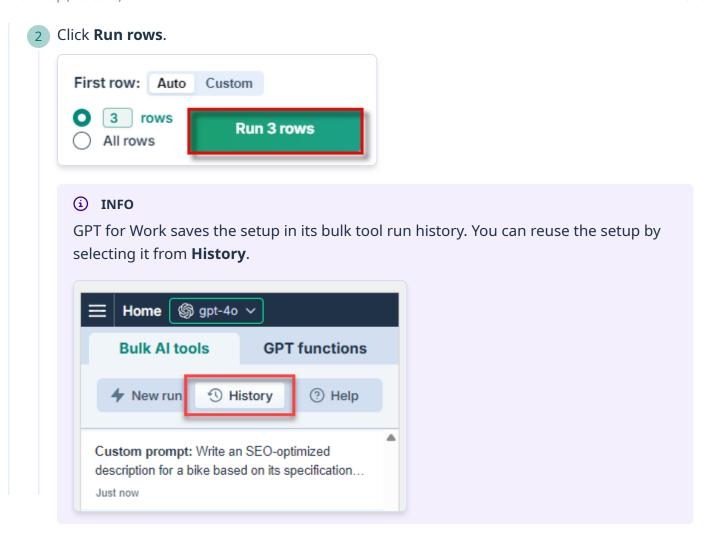


3 Set up your bulk tool run.

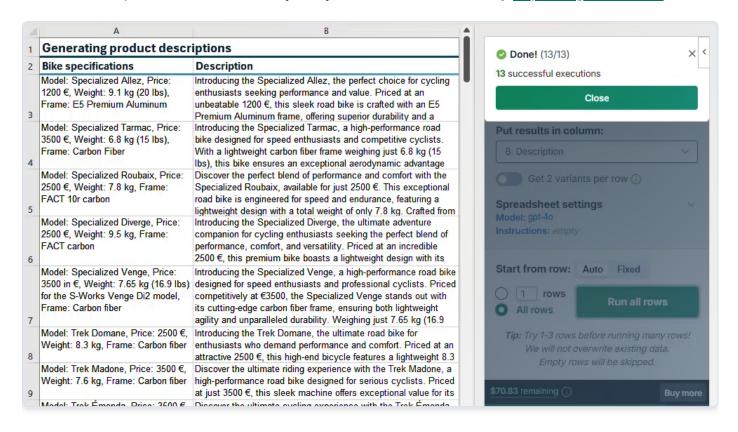


	Field	Description	Example
•	<b>Header row</b> (optional)	If your column headers aren't in the first row, select the number of the row that contains the headers. The bulk tool will run on the rows below this one.	2
2	Prompt to run for each row	Enter the prompt you want to run for each row. You can use column, cell, and range variables to reference content in other columns and cells in the spreadsheet. You must define at least one column variable for context. Learn more.	Write an SEO- optimized description for a bike based on its specifications: {{Bike specifications}}
3	Put results in column	Select the column to put the results in. Cells in this column won't be overwritten with the results if they contain text.	B: Description

- 4 Run the **Custom prompt** bulk tool starting from the first empty cell in the results columns:
  - 1 Select a specific number of rows to run or select **All rows**. <u>Learn more.</u>



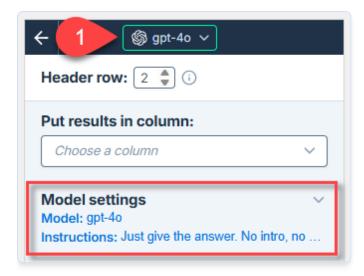
You have set up and run the **Custom prompt** bulk tool. If needed, try improving the results.



# **Improve results**

### Try different models

Find out which models work best for different use cases in our <u>AI models overview</u>. You can try different models by selecting them in the model switcher.

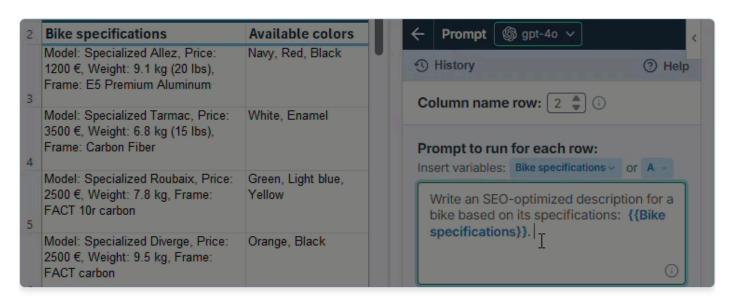


(i) INFO

<u>The model selection</u> applies to all bulk tool runs and all GPT function executions in the current spreadsheet.

## Use multiple variables

You must define at least one column variable in the prompt for context, for example {{A}}, or {{Bike specifications}}. To generate more accurate results, provide more context by using additional variables in the prompt.



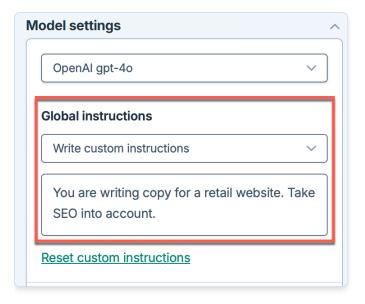
You can insert variables to reference columns, cells, and ranges in the prompt:

Variable	Description	Example
	Reference a column to include row- specific information from an adjacent column.	
Column	Column variables work like relative references and are highlighted in blue.  To add a column variable, use the Insert variables menus above the	Write a product description for {{Product name}} that costs {{Price}} and is made by {{Manufacturer}}.
	prompt. You can add a variable either by column label or column letter.	
Cell or range	Reference a specific cell or range to include the same content as context for each row.	Create a tagline for <b>{{Company</b> name}}.
from the current sheet	Cell and range variables work like absolute references and are highlighted in green.	Follow these rules: <b>{{A1}}</b> Use 1 term from this list:
	To add a cell or range variable, type it directly in the prompt.	{{A2:A100}}
Cell or range from another sheet	Reference a cell or a range from another sheet in the same spreadsheet. The content can be, for example, reference data or other shared information.	Translate <b>{{Source text}}</b> to Japanese.  Use the glossary: <b>{{Glossary!A1:B100}}</b>

# **Provide additional instructions**

Provide context and specific rules for the AI to follow. For example, you can add instructions to follow SEO best practices:

You are writing copy for a retail website. Take SEO into account.

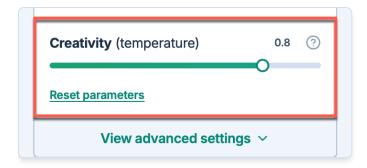


(i) INFO

<u>Global instructions</u> apply to all bulk tool runs and all GPT function executions in the current spreadsheet.

### Adjust the creativity level

Adjust the level of creativity (accuracy vs. freedom) the AI is allowed in generating results. Use a high level for a creative writing task.

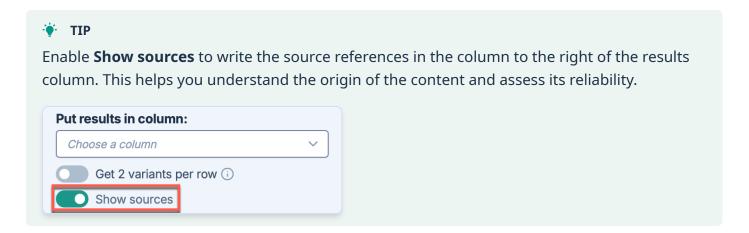


(i) INFO

<u>The creativity level</u> applies to all bulk tool runs and all GPT function executions in the current spreadsheet.

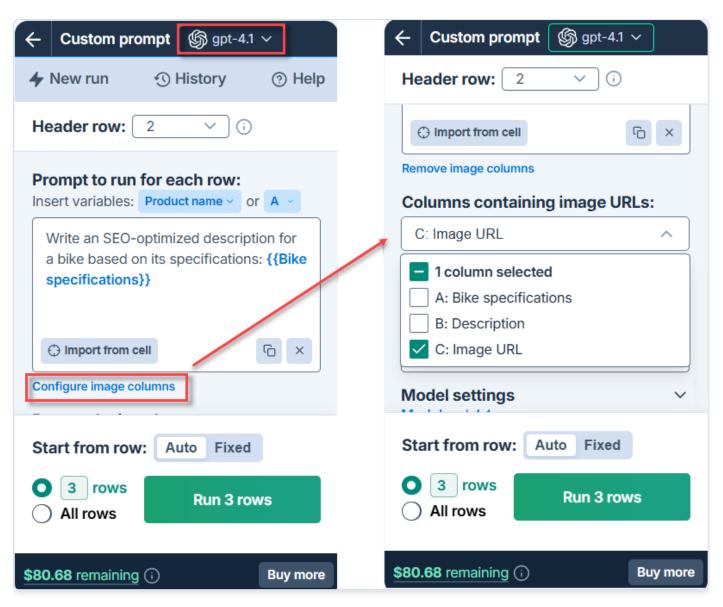
# Use web search capabilities

To generate more up-to-date content, select a model with web search capabilities (indicated by the icon in the model switcher). The available web search options vary depending on the model you select. Learn more about web search options.



### **Include images in your prompts**

To include images in your prompts, select a <u>vision model</u> in the model switcher. Then, choose the columns that contain image URLs so they can be attached to the prompt for each corresponding row. <u>Learn more about vision options.</u>



# What's next

Try another bulk AI tool.

# Generate in bulk in Excel

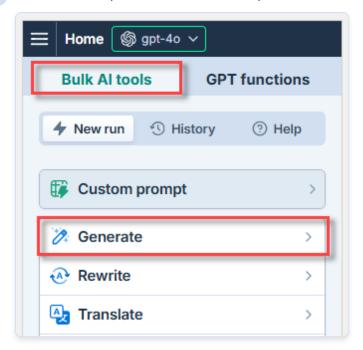
Use <u>GPT for Excel</u> to generate content by combining cells from multiple columns in Microsoft Excel. For example, you can generate product descriptions based on specifications from different columns.

### Run the bulk tool

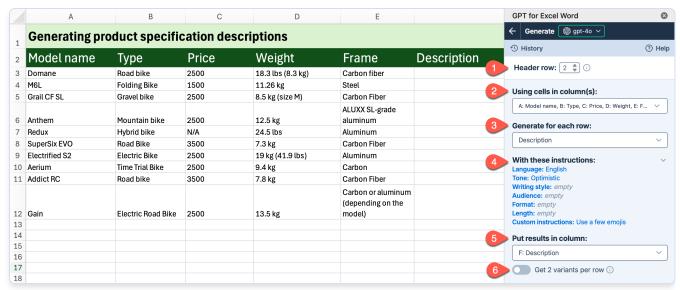
1 In the **Home** tab, click **GPT for Excel Word**.



2 In the sidebar, select **Bulk AI tools**, and click **Generate**.



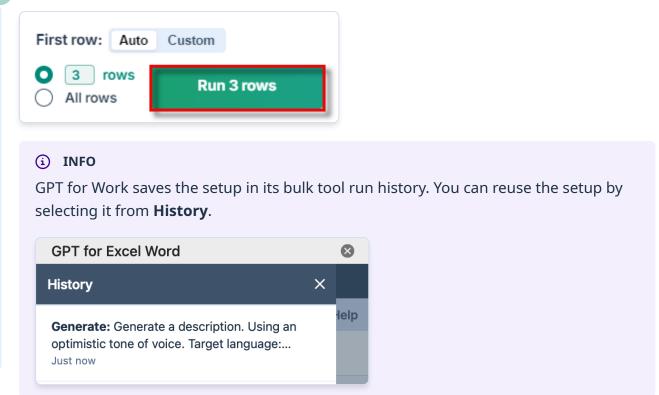
### 3 Set up your bulk tool run.



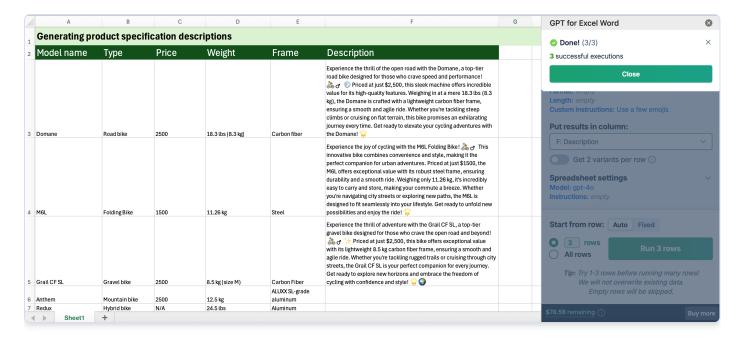
	Field	Description	Example
•	<b>Header row</b> (optional)	If your column headers aren't in the first row, select the number of the row that contains the headers. The bulk tool will run on the rows below this one.	2
2	Using cells in column(s)	Select one or more columns containing the cells you want to use as context for the generation.	A: Model name, B: Type, C: Price, D: Weight, E: Frame
3	Generate for each row	Select the type of content you want to generate, such as a title or description. You can also enter a custom content type to generate, such as Social media ad or Email body.	Description
4	With these instructions	Customize the output by setting the language, tone, writing style, audience, format, length, and custom instructions specific to this generation task.	Language: English  Tone: Optimistic  Custom instructions: Use a few emojis

	Field	Description	Example
5	Put results in column	Select the column to put the results in. Cells in this column won't be overwritten with the results if they contain text.	F: Description
6	Get 2 variants per row (optional)	Enable this option to generate two variants for each row. The variants are placed in adjacent columns.	Disabled

- 4 Run the **Generate** bulk tool starting from the first empty cell in the results column:
  - 1 Select a specific number of rows to run or select **All rows**. Learn more.
  - 2 Click **Run rows**.



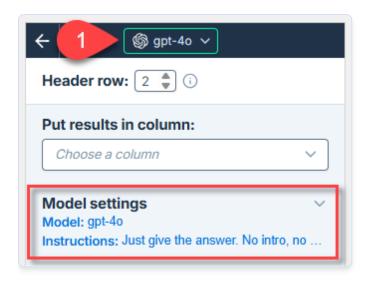
You have set up and run the **Generate** bulk tool. If needed, try improving the results.



# **Improve results**

### Try different models

Find out which models work best for different use cases in our <u>AI models overview</u>. You can try different models by selecting them in the model switcher.



i INFO

<u>The model selection</u> applies to all bulk tool runs and all GPT function executions in the current spreadsheet.

#### **Provide additional instructions**

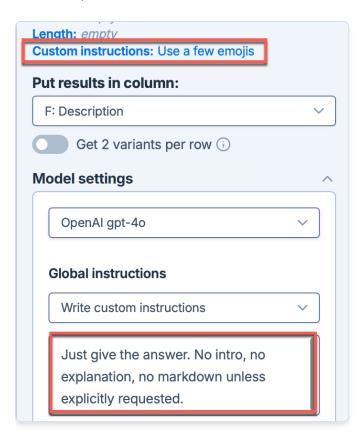
You can improve generation quality by providing specific instructions that help the AI more closely follow your requirements for tone, writing style, format, and other aspects.

You can define the following types of instructions for the AI:

- **Custom instructions** are defined for the current bulk tool run.
- **Global instructions** can also be defined in <u>Model settings</u> and apply to all bulk tools and GPT functions in the current spreadsheet.

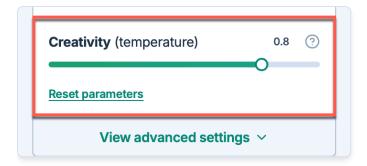
If both custom instructions and global instructions are defined, the AI uses both as a combined set of instructions. For consistent results, make sure both sets of instructions are aligned and do not contradict each other.

For example, set the current run to use a few emojis and instruct the AI to be concise in all runs:



# Adjust the creativity level

Adjust the level of creativity (accuracy vs. freedom) the AI is allowed in generating results. Use a high level for a creative writing task.

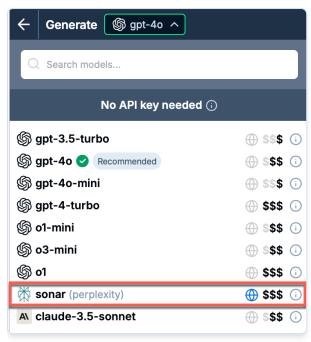


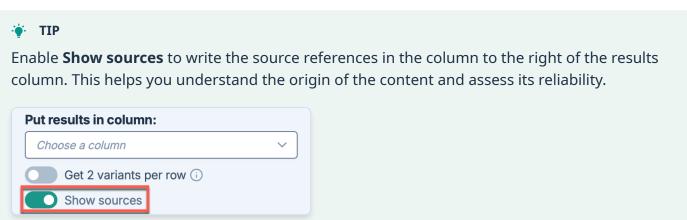


<u>The creativity level</u> applies to all bulk tool runs and all GPT function executions in the current spreadsheet.

### Use web search capabilities

If you need more up-to-date information in your generated content, select a model with web search capabilities (indicated by the icon in the model switcher). The available web search options vary depending on the model you select. Learn more about web search options.





### What's next

Try another bulk AI tool.

# Rewrite in bulk in Excel

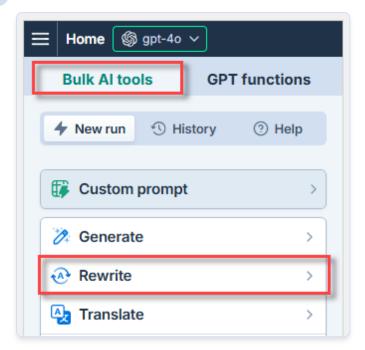
Use <u>GPT for Excel</u> to rewrite existing content in Microsoft Excel to match your desired tone and style. For example, you can transform casual product descriptions into professional ones.

### Run the bulk tool

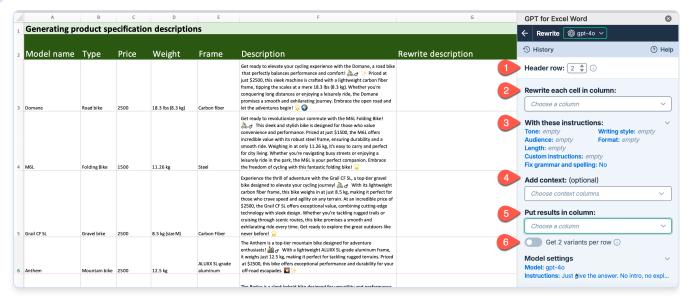
1 In the **Home** tab, click **GPT for Excel Word**.



2 In the sidebar, select **Bulk AI tools**, and click **Rewrite**.



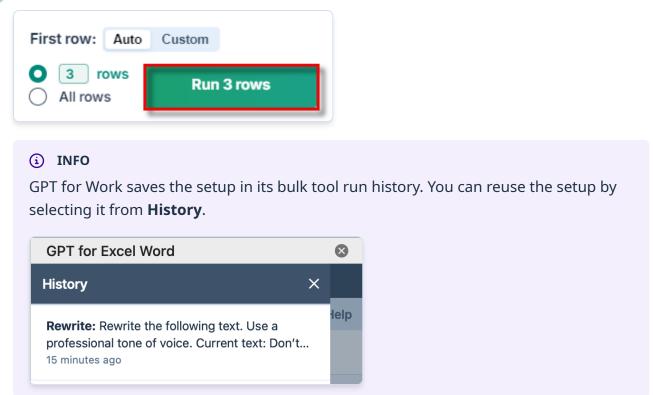
3 Set up your bulk tool run.



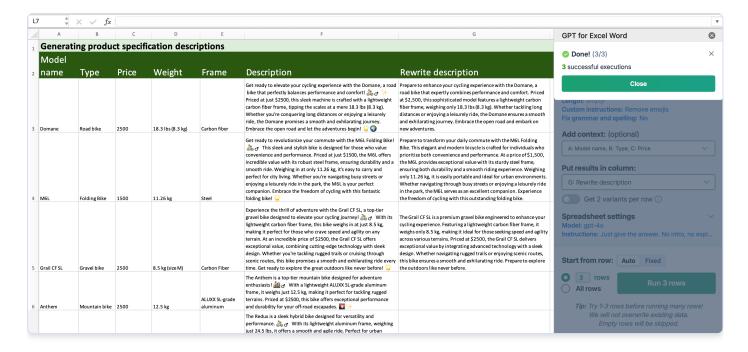
	Field	Description	Example
•	Header row (optional)	If your column headers aren't in the first row, select the number of the row that contains the headers. The bulk tool will run on the rows below this one.	2
2	Rewrite each cell in column	Select the column that contains the text you want to rewrite.	F: Description
3	With these instructions	Customize how the text should be rewritten by setting the tone, writing style, audience, format, length, and custom instructions, and whether to fix grammar and spelling errors.	Tone: Professional Writing style: Business  Custom instructions: Remove emojis and casual language
4	Add context (optional)	Select additional columns to provide context for the rewrite.	A: Model name, B: Type, C: Price
5	Put results in column	Select the column to put the rewritten text in. Cells in this column won't be overwritten if they contain text.	G: Rewrite description

	Field	Description	Example
6	Get 2 variants per row (optional)	Enable this option to generate two rewrite variants for each row. The variants are placed in adjacent columns.	Disabled

- 4 Run the **Rewrite** bulk tool starting from the first empty cell in the results column:
  - 1 Select a specific number of rows to run or select **All rows**. Learn more.
  - 2 Click **Run rows**.



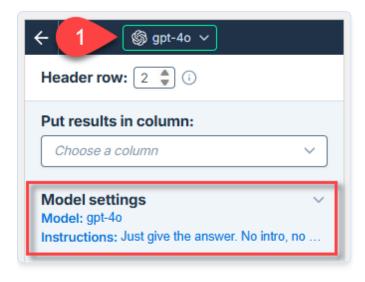
You have set up and run the **Rewrite** bulk tool. If needed, try improving the results.



# **Improve results**

### Try different models

Find out which models work best for different use cases in our <u>AI models overview</u>. You can try different models by selecting them in the model switcher.



i INFO

<u>The model selection</u> applies to all bulk tool runs and all GPT function executions in the current spreadsheet.

#### **Provide additional instructions**

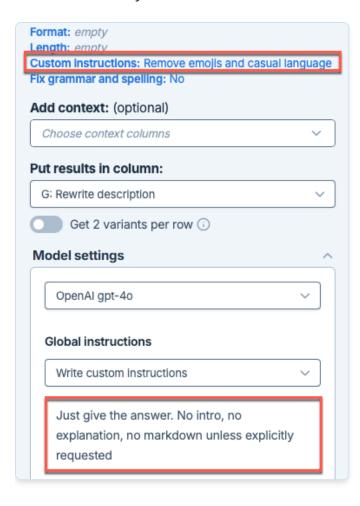
You can improve rewrite quality by providing specific instructions that help the AI more closely follow your requirements for tone, writing style, format, and other aspects.

You can define the following types of instructions for the AI:

- **Custom instructions** are defined for the current bulk tool run.
- Global instructions can also be defined in <u>Model settings</u> and apply to all bulk tools and GPT functions in the current spreadsheet.

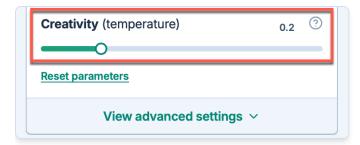
If both custom instructions and global instructions are defined, the AI uses both as a combined set of instructions. For consistent results, make sure both sets of instructions are aligned and do not contradict each other.

For example, set the current run to use professional language and instruct the AI to maintain technical accuracy in all runs:



## Adjust the creativity level

Adjust the level of creativity (accuracy vs. freedom) the AI is allowed in rewriting content. Use a lower level to stay closer to the original text.



(i) INFO

<u>The creativity level</u> applies to all bulk tool runs and all GPT function executions in the current spreadsheet.

# What's next

Try another bulk AI tool.

# Translate in bulk in Excel

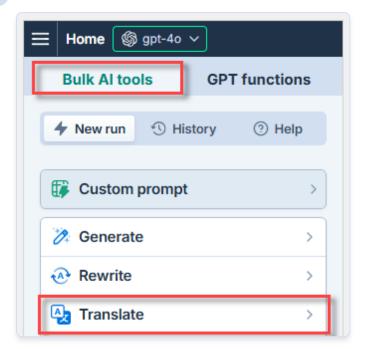
Use <u>GPT for Excel</u> to translate product catalogs, website copy, customer reviews, or any other content directly in Microsoft Excel, and optimize your translations by adding specific instructions and a glossary to guide the AI in the process. For example, you can translate a list of product names for a shoe store into French.

#### Run the bulk tool

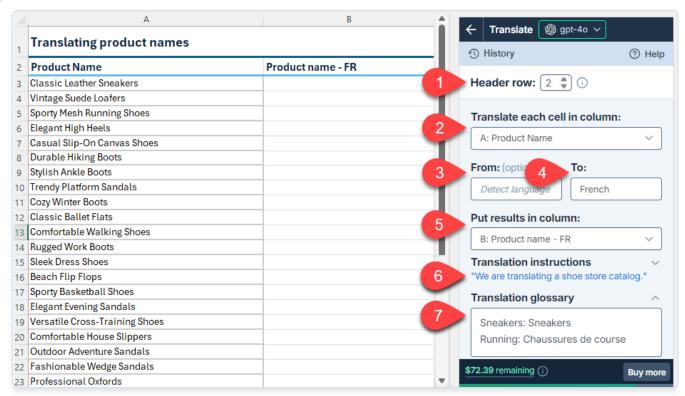
1 In the **Home** tab, click **GPT for Excel Word**.



2 In the sidebar, select **Bulk AI tools**, and click **Translate**.



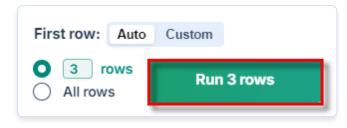
#### 3 Set up your bulk tool run.

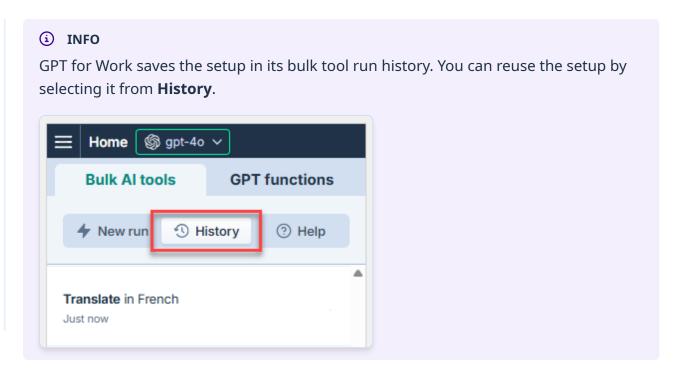


	Field	Description	Example
•	<b>Header row</b> (optional)	If your column headers aren't in the first row, select the number of the row that contains the headers. The bulk tool will run on the rows below this one.	2
2	Translate each cell in column	Select the column that contains the text you want to translate.	A: Product Name
3	From (optional)	Enter the source language, or leave the field empty if you want the AI to detect the source language for each cell.	Empty
4	То	Enter the target language.	French
5	Put results in column	Select the column to put the results in. Cells in this column won't be overwritten with the results if they contain text.	B: Product Name -

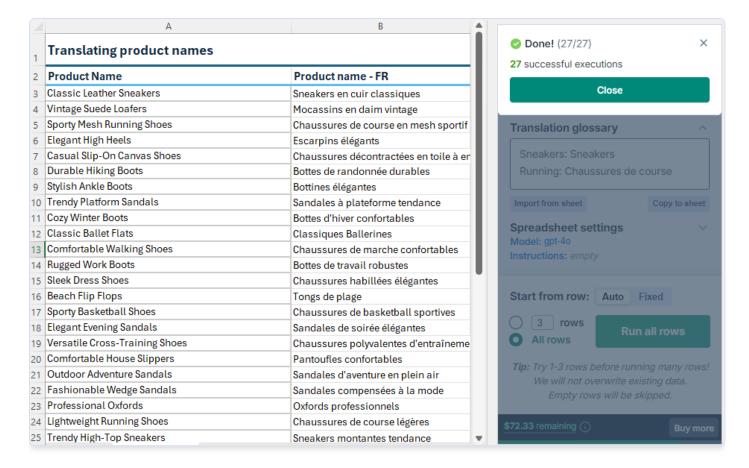
	Field	Description	Example
6	Translation instructions (optional)	Enter specific instructions for the translation.	We are translating a shoe store catalog.
7	Translation glossary (optional)	Enter a list of word pairs where the first word is the source language word and the second word is the target language translation of the first word.  Use the following syntax for each pair: <source word=""/> : <target word="">  Enter one pair per line.  If your glossary is in the current document, you can import it by clicking Import from sheet.</target>	Sneakers: Sneakers Running: Chaussures de course

- 4 Run the **Translate** bulk tool starting from the first empty cell in the results column:
  - 1 Select a specific number of rows to run or select **All rows**. <u>Learn more.</u>
  - 2 Click **Run rows**.





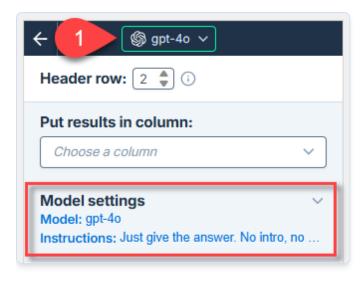
You have set up and run the **Translate** bulk tool. If needed, try improving the results.



# **Improve results**

# **Try different models**

Find out which models work best for different use cases in our <u>AI models overview</u>. You can try different models by selecting them in the model switcher.

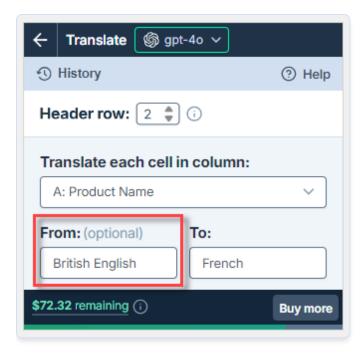


(i) INFO

<u>The model selection</u> applies to all bulk tool runs and all GPT function executions in the current spreadsheet.

#### Set the source language

The AI can automatically detect the source language, but manually defining it helps if the source text contains short, ambiguous phrases, which can confuse the AI. For example, "Trainers" in British English means "Sports shoes", whereas in American English, it means "People who train others".



#### **Provide additional instructions**

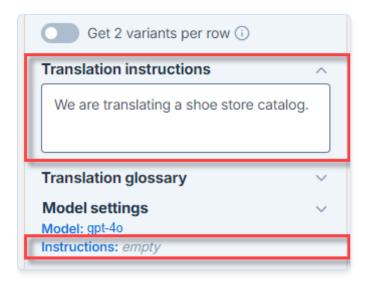
You can improve translation quality by providing specific instructions that help the AI more closely follow your requirements for tone, audience, and terminology.

You can define the following types of instructions for the AI:

- **Translation instructions** are defined for the current bulk tool run.
- **Global instructions** can also be defined in <u>Model settings</u> and apply to all bulk tools and GPT functions in the current spreadsheet.

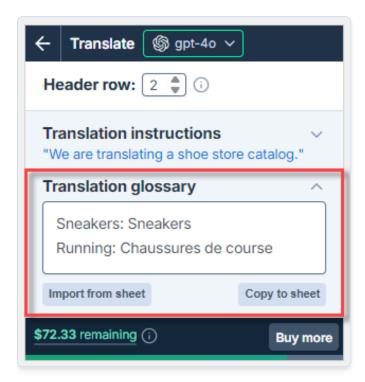
If both translation instructions and global instructions are defined, the AI uses both as a combined set of instructions. For consistent results, make sure both sets of instructions are aligned and do not contradict each other.

For example, omit the global instructions and only define translation instructions:



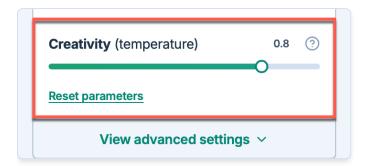
# **Create a glossary**

Glossaries ensure that translations are consistent, respect corporate terminology, and remain onbrand. If your glossary is in the current spreadsheet, you can import it by clicking **Import from sheet**.



#### Adjust the creativity level

Adjust the level of creativity (accuracy vs. freedom) the AI is allowed in translating text. For example, if you're translating marketing copy, set a high creativity level to generate more engaging and imaginative translations. If you're translating technical specifications, set a low creativity level to ensure the translations are precise and factual.



(i) INFO

<u>The creativity level</u> applies to all bulk tool runs and all GPT function executions in the current spreadsheet.

# What's next

Try another bulk AI tool.

# Classify / Categorize in bulk in Excel

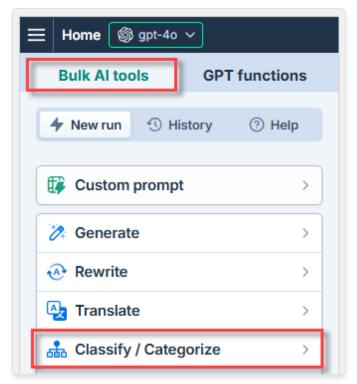
Use <u>GPT for Excel</u> to classify your catalog items, press articles, customer reviews, social media comments, or any other text directly in Microsoft Excel. The **Classify / Categorize** bulk tool classifies the content of each cell into one of the categories you provide if a match is found. For example, you can improve your lifecycle inventory management by classifying apparel products according to the activity they are used for.

#### Run the bulk tool

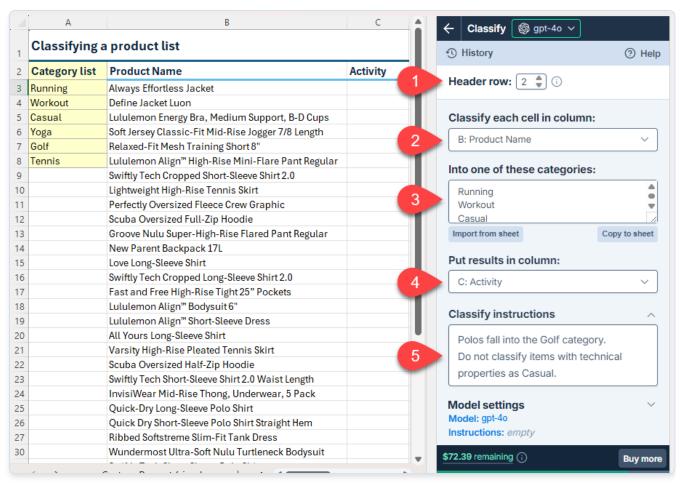
1 In the **Home** tab, click **GPT for Excel Word**.



2 In the sidebar, select **Bulk AI tools**, and click **Classify / Categorize**.



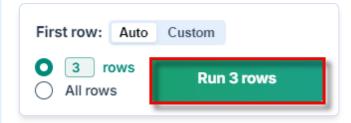
3 Set up your bulk tool run.



	Field	Description	Example
•	<b>Header row</b> (optional)	If your column headers aren't in the first row, select the number of the row that contains the headers. The bulk tool will run on the rows below this one.	2
2	Classify each cell in column	Select the column that contains the text you want to classify.	B: Product Name
3>	Into one of these categories	Enter the categories to classify the text into. If the categories are listed in the current document, you can import them by clicking <b>Import from sheet</b> .	Running Workout Casual Yoga Golf Tennis

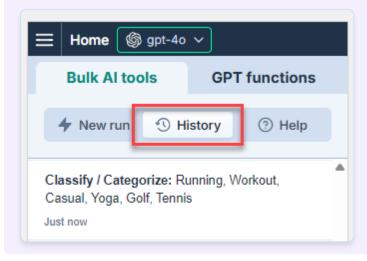
	Field	Description	Example
4	Put results in column	Select the column to put the results in. Cells in this column won't be overwritten with the results if they contain text.	C: Activity
5	Classify instructions (optional)	Enter specific instructions for the classification. <u>Learn more.</u>	Polos fall into the Golf category. Do not classify items with technical properties as Casual.

- 4 Run the **Classify / Categorize** bulk tool starting from the first empty cell in the results column:
  - 1 Select a specific number of rows to run or select **All rows**. Learn more.
  - 2 Click **Run rows**.



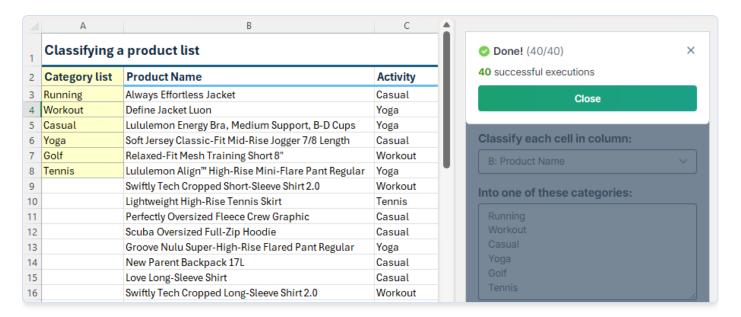
#### (i) INFO

GPT for Work saves the setup in its bulk tool run history. You can reuse the setup by selecting it from **History**.



- 5 Check the result for each cell:
  - The category name if a match is found.
  - #N/A if no match is found.

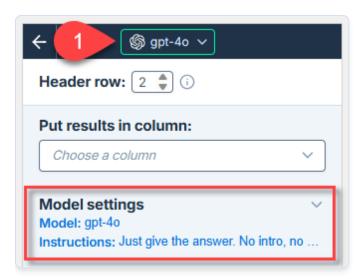
You have set up and run the **Classify / Categorize** bulk tool on a column. If needed, try <u>improving</u> the results.



# **Improve results**

## **Try different models**

Find out which models work best for different use cases in our <u>AI models overview</u>. You can try different models by selecting them in the model switcher.





<u>The model selection</u> applies to all bulk tool runs and all GPT function executions in the current spreadsheet.

#### **Provide additional instructions**

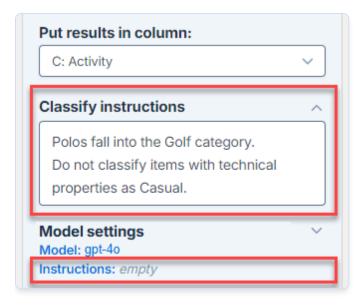
You can improve classification quality by providing specific instructions that help the AI more closely follow your requirements for categorization rules and context.

You can define the following types of instructions for the AI:

- **Classify instructions** are defined for the current bulk tool run.
- Global instructions can also be defined in <u>Model settings</u> and apply to all bulk tools and GPT functions in the current spreadsheet.

If both classify instructions and global instructions are defined, the AI uses both as a combined set of instructions. For consistent results, make sure both sets of instructions are aligned and do not contradict each other.

For example, omit the global instructions and only define classify instructions:



## **Set Creativity to 0**

Ensure *Creativity* is set to 0. This setting helps the AI follow instructions more closely.



(i) INFO

<u>The creativity level</u> applies to all bulk tool runs and all GPT function executions in the current document.

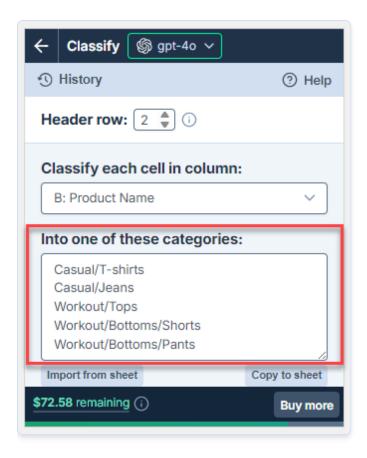
#### Use full path for categories

If your categories form a hierarchy, use their full path instead of their name. This helps avoid ambiguity and ensures that the classification is as precise as possible.

Using only the category names can lead to ambiguity. For instance, T-shirts and Tops could be considered as very largely overlapping categories. By specifying Casual/T-shirts and Workout/Tops, you provide a clear context, ensuring that the AI classifies the items accurately according to the intended category.

For example, instruct the AI to classify items according to these category paths:

Casual/T-shirts
Casual/Jeans
Workout/Tops
Workout/Bottoms/Shorts
Workout/Bottoms/Pants



#### What's next

Try another bulk AI tool.

# **Extract in bulk in Excel**

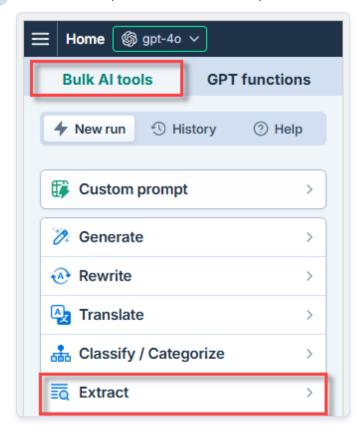
Use <u>GPT for Excel</u> to extract key information like names, email addresses, and product attributes from unstructured text directly in Microsoft Excel. For example, you can extract name, weight, and price from bike model descriptions to create a catalog.

#### Run the bulk tool

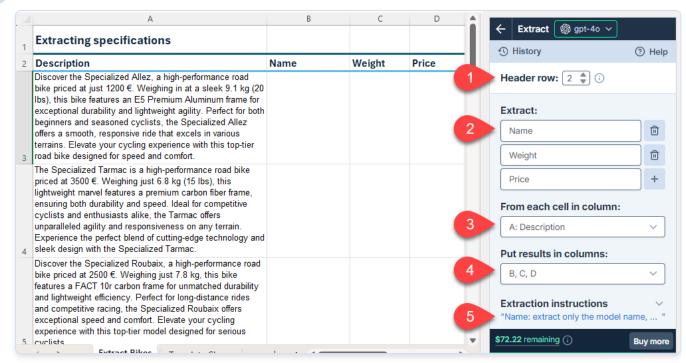
1 In the **Home** tab, click **GPT for Excel Word**.



2 In the sidebar, select **Bulk AI tools**, and click **Extract**.



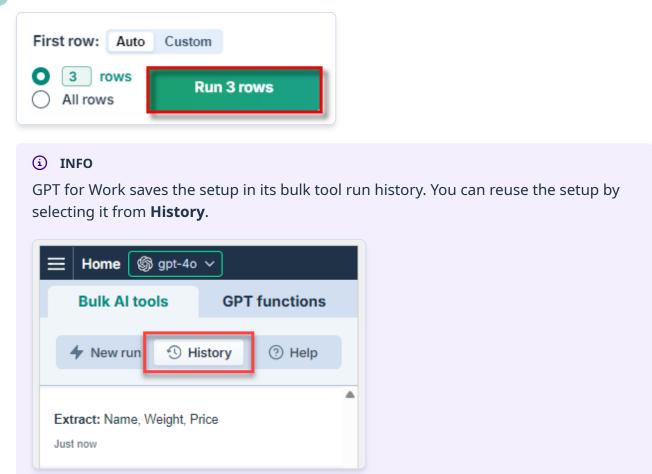
3 Set up your bulk tool run.



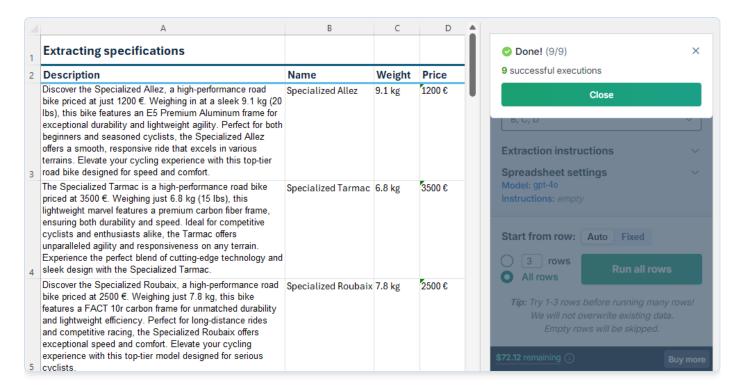
	Field	Description	Example
•	<b>Header row</b> (optional)	If your column headers aren't in the first row, select the number of the row that contains the headers. The bulk tool will run on the rows below this one.	2
2	Extract	Enter the entities you want to extract.	Name Weight Price
3	From each cell in column	Select the column that contains the text from which you want to extract entities.	A: Description
4	Put results in column	Select the column or columns to put the results in. Cells in these columns won't be overwritten with the results if they contain text.	B, C, D

	Field	Description	Example
5	Extraction instructions (optional)	Enter specific instructions for the extraction.	Name: Extract only the model name, without manufacturer or year

- 4 Run the **Extract** bulk tool starting from the first empty cell in the results columns:
  - 1 Select a specific number of rows to run or select **All rows**. Learn more.
  - 2 Click **Run rows**.



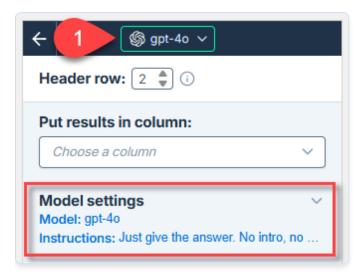
You have set up and run the **Extract** bulk tool. If needed, try improving the results.



# **Improve results**

#### Try different models

Find out which models work best for different use cases in our <u>AI models overview</u>. You can try different models by selecting them in the model switcher.



(i) INFO

<u>The model selection</u> applies to all bulk tool runs and all GPT function executions in the current spreadsheet.

#### **Provide additional instructions**

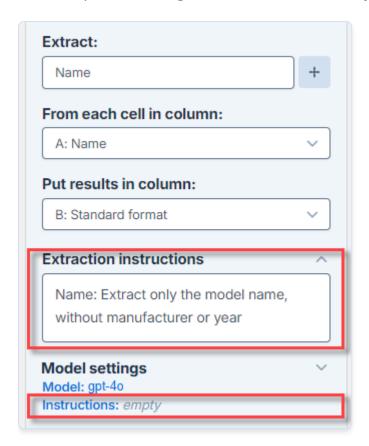
You can improve extraction quality by providing specific instructions that help the AI more closely follow your requirements for text identification and formatting rules.

You can define the following types of instructions for the AI:

- Extraction instructions are defined for the current bulk tool run.
- **Global instructions** can also be defined in <u>Model settings</u> and apply to all bulk tools and GPT functions in the current spreadsheet.

If both extraction instructions and global instructions are defined, the AI uses both as a combined set of instructions. For consistent results, make sure both sets of instructions are aligned and do not contradict each other.

For example, omit the global instructions and only define extraction instructions:



The following table provides examples of extraction instructions for different goals:

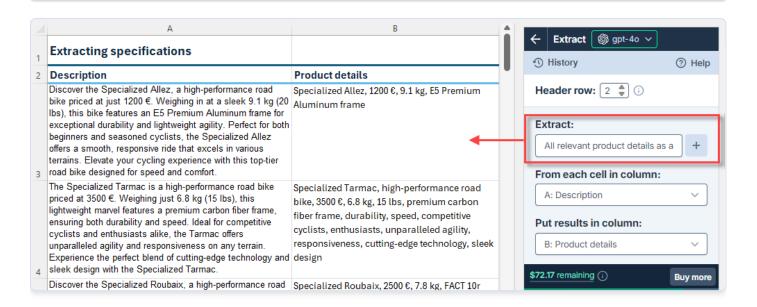
Goal	Description	Example
Remove irrelevant information	Define what should be excluded from the extraction to get cleaner results.	Name: Extract only the model name, without manufacturer or year

Goal	Description	Example
Normalize entities	Set a consistent output for variations of the same entity in your text.	Weight: Extract weight in kilograms
		Add Price value and Price currency as entities in the <b>Extract</b> field, then instruct:
Extract numerical values and units	Separate numbers from units to simplify their manipulation.	Price value: Extract only the numerical value Price currency: Extract only the currency code (for example USD, or EUR)

#### Perform open-ended extraction

Open-ended extraction helps you gather a wide range of information without specifying each entity. This approach works well when entities vary from one cell to another or when you want to avoid missing any extraction. For example, enter the following in the **Extract** field:

All relevant product details as a comma-separated list.



## What's next

Try another bulk AI tool.

# Reformat in bulk in Excel

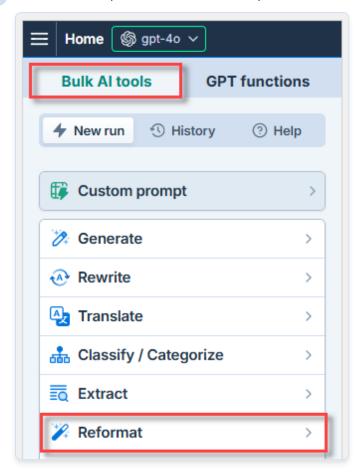
Use <u>GPT for Excel</u> to standardize dates, phone numbers, or any other text to a consistent format directly in Microsoft Excel. For example, you can reformat product names before you include them in your catalog.

#### Run the bulk tool

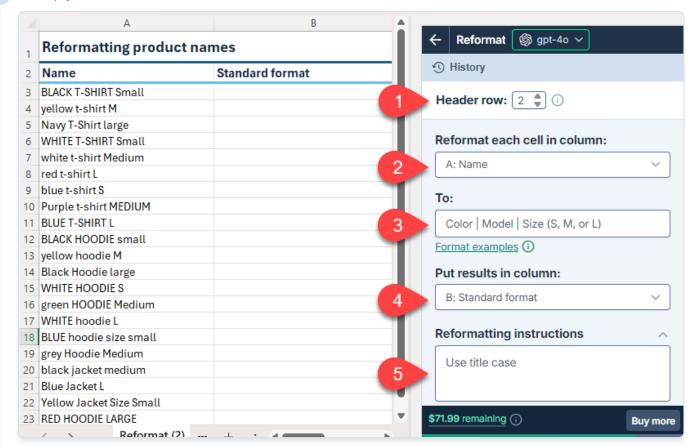
1 In the **Home** tab, click **GPT for Excel Word**.



2 In the sidebar, select **Bulk AI tools**, and click **Reformat**.



3 Set up your bulk tool run.

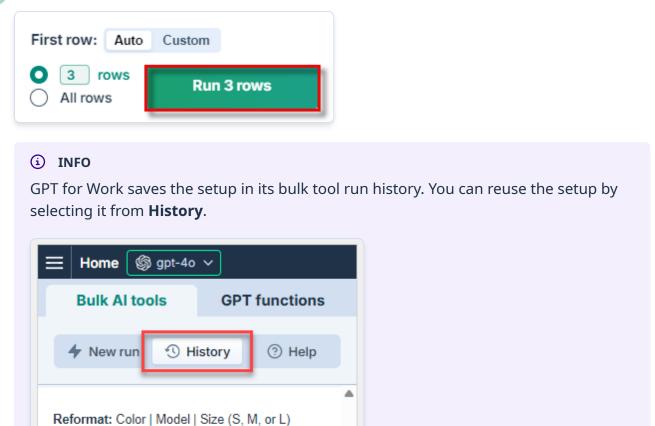


	Field	Description	Example
•	<b>Header row</b> (optional)	If your column headers aren't in the first row, select the number of the row that contains the headers. The bulk tool will run on the rows below this one.	2
2	Reformat each cell in column	Select the column that contains the text to reformat.	A: Name
3	То	Describe the format to which you want to convert the text.	Color   Model   Size (S, M, or L)
•	Put results in column	Select the column to put the results in. Cells in this column won't be overwritten with the results if they contain text.	B: Standard format

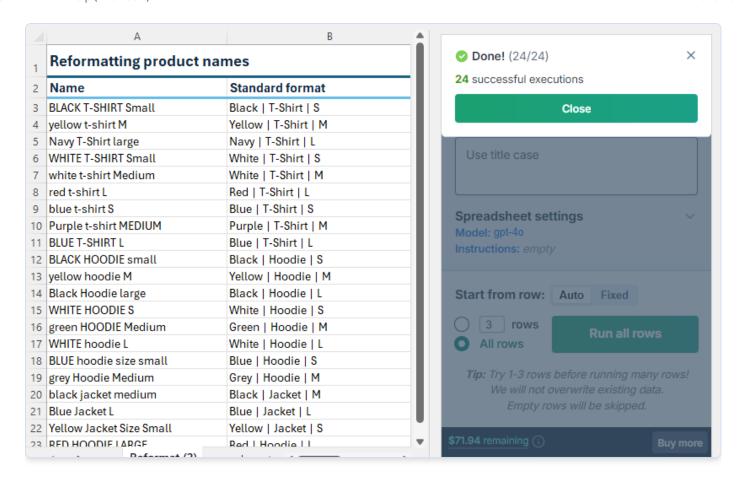
	Field	Description	Example
5	Reformatting instructions (optional)	Enter specific instructions for the reformatting.	Use title case

- 4 Run the **Reformat** bulk tool starting from the first empty cell in the results column:
  - 1 Select a specific number of rows to run or select **All rows**. <u>Learn more.</u>
  - 2 Click **Run rows**.

Just now



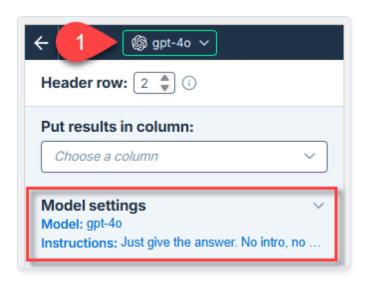
You have set up and run the **Reformat** bulk tool. If needed, try improving the results.



# **Improve results**

## Try different models

Find out which models work best for different use cases in our <u>AI models overview</u>. You can try different models by selecting them in the model switcher.



(i) INFO

<u>The model selection</u> applies to all bulk tool runs and all GPT function executions in the current spreadsheet.

#### **Provide additional instructions**

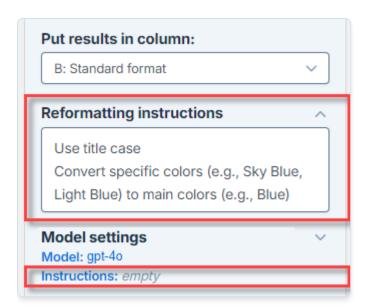
You can improve reformatting quality by providing specific instructions that help the AI more closely follow your requirements for formatting rules and consistency.

You can define the following types of instructions for the AI:

- **Reformatting instructions** are defined for the current bulk tool run.
- **Global instructions** can also be defined in <u>Model settings</u> and apply to all bulk tools and GPT functions in the current spreadsheet.

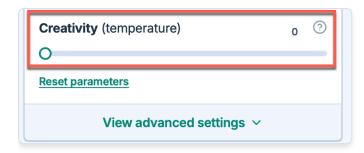
If both reformatting instructions and global instructions are defined, the AI uses both as a combined set of instructions. For consistent results, make sure both sets of instructions are aligned and do not contradict each other.

For example, omit the global instructions and only define reformatting instructions:



# **Set Creativity to 0**

Ensure *Creativity* is set to 0. This setting helps the AI follow instructions more closely.



**i** INFO

<u>The creativity level</u> applies to all bulk tool runs and all GPT function executions in the current document.

# What's next

Try another bulk AI tool.

# Prompt images in bulk in Excel

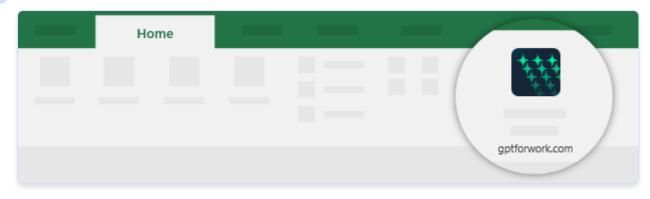
Use <u>GPT for Excel</u> to generate content based on images directly in Microsoft Excel. For example, you can generate descriptions for your product images to improve your listings.

#### (i) INFO

- <u>Custom prompt</u> and **Prompt images (Vision)** are the only bulk AI tools that accept images as input.
- To use **Prompt images (Vision)**, you must select a vision model.

#### Run the bulk tool

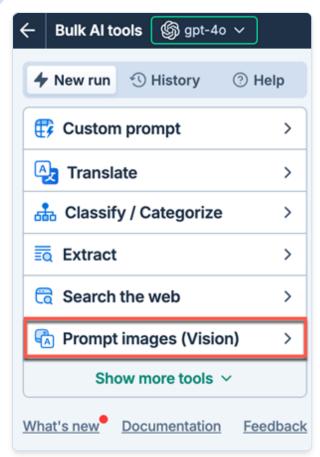
1 In the **Home** tab, click **GPT for Excel Word**.



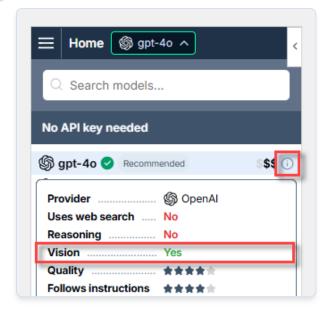
(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

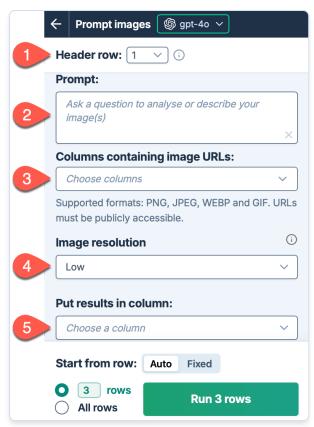
2 In the sidebar, select **Bulk AI tools**, and click **Prompt images (Vision)**.



3 In the model switcher, select a vision model.



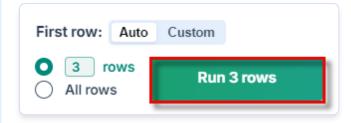
4 Set up your bulk tool run.

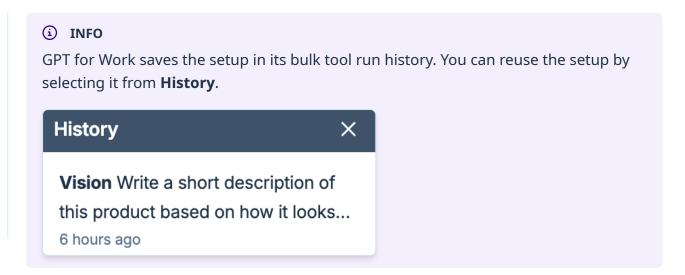


	Field	Description	Example
•	<b>Header row</b> (optional)	If your column headers aren't in the first row, select the number of the row that contains the headers. The bulk tool will run on the rows below this one.	4
2	Prompt	Describe the task you want the AI to perform based on the target images. For example, ask a question about the images or request content based on the images.	Write a short description of this product based on how it looks, how it's used, and its build quality.

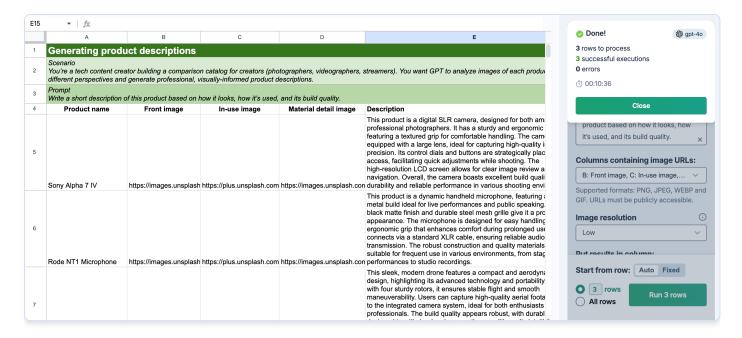
	Field	Description	Example
3	Columns containing image URLs	Select up to five columns that contain image URLs. For each row, the tool processes all images present in the selected columns. URLs must be publicly accessible.  Supported image formats:  PNG  PNG  VebP  Non-animated GIF	B: Front image, C: In-use image, D: Material detail image
4	Image resolution (optional)	Choose the level of detail for image processing:  • High: Better image understanding, higher latency and cost  • Low: Faster processing, lower cost  • Auto: Let the model decide (default)	Low
5	Put results in column (optional)	Select the column to put the results in. Cells in this column won't be overwritten with the results if they contain text.	E: Description

- 5 Run the **Prompt images (Vision)** bulk tool starting from the first empty cell in the results column:
  - 1 Select a specific number of rows to run or select **All rows**. <u>Learn more.</u>
  - 2 Click **Run rows**.





You have set up and run the **Prompt images (Vision)** bulk tool. If needed, try <u>improving the</u> results.



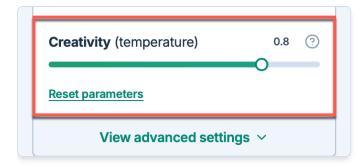
# **Improve results**

# **Try different models**

Try different <u>vision models</u> to find the one that works best for your use case. <u>We recommend using gpt-4.1</u> for most vision tasks.

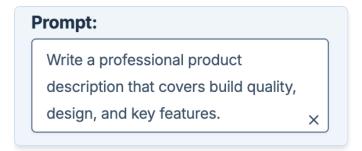
## Adjust the creativity level

Adjust the level of creativity (accuracy vs. freedom) the AI is allowed in generating results. For example, if you're generating marketing copy, set a high creativity level to generate more engaging and imaginative text. If you're generating technical specifications, set a low creativity level to ensure the generated text is precise and factual.



#### Refine your prompt

Be specific about what you want the AI to focus on. For example, specify which kind of description you want the AI to generate.



#### Adjust image resolution

Choose the appropriate image resolution setting based on your needs:

- **High:** Use for detailed analysis where image quality and understanding are critical. This setting provides better image understanding but increases latency and cost.
- Low: Use for faster processing and lower cost when basic image recognition is sufficient.
- Auto: Let the model decide the optimal resolution (default).

For product descriptions and detailed analysis, consider using **High** resolution to ensure the AI captures all important visual details.

#### What's next

Try another bulk AI tool.

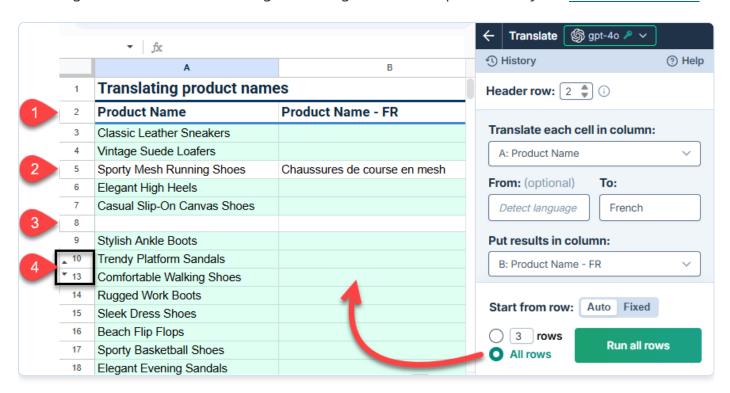
# Select which rows to process with bulk AI tools

The bulk AI tools in GPT for Excel are designed to process only the relevant rows in your spreadsheet. You can additionally control where to start and how many rows to process, making it easy to test on a small sample before processing your entire dataset.

Bulk tools automatically skip:

- 1 The header row
- 2 Rows with content in the result column
- 3 Rows where all input columns are empty
- 4 Hidden or filtered rows

In the figure below, all rows with a green background will be processed by the Translate bulk tool.



# Try a bulk tool on a few rows, then run all rows

The default settings for bulk tool runs is ideal for starting with a quick test:

Setting	Value	Description
Header row	1	Row 1 contains the column headers.

Setting	Value	Description
Start from row	Auto	The tool processes the first 3 rows after the header row. If a row has a non-empty cell in the result column, the tool skips to the next row.
X rows	3	The tool processes 3 rows after the header row.

To run a bulk tool with the default settings, simply click **Run 3 rows**.

The following video shows you how to run the <u>Extract tool</u> on 3 rows to check that the specifications for your product descriptions are extracted correctly.

When you're ready to run the tool on the whole spreadsheet, change the row setting to **All rows** and click **Run all rows**. The tool skips the first 3 rows as they have already been processed.

# Run a bulk tool on new content only

If you've already run a bulk tool on a spreadsheet and then add new data, you don't need to filter the new rows to process them. Just run the tool again on all rows. It skips the rows that have already been processed.

Setting	Value	Description
Start from row	Auto	The tool starts on the first empty cell in the result column.
X rows	All rows	The tool processes all remaining rows, skipping the rows that have already been processed.

The following video shows how to run the <u>Classify / Categorize</u> tool to process only new rows in a product list. Even if the list is already sorted so that the new rows are not all at the end, the tool only processes the new rows.

# Run a targeted test

You can target a specific section of rows in a spreadsheet by explicitly defining the start row and the number of rows to process:

Setting	Value	Description
Start from row	Fixed: 5	The tool starts on the first empty cell in the result column on or after row 5.
X rows	2	The tool processes 2 rows, starting from the first empty cell in the result column on or after row 5.

The following video shows you how to run the Translate tool on 2 rows to check that your glossary is taken into account when translating your product names from English to French.

# Rerun a bulk tool on a few cells

To rerun a bulk tool on a few cells, simply delete the cell content and rerun the tool. This allows you to easily update a few selected rows without affecting the rest of the results:

Setting	Value	Description
Start from row	Auto	The tool starts at the first empty cell in the result column.
X rows	All rows	The tool processes all rows with empty cells in the result column.

The following video shows how to rerun the Custom tool on a few cells to update the results after tweaking your prompt.



To rerun a bulk tool on the same rows, you can select a new column to write the results to. This way, you can keep the original results and compare them with the new ones.

# What's next

- Learn more about the bulk AI tools.
- If you encounter issues with bulk AI tools, see the troubleshooting guide.

# **GPT functions in GPT for Excel**

Build formulas with <u>GPT functions</u> to prompt AI from inside spreadsheet cells. Use the GPT for Excel sidebar to manage your GPT formulas.

# **Start using GPT functions**

Learn the basics of using GPT functions — from enabling GPT functions for a workbook to building formulas that combine GPT functions with native functions.

#### **Create GPT formulas**

Create GPT formulas in Microsoft Excel and control the execution of GPT formulas.

# Manage GPT formulas from the sidebar

Manage your GPT formulas and avoid unexpected changes and costs.

### **All GPT functions**

All the GPT functions, with simple examples and an extensive list of parameters.

# Start using GPT functions in Excel

GPT functions are custom spreadsheet functions in GPT for Excel that allow you to prompt AI from inside spreadsheet cells. GPT functions work exactly like native functions in that you can use them on their own or combine them with other functions when creating formulas.

This guide walks you through the basics of using GPT functions — from enabling GPT functions for a workbook through building formulas with GPT functions to using functions for web search and image processing. The focus is on the GPT function, the simplest function included in GPT for Excel, but the same rules apply to all GPT functions.



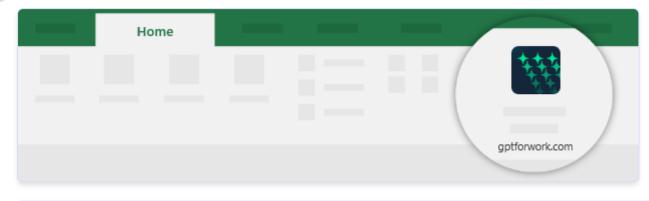
To try out the examples in this guide, download our GPT function starter examples template, and open it in Excel as a new workbook.

# **Enable GPT functions**

GPT for Excel must be running before you can use GPT functions for the first time in a workbook.

To start GPT for Excel:

- 1) Open the workbook where you want to use GPT functions.
- 2 In the **Home** tab, click **GPT for Excel Word**.



(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

# Use GPT functions

Learn the basics of using GPT functions, from how you type a function through how you use functions in formulas to how you search the web and process images with functions.

# **GPT function syntax**

Each GPT function follows a specific syntax that consists of a **function name** and one or more **parameters** (also called "arguments") enclosed in parentheses. The parameters together tell the function what to do. Some parameters are required, while others are optional. The syntax of a function is presented as follows:

```
FUNCTION_NAME(parameter_1, parameter_2, [parameter_3])
```

The order of the parameters matters, so always write them in the order required by the function syntax. Optional parameters are in square brackets.

For example, the GPT function has the following syntax:

```
GPT(prompt, [value], [temperature], [model])
```

The GPT function takes the following four parameters:

Parameter	Required	Description	
prompt	Yes	The <u>prompt</u> for the AI. The prompt can be:	
		• Text: "Write a tagline for a tea house"	
		Cell reference: A1	
		• Range reference: A1:A3	

Parameter	Required	Description	
value	No	Input that you want to combine with the prompt. The input can be:  • Text: "Tone: Calm and serene"  • Cell reference: B1  • Range reference: B1:B3  If you provide value, GPT for Excel uses the following template to build the final prompt sent to the AI: <pre></pre>	
temperature	No	<ul> <li>Number between 0 and 1 that specifies how creative the AI should be in generating the response:</li> <li>0 sets minimum creativity. Responses to the same prompt are predictable and very similar.</li> <li>1 sets maximum creativity. Responses to the same prompt can vary wildly. Highest risk of hallucination.</li> </ul>	

Parameter	Required	Description
model	No	Name of the <u>AI model</u> that you want to use. You can find the model names in the <u>model switcher</u> in the add-in sidebar. <u>Learn more.</u>

The first parameter of the GPT function is required, so you always have to provide it. The remaining three parameters are optional, so you only need to provide them when you want additional control over how the function operates. You can provide one, two, or all three optional parameters, depending on your needs.

### **(i)** DOUBLE QUOTES

If a parameter takes a text value, always enclose the text in double quotation marks. For example:

☑ GPT("Write a tagline for a tea house")

X GPT(Write a tagline for a tea house)

The latter fails with an error because the function cannot interpret the words as valid parameters.

#### **(i)** EMPTY PARAMETERS

If you skip an optional parameter other than the last one, always provide a lone comma ("empty parameter") as a placeholder to maintain the correct syntax. For example:

GPT("Write a tagline for a tea house", , 0.5, "claude-4-sonnet")

 $\times$  GPT("Write a tagline for a tea house", 0.5, "claude-4-sonnet")

The latter fails with an error because the function treats [0.5] as the second parameter (value, which expects text or a reference) and "claude-4-sonnet" as the third parameter (temperature, which expects a number).

# **Run a GPT function**

To use the GPT function:

- 1 Select a cell where you want the response to appear.
- 2 Type the equal sign = followed by the function. For example, to use the GPT function with just the prompt parameter, type:

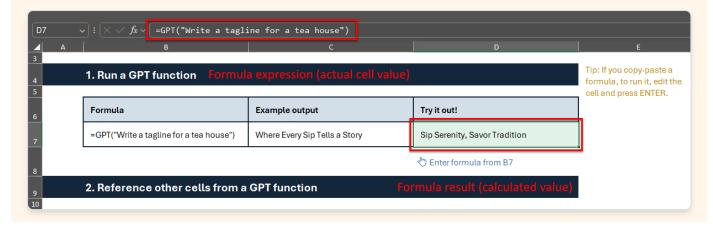
=GPT("Write a tagline for a tea house")

3 Press ENTER.

The function runs: It sends the prompt to the AI, receives a response, and displays the response in the selected cell.

#### **↑** CALCULATED VALUES AND CONSTANTS

The text you see in the cell is the result of the formula — a dynamically calculated value. The actual value of the cell is the formula expression: =GPT("Write a tagline for a tea house"). You cannot edit the result; you can only edit the formula. If you want to set the result as the actual value of the cell, that is, if you want to turn the calculated value into a constant that you can edit, replace the formula with its result.



#### Reference other cells from a GPT function

You can reference other cells and ranges from a GPT function. You can use <u>relative</u>, <u>absolute</u>, <u>and</u> mixed references as you would with any function.

For example, to retrieve the prompt for the GPT function from another cell:

1 Select a cell and enter the prompt:

Write a tagline for a tea house

\* TIP

You do not need double quotation marks around the prompt here because Excel automatically returns the value as text.

2 Select another cell and enter the GPT function with the prompt cell as the only parameter. For example, if the prompt is in cell B12, enter:

=GPT(B12)

The function runs and returns the AI's response in the selected cell.

Both GPT(B12) and GPT("Write a tagline for a tea house") work the same way — they send the exact same prompt to the AI. The only difference is that the former retrieves the prompt from a cell, while the latter provides it directly as a text constant in the function.

# Apply the same prompt to multiple cells

You can apply the same GPT function and prompt to adjacent cells by <u>filling the formula across a range</u>.

For example, suppose you want to generate unique taglines for multiple businesses. The businesses are listed in one column of your sheet, and you want to fill another column with the corresponding taglines. You can generate the taglines by using the GPT function with the prompt and value parameters, where prompt specifies the basic instructions and value specifies a specific business as a cell reference:

1 Select the first tagline cell and enter the GPT function. For example, if the business whose tagline you're generating is specified in cell B7, enter:

```
=GPT("Write a tagline", B7)
```

The function combines the two parameters into a single prompt, based on the <u>underlying</u> <u>prompt template</u>, which is then sent to the AI. For example, if B7 contains the text <u>antique</u> store, the final prompt sent to the AI is:

```
Write a tagline
Input: antique store
Output:
```

The function runs and returns the AI's response in the selected cell.

2 Fill the formula down to apply it to the rest of the column: Select the fill handle and drag it down across the cells you want to fill. Excel automatically updates the cell reference in the function so that each row receives a tailored response based on its business. The formula in row 8 will reference B8, the formula in row 9 will reference B9, and so on.

To see how absolute references work, let's move the prompt to its own cell:

1 Select an empty cell and enter the prompt:

```
Write a tagline
```

2 Select the first tagline cell and update the GPT function to reference the prompt cell. For example, if the prompt is in cell C8 and the business whose tagline you're generating is now specified in cell B11, enter:

```
=GPT($C$8, B11)
```

\$C\$8 is an absolute reference to C8, which you need here since you do not want Excel to automatically adjust the reference when you fill the formula to adjacent cells.



Since you're only filling vertically across a single column, it would be enough to fix the prompt cell row using a mixed reference:

```
=GPT(C$8, B11)
```

3 Fill the formula down to apply it to the rest of the column: Select the fill handle and drag it down across the cells you want to fill, overwriting the existing formulas. Excel automatically updates the value cell reference for each row, while keeping the prompt cell reference fixed.

# Create a prompt by combining text from multiple cells

You can use concatenation to combine text from two or more cells into a single text string. This allows you to create advanced prompts, where different parts of the prompt come from different cells in the sheet.

For example, suppose you want to further customize the taglines of the previous example, so that they follow a specific tone and target a specific customer age range. The businesses are listed in the first column, the tone in the second, and the age range in the third, with the fourth column now reserved for the taglines.

To build the prompt by combining the information from the different columns:

1) Select the first tagline cell and enter the GPT function. For example, if the business whose tagline you're generating is specified in cell B11, with the tone in cell C11 and age range in cell D11, enter the following in cell E11:

```
=GPT("Write a tagline for " \& B11 \& ", the tone is " \& C11 \& ", the
audience is aged " & D11)
```

The function uses the & operator to concatenate the different parts, which include literal text values and cell references, into a single text string. For example, if B11 contains the text antique store, C11 contains nostalgic and refined, and D11 contains 35-65, the final prompt sent to the AI is:

Write a tagline for antique store, the tone is nostalgic and refined, the audience is aged 35-65

```
Instead of the & operator, you can also use the native CONCAT function:

=GPT(CONCAT("Write a tagline for ", B11, ", the tone is ", C11, ", the audience is aged ", D11))

The GPT function uses the CONCAT function as a nested function. Learn more.

If you want to concatenate without having to worry about white spaces and newlines, use the GPT_CREATE_PROMPT function:

=GPT(GPT_CREATE_PROMPT("Write a tagline for", B11, ", the tone is", C11, ", the audience is aged", D11))
```

2 Fill the formula down to apply it to the rest of the column: Select the fill handle and drag it down across the cells you want to fill. Excel automatically updates the cell references in the function so that each row receives a tailored response based on its business. The formula in row 12 will reference B12, C12, and D12; the formula in row 13 will reference B13, C13, and D13; and so on.

### Combine a GPT function with a native function

You can combine GPT functions with native functions like you would any other function.

For example, suppose you want to run the GPT function from <u>above</u> only when the current row has a business specified. If the business cell is empty, you want to skip the row. You can do this by combining the GPT function with the native IF function:

1 Select the first tagline cell and enter a formula that wraps GPT inside an IF function. For example, if the business whose tagline you're generating is specified in cell B11 and the GPT function for that is GPT(\$C\$8, B11), enter:

```
=IF(B11="", "", GPT($C$8, B11))
```

The GPT function runs only if cell B11 is not empty. If B11 is empty, the formula leaves the current cell empty, too.

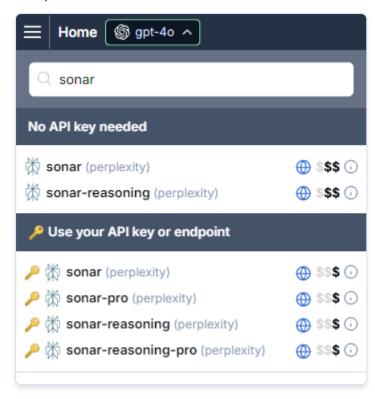
- 2 Fill the formula down to apply it to the rest of the column: Select the fill handle and drag it down across the cells you want to fill, overwriting the existing formulas. Excel automatically updates the value cell reference for each row, while keeping the prompt cell reference fixed.
- 3 To see the conditional logic in action, empty one of the business cells. The formula for that row reruns and removes the tagline.

### Search the web with a GPT function

You can search the web with a GPT function simply by using a <u>web search model</u>. You can either select the model in the model switcher or specify the model with the <u>model</u> parameter.

For example, suppose you want to do a search for company CEOs. The companies are listed in one column of your sheet, and you want to fill the next column with the CEO names.

1 In the sidebar, expand the model switcher and select a web search model (indicated by the icon).



(i) INFO

If you select a Gemini model, make sure web search is enabled for Gemini models.

2 Select the first CEO cell and enter the GPT function. For example, if the company whose CEO you're fetching is specified in cell B13, enter:

=GPT("Give me this company's current CEO. I only want the name of the CEO, no citations.", B13)



TIP

If you want to override the model switcher selection, specify the model in the GPT function with the model parameter. For example, if you want to use the Sonar model, enter:

```
=GPT("Give me this company's current CEO. I only want the name of the
CEO, no citations.", B13, , "sonar")
```

3 Fill the formula down to apply it to the rest of the column: Select the fill handle and drag it down across the cells you want to fill. Excel automatically updates the company cell reference for each row.

For more information about web search, see Search the web with GPT for Excel.

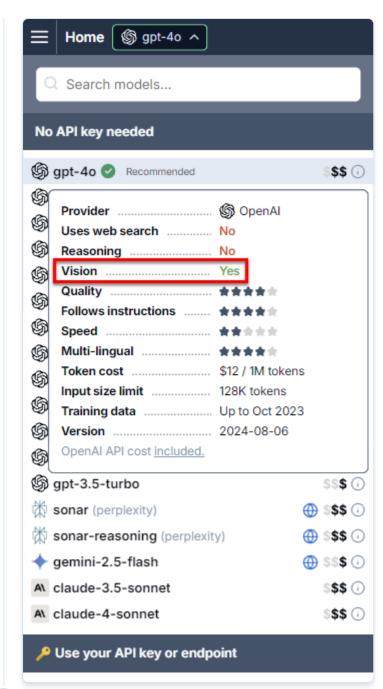
# **Process images with GPT\_VISION**

You can apply a text prompt to an image using the GPT\_VISION function with a vision model. You can either select the model in the model switcher or specify the model with the model parameter.

For example, suppose you want to extract the brand name from product images featuring coffee bean packs. The image URLs are listed in one column of your sheet, and you want to fill the next column with the brand names.

1) In the sidebar, expand the model switcher and select a vision model.

To determine whether a model supports vision, check its info popup. For a list of available vision models, see AI providers & models and filter the tables by **Vision**.



2 Select the first image URL cell and enter the GPT function. For example, if the image URL that you want to process is in cell C13, enter:

=GPT\_VISION("Extract the coffee brand from this image. Normalize the brand name to title case.",  ${\rm C13})$ 



If you want to override the model switcher selection, specify the model in the GPT function with the model parameter. For example, if you want to use the Claude Sonnet 4 model, enter:

=GPT\_VISION("Extract the coffee brand from this image. Normalize the brand name to title case.", C13, , , "claude-4-sonnet")

3 Fill the formula down to apply it to the rest of the column: Select the fill handle and drag it down across the cells you want to fill. Excel automatically updates the image URL cell reference for each row.

For more information about AI vision, see Use images in prompts in Excel.

## Set the model for a GPT function

You can run a GPT function with a specific model by providing the <u>model</u> parameter. The function will ignore what's currently selected in the model switcher and use the provided model instead.

For example, if you want the Perplexity Sonar model to answer a query about current events, provide sonar as the model:

```
=GPT("What was the previous month's inflation rate in the US?", , , "sonar")
```



If the model is available both with and without an API key in GPT for Excel, the function uses the model with the API key.

Use the model parameter when:

- You want to lock a formula to a specific model. For example, if you have a web search formula, you want it to consistently use the same web search model.
- You want to compare how a specific model compares with other models. For example, use the same GPT function and prompt in two formulas the first with the model parameter, the second without and then use the model switcher to change the model used by the second formula, regenerating its response after each change.

```
=GPT("Write a tagline for a tea house", , , "claude-4-sonnet")
=GPT("Write a tagline for a tea house")
```

# Set the creativity level for a GPT function

You can run a GPT function with a specific <u>creativity level</u> by providing the <u>temperature</u> parameter. The function will ignore the creativity level defined in the model settings and use the provided level instead.

For example, if you're working on a creative task and want to experiment with highly creative responses, set the temperature close to 1:

2025-10-22

```
=GPT("Write a three-sentence horror story about a teahouse.", , 0.9);
```

For more information about temperature, see our temperature guide for OpenAI models.

# **GPT functions: Defaults, settings, behavior**

#### **Default model**

By default, GPT functions use the <u>currently selected model</u>. If you want a GPT function to use a specific model regardless of what's currently selected in the model switcher, use the <u>model</u> parameter to <u>explicitly</u> set the <u>model</u>.



If you provide the model parameter, and if the model is available both with and without an API key in GPT for Excel, the function uses the model with the API key.

# **Default creativity level**

By default, GPT functions use the <u>creativity level defined in the model settings</u>. If you want a GPT function to use a specific creativity level regardless of what's defined the model settings, use the <u>temperature</u> parameter to <u>explicitly set the creativity level</u>.

# Global instructions and advanced settings

The <u>global instructions</u> and <u>advanced settings</u> defined in the GPT for Excel sidebar apply to GPT functions. If you find that a function is not working as expected, check the model settings for a possible cause.

# **Regional settings**

The default characters used by Excel for parameter and decimal separators depend on your currently selected region:

• **Parameters:** Some regions use the comma (, ) as the default parameter separator, while others use the semicolon (; ).

```
=GPT("Write a tagline", B7)
=GPT("Write a tagline"; B7)
```

• **Decimals:** Some regions use the period ( . ) as the default decimal separator, while others use the comma ( , ). As a rule, regions that use the period for decimals use the comma for

parameters, whereas regions that use the comma for decimals use the semicolon for parameters.

```
=GPT("Write a tagline for a tea house", , 0.5)
=GPT("Write a tagline for a tea house"; ; 0,5)
```

The examples in the current documentation use the comma as the parameter separator and the period as the decimal separator. If the examples fail with syntax errors in your workbook, <u>check</u> your regional settings to verify which punctuation to use.

#### Formula auto-refresh

When your sheet auto-refreshes, Excel automatically recalculates some or all formulas on the sheet, including GPT formulas. For each GPT formula:

- If the <u>GPT formula cache</u> is enabled for the workbook, Excel reuses the formula's previously generated result from the cache.
- If the cached result has expired, or if you have the cache disabled, Excel runs the formula normally.

In Excel, the following triggers cause a sheet to auto-refresh:

Recalculation trigger	What gets recalculated
Insert, move, or delete a column	All formulas on the sheet
Insert, move, or delete a row	All formulas on the sheet
Filter rows by column	All formulas on the sheet
Hide and unhide rows	Formulas in the selected rows
Sort rows	Formulas in the selected rows
Move a formula to a different cell	All formulas on the sheet
Undo the deletion of a formula from a cell	Restored formula

To prevent GPT formulas from being recalculated, <u>replace the formulas with their results</u>.

# When to use bulk AI tools

Consider using bulk AI tools instead of GPT functions if:

- You want AI responses saved as plain text in cells. Bulk AI tools fill cells with static text values, or constants, so you don't need to replace any formulas. You also avoid <u>formula autorefresh</u>, reducing the risk of unintended data changes.
- You want better tracking information about the progress of AI requests. Bulk AI tools provide a live progress tracker that shows you how many rows have been successfully processed, how many have resulted in an error, and how much time has elapsed.
- Your formulas regularly become stuck in the #BUSY! state.

# What's next

- Discover all GPT functions available in GPT for Excel.
- Learn how to use each GPT function with a real-world example.
- Try out example use cases for different <u>business applications</u> and <u>product capabilities</u>.
- Browse all our GPT function resources.
- Select the model that best fits your needs.
- Configure the model settings to customize how the currently selected model operates.

# **Create GPT formulas with GPT for Excel**

Delay and chain GPT functions, and learn how to use different GPT functions by example.

#### **Control GPT formula execution**

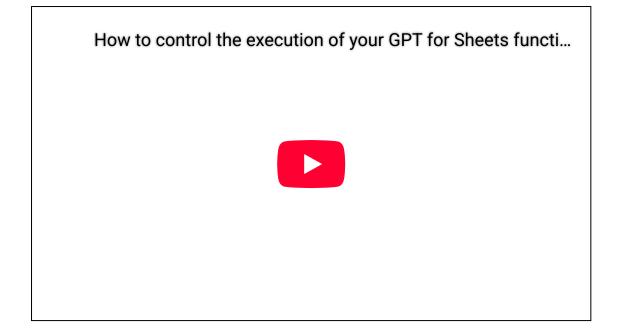
Delay or sequence the execution of GPT formulas in Microsoft Excel.

# **GPT formula examples**

Examples for all the functions in the GPT for Excel.

# **Control GPT formula execution in Excel**

You might want to delay the execution of your <u>GPT for Excel</u> functions until your workbook is ready. Or you might want to sequence the execution of multiple chained calls. Avoid running into errors or going over your <u>rate limits</u> by learning how to keep control over the executions of your <u>GPT functions</u> in Microsoft Excel in this video.



# **GPT formula examples for Excel**

See GPT functions in action with real-world examples using some of the functions included in <u>GPT</u> for Excel.



To try out the examples, download our GPT for Excel examples template, and open it in Excel.

# **Rewrite and generate**

Use GPT functions to rewrite or create content adapted to your goals:

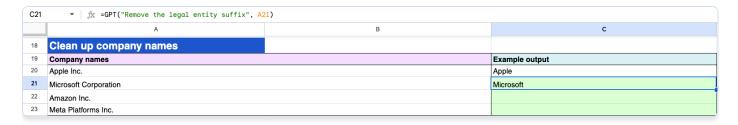
- Rephrase existing text by adjusting length, style, grammar or tone.
- Create content that matches your audience needs using the perfect level of creativity.

# **Rewrite or rephrase content**

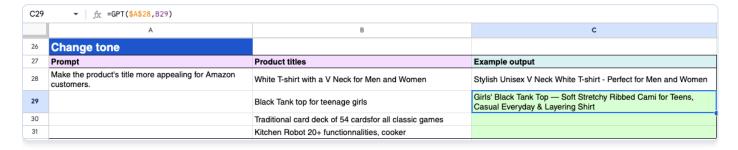
Shorten product names:



#### Clean up text:



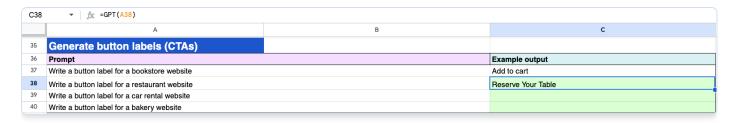
#### Change tone:



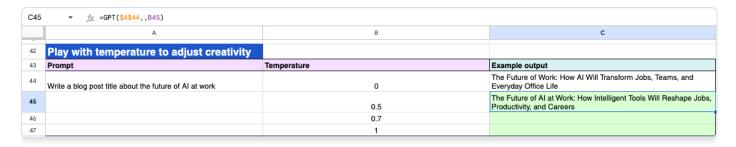
Learn more on GPT.

#### **Create content**

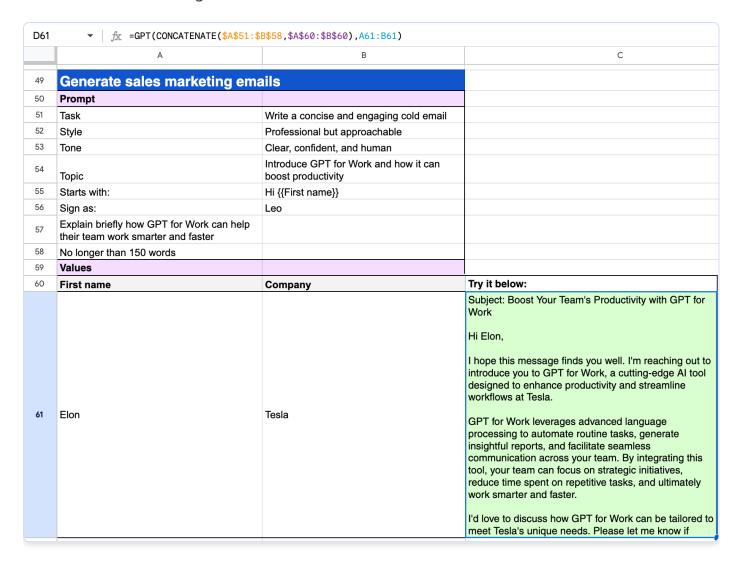
#### Generate button labels (CTAs):



#### Make your content more or less creative:



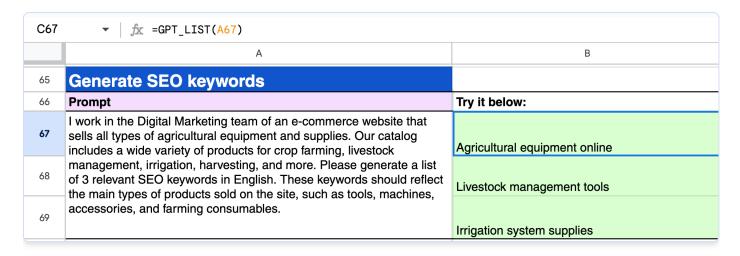
### Generate sales marketing emails:



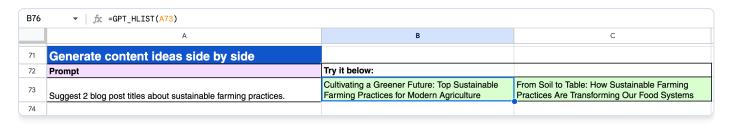
Learn more on GPT.

# **Generate multiple outputs (vertical vs. horizontal)**

Generate SEO keywords:



Generate content ideas side by side:



Learn more on GPT\_LIST and GPT\_HLIST.

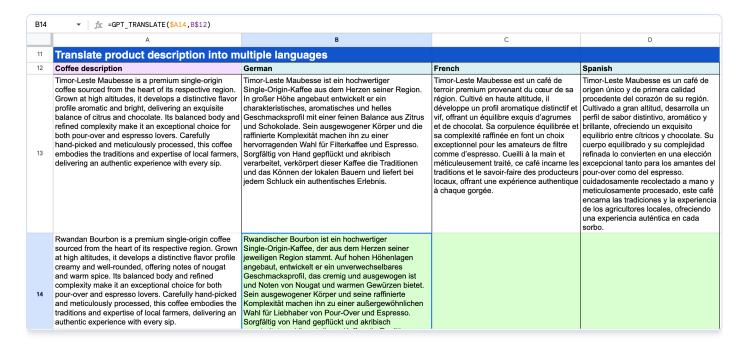
# **Translate**

Leverage large language models for your machine translation tasks and benefit from:

- **High performance**: AI models from leading providers (such as OpenAI) support translation across a wide range of language pairs. See all supported models.
- **Support for many languages**: The full list of supported language pairs isn't public, but ChatGPT is known to work in 80+ languages, with varying accuracy depending on language and context.
- Integration of your corporate terminology: For on-brand, consistent translations.

# Translate with GPT\_TRANSLATE

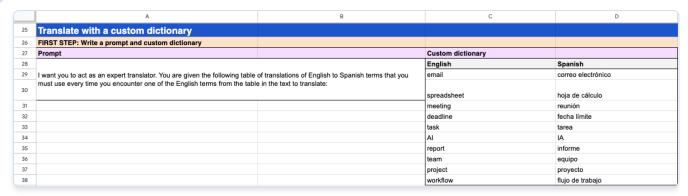
Translate descriptions:



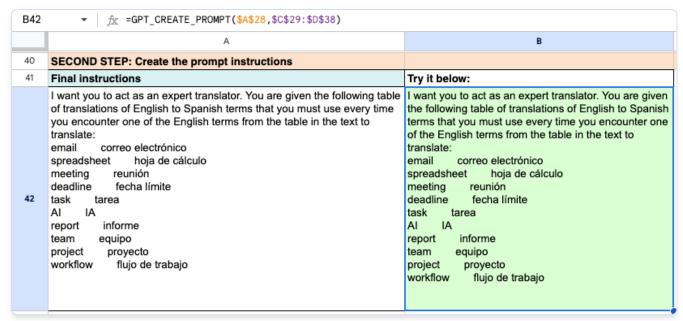
# **Translate with specific instructions**

Translate with a custom dictionary:

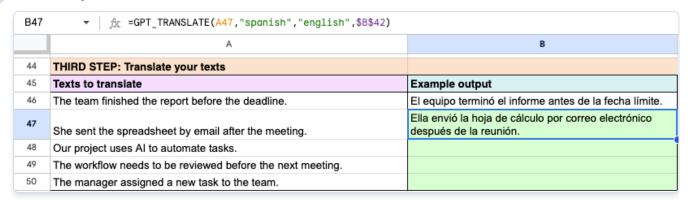
1 Write a prompt and custom dictionary.



2 Create the prompt instructions.



3 Translate your texts.



Your texts are translated in the target language, and the translations comply with the terminology you provided.

Learn more on GPT\_TRANSLATE.

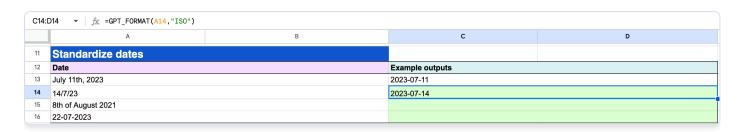
# **Prepare data**

Free up your teams from tedious data preparation so they can concentrate on high-value data analysis:

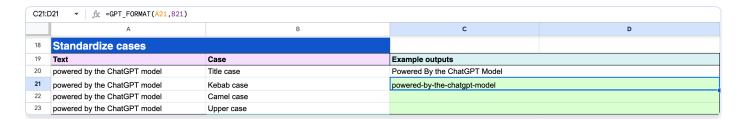
- Basic data cleaning tasks include formatting data according to known standards or by following examples you set.
- More advanced tasks like named entity extraction, which traditionally demanded a specific pattern-based approach, are also an option.

# Format data with GPT\_FORMAT

Standardize dates:



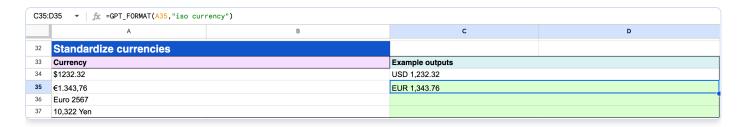
#### Standardize cases:



#### Standardize phone numbers:



#### Standardize currencies:



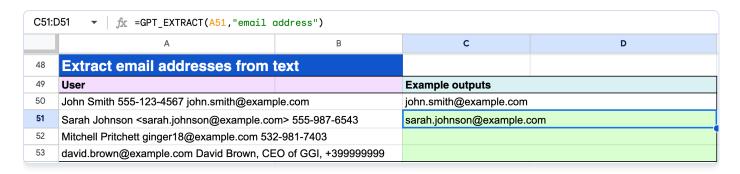
Learn more on GPT\_FORMAT.

# **Extract data with GPT\_EXTRACT**

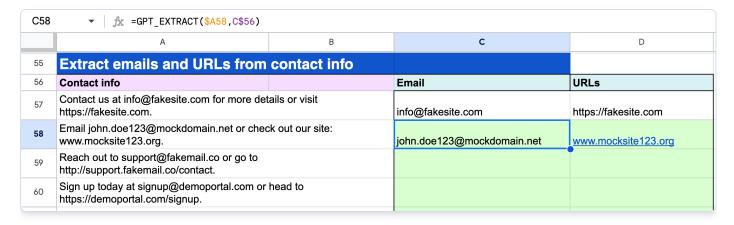
#### Extract postal addresses:



#### Extract email addresses:



Extract emails and URLs:



Learn more on GPT\_EXTRACT.

# **Analyze**

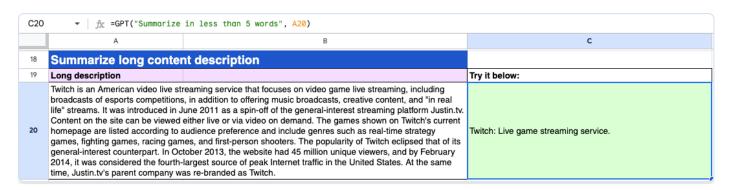
Get instant insights from large volumes of content through automated summarizing, categorization, tagging, and sentiment analysis.

#### Summarize data with GPT

Summarize customer tickets across languages:



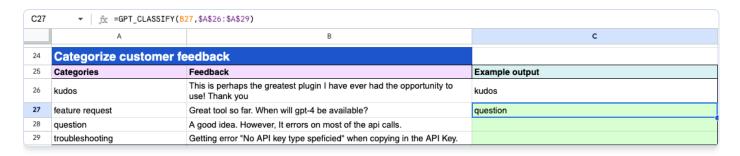
#### Summarize long descriptions:



Learn more on GPT.

# Categorize or classify data with GPT\_CLASSIFY

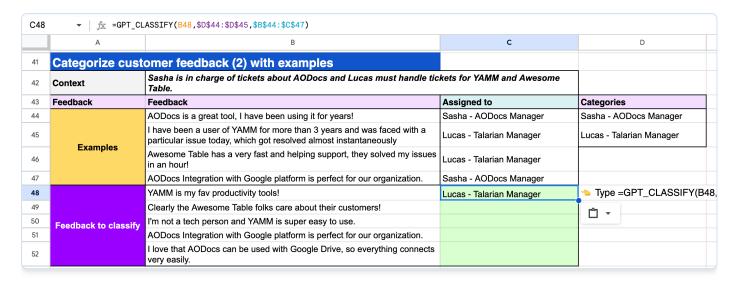
#### Categorize customer feedback:



## Analyze sentiment:



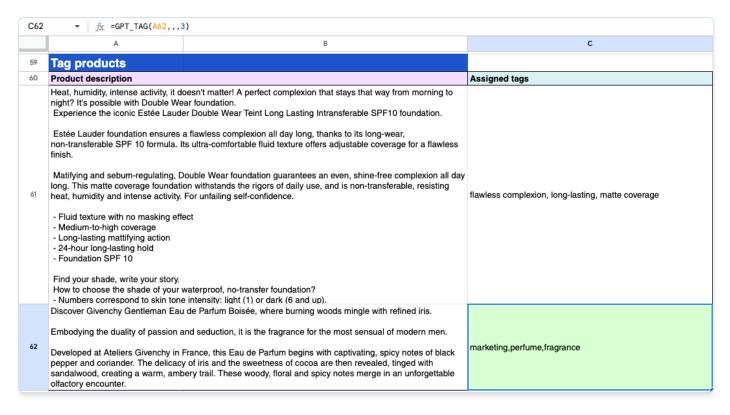
## Categorize customer feedback with examples:



Learn more on GPT\_CLASSIFY.

# Assign tags with GPT\_TAG

Tag products:



Learn more on GPT\_TAG.

# Analyze images with GPT\_VISION

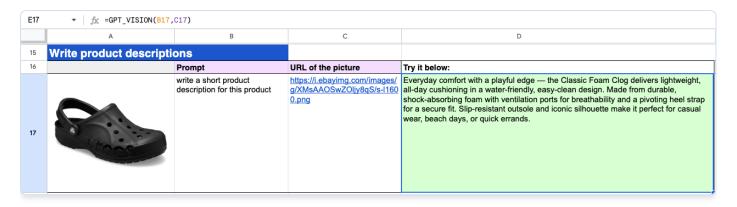
Applies a prompt to an image. GPT\_VISION is the only function that can process images. For example, you can ask a question about the image, generate a description or generate alt text for images.

**i** INFO

To use GPT\_VISION, you need to select a model that supports images (Vision).

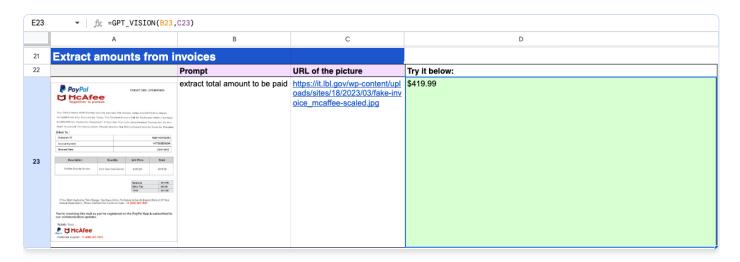
# Create content from an image

Write product descriptions:



# **Extract information from an image**

#### Extract amounts from invoices:



#### Extract info from an ID:

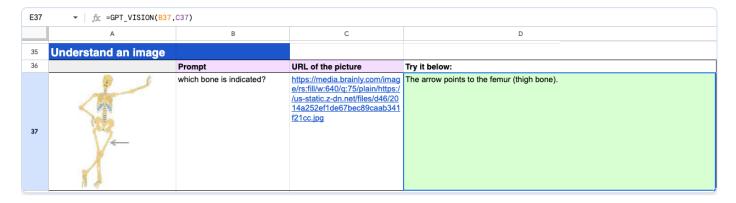


# Explain elements in an image

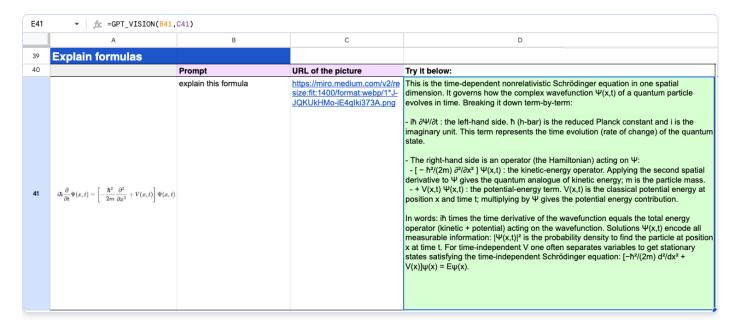
#### Identify elements of an image:



#### Understand an image:



#### **Explain formulas:**



Learn more on GPT\_VISION.

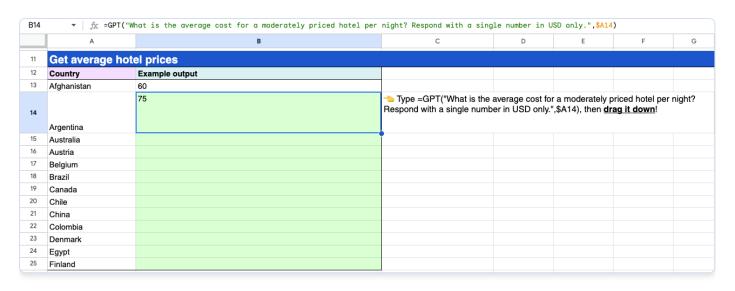
# Search the web

# Get answers from the web with GPT

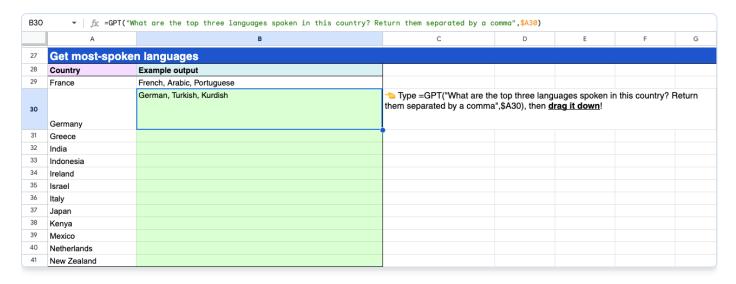
(i) INFO

To search the web with a GPT function, select a model with web search capabilities.

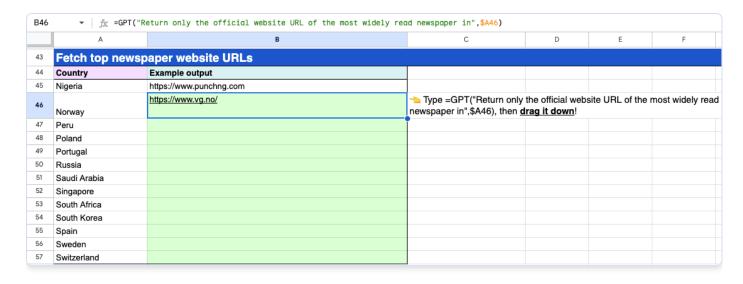
Get average hotel prices:



Get most-spoken languages:



# Fetch top newspaper website URLs:



# Manage GPT formulas from the sidebar in GPT for Excel

Use the GPT for Excel sidebar to manage your GPT formulas and avoid unexpected changes and costs.

# **Retry GPT formulas on error**

Re-execute all formulas on error in your current sheet.

# **Regenerate GPT formula results**

Re-execute selected formulas in your current sheet.

# Replace GPT formulas with their results

Replace GPT formulas with their results to prevent recalculation permanently.

#### Manage GPT formula cache for your workbook

Minimize costs by reusing previous results.

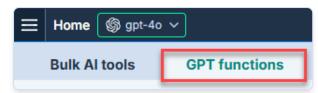
#### **Disable GPT formulas for your workbook**

Prevent the execution of GPT formulas in your workbook for an indefinite period of time.

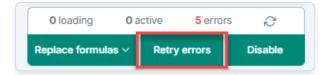
# Retry GPT formulas on error in GPT for Excel

After <u>troubleshooting GPT for Excel errors</u>, you can recalculate all GPT formulas in cells tagged with #ERROR! or #VALUE!.

1 In the sidebar, select **GPT functions**.



- 2 Check that the GPT formulas aren't disabled for your workbook.
- 3 Click **Retry errors**.



All GPT formulas that were on error in the current sheet are recalculated. If some errors persist, let us know by submitting a support request.

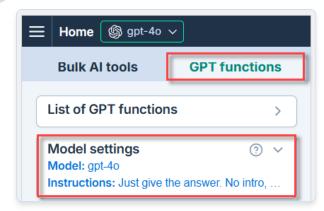


<u>Replace GPT formulas with their results in the selected cells</u> to prevent any further recalculation.

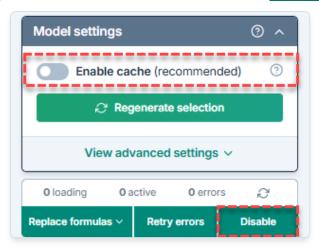
# Regenerate GPT formula results in GPT for Excel

Re-execute GPT formulas to update results in selected cells.

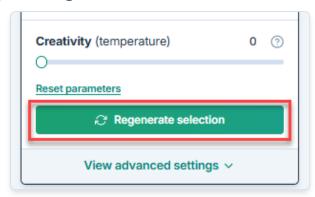
1 In the sidebar, select **GPT functions**, and click **Model settings**.



2 Check that the GPT formulas are not disabled and that caching is disabled for your workbook.



- 3 Select cells with active GPT formulas in the current sheet. Ensure all cells generated by formulas like GPT\_LIST are included to prevent data loss.
- 4 Click **Regenerate selection**.



5 (Optional) <u>Disable the formulas</u> to prevent recalculations in this sheet and the rest of the document.

GPT formula results within the selected cells are regenerated.

# Replace GPT formulas with their results in GPT for Excel

Convert GPT formulas to static values and prevent any further recalculation, either on a selected number of cells or across an entire sheet. If you need to recover the original formulas later, you can use the version history of your Microsoft workbook.

# Replace formulas manually

- 1 Select the cells that contain the GPT formulas.
- 2 Copy them by pressing **Ctrl+C** (or **Cmd+C** on Mac).
  - (i) NOTE

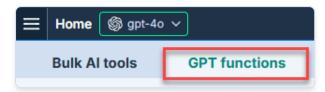
For GPT formulas with multi-row results, copy all rows with results, not just the formula row.

3 Paste the results as values by pressing Ctrl+Shift+V (or Cmd+Shift+V on Mac).

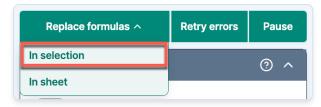
GPT formulas within the manually selected cells are replaced by their respective results.

# Replace formulas in selection

- 1 Select cells with active GPT formulas in the current sheet, ensuring all cells generated by formulas like GPT\_LIST are included to prevent data loss.
- 2 In the sidebar, select **GPT functions**.



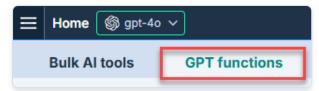
3 Choose **In selection** in the *Replace formulas* dropdown.



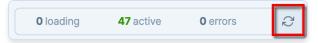
GPT formulas within the selected cells are replaced by their respective results.

# Replace formulas in entire sheet

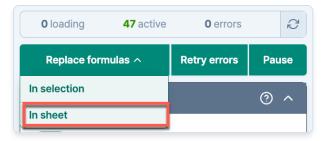
1 In the sidebar, select **GPT functions**.



2 Refresh the formula count to see the number of active GPT formulas in the current sheet. Formulas on error won't be replaced.



3 Choose **In sheet** in the *Replace formulas* dropdown.



All GPT formulas within the sheet are replaced by their corresponding results.

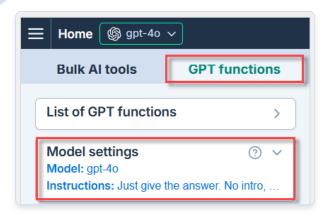
# Manage GPT formula cache for your workbook in GPT for Excel

Cache the results of your GPT formulas to minimize costs by reusing previous results, or disable caching to experiment with sidebar settings.

# Enable cache to save costs and reuse previous results when reloading a formula

You can enable cache usage to avoid being charged for reusing formulas. This mode ensures that results for the same formula are retrieved from the cache instead of generating new results.

1 In the sidebar, select **GPT functions**, and click **Model settings**.



2 Click on the **Enable cache** switch to start saving results.



Caching is enabled for GPT formula results in your workbook. You can now save costs and reuse all future results of your GPT formulas.

### Disable cache to experiment with sidebar settings

If you want to quickly experiment with various settings, you can disable cache usage. Disabling your cache doesn't clear its content. It stops storing new executions and fetching existing ones from it.

- 1 (Optional) Replace GPT formulas with their results if you want to preserve the current results.
- 2 In the sidebar, select **GPT functions**, and click **Model settings**.

3 Click on the **Enable cache** switch to put it in disabled state.

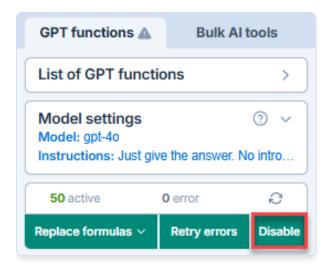


Caching is disabled for GPT formula results in your workbook. Each time the formulas are reloaded, they will be executed again, incur costs, and may return new results.

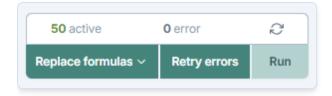
# Disable GPT formulas for your workbook in GPT for Excel

If the GPT for Excel <u>cache</u> is disabled, reloading active GPT formulas triggers their re-execution, which incurs costs and potentially returns new results. To preserve your results and avoid additional costs, disable GPT formula execution in your workbook.

In the sidebar, select **GPT functions**, and click **Disable**.



The button label changes to **Run**.



The GPT formulas in your workbook will not be executed until you click **Run**. If your workbook contains multiple sheets, the GPT formulas across all these sheets are prevented from executing.

# All GPT functions in GPT for Excel

Discover all custom functions in <u>GPT for Excel</u>, along with simple examples and an extensive list of parameters. If you're looking for more examples, download our <u>GPT for Excel examples template</u>, and open it in Excel as a new workbook.





To generate responses based on fresh web search data, use a model with web search capabilities (indicated by the  $\bigoplus$  icon in the model switcher).

### **GPT function**

The simplest function included in GPT for Microsoft Excel. Outputs the result in a single cell.



To process images, use GPT\_VISION.

Syntax	=GPT(prompt, [value], [temperature], [model])
Copy/paste example	=GPT("Write a tagline for an ice cream shop.")

Syntax	=GPT(prompt, [value], [temperature], [model])
⚠ Localization	In some locales, you might need to use ";" to separate parameters instead of ","
Output	A response to your prompt in a single cell

#### **Parameters**

Parameter	Definition
prompt (cannot be empty)	<ul> <li>Instruction provided to the AI to generate a result in a single cell.</li> <li>The prompt parameter can be:</li> <li>A string: "Write a tagline for an ice cream shop."</li> <li>A cell: A1</li> <li>A range of cells: A1:C3</li> </ul>
(optional) value	Text, cell or range you want your prompt to apply to
(optional) temperature, model	See <u>temperature</u> and model.

See more <u>usage examples</u>.

# **GPT\_CLASSIFY function**

Classifies a piece of text into a single category selected from a predefined list of categories.

Syntax	=GPT_CLASSIFY(value, categories, [examples], [temperature], [model])
Copy/paste example	=GPT_CLASSIFY("banana", "fruit, vegetable")

Syntax	=GPT_CLASSIFY(value, categories, [examples], [temperature], [model])
▲ Localization	In some locales, you might need to use ";" to separate parameters instead of ","
Output	The best applicable category

### **Parameters**

Parameter	Definition
value (cannot be empty)	Input text to classify.  The value parameter can be:  • A string: "banana"  • A cell: A1  • A range of cells: A1:C3
categories (cannot be empty)	Comma-separated categories or range of categories to choose from.  Only the most relevant category will be returned.
(optional) examples	A table of examples in two columns. The first column should contain the inputs and the second column should contain the outputs.
(optional) temperature, model	See <u>temperature</u> and model.

See more <u>usage examples</u>.

# **GPT\_EDIT** function

Applies the given task to the given text. The default task is to fix grammar and spelling.

### How to use

Syntax	=GPT_EDIT(text, [task], [temperature], [model])
Copy/paste example	=GPT_EDIT("For sum reezon thoose nunsberz arnt addin up")
⚠ Localization	In some locales, you might need to use ";" to separate parameters instead of ","
Output	The edited text in a single cell

### **Parameters**

Parameter	Definition
text (cannot be empty)	<ul> <li>Input text to edit.</li> <li>The text parameter can be:</li> <li>A string: "For sum reezon thoose nunsberz arnt addin up"</li> <li>A cell: A1</li> <li>A range of cells: A1:C3</li> </ul>
(optional) task	Text, cell or range specifying how the text should be edited. Defaults to fixing grammar and spelling. Other examples:  • "Make it funnier"  • "Make it shorter"  • "Make it sound formal"  • "Add an ending"
(optional) temperature, model	See <u>temperature</u> and model.

See more <u>usage examples</u>.

# **GPT\_EXTRACT function**

Extracts specific elements from text, such as names, dates, email addresses, URLs, or product attributes. Outputs as comma-separated values.

#### How to use

Syntax	GPT_EXTRACT(text, to_extract, [temperature], [model])	
Copy/paste example	=GPT_EXTRACT("I worked 5 years at Amazon.com and then 3 years at Apple", "companies")	
▲ Localization	In some locales, you might need to use ";" to separate parameters instead of ","	
Output	The extracted entities as comma-separated values in a single cell	

Parameter	Definition
text (cannot be empty)	<ul> <li>Input text to extract data from.</li> <li>The text parameter can be:</li> <li>A string: "I worked 5 years at Amazon.com and then 3 years at Apple"</li> <li>A cell: A1</li> <li>A range of cells: A1:C3</li> </ul>
to_extract (cannot be empty)	Text, cell or horizontal range specifying what you want to extract.  Examples:  "companies"  B3:E3
(optional) temperature, model	See <u>temperature and model</u> .

See more usage examples.

# **GPT\_FORMAT function**

Formats dates, currencies, addresses, names, etc. Fixes capitalization. And so much more.

#### How to use

Syntax	=GPT_FORMAT(input, target_format, [source_format], [temperature], [model])	
Copy/paste example	=GPT_FORMAT("14 February 71", "iso")	
<b>↑</b> Localization	In some locales, you might need to use ";" to separate parameters instead of ","	
Output	The converted input in a single cell unless it is converted a table, which outputs a table	

Parameter	Definition
input (cannot be empty)	Input text to format.  The input parameter can be:  • A string: "14 February 1971"  • A cell: A1  • A range of cells: A1:C3
target_format (cannot be empty)	Target format for the input. Examples: "iso", "currency iso", "international phone number", "lowercase/uppercase/camelcase/snake case/title case/sentence case"
(optional) source_format	Source format of the input. Optional, but including it can yield better results.

Parameter	Definition
(optional) temperature, model	See <u>temperature</u> and model.

See more usage examples.

# **GPT\_LIST / GPT\_HLIST function**

Like GPT, but outputs the results in a column. Very practical when the output is a list.

- Use GPT\_LIST to return options listed vertically.
- Use GPT\_HLIST to return options listed horizontally.

### How to use

Syntax	=GPT_LIST(prompt, [value], [temperature], [model])
Copy/paste example	=GPT_LIST("Give me 5 good short ads about spreadsheets.")
<b>↑</b> Localization	In some locales, you might need to use ";" to separate parameters instead of ","
Output	As many responses to your prompt as you asked, one response per cell

Parameter	Definition
prompt (cannot be empty)	<ul> <li>Instruction provided to the AI to generate a list.</li> <li>The prompt parameter can be:</li> <li>A string: "Give me 5 good short ads about spreadsheets."</li> <li>A cell: A1</li> <li>A range of cells: A1:C3</li> </ul>

Parameter	Definition
(optional) value	Text, cell or range you want your prompt to apply to
(optional) temperature, model	See <u>temperature and model</u> .

See more usage examples.

# **GPT\_MATCH function**

Matches the values of two columns by similarity.



#### (i) INFO

Regardless of the model you select in the model switcher, this function uses text-embeddingada-002, for a fixed cost of \$0.25 per 1M tokens.

#### **MARNING**

- GPT for Excel settings do not apply to the GPT\_MATCH function.
- You can only match up to about 1,000 rows at a time.

Syntax	=GPT_MATCH(search_keys, lookup_range, [confidence], [stats], [top_k])
Copy/paste example	=GPT_MATCH(A1:A10,B1:B4)
<b>A</b> Localization	In some locales, you might need to use ";" to separate parameters instead of ","
Output	A column of the best matches to each value in the range

#### **Parameters**

Parameter	Definition
search_keys (cannot be empty)	The values that you want to look for in the range
lookup_range (cannot be empty)	The range in which to look for values that are similar to search keys
confidence (optional)	Set a similarity threshold: only values with a superior similarity score are matched. Must be comprised between 0 and 1
stats (optional)	"true" to display similarity scores
top_k (optional)	Number of matching values to return per search_key (default: 1 - only the best match)

# **GPT\_SPLIT / GPT\_HSPLIT function**

Splits text semantically, such as by section, paragraph, sentence, customer...

- Use GPT\_SPLIT to return outputs listed vertically.
- Use GPT\_HSPLIT to return outputs listed horizontally.

Syntax	=GPT_SPLIT(text, split_by, [temperature], [model])
Copy/paste example	=GPT_SPLIT("Hello! How are you? Have you heard of GPT for Work?", "sentences")
<b>↑</b> Localization	In some locales, you might need to use ";" to separate parameters instead of ","
Output	Input text is split as requested, one element per cell

### **Parameters**

Parameter	Definition
text (cannot be empty)	<ul> <li>Input text to split.</li> <li>The text parameter can be:</li> <li>A string: "Hello! How are you? Have you heard of GPT for Work?"</li> <li>A cell: A1</li> <li>A range of cells: A1:C3</li> </ul>
split_by (cannot be empty)	<ul> <li>How to split the text. Examples:</li> <li>sections</li> <li>paragraphs</li> <li>sentences</li> <li>punctuation</li> </ul>
(optional) temperature, model	See <u>temperature</u> and model.

# **GPT\_TABLE function**

Like GPT, but outputs the results in a table. Very practical when the output is a table.

Syntax	=GPT_TABLE(prompt, [head], [inputs], [temperature], [model])
Copy/paste example	=GPT_TABLE("top 10 most eaten fruits and their nutrition data")
▲ Localization	In some locales, you might need to use ";" to separate parameters instead of ","
Output	The response to your prompt in the shape of a table

### **Parameters**

Parameter	Definition
prompt (cannot be empty)	<ul> <li>Instruction to generate a table.</li> <li>The prompt parameter can be:</li> <li>A string: "top 10 most eaten fruits and their nutrition data"</li> <li>A cell: A1</li> <li>A range of cells: A1:C3</li> </ul>
(optional) head	Range containing at least one row. the first row should be headers, the following rows can be used to specify examples If left empty, headers will be generated automatically.
(optional) inputs	Range containing partial rows to complete with GPT_TABLE
(optional) temperature, model	See temperature and model.

# **GPT\_TAG** function

Applies user-defined tags to text or automatically suggests relevant tags if none are specified.

Syntax	=GPT_TAG(value, [tags], [examples], [top_k], [temperature], [model])
Copy/paste example	=GPT_TAG("I love chocolate", "food, positive, negative")
<b>A</b> Localization	In some locales, you might need to use ";" to separate parameters instead of ","
Output	The applicable tags as csv in a single cell

#### **Parameters**

Parameter	Definition
value (cannot be empty)	Input text to tag.  The value parameter can be:  • A string: "I love chocolate"  • A cell: A1  • A range of cells: A1:C3
(optional) tags	Comma-separated tags or range of tags applicable. If left empty, GPT_TAG will automatically come up with the tags
(optional) top_k	Maximum number of tags to return
(optional) examples	A table of examples in two columns. The first column should contain the inputs and the second column should contain the outputs.
(optional) temperature, model	See <u>temperature</u> and model.

See more usage examples.

# **GPT\_TRANSLATE** function

Translates text from one language to another. Works better if you specify the source language.

Syntax	=GPT_TRANSLATE(text, [target_language], [source_language], [instructions],[temperature], [model])	
Copy/paste example	=GPT_TRANSLATE("Cool off with our delicious treats!", "spanish")	
⚠ Localization	In some locales, you might need to use ";" to separate parameters instead of ","	

Syntax	=GPT_TRANSLATE(text, [target_language], [source_language], [instructions],[temperature], [model])	
Output	The requested translation in a single cell	

#### **Parameters**

Parameter	Definition	
	Input text to translate.	
text (cannot be empty)	<ul> <li>The text parameter can be:</li> <li>A string: "Cool off with our delicious treats!"</li> <li>A cell: A1</li> <li>A range of cells: A1:C3</li> </ul>	
(optional) target_language	Language of the output. Examples: "spanish", "chinese", "french". Defaults to "english".	
(optional) source_language	Language of the input. Example: "english"	
(optional) instructions	Additional instructions for the translation. Can include a dictionary of translations.	
(optional) temperature, model	See temperature and model.	

See more <u>usage examples</u>.

# **GPT\_VISION** function

Applies a prompt to an image. For example you can ask a question about the image, ask for a description of it, or generate alt text for images. <u>Learn more.</u>

- i INFO
- GPT\_VISION is the only function that accepts images as input.
- If you want to use GPT\_VISION, you must use a <u>vision model</u>, like gpt-4.1.

### How to use

Syntax	=GPT_VISION(prompt, image_url, [high_res], [temperature], [model])		
Copy/paste example	=GPT_VISION("Write a short description for this product", A1, , , "gpt-4.1")		
<b>^</b> Localization	In some locales, you might need to use ";" to separate parameters instead of ","		
Output	A response to your prompt according to the information extracted from the image		

Parameter	Definition
prompt (cannot be empty)	<ul> <li>Instruction provided to the AI to analyze an image.</li> <li>The prompt parameter can be:</li> <li>A string: "Write a short description for this product"</li> <li>A cell: A1</li> <li>A range of cells: A1:C3</li> </ul>
image_url	Link to the image you want the AI to analyze. Supported formats are PNG, JPEG, non-animated GIF.  The image_url parameter can be:  • A string:  "https://static.nike.com/a/images/t_PDP_1280_v1/f_auto,q_auto:e6393-4af6-abbc-4f1acaa6ed94/air-max-dawn-womens-shoes-224mWf.png • A cell: A4
(optional) high_res	How the AI processes the image and generates its textual understanding. Possik true, false, and auto (default). Learn more.
(optional) temperature, model	See <u>temperature and model</u> .

See more usage examples.

# **GPT\_WEB function**

#### (i) INFO

- The GPT\_WEB function is deprecated. We recommend using models with web search capabilities (indicated by the icon in the model switcher) with any GPT function instead. See our web search guide for more details.
- If you want to use GPT\_WEB, you must select the Perplexity Sonar model in the model switcher or add it as a function parameter. See our troubleshooting guide for more details.

#### How to use

Syntax	=GPT_WEB(prompt, [value])		
Copy/paste example	=GPT_WEB("Who won the last presidential elections in Argentina?")		
▲ Localization	In some locales, you might need to use ";" to separate parameters instead of ","		
Output	A response to your prompt based on recent web search data		

#### **Parameters**

Parameter	Definition
prompt (cannot be empty)	<ul> <li>Instructions provided to the AI to generate results based on recent web search data. Provide instructions in English for better results.</li> <li>The prompt parameter can be:</li> <li>A string: "Who won the last presidential elections in Argentina?"</li> <li>A cell: A1</li> </ul>
(optional) value	Text, cell, or range you want your prompt to apply to

See more usage examples.

# **GPT\_CREATE\_PROMPT** helper function

Like the native **CONCAT** function, but inserts spaces and newlines automatically. Helps you create a prompt from scattered, disjointed cells and ranges. You can then use that prompt in GPT functions. This function does not call any AI provider's API and thus does not incur any cost.

#### How to use

Syntax	=GPT_CREATE_PROMPT(arg1, [arg2], [arg3], [argn])		
Copy/paste example	=GPT_CREATE_PROMPT(A1:B1, A2, C3:D5, E1:E6)		
⚠ Localization	In some locales, you might need to use ";" to separate parameters instead of ","		
Output	A prompt ready to use in GPT, GPT_LIST or GPT_TABLE		

#### **Parameters**

Parameter	Definition	
arg1 (cannot be empty)	<ul><li>Cell or range to concatenate. For example:</li><li>A1</li><li>A1:C3</li></ul>	
(optional) arg2 - argn	<ul><li>Cell or range to concatenate. For example:</li><li>A2</li><li>G2:H4</li></ul>	

# temperature and model

These parameters are present in most GPT functions. They are always optional.

For example with the GPT function, you can set:

- temperature to 0.1
- model to "gpt-4o-mini"

You can also <u>set these values from the sidebar</u> very easily. In this case, they become the default values for all future executions.

Parameter	Definition
(optional) temperature	<ul> <li>Number between 0 and 1 that governs the creativity of the output:</li> <li>O - Strictly according to the prompt</li> <li>O.5 - Slightly creative</li> <li>1 - Very creative</li> </ul>
	(i) <b>NOTE</b> In some locales, you might need to use "0,5" (comma) instead of "0.5" (period).
(optional) model	Name of the model surrounded by quotes. You can find model names in the model switcher in the sidebar.

# **Configuration of GPT for Excel**

Configure the GPT for Excel settings for your workbook. Select a model, specify global instructions, adjust the creativity level, and get even more control with advanced settings.

#### Select a model

Select the right AI model for your work, with or without an API key.

#### **Add global instructions**

Assign a very precise role to the AI to define its field of expertise and how it responds.

#### Set the creativity level

Define how standard (or not) your output is expected to be.

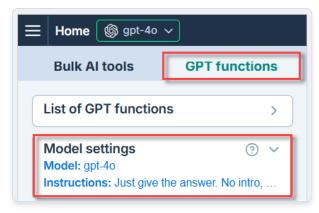
#### **Adjust advanced settings**

Get greater control over AI-generated output in Microsoft Excel.

# Add global instructions in GPT for Excel

Provide global instructions to add preferences or requirements that you'd like the AI to consider when generating its responses. All <u>GPT for Excel</u> operations in the current workbook will take these instructions into account.

1) In the sidebar, select **GPT functions**, and click **Model settings**.



2 Select the type of instructions you'd like to add and edit them if needed.

GPT for Excel uses the global instructions to generate all responses for GPT functions and bulk AI tools in the current workbook.

### (i) INFO

When cache is enabled, existing GPT formulas will not automatically update to the new instructions when you re-execute them.

To re-execute an existing formula with the new instructions:

- Change a parameter in the formula and press Enter.
- Disable the cache, select the formula, and regenerate its results.

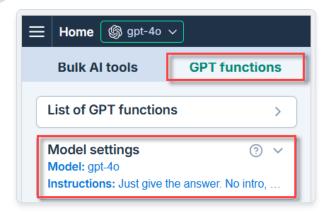
### What's next

- Run bulk AI tools and execute GPT functions in GPT for Excel.
- Configure other settings to customize how the language model operates.

# Set the creativity level in GPT for Excel

Set the **creativity level** that will be used for all <u>GPT for Excel</u> operations in your workbook to define how standard (or not) your output is expected to be. You can find out more about the temperature setting, used by OpenAI to set a creativity level, in our Temperature guide.

1) In the sidebar, select **GPT functions**, and click **Model settings**.



2 Use the slider to set **Creativity** between 0 and 1.

GPT for Excel uses the creativity level to generate all responses for GPT functions and bulk AI tools.



When cache is enabled, existing GPT formulas will not automatically update to the new creativity level when you re-execute them.

To re-execute an existing formula with the new creativity level:

- 1 Set the temperature parameter directly in the formula.
- 2 Press Enter to re-execute the formula.

### What's next

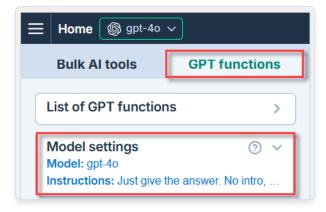
- Run bulk AI tools and execute GPT functions in GPT for Excel.
- Configure other settings to customize how the language model operates.

# Adjust advanced settings in GPT for Excel

Adjust the advanced settings in <u>GPT for Excel</u> to have greater control over generated output in Microsoft Excel. You can learn more in the OpenAI API documentation.

Term	Definition			
Token	Tokens can be thought of as pieces of words. During processing, the language model breaks down both the input (prompt) and the output (completion) texts into smaller units called tokens. Tokens generally correspond to ~4 characters of common English text. So 100 tokens are approximately worth 75 words. See how text is split into tokens.			
Тор Р	Helps adjust creativity level – Lower values result in more focused output, while higher values allow for more creative responses.			
Frequency penalty (not available for Claude models)	Penalizes tokens based on their frequency in the text so far – Higher values discourage the model from repeating the same tokens too frequently, as the more they appear in the text, the more penalized they get.			
Presence penalty (not available for Claude models)	Penalizes new tokens based on whether they appear in the text so far – Higher values encourage the model to use new tokens that are not penalized.			

1 In the sidebar, select **GPT functions**, and click **Model settings**.



- 2 Open the **View advanced settings** dropdown.
- 3 Use the corresponding sliders to set the values for:
  - Top P: Adjust creativity by setting the value between 0 and 1.
     Set the creativity level to 1 when the value for Top P is lower than 1.

• **Frequency penalty**: Set a penalty between 0 and 2 to apply to tokens each time they are repeated in the result.

• **Presence penalty**: Set a one-time penalty between 0 and 2 for tokens that appear more than once in the result.

GPT for Excel uses the selected model to generate all responses for GPT functions and bulk AI tools.



When cache is enabled, existing GPT formulas will not automatically update to the new advanced settings when you re-execute them.

To re-execute an existing formula with the new advanced settings:

- Change a parameter in the formula and press Enter.
- Disable the cache, select the formula, and regenerate its results.

### What's next

- Run bulk AI tools and execute GPT functions in GPT for Microsoft Excel.
- Configure other settings to customize how the language model operates.

# Search the web with GPT for Excel

Search the web directly in <u>GPT for Excel</u> using web search models. These models use fresh web search data, which allows you to generate up-to-date responses about companies, current events, facts, and more, directly in your workbook. You can also fetch content from specific URLs to extract information from web pages.

### Choose the right web search model

Choose a web search model that best fits your use case.

#### Web search

Get information that is not in the model's built-in knowledge:

- **Example:** Finding the current CEO of a company.
- How it works:

All web search models can go beyond their built-in knowledge by accessing information from search engines, like Google or Bing. This allows models, which have compressed historical knowledge, to explore topics in greater depth, with more current data or with a specific focus.

Web search models do not fetch full page content. Instead, they read search result snippets, like you would see on a Google search results page. The snippets are added to the context of the models, so they can use the information to generate a response.

- · Recommended models:
  - Sonar for quick results (cheapest).
  - Sonar Pro or Sonar Reasoning or GPT-4o Search models for high quality results.
  - o Gemini models with Web search for Google search quality (most expensive).

### **Content fetching**

Focus on specific URLs and extract content from them:

- **Example:** Extracting the product name and price from the URL of a product page.
- **How it works:** Some web search models can access the full content from specific URLs. The full content is added to the context of the models, so they can use it to answer questions about the content or extract information from it.
- Recommended models:
  - o Gemini 2.5 models with URL context

### Click here for a list of all web search models supported by GPT for Excel.

Provider	Model	Without API key	With API key
	sonar	V	V
Perplexity	sonar-pro	×	V
Perplexity	sonar-reasoning	V	V
	sonar-reasoning-pro	×	V
	gemini-2.0-flash	×	V
	gemini-2.0-flash-lite	×	V
Google	gemini-2.5-flash	V	V
	gemini-2.5-flash-lite	×	V
	gemini-2.5-pro	×	V
	gpt-4o-mini-search-preview	V	V
OpenAI	gpt-4o-search-preview	V	V
	gpt-5-search-api	V	V

For detailed pricing, see AI providers and models.

### Use web search models

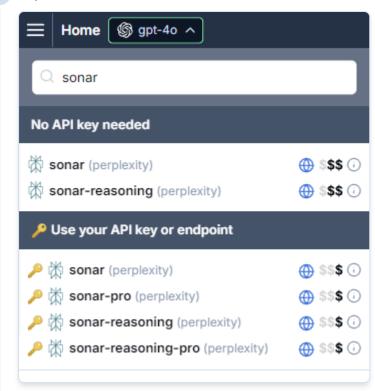
#### **Bulk tools**

Use bulk tools to perform web searches with any model that has web search capabilities (

).

- 1 Open GPT for Excel.
- 2 In the sidebar, select **Bulk AI tools** and click the tool you want to use.

3 Expand the model switcher and select a web search model (indicated by the 🌐 icon).



- 4 (Optional) Configure the <u>model-specific settings</u> in the sidebar. For Gemini models, make sure web search is enabled.
- 5 Set up your bulk tool run. For example, to set up a **Custom prompt** run:

	Field	Description	Example
1	Prompt to run for each row	Enter the prompt you want to run for each row.	Find and summarize reviews for: {{Event}}.
2	Put results in column	Select the column to put the results in. Cells in these columns won't be overwritten with the results if they contain text.	B: Information
3	Show sources	Enable this option to write source references in the column to the right of the results column.	Enabled

6 Click **Run rows**.

Your search results appear in the output column. If you enabled source references, they appear in the adjacent column.

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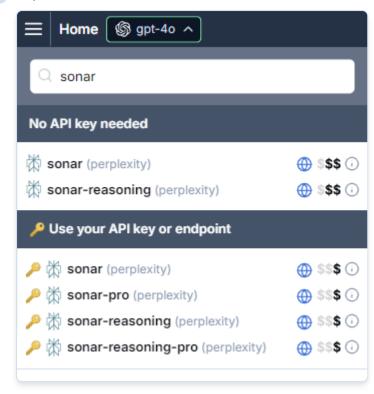
For instructions on how to use the tools, see Bulk AI tools.

#### **GPT functions**

Use GPT functions to perform web searches with any model that has web search capabilities (\(\phi\)).

#### Using the model switcher

- 1 Open GPT for Excel.
- 2 In the sidebar, select **GPT functions**.
- 3 Expand the model switcher and select a web search model (indicated by the 🌐 icon).



- 4 (Optional) Configure the <u>model-specific settings</u> in the sidebar. For Gemini models, make sure web search is enabled.
- 5 In the workbook, select a cell and write your formula:

```
=GPT("Find the Instagram handle for 'Berlin Salsa Festival 2025'.")
```

The formula uses the web search model selected in the model switcher.

### Specifying the model in the formula

- 1 Open GPT for Excel.
- 2 In the sidebar, select **GPT functions**.
- 3 (Optional) Configure the <u>model-specific settings</u> in the sidebar. For Gemini models, make sure web search is enabled.

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4 In the workbook, select a cell and write your formula, specifying a web search model directly in the formula, for example the Perplexity Sonar model:

```
=GPT("Find the Instagram handle for 'Berlin Salsa Festival 2025'.", , , "sonar")
```

The formula uses the web search model regardless of what's currently selected in the model switcher.

For instructions on how to write formulas with GPT functions, see GPT functions.

# **Model-specific settings**

Use the model-specific settings to configure the web search model for your use case.

### **Google Gemini**

Setting	Description	Example
Web search	Let Gemini decide when a Google search can improve the answer. This allows Gemini to provide more accurate answers and cite verifiable sources beyond its built-in knowledge. Enabling Web search incurs an additional search cost.	
URL context (Gemini 2.5 only)	Provide up to 20 URLs (pages, images, PDFs) to focus your search. No search cost is incurred, but the content retrieved from URLs counts as input tokens.	

# **Perplexity Sonar**

Setting	Description	Example
Context size	Choose how much content to retrieve from each source. Larger sizes produce richer and more detailed responses at a <u>higher cost</u> .	
<b>Domains</b> (Bulk tools only)	Specify up to 20 domains to generate responses based only on search results from these domains. Use simple domain names (e.g., wikipedia.org) without additional elements like https://orwwww.prefixes.	

# OpenAI GPT-4o Search

Setting	Description	Example
Context size	Choose how much content to retrieve from each source. Larger sizes produce richer and more detailed responses at a <u>higher cost</u> .	

# Use images in prompts in Excel

Use images in your prompts with GPT for Excel and vision models, which are multimodal and can process both text and images as input. For example, you can prompt images to describe them, or prompt images with additional text input from your spreadsheet to create product descriptions based on their photos and names.



TIP

Don't have image URLs yet? Learn how to host images on Google Drive for AI processing.



(i) INFO

Supported image formats: PNG, JPEG, WebP, non-animated GIF.

# Models that support vision

We recommend using **gpt-4.1** to analyze images, but you can use any vision model supported by GPT for Excel.

### Click here for a list of all vision models supported by GPT for Excel.

Provider	Model	Without API key	With API key
	gpt-4.1	V	V
	gpt-4.1-mini	V	V
	gpt-4.1-nano	V	V
	gpt-4o	V	V
	gpt-4o-mini	V	V
OpenAI	gpt-5	V	<b>V</b>
	gpt-5-chat	V	<b>~</b>
	gpt-5-mini	V	<b>~</b>
	gpt-5-nano	V	<b>~</b>
	o3	V	<b>~</b>
	o4-mini	V	V
	claude-3.5-haiku	×	V
Anthronia	claude-3.7-sonnet	×	V
Anthropic	claude-4-sonnet	V	V
	claude-4.5-sonnet	V	V

# **Prompt images only**



TIP

Want to use both text and images in your prompt? Skip to Prompt images with additional text input.

#### **Bulk AI tools vs. GPT functions**

To apply a prompt to images in your spreadsheet, you can either use the **Prompt images (Vision)** bulk AI tool or the **GPT\_VISION** function. Choose the method that best fits your needs:

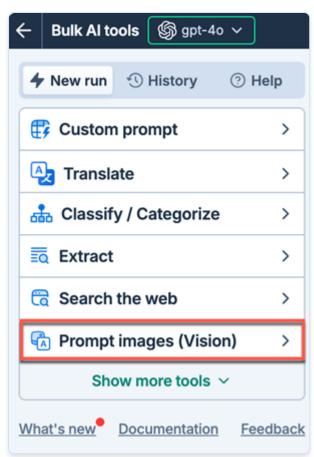
- Use the Prompt images (Vision) bulk AI tool if:
  - You want to apply a prompt to images in bulk (row-by-row).
  - You are working with thousands of rows.
  - You want to include up to 5 images per prompt.
  - A low image resolution is sufficient for your needs.
- Use the GPT\_VISION function if:
  - You're comfortable using spreadsheet formulas.
  - You're working with up to a few hundred cells or you want to prompt images for individual cells.
  - You need the flexibility of nested formulas or of combining GPT functions with native functions.
  - You only need to include a single image per prompt.
  - You want to control the image resolution.

### Prompt images (Vision) bulk AI tool

Use the **Prompt images (Vision)** bulk AI tool to apply a prompt to images in your spreadsheet.

1 Open GPT for Excel.

2 In the sidebar, select **Bulk AI tools** and click **Prompt images (Vision)**.

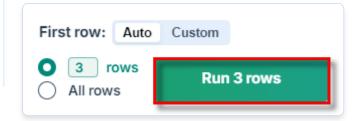


- 3 Expand the model switcher and select a vision model.
- 4 Set up your bulk tool run.

	Field	Description	Example
•	Prompt	Enter the prompt you want to apply to each image.	Write a short description of this product based on how it looks, how it's used, and its build quality.
2	Columns containing image URLs	Select up to five columns that contain image URLs. For each row, the tool processes all images present in the selected columns. URLs must be publicly accessible.	C: Front image, D: In-use image, E: Material detail image

	Field	Description	Example
3	Image resolution	Choose the level of detail for image processing:  • High: Better image understanding, higher latency and cost  • Low: Faster processing, lower cost  • Auto: Let the model decide (default)	Low
4	Put results in column	Select the column to put the results in. Cells in this column won't be overwritten with the results if they contain text.	F: Description

5 Click **Run rows**.



You have set up and run the **Prompt images (Vision)** bulk tool to apply a prompt to images in your spreadsheet.

For instructions on how to improve the results, see Prompt images (Vision) bulk AI tool.

## **GPT\_VISION function**

Use the **GPT\_VISION** function to describe or analyze images in individual cells.

## Using the model switcher

- 1 Open GPT for Excel.
- 2 In the sidebar, select **GPT functions**.
- 3 Expand the model switcher and select a vision model.
- 4 In the workbook, select a cell and write your formula:

=GPT\_VISION("Extract the coffee brand from this image. Normalize the brand name to title case.",C9)

The formula uses the vision model selected in the model switcher.

#### Specifying the model in the formula

- 1 Open GPT for Excel.
- 2 In the workbook, select a cell and write your formula, specifying a vision model directly in the formula:

```
=GPT_VISION("Extract the coffee brand from this image. Normalize the brand name to title case.",C9, , , "gpt-4.1")
```

The formula uses the vision model regardless of what's currently selected in the model switcher.

For instructions on how to write formulas with the GPT\_VISION function and set the image resolution, see GPT\_VISION.

## Prompt images with additional text input

## **Custom prompt bulk AI tool**

Use the **Custom prompt** bulk AI tool to combine a prompt with text and images from your spreadsheet.

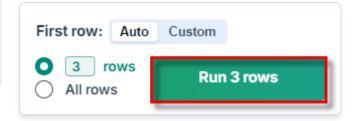
i INFO

In the **Custom prompt** bulk AI tool, the image resolution is fixed to Low and cannot be changed.

- 1 Open GPT for Excel.
- 2 In the sidebar, select **Bulk AI tools** and click **Custom prompt**.
- 3 Expand the model switcher and select a vision model.
- 4 Write your prompt and include any variables to be replaced with values from your spreadsheet.

Write a short description of {{Product name}} based on how it looks, how it's used, and its build quality.

- 5 Click **Configure image columns** to show the **Columns containing image URLs** dropdown, and select the columns that contain image URLs.
- 6 Click **Run rows**.



You have set up and run the **Custom prompt** bulk tool to include images and text from your spreadsheet.

For instructions on how to improve the results, see Custom prompt bulk AI tool.

## Host images on Google Drive for AI processing

To process an image in GPT for Excel, you need the direct URL of the image and the URL must be publicly accessible.

To host an image on Google Drive so that GPT for Excel can access and process it:

- 1 Upload the image to Google Drive.
- 2 Share the image publicly using the **Anyone with the link** option. For more information, see Google Drive Help.



To prevent other users from commenting or editing the image, set the access role to **Viewer**.

- 3 Copy the link.
- 4 Get the image file ID from the link URL, and build the following new URL with the ID:

```
https://drive.google.com/uc?id=<image-file-id>
```

For example:

```
# Original share URL from "Copy link"
https://drive.google.com/file/d/1dTZrIkAHsV_hKnvL2KjH1pfc00SpYVux/view
```

# Direct image URL
https://drive.google.com/uc?id=1dTZrIkAHsV\_hKnvL2KjH1pfc00SpYVux

You now have a direct image URL that you can access and process in GPT for Excel.

# **Troubleshooting GPT for Excel**

Find solutions and advice for troubleshooting various scenarios, including installation issues, API key validation, billing and subscription, bulk processing errors, formula syntax issues, and rate limits.

#### **Billing issues**

Troubleshoot balance issues and unexpected costs.

#### **Installation issues**

Troubleshoot installation issues and Microsoft account sign-in issues.

#### **GPT function issues**

Troubleshoot GPT function loading issues, error messages, and incomplete results.

#### **Bulk AI tool issues**

Troubleshoot ownership permissions, stuck processes, and custom prompt issues.

#### **API** key issues

Troubleshoot API key setup issues.

#### **Rate limit issues**

Troubleshoot token and request limit issues.

#### Add-in not working

Troubleshoot multiple accounts errors, blank sidebars, and menu visibility problems.

If none of the listed solutions addresses your issue, reach out to our support team for further assistance.

## **CONTACT SUPPORT**

# **Billing issues (GPT for Excel)**

# I have a ChatGPT Plus / Pro / Teams / Enterprise subscription, but my balance is empty

**Problem**: You have a ChatGPT Plus / Pro / Teams / Enterprise subscription, but GPT for Excel still says that your balance is empty.

#### **♦** SOLUTION

OpenAI's <u>ChatGPT Plus / Pro / Teams / Enterprise subscription</u> is neither necessary nor sufficient for using the GPT for Work add-ons.

Buy a pack to add money to your balance in GPT for Excel.

## I bought a pack but my balance is empty

**Problem**: You have bought a pack but your balance in GPT for Excel is still empty.

#### **SOLUTION**

Click on your balance in GPT for Excel and check that you are using the Microsoft account with which you have purchased your pack. <u>Switch to another account</u> if needed.

## My packs have disappeared from the tracking screen

**Problem**: You have bought packs and used GPT for Excel but now all your packs have disappeared from the usage tracking screen.

### **SOLUTION**

Click on your balance in GPT for Excel and check that you are using the Microsoft account with which you have bought your packs. <u>Switch to another account</u> if needed.

## The costs are too high

**Problem**: Your consumption is higher than you expected and you wish to spend less money on GPT function executions.

#### **SOLUTIONS**

• Estimate your costs with the *Token counter* before executing GPT functions on a large number of cells. Select **Token counter** from the add-in menu to access it.

- Select a cheaper model after comparing their costs with the *Cost estimator*.
- <u>Set up an API key</u> to save on total cost.

# **Installation issues (GPT for Excel)**

## I can't sign in after installing

**Problem**: You have installed GPT for Excel and you have trouble signing in with Microsoft.



- Check which versions of Excel and which browsers are supported by this add-in.
- Try using the web version of Excel instead of the desktop version.
- Try using Excel in a private/incognito window.

## I signed in with the wrong Microsoft account

**Problem**: You signed in with the wrong Microsoft account while installing GPT for Excel and need to switch to the correct one.

#### **SOLUTION**

Open the sidebar menu and click **Log out** to sign out, then sign in again with the correct account. Learn more.

## I want to uninstall

Problem: You are not using the add-in in Excel or Word, and you want to uninstall it.



To remove the add-in from Excel and Word, follow our uninstallation guide.

### I can't uninstall GPT for Excel

**Problem**: GPT for Excel prompts you to be activated every time you open Excel, which may be caused by remaining GPT formulas in your workbook.

#### **SOLUTION**

To find and remove all GPT formulas in your workbook (the experience might be slightly different on Web version and Mac desktop version):

- 1 Press CTRL + F to open the Find and Replace window.
- 2 Click **Options**.
- 3 In **Find what**, enter =GPT.
- 4 Set Within to Workbook, and Look in to Formulas.
- 5 Click Find All.

You can now locate all GPT formulas and delete them.

**Problem:** You want to uninstall the add-in, but the **Remove** option is not available in the add-in **Options** menu in the *Office Add-ins* popup.

#### **SOLUTION**

Clear the Microsoft Office cache:

- 1 Close all Office applications.
- 2 Follow Microsoft's instructions for clearing the cache.
- 3 Open Excel and try removing the add-in again.

## Add-in not supported

This add-in is only supported with your Microsoft 365 subscription license and is not supported with your Office license.

The following table lists the **minimum versions of Microsoft Excel** compatible with the GPT for Excel add-in on different Microsoft Office platforms.

	Windows	Мас	Online
X	Microsoft 365 subscription:  Version 2002 (Build 12527.20092)  Retail perpetual:  Version 2002 (Build 12527.20092)  Volume-licensed perpetual:  Excel 2021: Version 2108 (Build	Version 16.35 (Build 20030802)	Supported on:  • Google Chrome (latest version)  • Microsoft Edge (latest version)
	Volume-licensed perpetual:	2000002,	j .

Which version of Excel am I using?

# **GPT** function issues (GPT for Excel)

#### **Invalid** name

#NAME? Invalid Name Error. The formula contains unrecognized text.

**Problem**: The GPT functions aren't recognized by Excel.

#### **SOLUTIONS**

- Check that GPT for Excel is installed on the current Microsoft account.
- Click **GPT for Excel Word** in the *Home* tab to enable the GPT functions.
- If the problem persists, try activating the add-in (the experience might be slightly different for Mac users):
  - 1 Click **Add-ins** in the *Home* tab.
  - 2 Click More Add-ins.
  - 3 Select **GPT for Excel Word** in the *My Add-ins* tab.
  - 4 Click Add.
  - 5 Click **GPT for Excel Word** in the *Home* tab and click **Retry errors** in GPT for Excel sidebar.
- Use the add-in on the Web version of Excel (see supported versions).

## **Invalid parameter**

Error: Invalid xxx parameter.

**Problem**: The error indicates a formatting issue or an unreadable parameter within the formula.

#### **SOLUTIONS**

- Check that your parameters are in the correct order. See the function list.
- Check that all parameters (even optional ones) are added as empty when there is another parameter coming after them:
  - ✓ GPT\_TRANSLATE(A2, "french", , "Avoid passive voice")
- Check that you are using the right parameter separator for your locale: , or ;?
- Check that you are using the correct number formats for temperature for your locale: 0.8 or 0.8?

## Missing parameter

#ERROR: Missing required arguments categories for function GPT\_XXX.

**Problem**: One of the parameters in your GPT formula is required and hasn't been set.



<u>Check which parameters are required</u> for the GPT function you are using and adjust the formula as needed.

#### **Text values limited to 255 characters**

Text values in formulas are limited to 255 characters.

**Problem**: The text value in your formula is too long and exceeds Excel's 255-character limit.

**SOLUTION** 

Insert the text into another cell and reference it in your formula, for example, =GPT(A1), where A1 contains the text value.

## **Functions are stuck on #BUSY**

**Problem**: GPT functions fail to execute and remain in a #BUSY! state, even after reopening your file or restarting Excel.

#### **SOLUTIONS**

- Open the GPT for Excel sidebar before using any GPT functions:
  - Click GPT for Excel Word in the Home tab.
  - Wait for the sidebar to fully load before entering your first GPT formula.
- Delete the GPT formula and undo the deletion to run the formula again.
- Enter a new GPT formula in a different cell. Subsequent functions typically work correctly.
- Use bulk AI tools to avoid this issue in the future, if your use case allows it.

## **GPT\_WEB** function is not working

If you're using the GPT\_WEB function and experiencing issues, this is likely because:

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- The GPT\_WEB function only works with the Perplexity Sonar model.
- If you've selected a non-Perplexity model that uses an API key, GPT\_WEB fails because it tries to use that API key with Perplexity Sonar.

#### **SOLUTIONS**

• (Recommended)

Select a web search model ( ) from the model switcher and then use the GPT function. Learn more.

```
=GPT("your prompt")
```

• You can also use a web search model as a parameter in the GPT function. Learn more.

```
=GPT("your prompt", , , "sonar")
```

• If you want to keep using the GPT\_WEB function, make sure you first select the Sonar model from the model switcher.

# **Bulk AI tool issues (GPT for Excel)**

## The Custom prompt tool is not working

**Problem**: The Custom prompt bulk tool does not give the desired result, often because the prompt is incomplete or the variables are incorrectly formatted.



#### **SOLUTION**

Review the Custom prompt article for guidance on creating effective prompts and using the tool. If the issue persists, contact support.

# **API** key issues (GPT for Excel)

## Your API key is invalid or revoked

**Problem**: You are trying to set an API key but GPT for Excel won't save it.



- Make sure that you copied it correctly, or create a new one and try again.
- **Solution for immediate use:** If immediate use is needed and using your API key is not a priority, select a model without an API key.

## I've entered my API key but it's not working

**Problem**: You have entered an API key in the GPT for Excel sidebar but you cannot use it.



Even though you have entered an API key, you also need to purchase a pack in GPT for Excel. Learn more.

## I can't enter my API key

**Problem**: You can't enter an API key in the GPT for Excel sidebar because you don't have permission to do so.

#### **SOLUTIONS**

Request your space administrator to <u>allow users to set their own API keys</u>. Check the <u>GPT for Work dashboard</u> to see who the administrator or owner of your team is.

# Rate limit issues (GPT for Excel)

## Token limit reached

**Problem**: You are facing a rate limit error message from your AI provider that indicates you've reached your tokens per minute limit.

#### **SOLUTIONS**

- Temporary: Choose a different model, or wait until your token limit resets.
- Permanent: Use <u>models that don't require an API key</u> or <u>use your own OpenAI API key</u> if you belong to a Tier 5 organization.

## Request limit reached

**Problem**: You are facing a rate limit error message from your AI provider that indicates you've reached your requests per minute limit.

#### **SOLUTIONS**

- Temporary: Choose a different model, or wait until your request limit resets: one minute or 24 hours.
- Permanent: Use <u>models that don't require an API key</u> or <u>use your own OpenAI API key</u> if you belong to a Tier 5 organization.

# Add-in not working (GPT for Excel)

## Sidebar is blank, or fails to load

Error loading Add-Ins

**Problem**: GPT for Excel sidebar fails to load, or remains blank.

#### **SOLUTIONS**

- In the desktop version of Excel, open the menu to the right of the sidebar (Windows) or click the info icon (macOS), then click **Reload**.
- Restart Excel, create a new workbook, and launch the add-in again by clicking **GPT for Excel Word** in the **Home** tab.
- Refresh the add-ins in the Office Add-ins pop-up:
  - 1 In Excel, select **Add-ins** in the **Home** tab.
  - 2 Click More Add-ins.
  - 3 In the Office Add-ins pop-up, click Refresh.
- <u>Uninstall</u> and <u>reinstall</u> the add-in.
- Clear the Office cache, and then uninstall and reinstall the add-in again:
  - 1 Clear the Office cache:
    - **For Windows:** Follow the Microsoft instructions to <u>clear the Office cache on</u> Windows.
    - For Mac: Follow the Microsoft instructions to clear the Office cache on Mac.
  - 2 Uninstall the add-in.
  - 3 Reinstall the add-in.

If the issue persists, contact support.

# **FAQ (GPT for Excel)**

### How do I install the GPT for Excel add-in?

Install from Microsoft AppSource:

- 1 Go to the installation page.
- 2 Click **Open in Excel**.
- 3 Follow the steps until the end.

Learn more.

## Which versions of Excel are compatible with this add-in?

The following table lists the **minimum versions of Microsoft Excel** compatible with the GPT for Excel add-in on different Microsoft Office platforms.

	Windows	Мас	Online
X	Microsoft 365 subscription:	Version 16.35 (Build 20030802)	
	Version 2002 (Build		
	12527.20092)		Supported on:
	Retail perpetual:		Google Chrome (latest version)
	Version 2002 (Build		
	12527.20092)		Microsoft Edge (latest
	Volume-licensed perpetual:		version)
	Excel 2021: Version 2108 (Build 12527.20092)		

## Which version of Excel am I using?

To check your desktop Excel version, see What version of Office am I using? at Microsoft Support.

If you're using Excel Online, your version is always the latest.

## Which browsers are compatible with GPT for Excel?

GPT for Excel is compatible with the following browsers:

- Google Chrome (recommended for the best experience)
- Microsoft Edge (only for Windows users, recommended for the best experience)
- Mozilla Firefox
- Safari (only for Mac users)

## What permissions are required by the GPT for Excel add-in?

See Security and privacy FAQ.

## What is the pricing of GPT for Excel?

<u>Our pricing options</u> include a consumption-based plan, which is proportional to your usage, and a subscription-based plan, which has a fixed monthly fee.

## Can GPT for Excel analyze PDF files?

Yes. You can analyze PDF files using GPT for Excel and Google Gemini 2.5 models with URL context.

## Can I scrape webpages in Excel?

Yes. You can scrape specific webpages using GPT for Excel and <u>Google Gemini 2.5 models with URL</u> context.

### How can I add users?

You can add users from the dashboard.

## How is my data processed? Is it used to train models?

- We do not read or store any data from your document that you do not use as an input.
- If you use a model **with** an API key, we do not log or store any of the inputs submitted or outputs received.
- Whether you use a model with or without an API key, Talarian does not use your inputs and outputs to train language models.

For more information, see the Security and privacy FAQ.

## Do I need my own API key?

Yes, if you are on a subscription plan.

No, if you use prepaid packs, many models are available without any API key.



If you're using GPT for Excel as part of a team space, your space admin can control which models are available in the model switcher, regardless of your subscription or API key setup. Learn more.

## Can I use my own API key?

Yes.

Using API keys offers several benefits:

- **More models.** Access a <u>wider range of models from a bigger pool of AI providers</u> than what is available without API keys.
- **More control.** Monitor and manage your AI usage and costs directly on the AI provider's platform.
- **Improved privacy.** We do not log inputs and outputs when you use a model with an API key. For more information, see our security and privacy FAQ.
- **Reduced costs.** If you're on <u>usage-based pricing</u>, using an API key reduces costs. You pay the model usage fees directly to the AI provider, while paying a reduced service fee for GPT for Work.
  - (i) INFO

Using API keys is mandatory if you're on a subscription plan.

#### (i) INFO

If you are a user in a <u>space</u> that does not allow users to set their own <u>API keys</u>, you will still benefit from any space API keys set by the space owner or admins.

## Is gpt-4o supported?

Yes, gpt-4o and gpt-4o-mini are supported with and without an API key.

#### Is GPT for Excel connected to the web?

Yes, all <u>bulk AI tools</u> and <u>functions</u> in GPT for Excel can access up-to-date information using models with web search capabilities (indicated by the icon in the model switcher).

## Is web browsing available with gpt-4 and gpt-4o?

No, but you can use models with web search capabilities (indicated by the  $\bigoplus$  icon in the model switcher).

#### Where can I find the list of available GPT functions?

The list along with full documentation and video tutorials is available <u>here</u>. To try out some examples, download our GPT for Excel examples template, and open it in Excel as a new workbook.

## Do formulas reload each time the file is opened?

If you have <u>enabled GPT for Excel cache in your workbook</u>, GPT formulas do not reload. Instead, the results are retrieved from the cache, preventing any extra cost or loss of results.

When the cache is not enabled, GPT formulas follow Excel calculation rules and typically reload each time you move, insert, or delete rows or columns in your workbook. This causes extra costs and can lead to loss of results.

## Can GPT for Excel process images?

Yes, GPT for Excel supports multiple vision models that you can use with the following features:

- Custom prompt bulk AI tool
- Prompt images (Vision) bulk AI tool
- GPT\_VISION function

## Can I use OpenRouter?

Yes, you can use the OpenRouter service in GPT for Work with an API key. With <u>OpenRouter</u>, you can access AI models from multiple providers through a single API key.

For API key setup instructions, check out Connect OpenRouter.

## Can I use my OpenAI Assistants and custom GPTs?

Yes. You can use OpenAI Assistants and custom GPTs in GPT for Excel:

- Set your OpenAI API key and your Assistants will become available in the model switcher.
- You can replicate your custom GPTs as Assistants to make them available in the model switcher.

### Can I reference data located in another sheet in bulk tools?

Yes, in the prompt field of the **Custom prompt** bulk tool, you can reference cells located in another sheet within the same spreadsheet. Use the following syntax for the reference: {{SheetName!Cell}} or {{SheetName!Range}}

```
For example, to reference cells A1 to B5 in a sheet named Categories, use: {{Categories!A1:B5}}
```

# Can I transfer my balance between GPT for Sheets and GPT for Excel or Word?

Packs are not directly transferable between platforms, but you can request a balance transfer between GPT for Sheets and GPT for Excel or Word. Here's what you need to know:

- Packs purchased for Microsoft Excel can be used on Microsoft Word and vice versa.
- Packs purchased for Google Sheets are separate and can only be used on Google Sheets.

If you need to transfer your balance between Google Sheets and Microsoft Excel or Word, <u>contact</u> our support team.

## Is there a limit to the number of requests I can send?

AI providers enforce rate limits in order to ensure a smooth and fair access to everyone. <u>Learn</u> more.

## How do I uninstall the GPT for Excel add-in?

The uninstallation process is described here.

#### Which models can I use?

Check our list of supported models.



If you're using GPT for Excel as part of a team space, your space admin can control which models are available in the model switcher. Learn more.

#### Can I use local models with GPT for Excel?

Yes. GPT for Excel supports integration with Ollama and any LLM server that provides an OpenAI-compatible API, allowing you to use locally running open-source models:

- Connect to Ollama from Excel and Word
- Connect to OpenAI-compatible local servers from Excel and Word

## Which languages can I use?

Models work in many languages, but deliver the best results in English. All we can say is, try it. It is usually better to prompt in the language you want the response to be in. In any case, avoid mixing languages in a prompt.

## How do I get support?

We recommend checking our troubleshooting and FAQ pages.

If that doesn't help, submit a support request and we'll get back to you.

Our support hours are from Monday to Friday:

- 7:30 PM 12:00 PM (New York)
- 1:30 AM 6:00 PM (Paris)
- 5:00 AM 9:30 PM (India)
- 8:30 AM 1:00 AM (Tokyo)

# **Remove Microsoft account access from GPT** for Excel

#### **↑** WARNING

Removing Microsoft account access from GPT for Excel means removing access from the GPT for Excel Word add-in, which also removes access from GPT for Word.

#### (i) NOTE

The following instructions only apply to personal accounts. If you have a school or work account, contact your organization administrator about add-in access.

- 1) In your browser, log in to the Microsoft account you use in GPT for Excel.
- 2 Open the privacy dashboard for your Microsoft account.
- 3 In the **Empower your productivity** section, select **App access**.
- 4 In the **Manage your app access** section, click **Don't Allow** for GPT for Excel Word.

The **GPT for Excel Word** add-in no longer has access to your Microsoft account.

## (i) NOTE

Removing account access does not uninstall the add-in from Microsoft Excel. The next time you open the add-in, Excel displays a welcome screen in the sidebar, after which you can sign in with your Microsoft account and grant access again.

## Uninstall GPT for Excel

#### PREREQUISITES

Remove all GPT formulas from all of your workbooks before uninstalling the add-in. Leaving any GPT formulas in a workbook causes Excel to reinstall the add-in automatically when you open the workbook.

#### **↑** CAUTION

Uninstalling GPT for Excel means removing the GPT for Excel Word add-in from both Excel and Word.

In Excel, select **Add-ins** in the *Home* tab.



#### (i) NOTE

If you're on a Mac, select **Get Add-ins** in the *Insert* tab.

2 Click More Add-ins.

The Office Add-ins pop-up opens.

- 3 Select the **MY ADD-INS** tab, hover over **GPT for Excel Word**, and click the **Options** menu icon.
- 4 Select **Remove**.

A confirmation pop-up opens.



#### TIP

If the **Remove** option is not available in the menu, clear the Microsoft Office cache:

- Close all Office applications.
- 2 Follow Microsoft's instructions for clearing the cache.
- 3 Open Excel and try removing the add-in again.
- 5 Click **Remove** to confirm.

The **GPT for Excel Word** add-in is removed from Excel and Word. If you ever need to use the add-in again, follow the installation process.



Removing the add-in does not remove its app access permissions from your Microsoft account. You can <u>remove access manually</u>.

## **GPT for Word**

GPT for Word turns generative AIs into your personal writing assistants available directly in Microsoft Word.

To get started with GPT for Word, see Quickstart for documents.

#### **Overview**

GPT for Word is a Microsoft Word add-in that turns generative AIs into your personal writing assistants available directly in the Word user interface. Like ChatGPT inside Word.

#### **Author text**

Use AI to plan, create, edit, and review your Word documents.

#### Manage text formatting

Manage how GPT for Word handles formatting in your documents.

#### Configuration

Save GPT for Word parameters along with your document.

#### **Example prompts**

Examples of using GPT for Word to translate, review, and summarize your Word documents.

#### Search the web

Learn how to use web search models to get up-to-date information from the web.

#### **Troubleshooting**

Troubleshoot common issues in GPT for Word.

#### **FAQ**

How can I ask questions about my document? ...and other questions.

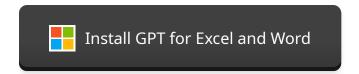
#### **Remove Microsoft account access**

Remove Microsoft account access from the GPT for Excel Word add-in.

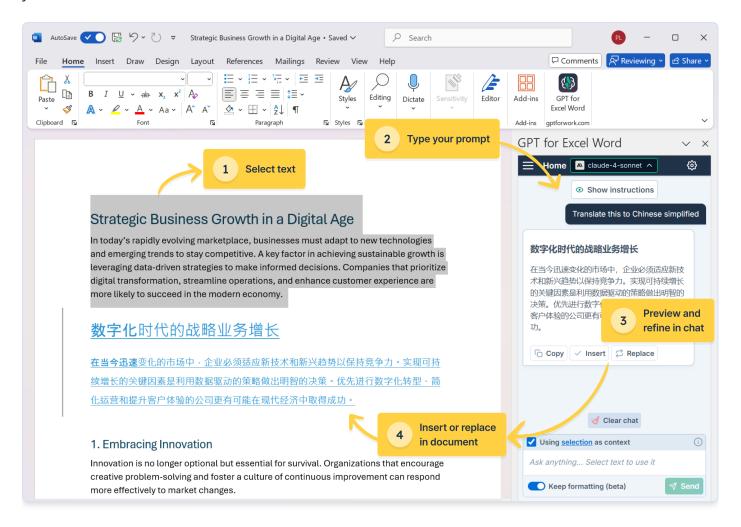
#### Uninstall

Remove the GPT for Word add-in from Microsoft Word.

## Overview of GPT for Word



GPT for Word is a Microsoft Word add-in that turns generative AIs into your personal writing assistants available directly in the Word user interface. Think of it as ChatGPT inside Word. Use your favorite AI to edit, rewrite, correct, review, translate, summarize, draft, write, and more.



## Use cases

Here are a few common use cases that you can easily handle with GPT for Word:

- **Rewrite or rephrase** content in a different style, tone, or voice.
- Check and correct the grammar and spelling in your document.
- **Generate** a document template, or a document draft or outline that you can then flesh out.
- **Translate** content to multiple target languages while observing appropriate localization conventions.

- **Summarize** a document into a few bullet points.
- **Explain** individual words, phrases, and paragraphs in your document.
- **Review** your document for logical structure, clarity and consistency of content, and other aspects that you want to validate.

#### **Features**

- Prompt an AI as you would in ChatGPT or another AI chatbot.
- Use a highlighted selection or the whole document as context for your prompts.
- Preserve common formatting elements such as headings, lists, tables, and basic text styles when inserting generated content.
- Preview and refine content in a chat interface before inserting the content into your document.
- Enable Word's **Track changes** mode to keep track of your AI edits.

The following video shows you how to translate selected text and replace the selection with the translation while preserving formatting.

#### **Benefits**

- **Integrate AI into your content workflow.** Prompt your favorite AI directly from inside your documents. No more copy-pasting between Word and AI chatbots like ChatGPT.
- **Choose your preferred AI model.** Use models from OpenAI, Anthropic, Google, xAI, Perplexity, or OpenRouter. You can also use your own OpenAI Assistants and even connect to local models with Ollama or any LLM server that provides an OpenAI-compatible API.
- **Bring an API key to get more features at reduced cost.** You do not need an API key to use GPT for Word, but using a key gives you access to more models, affords you more control and privacy, and you pay a reduced service fee.

## What's next

- Install GPT for Word if you have not already.
- Select an AI model that best meets your needs.
- Author text with GPT for Word.
- Learn how to use GPT for Word effectively through practical examples.

## **Author text with GPT for Word**

<u>GPT for Word</u> is an AI assistant that helps you plan, create, edit, and review content directly in Microsoft Word documents, whether you're drafting from scratch, refining existing text, or analyzing content.

## **How it works**

To use GPT for Word:

- 1 Prompt the AI with your request.
- 2 (Optional) <u>Use the AI's response</u> in your document.

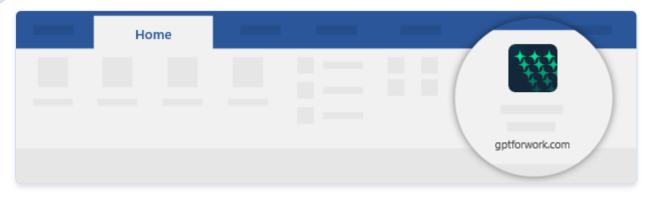
Here are some common ways to use GPT for Word:

- Translate content to other languages.
- Fix grammar and spelling errors.
- Summarize document content.

## **Prompt the AI**

Configure the AI and send prompts to generate AI responses for your document.

1 In the **Home** tab, click **GPT for Excel Word**.



i INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

2 (Optional) Select an AI model.



(i) INFO

To customize how the AI responds, you can set **Custom instructions**.

- In the document, select the text you want to work with and, in the sidebar, select **Use**selection as context. If no text is selected, GPT for Word uses the entire document as context.
- 4 Type your prompt in the chat. For example: Translate to French
- 5 Click **Send**. GPT for Word generates a response.
- 6 (Optional) Refine the AI-generated response and click **Send**. For example: Make it shorter

The AI generates responses based on your settings, selected context, and prompts.

## Use AI responses in your document

Once you are satisfied with the AI-generated content, you can:

- **Insert** the AI response at the cursor position or under the selected text.
- **Replace** the selected text with the AI response.
- **Copy** the AI response to clipboard.
  - INFO

You can also **Replace**, **Insert**, or **Copy** part of the AI response by selecting the text in the response. When **Plain text mode** is disabled, you can only **Copy** part of the AI response.

• TIF

To include AI-generated responses as suggestions in your documents with Microsoft Word, you can activate **Track Changes**. Learn more

## What's next

- Choose between formatted or plain text responses.
- Guide how the AI responds with custom instructions.
- Choose the model that works best for you.
- Select a model.
- Explore practical use cases with examples.

# Manage text formatting in GPT for Word

<u>GPT for Word</u> generates formatted AI responses in a sidebar. By default, the add-in analyzes and extracts common formatting elements from your document, including headings, lists, tables, and basic text styles, then applies similar formatting to the generated content. If you don't need formatting, you can generate plain text responses.

#### (i) INFO

The generating formatted text is slightly slower and uses about 20% more tokens than generating plain, unformatted text.

## Formatted text vs. plain text

#### Use formatted text mode (default) when:

- You want the add-in to analyze your document's formatting and apply similar formatting to the generated content. This is particularly useful for translations.
- You want to preserve formatting elements when inserting or replacing text from the sidebar into your document.

### i INFO

When using formatted text mode, GPT for Word cannot generate or preserve:

- Font properties (family, size, color)
- Text alignment and spacing
- Background colors
- Text decorative effects (shadows, glow, reflection)
- Media and embedded objects (images, charts, icons)

#### Use plain text mode when:

- You don't need to preserve formatting in responses. This is particularly useful when drafting or summarizing content or analyzing text.
- You want to increase speed and/or reduce token consumption.

## Enable and disable plain text mode

To manage the text formatting mode in GPT for Word:

GPT for Work Help (Microsoft)

- 1 Click **GPT for Excel Word** in the *Home* tab. If you don't see it, go to **Home** > **Add-ins** > **My add-ins** > **GPT for Excel Word**.
- 2 Choose the mode that best suits your needs:
  - Enable **Plain text mode** to process text without formatting.
  - Disable **Plain text mode** to preserve and work with formatting.

#### **CAUTION**

Changing the plain text mode setting clears your chat history.

## What's next

- To assign a specific role to the AI and more closely define how it responds, <u>add custom</u> instructions.
- See more GPT for Word examples.

## **Configuration of GPT for Word**

Configure the GPT for Word settings for your document. Select a model, specify custom instructions, adjust the creativity level, and reduce repetitions.

#### Select a model

Select the right AI model for your work, with or without an API key.

#### Add custom instructions

Assign a very precise role to the AI to define its field of expertise and how it responds.

#### Set the creativity level

Define how standard (or not) your output is expected to be.

#### **Reduce AI response repetition**

Configure settings to reduce repetitive language in AI responses.

## Add custom instructions in GPT for Word

Provide custom instructions in <u>GPT for Word</u> to specify preferences or requirements that you'd like the AI to consider when you chat with your Word document.

- 1 In the GPT for Word sidebar, click **Settings**.
- 2 Select the type of instructions you'd like to add and edit them if needed.
- 3 Click Save.

Your custom instructions are now taken into account when you chat with your Word document. They are active until you choose to **Reset to default**.

#### What's next

Select other settings to customize how the language model operates.

## Set the creativity level in GPT for Word

Control how creative the <u>AI model</u> is in <u>GPT for Word</u> by setting the temperature and top-p parameters. These parameters work together to influence model output:

Parameter	Description	How to use
Temperature	Controls randomness in the output	<ul> <li>Possible values: 0-1</li> <li>Keep at 1 if adjusting Top P</li> <li>Lower for factual, higher for creative</li> </ul>
Тор Р	Controls diversity of word choices	<ul> <li>Possible values: 0-1</li> <li>Keep at 1 for most use cases</li> <li>Only lower if <b>Temperature</b> is 1</li> </ul>

- 1) In the GPT for Word sidebar, click the **Settings** icon.
- 2 Use the slider to set **Creativity** between 0 and 1.
- 3 (Optional) Use the slider to set **Top P** between 0 and 1.
- 4 Click **Save**.

You've set the creativity level. GPT for Word now uses the new temperature and top-p values for generating all responses.

### What's next

Configure other settings to customize how the language model operates.

# Reduce AI response repetition in GPT for Word

Set frequency and presence penalties in <u>GPT for Word</u> to reduce the tendency of OpenAI and xAI models towards repetition.

Parameter	Description	How to use
Frequency penalty	Controls how much to penalize new tokens based on their frequency in the text so far	<ul><li>Possible values: 0-2</li><li>Keep at 0 by default</li><li>Higher values</li><li>reduce repetition</li></ul>
Presence penalty	Controls how much to penalize new tokens based on whether they appear in the text so far	<ul><li>Possible values: 0-2</li><li>Keep at 0 by default</li><li>Higher values</li><li>increase diversity</li></ul>

- 1 In the GPT for Word sidebar, click the **Settings** icon.
- 2 Use the slider to set **Frequency penalty** and **Presence penalty** between 0 and 2.
- 3 Click **Save**.

You've set the penalties. GPT for Word now uses the new **Frequency penalty** and **Presence penalty** values for generating all responses.

## What's next

<u>Select other settings</u> to customize how the language model operates.

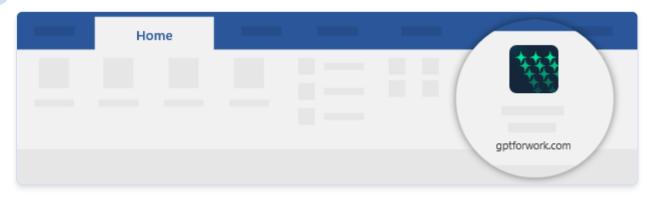
## **Example prompts for GPT for Word**

Learn how to use GPT for Word effectively through practical examples. Each example demonstrates a common use case and includes step-by-step instructions.

#### Translate a document

You can follow along using either your own Word document or our translation example template.

1 In the **Home** tab, click **GPT for Excel Word**.



(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

- 2 Select the <u>model</u> of your choice.
- 3 Define custom instructions to improve the AI response:
  - 1 Click the settings icon.
  - 2 Choose the **Copywriter** pre-defined instruction.
  - 3 Click **Save**.
- In the document, select the text you want to translate and, in the sidebar, select **Use selection** as context.
- 5 Type your prompt:

Translate to French

- 6 Make sure plain text mode is disabled.
- 7 Click **Send**. GPT for Word generates a response.

- 8 Refine the AI-generated response:
  - 1 Type the prompt:

Make it shorter

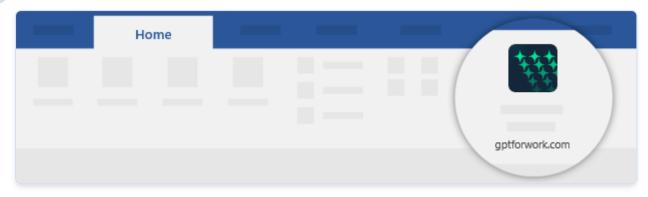
- 2 Click **Send**. GPT for Word generates a new response.
- 9 To replace the selected text with the response, click **Replace**.

GPT for Word has replaced the original text with the AI-generated translation, while preserving all formatting.

## Correct grammar or spelling errors of a document

You can follow along using either your own Word document or our grammar correction template.

1 In the **Home** tab, click **GPT for Excel Word**.



INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

- 2 Select the <u>model</u> of your choice.
- 3 Define custom instructions to improve the AI response:
  - 1 Click the settings icon.
  - 2 Select Write custom instructions.
  - 3 Replace the existing instructions with:

Act as a professional editor focusing on grammar, spelling, and clarity

4 Click **Save**.

- 4 In the document, select the text you want to improve and, in the sidebar, select **Use selection** as context.
- 5 Type your prompt:

Correct grammar or spelling errors

- 6 Make sure plain text mode is disabled.
- 7 Click **Send**. GPT for Word generates a response.
- 8 To replace the selected text with the response, click **Replace**.

GPT for Word has replaced the original text with the AI-generated corrected response.

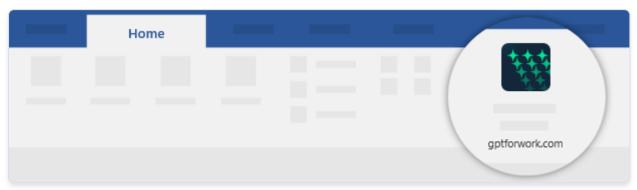


To review the AI's corrections, enable **Track Changes** in Word. Go to **Review > Track Changes** or press Ctrl/Cmd+Shift+E.

#### Summarize a document into a table

You can follow along using either your own Word document or our summarization example template.

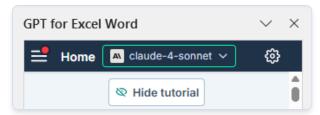
1 In the **Home** tab, click **GPT for Excel Word**.



(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

2 Select the model of your choice.



In the document, select the text you want to summarize into a table and, in the sidebar, select **Use selection as context**.

4 Type your prompt:

Summarize this document into a table

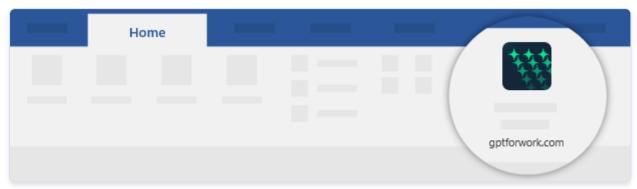
- 5 Make sure <u>plain text mode</u> is disabled.
- 6 Click **Send**. GPT for Word generates a response.
- 7 To add the table at the cursor position or under the selected text, click **Insert**.

GPT for Word has inserted the AI-generated table into the Word document.

## Summarize a document into one paragraph

You can follow along using either your own Word document or our <u>summarization example</u> <u>template</u>.

1 In the **Home** tab, click **GPT for Excel Word**.



i INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

2 Select the <u>model</u> of your choice.

- 3 Select **Use full document as context**.
- 4 Type your prompt:

Create a concise summary of this document

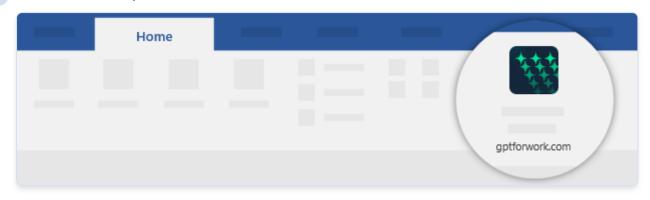
- 5 Make sure <u>plain text mode</u> is enabled.
- 6 Click **Send**. GPT for Word generates a response.

GPT for Word has generated a one-paragraph summary of the document. You can now **Copy** or **Insert** the summary.

## Create a job description draft

You can follow along using your own Word document.

1 In the **Home** tab, click **GPT for Excel Word**.



(i) INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

- 2 Select the <u>model</u> of your choice.
- 3 Define custom instructions to improve the AI response:
  - 1 Click the settings icon.
  - 2 Choose the **HR Consultant** pre-defined instruction.
  - 3 Click **Save**.
- 4 (Optional) Deselect **Use selection or document for context**. Since you're starting from a blank document, there's nothing to use as context.

5 Type your prompt:

Write a job description for a Senior Software Engineer position, including qualifications, responsibilities, and benefits

- 6 Make sure plain text mode is disabled.
- 7 Click **Send**. GPT for Word generates a response.
- 8 Refine the AI-generated response:
  - 1 Type the prompt:

Add more emphasis on collaboration skills and remote work experience

- 2 Click **Send**. GPT for Word updates the content.
- 9 To add the job description at the cursor position, click **Insert**.

GPT for Word has inserted the AI-generated job description into the Word document.

## **Analyze a text selection**

You can follow along using either your own Word document or our <u>product review template</u>.

1 In the **Home** tab, click **GPT for Excel Word**.



i INFO

You can also select **Home > Add-ins > My Add-ins > GPT for Excel Word**.

2 Select the model of your choice.



3 In the document, select the text you want to analyze and, in the sidebar, select **Use selection** as **context**.

4 Type your prompt:

What are the pros and cons mentioned here?

- 5 Make sure plain text mode is enabled.
- 6 Click **Send**. GPT for Word generates a response.

GPT for Word has generated an analysis of the selected text. You can now **Copy** or **Insert** the analysis.

## Search the web with GPT for Word

Search the web directly in <u>GPT for Word</u> using web search models. These models use fresh web search data, which allows you to generate up-to-date responses about companies, current events, facts, and more, directly in your document. You can also fetch content from specific URLs to extract information from web pages.

## Choose the right web search model

Choose a web search model that best fits your use case.

#### Web search

Get information that is not in the model's built-in knowledge:

- **Example:** Writing a report about the latest AI trends in your business.
- How it works:

All web search models can go beyond their built-in knowledge by accessing information from search engines, like Google or Bing. This allows models, which have compressed historical knowledge, to explore topics in greater depth, with more current data or with a specific focus.

Web search models do not fetch full page content. Instead, they read search result snippets, like you would see on a Google search results page. The snippets are added to the context of the models, so they can use the information to generate a response.

- Recommended models:
  - Sonar for quick results (cheapest).
  - Sonar Pro or Sonar Reasoning for high quality results.
  - Gemini models with Web search for Google search quality (most expensive).

### **Content fetching**

Focus on specific URLs and extract content from them:

- **Example:** Extracting key requirements from a job posting URL and writing a tailored cover letter.
- **How it works:** Some web search models can access the full content from specific URLs. The full content is added to the context of the models, so they can use it to answer questions about the content or extract information from it.
- Recommended models:
  - o Gemini 2.5 models with URL context

#### Click here for a list of all web search models supported by GPT for Word.

Provider	Model	Without API key	With API key
	sonar	V	V
Dorrolovity	sonar-pro	V	V
Perplexity	sonar-reasoning	V	V
	sonar-reasoning-pro	×	V
	gemini-2.0-flash	×	V
	gemini-2.0-flash-lite	×	V
Google	gemini-2.5-flash	V	V
	gemini-2.5-flash-lite	×	V
	gemini-2.5-pro	×	V

For detailed pricing, see AI providers and models.

### Use web search models

- 1 Open GPT for Word.
- 2 Expand the model switcher and select a web search model (indicated by the  $\oplus$  icon).
- 3 (Optional) Click the settings icon and configure the <u>model-specific settings</u> in the sidebar. For Gemini models, make sure web search is enabled.
- 4 Type your search prompt in the chat. For example:

What are the latest trends in AI technology?

- 5 Click **Send**. The model generates a response using up-to-date web search data.
- 6 Once you're satisfied with the response, you can:
  - **Insert** the response at your cursor position

- **Replace** the selected text with the response
- **Copy** the response to your clipboard

## **Model-specific settings**

Use the model-specific settings to configure the web search model for your use case.

#### **Google Gemini**

Setting	Description	Example
Web search	Let Gemini decide when a Google search can improve the answer. This allows Gemini to provide more accurate answers and cite verifiable sources beyond its built-in knowledge. Enabling Web search incurs an additional search cost.	
URL context (Gemini 2.5 only)	Provide up to 20 URLs (pages, images, PDFs) to focus your search. No search cost is incurred, but the content retrieved from URLs counts as input tokens.	

### **Perplexity Sonar**

Setting	Description	Example
Search context size	Choose how much content to retrieve from each source. Larger sizes produce richer and more detailed responses at a <u>higher cost</u> .	

### What's next

- Choose between formatted or plain text responses.
- Guide how the AI responds with custom instructions.
- Explore practical use cases with examples.

## **Troubleshooting GPT for Word**

Find solutions and advice for troubleshooting various scenarios, from API key and empty balance issues to cut responses and rate limits.

#### **Billing issues**

Troubleshoot balance and pack issues.

#### **Installation issues**

Troubleshoot installation issues and Microsoft account sign-in issues.

#### **Output issues**

Troubleshoot responses cut or incomplete and responses that don't make sense.

#### **API** key issues

Troubleshoot API key setup issues and OpenAI free trial limitations.

#### **Rate limit issues**

Troubleshoot token and request rate limit issues.

#### Add-in not working

Troubleshoot multiple accounts errors, blank sidebars, and menu visibility problems.

If none of the listed solutions addresses your issue, reach out to our support team for further assistance.

#### **CONTACT SUPPORT**

## **Billing issues (GPT for Word)**

## I have a ChatGPT Plus / Pro / Teams / Enterprise subscription, but my balance is empty

**Problem**: You have a ChatGPT Plus / Pro / Teams / Enterprise subscription, but GPT for Word still says that your balance is empty.

#### **♦** SOLUTION

OpenAI's <u>ChatGPT Plus / Pro / Teams / Enterprise subscription</u> is neither necessary nor sufficient for using the GPT for Work add-ons.

Buy a pack to add money to your balance in GPT for Word.

## I bought a pack but my balance is empty

**Problem**: You have bought a pack but your balance in GPT for Word is still empty.

#### **SOLUTION**

Click on your balance in GPT for Word and check that you are using the Microsoft account with which you have purchased your pack. Switch to another account if needed.

## My packs have disappeared from the tracking screen

**Problem**: You have bought packs and used GPT for Word but now all your packs have disappeared from the <u>usage tracking screen</u>.

#### **SOLUTION**

Click on your balance in GPT for Word and check that you are using the Microsoft account with which you have bought your packs. <u>Switch to another account</u> if needed.

## **Installation issues (GPT for Word)**

## I can't sign in after installing

**Problem**: You have installed GPT for Word and you have trouble signing in with Microsoft.

#### **SOLUTIONS**

- Check which versions of Word and which browsers are supported by this add-in.
- Try using the web version of Word instead of the desktop version.
- Try using Word in a private/incognito window.

## I signed in with the wrong Microsoft account

**Problem**: You signed in with the wrong Microsoft account while installing GPT for Word and need to switch to the correct one.

#### **SOLUTION**

Open the sidebar menu and click **Log out** to sign out, then sign in again with the correct account. Learn more.

#### I want to uninstall

**Problem:** You are not using the add-in in Word or Excel, and you want to uninstall it.

#### **SOLUTION**

To remove the add-in from Word and Excel, follow our uninstallation guide.

## I can't uninstall GPT for Word

**Problem:** You want to uninstall the add-in, but the **Remove** option is not available in the add-in **Options** menu in the *Office Add-ins* popup.

#### **SOLUTION**

Clear the Microsoft Office cache:

- 1 Close all Office applications.
- 2 Follow Microsoft's instructions for clearing the cache.
- 3 Open Word and try removing the add-in again.

## **Output issues (GPT for Word)**

## Response is cut or incomplete

**Problem**: The response you get from GPT for Word seems truncated.



#### **SOLUTION**

Models have a maximum token limit, which is the maximum total number of tokens that can be used in both the input and the response. This means models may not provide complete responses to long queries or when a large portion of text is selected as input.

To stay within the token limit, you can:

- In the sidebar, click **Clear chat** to delete your chat history.
- Break up your work into smaller parts.
- Select a model with a higher limit.

## Responses don't make sense

**Problem**: The responses you get from GPT for Word don't match your requests.



#### **SOLUTION**

- Click on **Clear chat** to delete your chat history. This deletes previous chat messages that might interfere with your current request.
- Refine your prompt and/or select a different model. See our examples for guidance.

## **API** key issues (GPT for Word)

## Your API key is invalid or revoked

**Problem**: You are trying to set an API key but GPT for Word won't save it.



- Make sure that you copied it correctly, or create a new one and try again.
- **Solution for immediate use:** If immediate use is needed and using your API key is not a priority, select a model without an API key.

## I've entered my API key and it's not working

**Problem**: You have entered an API key in the GPT for Word sidebar but you cannot use it.



Even though you have entered an API key, you also need to purchase a pack in GPT for Word. Learn more.

### I can't enter my API key

**Problem**: You can't enter an API key in the GPT for Word sidebar because you don't have permission to do so.

#### **SOLUTIONS**

Request your space administrator to <u>allow users to set their own API keys</u>. Check the <u>GPT for Work dashboard</u> to see who the administrator or owner of your team is.

## Rate limit issues (GPT for Word)

#### Token limit is reached

**Problem**: You are facing a rate limit error message from your AI provider that indicates you've reached your tokens per minute limit.

#### **SOLUTIONS**

- Temporary: Choose a different model, or wait until your token limit resets.
- Permanent: Use <u>models that don't require an API key</u> or <u>use your own OpenAI API key</u> if you belong to a Tier 5 organization.

## Request limit is reached

**Problem**: You are facing a rate limit error message from your AI provider that indicates you've reached your requests per minute limit.

#### **SOLUTIONS**

- Temporary: Choose a different model, or wait until your request limit resets: one minute or 24 hours.
- Permanent: Use <u>models that don't require an API key</u> or <u>use your own OpenAI API key</u> if you belong to a Tier 5 organization.

## Add-in not working (GPT for Word)

### Sidebar is blank, or fails to load

Error loading Add-Ins

**Problem**: GPT for Word sidebar fails to load, or remains blank.

#### **SOLUTIONS**

- In the desktop version of Word, open the menu to the right of the sidebar (Windows) or click the info icon (macOS), then click **Reload**.
- Restart Word, create a new document, and launch the add-in again by clicking **GPT for Excel Word** in the **Home** tab.
- Refresh the add-ins in the Office Add-ins pop-up:
  - 1 In Word, select **Add-ins** in the **Home** tab.
  - 2 Click More Add-ins.
  - 3 In the Office Add-ins pop-up, click Refresh.
- Uninstall and reinstall the add-in.
- Clear the Office cache, and then uninstall and reinstall the add-in again:
  - 1 Clear the Office cache:
    - **For Windows:** Follow the Microsoft instructions to <u>clear the Office cache on</u> Windows.
    - For Mac: Follow the Microsoft instructions to clear the Office cache on Mac.
  - 2 Uninstall the add-in.
  - 3 Reinstall the add-in.

If the issue persists, contact support.

## **FAQ (GPT for Word)**

#### How do I install the GPT for Word add-in?

Install from Microsoft AppSource:

- 1 Go to the installation page.
- 2 Click **Open in Word**.
- 3 Follow the steps until the end.

Learn more.

## Which versions of Word are compatible with this add-in?

The following table lists the **minimum versions of Microsoft Word** compatible with the GPT for Word add-in on different Microsoft Office platforms.

	Windows	Мас	Online
	Microsoft 365 subscription:		
	Version 2205 (Build 15202.10000)		Supported on:
W	Retail perpetual:	Version 16.61 (Build	Google Chrome (latest)
	Version 2205 (Build 15202.10000)	22040100)	version)
	Volume-licensed perpetual:		<ul> <li>Microsoft Edge (latest version)</li> </ul>
	Word 2024: Version 2205 (Build 15202.10000)		

## Which version of Word am I using?

To check your desktop Word version, see What version of Office am I using? at Microsoft Support.

If you're using Word Online, your version is always the latest.

## Which browsers are compatible with GPT for Word?

GPT for Word is compatible with the following browsers:

- Google Chrome (recommended for the best experience)
- Microsoft Edge (only for Windows users, recommended for the best experience)
- Mozilla Firefox
- Safari (only for Mac users)

### What permissions are required by the GPT for Word add-in?

See Security and privacy FAQ.

## I have installed GPT for Word, how do I get started?

Now that GPT for Word is installed, you can launch it from the Microsoft Word *Home* tab and start chatting with your Word documents. Learn more in our quickstart guide.

## What is the pricing of GPT for Word?

<u>Our pricing options</u> include a consumption-based plan, which is proportional to your usage, and a subscription-based plan, which has a fixed monthly fee.

#### How can I add users?

You can add users from the dashboard.

### How is my data processed? Is it used to train models?

- We do not read or store any data from your document that you do not use as an input.
- If you use a model **with** an API key, we do not log or store any of the inputs submitted or outputs received.
- Whether you use a model with or without an API key, Talarian does not use your inputs and outputs to train language models.

For more information, see the Security and privacy FAQ.

## Do I need my own API key?

Yes, if you are on a subscription plan.

No, if you use prepaid packs, many models are available without any API key.

#### (i) NOTE

If you're using GPT for Word as part of a team space, your space admin can control which models are available in the model switcher, regardless of your subscription or API key setup. Learn more.

## Can I use my own API key?

Yes.

Using API keys offers several benefits:

- **More models.** Access a <u>wider range of models from a bigger pool of AI providers</u> than what is available without API keys.
- **More control.** Monitor and manage your AI usage and costs directly on the AI provider's platform.
- **Improved privacy.** We do not log inputs and outputs when you use a model with an API key. For more information, see our security and privacy FAQ.
- Reduced costs. If you're on <u>usage-based pricing</u>, using an API key reduces costs. You pay the
  model usage fees directly to the AI provider, while paying a reduced service fee for GPT for
  Work.

#### (i) INFO

Using API keys is mandatory if you're on a subscription plan.

#### (i) INFO

If you are a user in a <u>space</u> that does not allow users to set their own <u>API keys</u>, you will still benefit from any space API keys set by the space owner or admins.

## Is gpt-4o supported?

Yes, gpt-4o and gpt-4o-mini are supported with and without an API key.

### Is GPT for Word connected to the web?

Yes, GPT for Word can access up-to-date information using models with web search capabilities (indicated by the \bigoplus icon in the model switcher).

## Can I scrape webpages in Word?

Yes. You can scrape specific webpages using GPT for Word and Google Gemini 2.5 models with URL context.

### How can I ask questions about my document?

Select some text or the whole document to include the selection as context for your prompt in the chat.

## Can GPT for Word analyze PDF files?

Yes. You can analyze PDF files using GPT for Word and Google Gemini 2.5 models with URL context.

## Why is my response cut or incomplete?

Models have a maximum token limit, which is the maximum total number of tokens that can be used in both the input and the response. This means models may not provide complete responses to long queries or when a large portion of text is selected as input.

To stay within the token limit, you can:

- In the sidebar, click **Clear chat** to delete your chat history.
- Break up your work into smaller parts.
- Select a model with a higher limit.

## Can I use my OpenAI Assistants and custom GPTs?

No. GPT for Word does not currently support OpenAI Assistants or custom GPTs.



You can use OpenAI Assistants and custom GPTs in GPT for Excel and GPT for Sheets:

- Set your OpenAI API key and your Assistants will become available in the model switcher.
- You can replicate your custom GPTs as Assistants to make them available in the model switcher.

### Can I use OpenRouter?

Yes, you can use the OpenRouter service in GPT for Work with an API key. With <u>OpenRouter</u>, you can access AI models from multiple providers through a single API key.

For API key setup instructions, check out Connect OpenRouter.

## Can I transfer my balance between GPT for Sheets and GPT for Excel or Word?

Packs are not directly transferable between platforms, but you can request a balance transfer between GPT for Sheets and GPT for Excel or Word. Here's what you need to know:

- Packs purchased for Microsoft Excel can be used on Microsoft Word and vice versa.
- Packs purchased for Google Sheets are separate and can only be used on Google Sheets.

If you need to transfer your balance between Google Sheets and Microsoft Excel or Word, <u>contact</u> <u>our support team</u>.

## Is there a limit to the number of requests I can send?

AI providers enforce rate limits in order to ensure a smooth and fair access to everyone. <u>Learn more.</u>

#### How do I uninstall the GPT for Word add-in?

The uninstallation process is described here.

#### Which models can I use?

Check our list of supported models.



If you're using GPT for Word as part of a team space, your space admin can control which models are available in the model switcher. Learn more.

#### Can I use local models with GPT for Word?

Yes. GPT for Word supports integration with Ollama and any LLM server that provides an OpenAI-compatible API, allowing you to use locally running open-source models:

- · Connect to Ollama from Excel and Word
- Connect to OpenAI-compatible local servers from Excel and Word

## Which languages can I use?

Models work in many languages, but deliver the best results in English. All we can say is, try it. It is usually better to prompt in the language you want the response to be in. In any case, avoid mixing languages in a prompt.

## How do I get support?

We recommend checking our troubleshooting and FAQ pages.

If that doesn't help, submit a support request and we'll get back to you.

Our support hours are from Monday to Friday:

- 7:30 PM 12:00 PM (New York)
- 1:30 AM 6:00 PM (Paris)
- 5:00 AM 9:30 PM (India)
- 8:30 AM 1:00 AM (Tokyo)

## **Remove Microsoft account access from GPT** for Word

#### ★ WARNING

Removing Microsoft account access from GPT for Word means removing access from the GPT for Excel Word add-in, which also removes access from GPT for Excel.

#### (i) NOTE

The following instructions only apply to personal accounts. If you have a school or work account, contact your organization administrator about add-in access.

- 1 In your browser, log in to the Microsoft account you use in GPT for Word.
- 2 Open the privacy dashboard for your Microsoft account.
- 3 In the **Empower your productivity** section, select **App access**.
- 4 In the **Manage your app access** section, click **Don't Allow** for GPT for Excel Word.

The **GPT for Excel Word** add-in no longer has access to your Microsoft account.

#### (i) NOTE

Removing account access does not uninstall the add-in from Microsoft Word. The next time you open the add-in, Word displays a welcome screen in the sidebar, after which you can sign in with your Microsoft account and grant access again.

## **Uninstall GPT for Word**

#### 

Uninstalling GPT for Word means removing the GPT for Excel Word add-in from both Word and Excel.

1 In Word, select **Add-ins** in the *Home* tab.



If you're on a Mac, select **Get Add-ins** in the *Insert* tab.

2 Click More Add-ins.

The Office Add-ins pop-up opens.

- 3 Select the MY ADD-INS tab, hover over GPT for Excel Word, and click the Options menu icon.
- Select **Remove**.

A confirmation pop-up opens.



If the **Remove** option is not available in the menu, clear the Microsoft Office cache:

- Close all Office applications.
- 2 Follow Microsoft's instructions for clearing the cache.
- 3 Open Word and try removing the add-in again.
- 5 Click **Remove** to confirm.

The GPT for Excel Word add-in is removed from Word and Excel. If you ever need to use the add-in again, follow the installation process.



#### (i) NOTE

Removing the add-in does not remove its app access permissions from your Microsoft account. You can remove access manually.

## **Concepts**

Key concepts related to <u>GPT for Work add-ons</u> and the use of ChatGPT and other AIs directly from MS Excel, and Word, Google Sheets and Docs.

## **AI** concepts

#### AI provider

Company or platform that provides <u>models</u> to GPT for Work add-ons. GPT for Work integrates with multiple AI providers, including OpenAI, Anthropic, and Google. See the complete list of supported models.

#### **API** key

Unique identifier that grants access to <u>models</u> served by <u>AI providers</u>. Using an API key gives you access to more models, and affords you more control and privacy. Using an API key can also lower costs if you're on usage-based pricing.

API keys in GPT for Work can be set at two different levels:

- **For a specific user:** When you set API keys for your own use, they work only for you. Only *you* have access to models associated with the keys, and only *you* can set and manage the keys.
- **For all space users:** When you set API keys for your <u>space</u>, they work for all users in the space. Space users automatically have access to models associated with the keys, but only the space owner and admins can set and manage the keys. Billing for a space key reflects its usage by all space users. Learn more.

If keys are set at both levels for the same AI provider, the specific user key overrides the space key.

#### **Custom instructions**

Specific guidelines provided to the model to define its role, expertise, or how it should respond to prompts. Custom instructions are set in the sidebar of the GPT for Work add-ons, and remain active in the document or spreadsheet until you change them.

### Formula (spreadsheet)

A spreadsheet formula is an expression you enter into a spreadsheet cell to calculate a value, process text, retrieve data, or perform some other task that returns a result. Formulas can contain functions, cell references, operators, as well as numbers, text, and other values. A

formula always starts with the equal sign =, which tells the spreadsheet to evaluate the expression instead of treating the entry as plain text.

The following simple formula consists of single function, SUM, which adds values:

```
=SUM(A1:A5)
```

The following more complex formula, which consists of two functions, one nested inside the other, runs the inner GPT function only if the cell A1 is not blank, which is determined by the outer IF function. If A1 is not blank, the formula returns the result from the GPT function; if A1 is blank, the formula returns an empty value.

```
=IF(A1="", "", GPT("Write a tagline for", A1))
```

#### **Function (spreadsheet)**

A spreadsheet function is a predefined <u>formula</u> that performs a specific task in a spreadsheet, such as calculating values, processing text, or retrieving data. Functions always return a result. Functions typically take one or more parameters as input, which tell them how exactly to perform their task and generate their result. For example, the SUM function adds values:

```
=SUM(A1:A5)
```

Functions can be divided into native functions, which are built into the spreadsheet software, such as SUM in Excel and Sheets, and custom functions, which come from user scripts or third-party software, such the GPT function in GPT for Excel and GPT for Sheets.

You can use a function on its own (a simple formula) or combine it with other functions to create more complex formulas, optionally with nesting and conditional logic.

#### Model

<u>Large language model (LLM)</u> used in a GPT for Work add-on. You select the model in the add-on sidebar. The available models depend on the add-on and whether you are using an API key or have access to <u>cloud-hosted models</u> or <u>local models</u> through API endpoints. See the complete list of supported models.

#### **Cloud-hosted model**

Model served over the internet by a cloud-based LLM platform. This is in contrast to models served by an LLM server running on a local machine. Compared to local models, cloud-

hosted models generally run on more powerful hardware, but require online access and involve sending data over the internet to an external service. For using cloud-hosted models, GPT for Work supports multiple AI providers, both model creators, such as OpenAI, Anthropic, and Google, and model hosts, such as Anyscale, Fireworks AI, Together AI, or <u>any</u> platform with an OpenAI-compatible API endpoint.

#### Local model

Model served by an LLM server running on a local machine, such as your own computer or another computer on a local network. This is in contrast to models served over the internet by cloud-based LLM platform. Compared to cloud-hosted models, local models offer enhanced data privacy and offline access. For using local models, GPT for Work supports Ollama and any LLM server with an OpenAI-compatible API.

#### Web search models

All web search models can go beyond their built-in knowledge by accessing information from search engines, like Google or Bing. This allows models, which have compressed historical knowledge, to explore topics in greater depth, with more current data or with a specific focus.

Web search models do not fetch full page content. Instead, they read search result snippets, like you would see on a Google search results page. The snippets are added to the context of the models, so they can use the information to generate a response.

#### **Content fetching models**

Some web search models can access the full content from specific URLs. The full content is added to the context of the models, so they can use it to answer questions about the content or extract information from it.

### **Prompt**

Input text given to the model to generate a response or perform a task. Prompts can be included in the sidebar of the GPT for Work add-ons, or passed as arguments in GPT functions. For guidance, see How to write a good prompt.

#### **Rate limits**

Restrictions on the number of tokens or on the number of requests that can be processed within a certain time frame (minute, day, month). AI providers set rate limits on their models. Google also enforces rate limits on the daily number of requests. Learn more.

#### **Tokens**

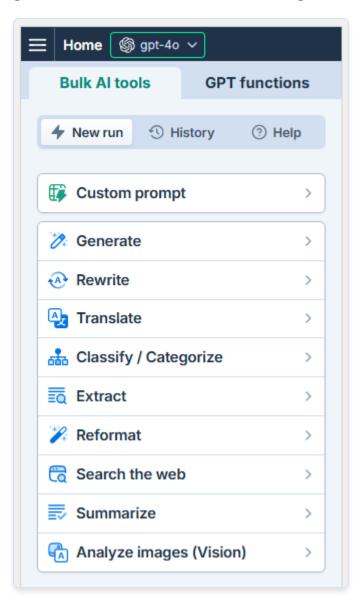
Small pieces of text that can represent a word or subword, a punctuation sign or a symbol. Models split all input and output into tokens for efficient processing. The token is the basic unit of usage of model providers. The number of tokens used in the prompt (input) and the AI's response (output) impacts your balance if you're on usage-based pricing.

### **GPT for Work concepts**

#### **Bulk AI tools**

Bulk AI tools allow you to run prompts on an entire spreadsheet column at once without writing any formulas. You configure and run bulk tools from the add-on sidebar.

GPT for Work provides dedicated bulk tools for selected use cases, such as classification, generation, and translation, as well as a generic bulk tool for custom prompts.



For more information, see Bulk AI tools in GPT for Excel and Bulk AI tools in GPT for Sheets.

#### Formula assistant

The <u>formula assistant</u> allows you to **generate** spreadsheet formulas based on plainlanguage descriptions of what you want to achieve. You can also use the formula assistant to **explain** existing formulas (in English).

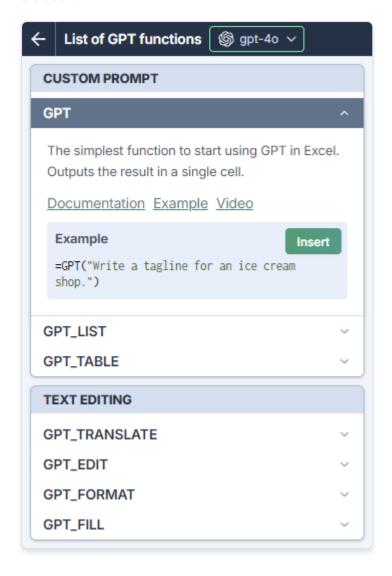
The formula assistant is available in the add-on sidebar, both under **Bulk AI tools** and **GPT** functions

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#### **GPT functions**

GPT functions are custom <u>spreadsheet functions</u> that allow you to prompt AI from inside spreadsheet cells. GPT functions work exactly like native functions in that you can use them on their own or combine them with other functions when creating formulas.

GPT for Work provides dedicated GPT functions for selected use cases, such as classification, summarization, translation, and web search, as well as a generic GPT function for all other use cases. You can define function-specific parameters to further refine how the AI generates responses. You can find a list of all available functions with usage examples in the add-on sidebar.

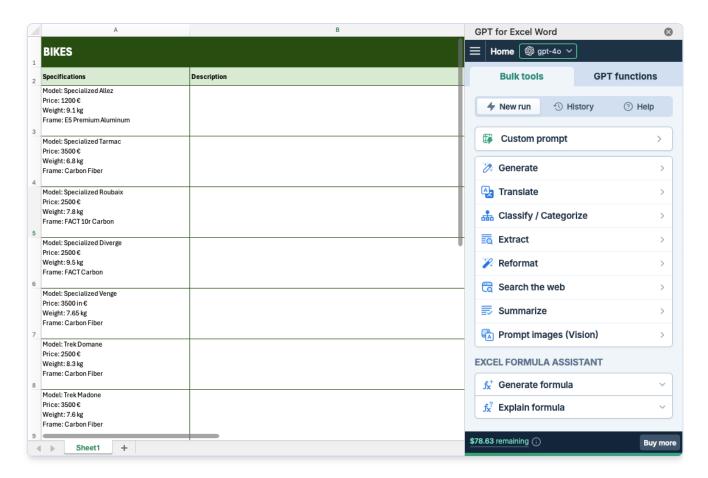


For more information, see <u>GPT functions in GPT for Excel</u> and <u>GPT functions in GPT for</u> Sheets.

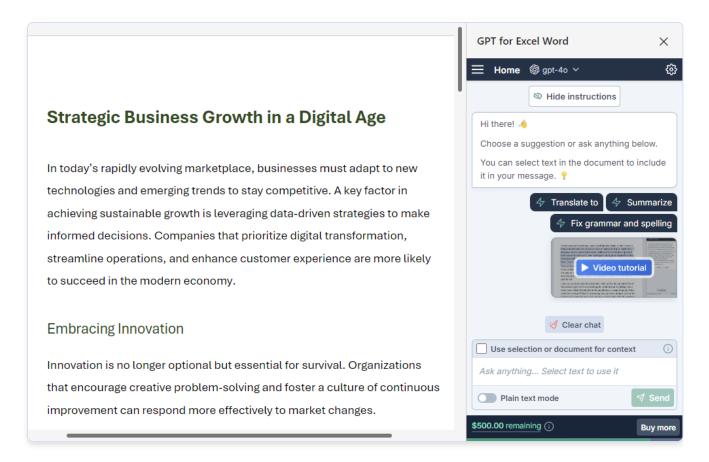
#### **Sidebar**

Panel in GPT for Work add-ons where users can interact with the AI, input prompts, and adjust settings. When you launch the GPT for Work add-ons, the sidebar opens on the right side of the screen.

#### **MS Excel**



#### **MS Word**



### **Space**

A space is the administrative hub for GPT for Work. Available through the <u>GPT for Work</u> <u>dashboard</u>, it centralizes purchases, billing, usage controls, and API keys for an individual or a team.

If you sign in to both <u>GPT for Sheets and Docs</u> (Google) and <u>GPT for Excel and Word</u> (Microsoft), you will have two separate spaces. These spaces are independent: balances/subscriptions, users, and API keys do not carry over between platforms.

You can be active in only one space at a time. If you join another user's space, you lose access to your own space balance/subscription and space API keys.

In the screenshot below, you can see the overview of a GPT for Sheets and Docs space with three space users. If you are on a <u>subscription plan</u>, your dashboard will show subscription details instead of a balance.

## How to write a good prompt

Write a good prompt to get the best results from our extensions. Be very specific about what you want and prompt exactly like you would brief a person to do the job, by providing clear instructions and ample context.

While models can sometimes process multi-lingual prompts or generate a response in a different language from the prompt language, it is highly recommended to write your prompt in the language that you expect your response to be in.

You can also check out our OpenAI GPT prompt generator.

Label	Description	Examples
Task	What you want to achieve  Note: This should be composed of at least a verb and a noun. You can replace "Task" by "Question" if it makes more sense.	Task: write a cold email  Task: write a blogpost  Task: write 5 taglines  Task: summarize in 3 paragraphs  Task: translate from English to  Spanish  Task: create a tweet thread of 10 tweets  Question: How can I find an SE0 expert?
Topic	What your text is about <b>Note:</b> Don't hesitate to be highly specific.	Topic: sell a shampoo  Topic: an ice-cream shop  Topic: food in Ancient Rome

Label	Description	Examples
Role	What character the AI has to impersonate	Role: Act as a teacher. Write in very basic terms, and illustrate with examples adapted to your audience. Then provide links to explore the topic further.  Role: Act as a tech reviewer. You write in-depth reviews including pros, cons, features, and benchmarks.  Role: Act as a technical writer. Your writing is very structured and hierarchical. Instructions are provided step by step so the reader can apply them without thinking.
Style	What type of language you want to use	Style: casual Style: formal Style: business Style: creative Style: academic
Tone	How you want your text to sound	Tone: joyful  Tone: angry  Tone: funny  Tone: serious  Tone: excited  Tone: sad

Label	Description	Examples
Audience	Who this text is for <b>Note:</b> This enables the model to select appropriate words and the right level of abstraction.	Audience: 5-year old  Audience: teenager who likes rock music  Audience: my boss  Audience: topic expert
Length	How long the output is expected to be (any unit)  Note: Language models have limited numerical accuracy, so it's good to be overly precise if you have a hard limit.	Length: 4 paragraphs  Length: 250 words  Length: strictly under 30 characters including spaces
Format	What structure or syntax your output must comply with	Format: HTML  Format: table  Format: markdown
	Any other parameter or instruction that is useful to you	Country: X  Product: door bell  Relate recipient job title to the user selling proposition  Sign as XYZ  Start with xxx  Include references to X, Y and Z

It is then extremely easy to write a good prompt that you can then use with our extensions.

## **Spreadsheets**

This is what your prompt should look like in a spreadsheet with GPT for Sheets or GPT for Excel Custom prompt bulk tool:

Learn more about <u>GPT for Sheets Custom prompt bulk tool</u> or <u>GPT for Excel Custom prompt bulk</u> tool.

#### **Documents**

This is what a prompt should look like in a document with GPT for Word:

This is what a prompt should look like in a document with GPT for Docs:

You can copy this prompt from the text below:

Task: Write a cold email

Style: Salesy
Tone: Funny

Topic: Sell the person on the idea of building their brand and growing their

business through social media videos with our company Brandtegic.

Length: 3 paragraphs

## **Rate limits**

GPT for Work extensions rely on services that enforce rate limits to ensure smooth and fair access to everyone.

If you choose not to set up API keys, you will share rate limits with other GPT for Work users. By setting API keys, you benefit from your own rate limits, which you can manage from these links:

- For OpenAI models
- For Anthropic models
- For Mistral AI models
- For Gemini models

#### **Google rate limits:**

If you use the GPT for Sheets and Docs add-on, you are also subject to the <u>rate limits enforced by Google</u>, based on your type of account:

	External service calls daily limits (URL fetch)
gmail.com	20k / day / gmail.com account
Google Workspace	100k / day / Google Workspace account



**Google's rate limits apply to all add-ons and scripts**, not just ours. If you use multiple scripts or add-ons, your usage counts towards the same rate limits. GPT for Excel and Word are not affected by Google's rate limits.