

# ChatGPT Desktop App for Finance

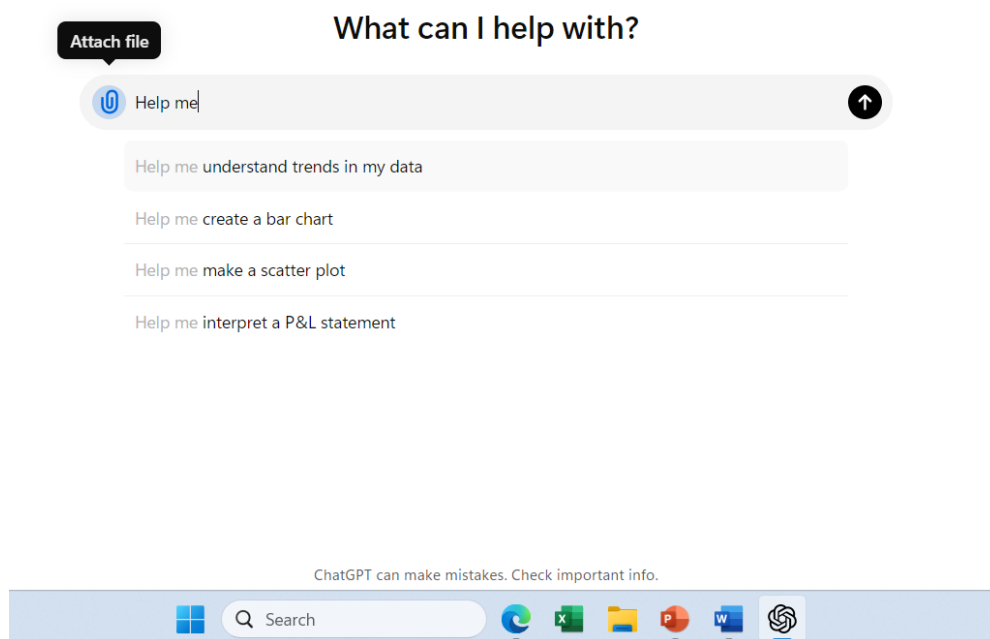
OpenAI has released an early version of the ChatGPT Windows app to ChatGPT users on paid plans (Plus, Team, Edu, and Enterprise).

You can download the Windows app from the Microsoft Store.

And then how to use it?

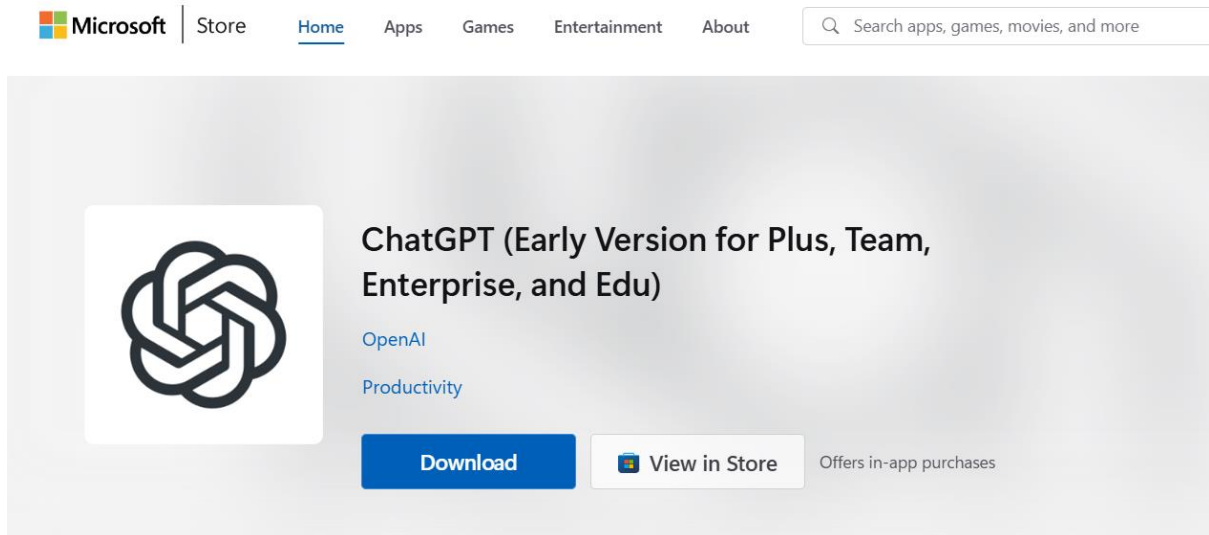
And what does this mean for finance and FP&A Teams.

I'll cover it on this guide!

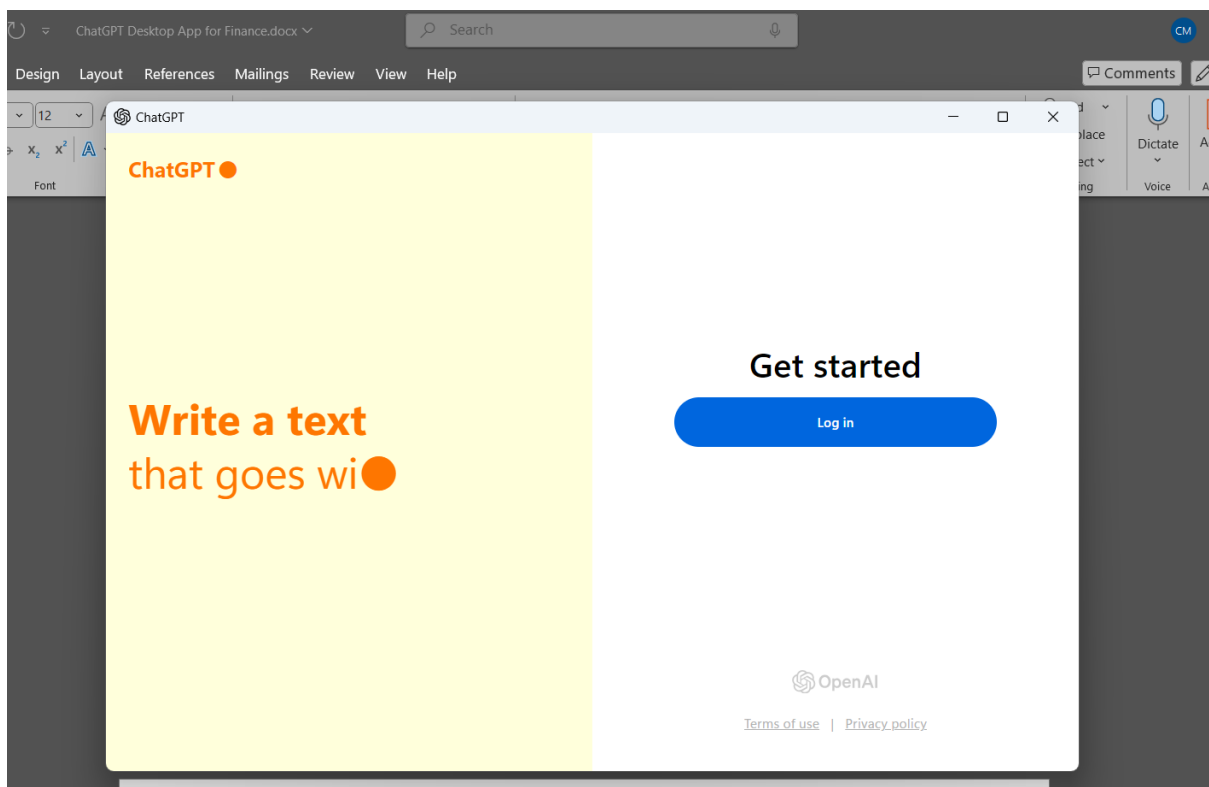


## How to get the ChatGPT Desktop App?

You can download the app [here](#).



It will be installed in your computer and then you need to log in:



## How to Use the ChatGPT Windows App for Financial Planning and Analysis (FP&A)?

The introduction of AI-powered tools like ChatGPT offers FP&A teams an opportunity to streamline tasks, generate insights faster, and increase overall efficiency.

With the release of the ChatGPT Windows app, users can now integrate this powerful tool into their daily workflows more seamlessly.

These are some key cases and I'll demonstrate how to do them in the app:

### Key Use Cases for FP&A with ChatGPT Windows App

#### 1. Improving Financial Reporting

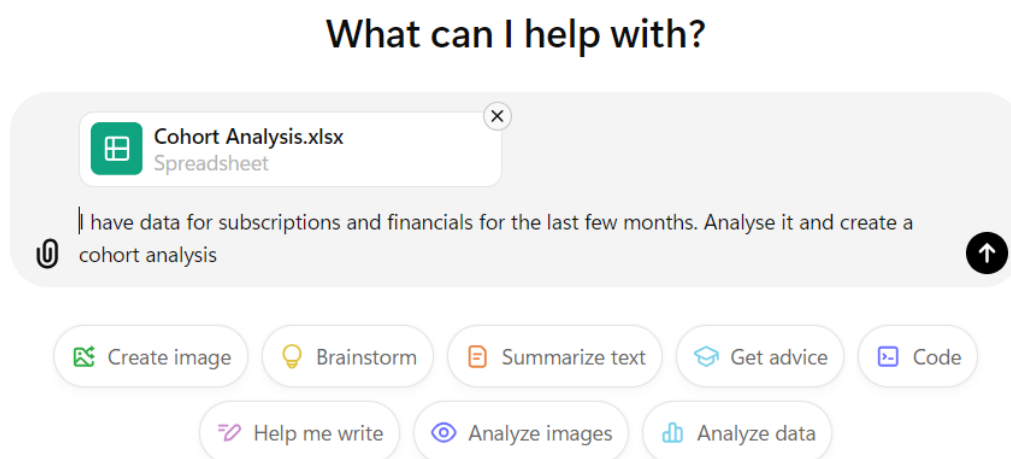
Creating regular financial reports is a core function of FP&A teams, but it can be time-consuming.

ChatGPT can help you by doing the initial analysis of your data.

Try prompts like:

1. Analyse my data
2. Act as a McKinsey consultant and analyse this dataset. Provide meaningful recommendations alongside to data visualizations.
3. I have data for subscriptions and financials for the last few months. Analyse it and create a cohort analysis

For the cohort example, you would prompt the app like this:



Then, it will start analysing your dataset:

2	2022-01-31T00:00:00	2	Enterprise
3	2022-01-31T00:00:00	3	Pro
4	2022-01-31T00:00:00	4	Pro

I have data for subscriptions and financials for the last few months. Analyse it and create a cohort analysis



The data contains the following columns:

- **Date:** The date of the subscription or financial transaction.
- **Customer\_ID:** The unique identifier for each customer.
- **Product:** The type of subscription (e.g., Basic, Pro, Enterprise).
- **Invoice:** The amount invoiced to the customer.

To perform cohort analysis, we'll need to group customers by their first subscription date and track their behavior over time, especially regarding how long they stay subscribed and their spending patterns.

I'll create a cohort analysis based on the customer's first subscription date and analyze the revenue retention and customer retention over the months. [↗]

Analyzing ▾



Message ChatGPT



You can then ask to create a heatmap visualization for this



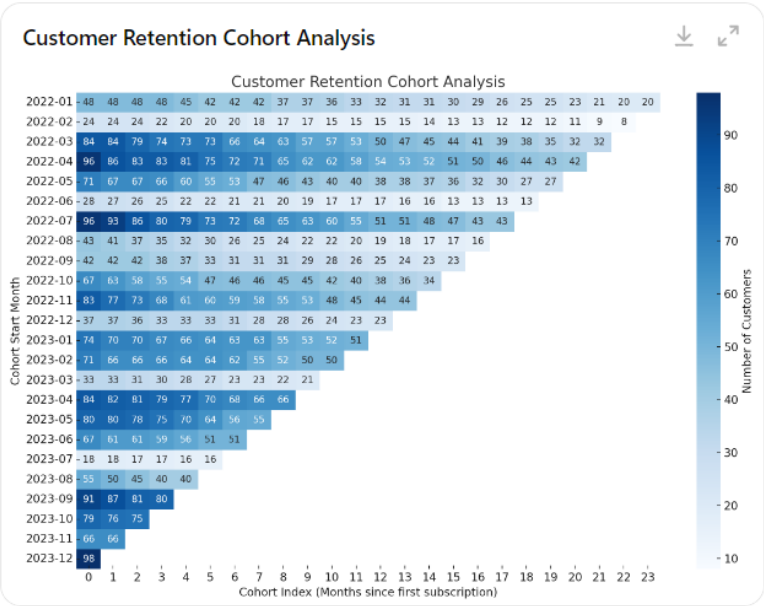
Create a heatmap visualization for this



ChatGPT can make mistakes. Check important info.

And the result will be:

Create a heatmap visualization for this

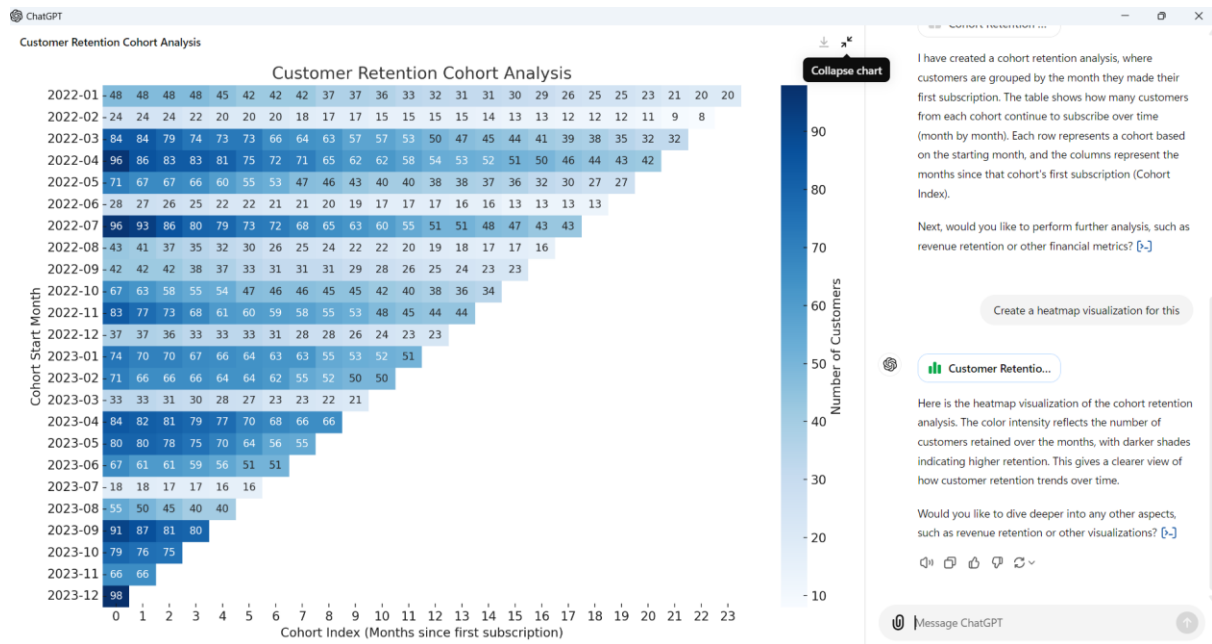


Here is the heatmap visualization of the cohort retention analysis. The color intensity reflects the number of customers retained over the months, with darker shades indicating higher retention. This gives a clearer view of how customer retention trends over time.

You can download the graph:



Or expand/collapse it:



**2. Preparing executive summaries:** You can use ChatGPT to draft high-level overviews for presentations or leadership updates, saving time on crafting summaries manually.

Try prompts like:

*I have a meeting with my CFO, this is my dataset. Use the pyramid principle to propose 3 slides with the key points about the financial performance of the last 3 months*

## What can I help with?

paper\_company\_dataset.xlsx  
Spreadsheet

I have a meeting with my CFO, this is my dataset. Use the pyramid principle to propose 3 slides with the key points about the financial performance of the last 3 months

Create image Summarize text Analyze images Analyze data More

It will start analyzing:

Paper Company Dataset Sheet1				
	Date	Region	Warehouse	Prod
1	2022-01-01T00:00:00	South America	Warehouse B	Pape
2	2022-01-02T00:00:00	Australia	Warehouse D	Pape
3	2022-01-03T00:00:00	Asia	Warehouse D	Pape
4	2022-01-04T00:00:00	Australia	Warehouse A	Pape

I have a meeting with my CFO, this is my dataset. Use the pyramid principle to propose 3 slides with the key points about the financial performance of the last 3 months



And provide you the slides content proposal:

4	min	101.0	1675.85
5	25%	915.5	5321.4974999999995
6	50%	2096.5	9557.065

Based on the dataset, here are three key slides summarizing the financial performance of the last three months, following the pyramid principle:

#### Slide 1: Overview of Financial Performance

- **Key takeaway:** Despite fluctuations in costs, operational efficiency has remained strong, with stable fulfillment rates and shipping volumes.
- **Supporting points:**
  - **Units Shipped:** Average of 2,228 units per shipment with consistent output.
  - **Operational Costs:** Average of \$26,678, indicating stable operating expenses.
  - **Shipping Costs:** Averaged \$9,953 with a broad range of cost variation, indicating possible optimization opportunities in shipping processes.

#### Slide 2: Operational Efficiency

- **Key takeaway:** Order fulfillment is consistently above 95%, showcasing reliable operations, but return rates and customer satisfaction need attention.
- **Supporting points:**

One thing that not many people tried is that you can ask it to generate a downloadable PowerPoint out of this:

Generate a downloadable PowerPoint out of this

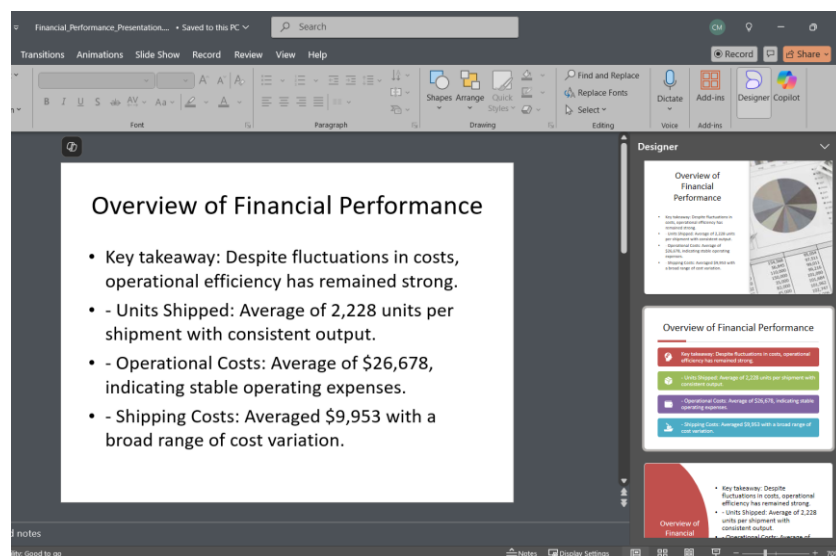


I have generated the PowerPoint presentation for you. You can download it using the link below:

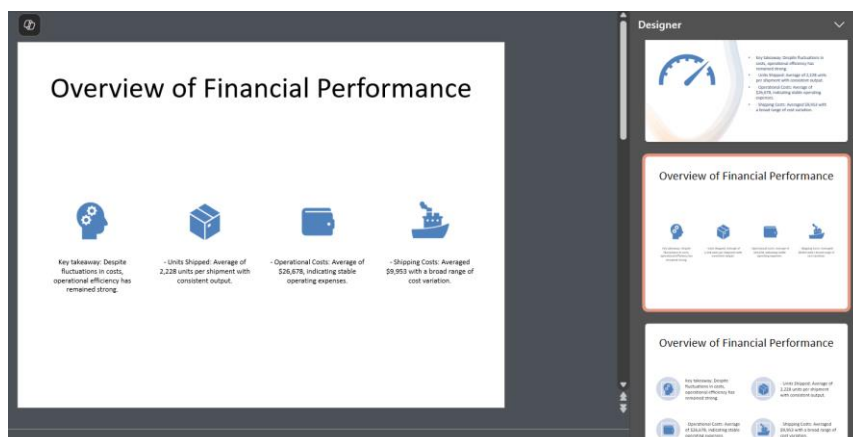
[Download the Financial Performance Presentation \[x\]](#)



It won't be the best designed one but you will get all the information there and then you can use PowerPoint Designer Feature of Copilot to improve the design:



All with a few clicks:

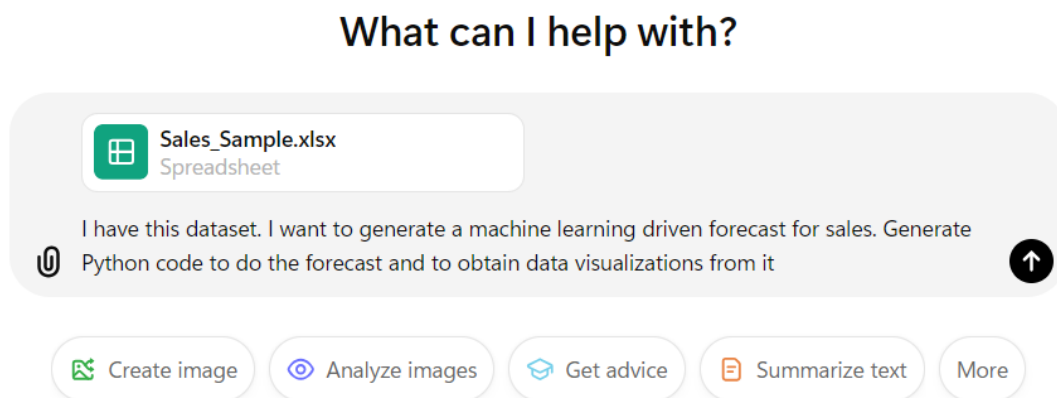




### 3. Use it to generate forecasts with Machine Learning

You can prompt it like:

*I have this dataset. I want to generate a machine learning driven forecast for sales. Generate Python code to do the forecast and to obtain data visualizations from it*



It will generate the code:

1. **Install the Prophet package:** Since Google Colab doesn't come pre-installed with `prophet`, you'll need to install it first.
2. **Preprocess your data:** Format the dataset for Prophet.
3. **Fit the model and make predictions.**
4. **Visualize the forecast.**

Python code for Prophet in Google Colab:

```
python Copy code

# Step 1: Install Prophet in Colab
!pip install prophet

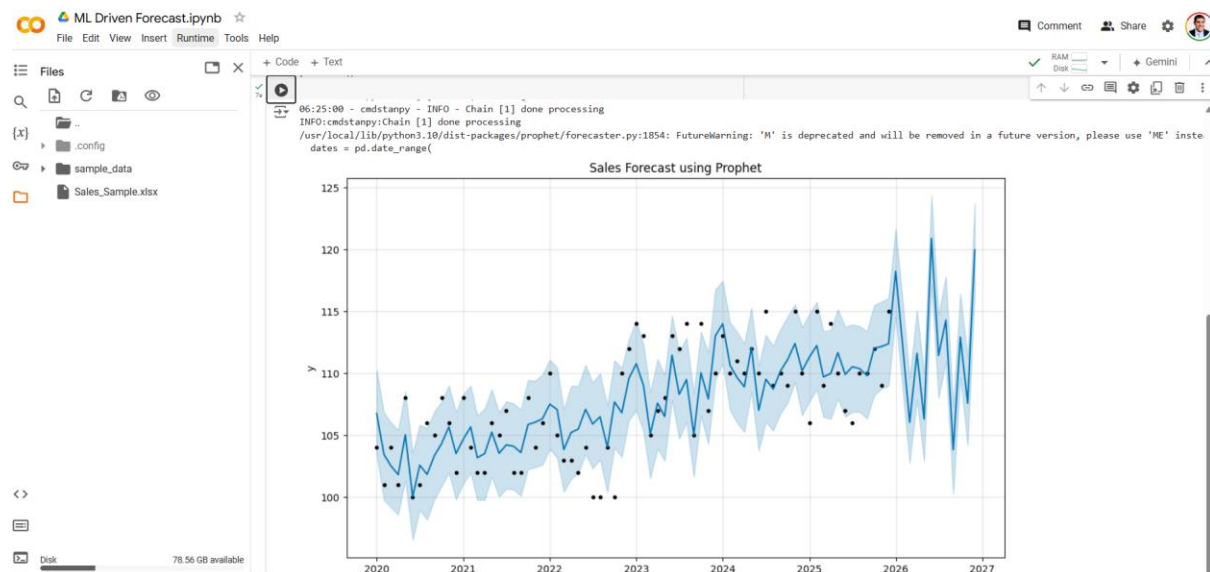
# Step 2: Import necessary libraries
import pandas as pd
from prophet import Prophet
import matplotlib.pyplot as plt

# Step 3: Load your dataset (upload your file in Colab or mount Google Drive)
# Assuming you have the dataset as a Pandas DataFrame
# sales_data = pd.read_excel('path_to_your_file.xlsx')

# Replace the following line with your file loading code
# sales_data = pd.read_excel('Sales_Sample.xlsx')

# Step 4: Preprocess the data
# Prophet expects columns to be named 'ds' for date and 'y' for the value (sales amount)
sales_forecast_data = sales_data[['Date', 'Amount']].rename(columns={'Date': 'ds', 'Amount': 'y'})
```

Then, you can use this code in your environment of choice: Python in Excel, Google Colab or Visual Studio:



#### 4. Scenario Planning and “What-If” Analysis

FP&A teams often need to plan for multiple contingencies. The ChatGPT app can help streamline scenario planning by:

- **Simulating different business conditions:** Ask ChatGPT to run “what-if” analyses for different variables like changes in market conditions, operational costs, or customer demand.
- **Stress testing assumptions:** ChatGPT can simulate how changes in variables like interest rates or inflation would impact financial performance.
- **Building contingency plans:** Quickly generate alternative action plans based on different financial scenarios.

For example you can add your company's projected sales figures and ask ChatGPT to simulate the impact of a 10% cost increase on profitability.



To simulate the impact of a 10% cost increase on profitability, I'll follow these steps:

1. Assume you have both revenue and cost data. If the cost increases by 10%, the profitability will decrease accordingly.
2. We'll calculate profitability using the formula:

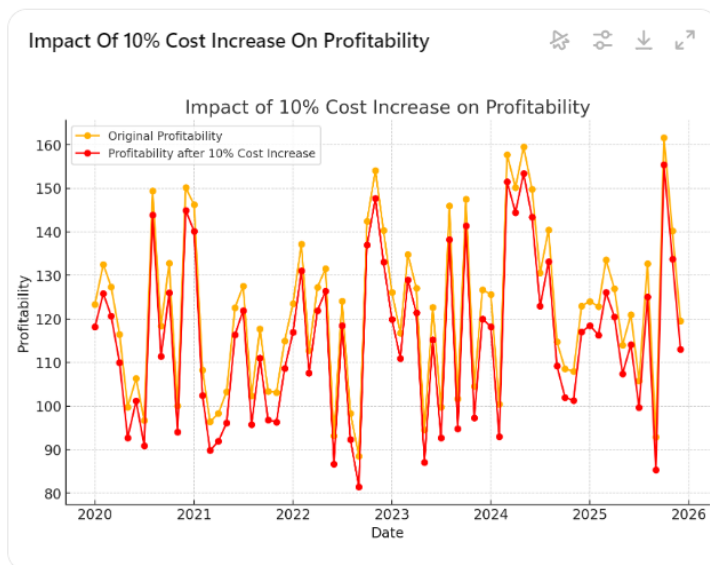
$$\text{Profitability} = \text{Revenue} - \text{Cost}$$

After a 10% cost increase, it becomes:

$$\text{New Profitability} = \text{Revenue} - (\text{Cost} \times 1.1)$$

This will be the output:


I'll simulate the profitability and the impact of the 10% cost increase based on these assumptions and plot the results.



The graph shows the comparison between the original profitability (blue line) and the profitability after a 10% cost increase (red line). As expected, the profitability decreases after the cost increase.

Hope you enjoyed this guide and keep experimenting with AI for FP&A!

Also, if you want to learn more about how to use Advanced ChatGPT and Python for Finance, I have this [course](#):

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# Advanced ChatGPT for Finance

★★★★☆ 4.7 (75 RATINGS) · 3 DAYS · COHORT-BASED COURSE

Learn Advanced Financial Analysis with Generative AI (ChatGPT, Copilot, Gemini and Python)

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Finance Thought Leaders on AI with more than 1 million followers on social media

Finally, in the next page I also give you some frequent asked questions about ChatGPT Desktop App.

## **FAQ: ChatGPT Windows App for FP&A**

### **1. What are the system requirements for the ChatGPT Windows app?**

The ChatGPT Windows app requires **Windows 10 (x64 and arm64) version 17763.0 or higher**. Ensure your system meets these requirements before downloading the app from the Microsoft Store.

### **2. Who can access the ChatGPT Windows app?**

As for today, October 18th 2024, the app is available to users on paid plans, including **Plus, Team, Edu, and Enterprise**. You can download it directly from the Microsoft Store and begin integrating it into your financial planning and analysis tasks seamlessly.

### **3. Are all features from the macOS and web versions available in the Windows app?**

Currently, a subset of features from the macOS and web versions are unavailable in the early version of the Windows app. The features that are not yet available include:

- Standard and Advanced Voice Features
- Authentication into Google Drive and Microsoft OneDrive for setting up Context Connectors
- 3rd Party Authentication in the GPT Builder

These features are expected to be included in future updates when the full release of the app is available.

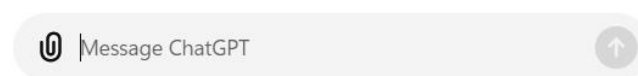
#### 4. How do I use the Companion Chat feature in the Windows app?

The **Companion Chat** allows you to instantly ask ChatGPT questions, upload files, generate images, or start a new conversation. To access the Companion Chat:

- **Press Alt + Space** when you have the ChatGPT app open.
- The Companion Chat remembers its last position but will reset to the bottom center of the screen when the app resets.

Please note, if the Alt + Space shortcut is already registered with another Windows application, it will not work with ChatGPT. There is currently no option to change the companion chat shortcut.

This shortcut will launch this window:



#### 5. What is the Enterprise and Edu retention policy for ChatGPT?

By default, OpenAI does not use content submitted by customers in its **business offerings** (such as API or ChatGPT Enterprise) to improve model performance. If you have opted to share data through feedback, it may be used to improve services. For more details on data usage, refer to the [Enterprise Privacy Page](#).

This retention policy ensures that data used by FP&A teams in business contexts is protected and not used for model training unless explicitly opted in.

## **6. What are some limitations of the current version of the ChatGPT Windows app?**

In addition to the features currently unavailable (such as voice features, external file authentication, and third-party integrations), certain functionalities like customizing the Companion Chat shortcut are also not supported. However, these features are expected to be included in future releases of the app.

If you're using the early version of the app, you can still access core ChatGPT functions like text-based queries, document summaries, and basic financial analysis tools.