

EXCEL AUTOMATION WITH CHATGPT

ChatGPT Powered Formulas



RICHARD NERO

Imagine if you had **ChatGPT**
powers **inside Excel**

Formulas powered by
ChatGPT for free

Swipe on to learn more!



WRITING LONG PERSONALISED EMAILS CAN BE PAINFUL

Sometimes you need
to write **lots of emails**

But they need to be
hyper personalised..

...so copy pasting wont work



THE CHALLENGE

Bulk create hyper personalised event invite emails

	A	B	C	D	E
1	Customer	Role	Sector	Account Mgr	Notes
2	Mynda	CFO	Retail	Richard Nero	Famous Excel YouTuber
3	Jordan	CEO	Logistics	Richard Nero	Written books on data
4	Rick	CIO	Pharma	Richard Nero	Skilled Excel user
5	Leila	CTO	Finance	Bill Nero	Popular on TikTok
6	Kat	CFO	Media	Bill Nero	Privacy concerns with AI
7	Ajay	CMO	Marketing	Bill Nero	Uses Magento and SAP
8	Tom	CTO	Retail	Nadine Nero	Won an Excel award
9	Oz	CFO	Oil and Gas	Nadine Nero	Fan of kaleidoscopes

Use the name, role, sector, manager and notes to give them the human touch

YOU COULD ENTER THE TIME VORTEX

Hours searching YouTube

Hours searching forums

Hours getting nowhere

OR MAYBE USE..

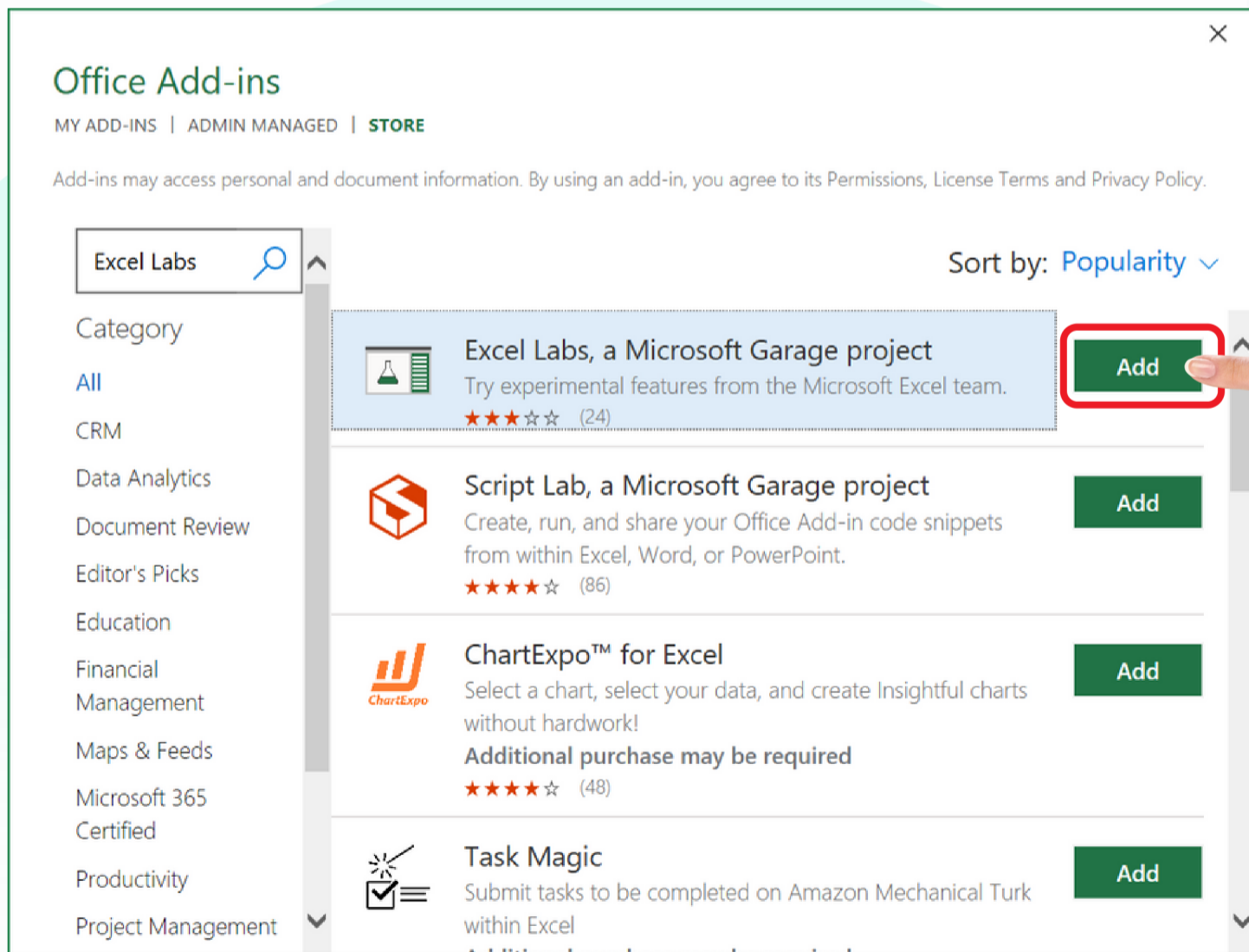
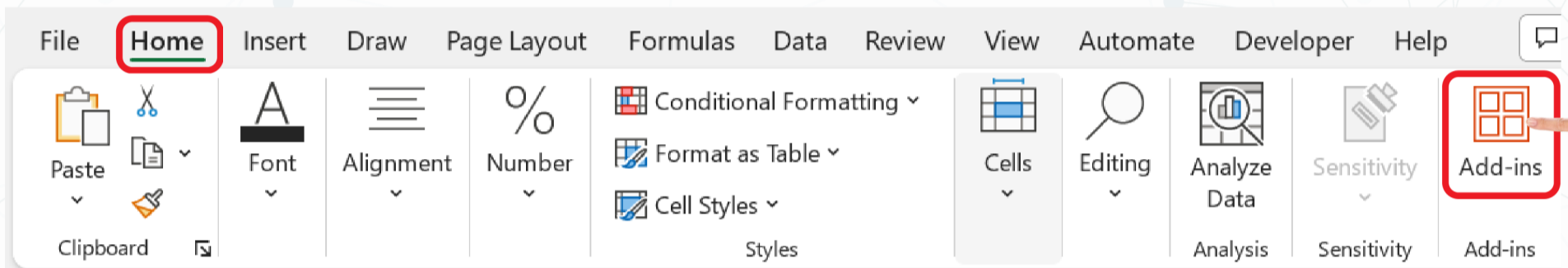


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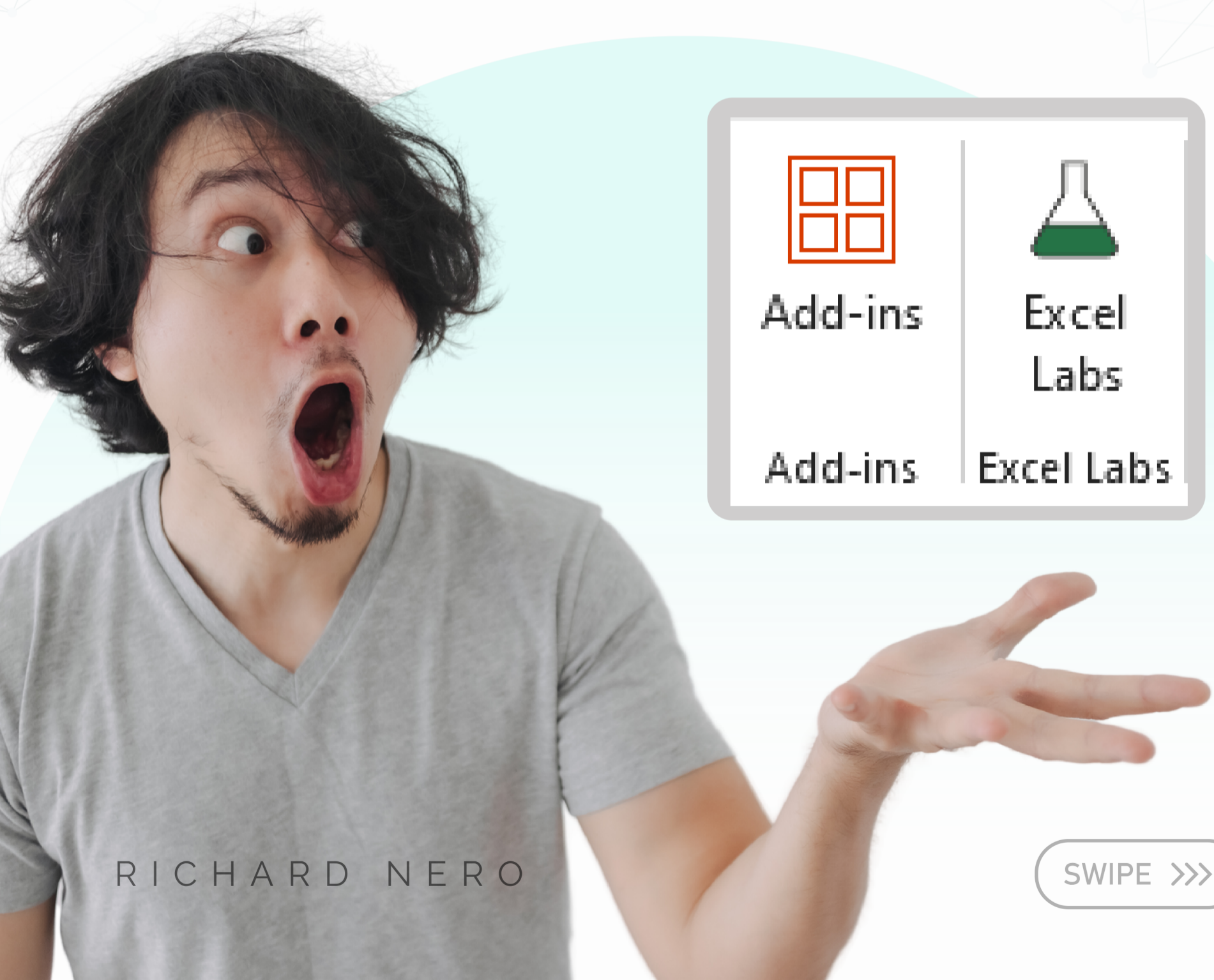
SWIPE >>>

STEP 1

Get the **Excel Labs** add-in



The **Excel Labs** add-in
should appear
in your '**Home**' tab



STEP 2

Click on the **Excel Labs** add-in



LABS.GENERATIVEAI function

Use a custom function to send prompts to a generative AI model and return the response.

With the announcement of [Microsoft 365 Copilot](#), we see so much potential in the power of generative AI. Using this experimental add-in, you can test the benefits of generative AI directly from the Excel grid. This is not part of M365 Copilot but rather a place for you to play and experiment with some AI today within the Garage framework.

Open



Make default

Click **Open**

STEP 3

Click 'Configure API key'

Configure API key

To use the `LABS.GENERATIVEAI` function, you must register an OpenAI account and enter your account key in the following **OpenAI API key** field.

This OpenAI account key is stored in your machine's local Excel settings and is shared across workbooks on your machine, but it's not saved in the workbook or shared with other users who open the workbook.

OpenAI API key

Secret key (usually starting with "sk-")

[Get your API key here](#)

Click 'Get your API Key'

platform.openai.com/account/api-keys

You are now on openai.com

platform.openai.com/account/api-keys

Overview Documentation API reference Examples Playground Fine-tuning Forum Help Personal

ORGANIZATION

- Personal
- Settings
- Usage
- Rate limits
- Members
- Billing

USER

- Settings
- API keys**

API keys

Your secret API keys are listed below. Please note that we do not display your secret API keys again after you generate them.

Do not share your API key with others, or expose it in the browser or other client-side code. In order to protect the security of your account, OpenAI may also automatically disable any API key that we've found has leaked publicly.

NAME	KEY	CREATED	LAST USED	
Secret key	sk-...9E2j	Mar 6, 2023	Never	
Secret key	sk-...tS1p	Mar 6, 2023	Sep 30, 2023	
MealPlanTypeForm	sk-...e4xr	Aug 21, 2023	Sep 16, 2023	

+ Create new secret key

Default organization

If you belong to multiple organizations, this controls which organization is used by default when making requests with the API keys above.

Click 'Create new secret key'

STEP 4

Create new secret key

Name Optional

ExcelLabs

Cancel

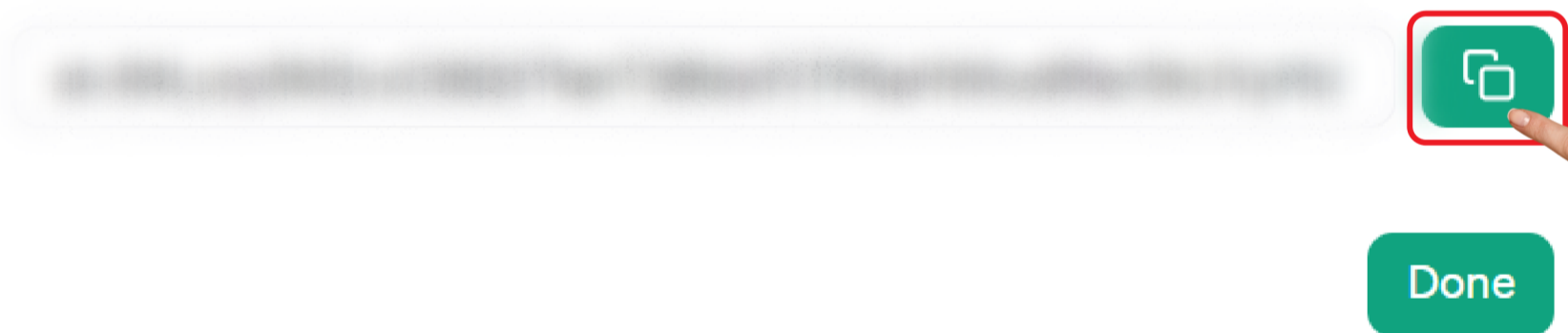
Create secret key

Give it a **memorable name**

Write this down as you won't
get to see it ever again.

Create new secret key

Please save this secret key somewhere safe and accessible. For security reasons, **you won't be able to view it again** through your OpenAI account. If you lose this secret key, you'll need to generate a new one.



Click copy and then
paste it into Excel Labs

Bonus levels activated!!!!

=LAB



LABS.GENERATIVEAI

Invoke a generative AI model w



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SWIPE >>>

STEP 5

Setup some named ranges

The image shows an Excel spreadsheet with the following data:

	A	B	C	D	E
1	Customer	Role	Sector	Account Mgr	Popular Excel YouTuber
2	Mynda	CFO	Retail	Richard Nero	Famous YouTuber
3	Jordan	CEO	Logistics	Richard Nero	Written books on data
4	Rick	CIO	Pharma	Richard Nero	Skilled Excel user
5	Leila				
6	Kat				
7	Ajay				
8	Tom				
9	Oz				
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					

The Name Manager dialog box is open, showing the following table:

Name	Refers To	Scope	Value
Customer	=Sheet1!\$A2	Workbook	Mynda
Note	=Sheet1!\$E2	Workbook	Famous YouTuber
Role	=Sheet1!\$B2	Workbook	CFO
Sector	=Sheet1!\$C2	Workbook	Retail
Sender	=Sheet1!\$D2	Workbook	Richard Nero
Table1	=Sheet1!\$A\$2:\$F\$9	Workbook	["Mynda", "CFO", "Re...

The 'Refers to:' field at the bottom of the dialog box contains the formula =Sheet1!\$A2.

STEP 6 - THE FORMULA



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=LABS.GENERATIVEAI("Write the body to "&Customer&" with a short 2 paragraph personalised email invite to our event about Excel called 'ChatGPT and Excel' and make it relevant to a "&Role&" in the "&Sector&"sector.Event will be held at The Ned in London at 6pm on 22nd November.

Email will be sent from "&Sender&"

Add this bit of personal information about them "&Note&".

No subject is required. Just the body of the email")

SWIPE >>>

STEP 7

Wait for formulas to refresh

	A	B	C	D	E	F
1	Customer	Role	Sector	Account	Excel YouTuber	Email
2	Mynda	CFO	Retail	Richard	s YouTuber	📧 #BUSY!
3	Jordan	CEO	Logistics	Richard	books on data	📧 #BUSY!
4	Rick	CIO	Pharma	Rich	user	📧 #BUSY!
5	Leila	CTO	Finance	Bill	Tok	📧 #BUSY!
6	Kat	CFO	Media		with AI	📧 #BUSY!
7	Ajay	CMO	Marketing		SAP	📧 #BUSY!
8	Tom	CTO	Retail	Nad	ce. rd	📧 #BUSY!
9	Oz	CFO	Oil and Gas	N	idoscopes	📧 #BUSY!





Dear Jordan,

I hope this email finds you well. As a CEO in the Logistics sector, I wanted to personally invite you to our exclusive event called "ChatGPT and Excel" on 22nd November at 6pm, held at The Ned in London.

With your expertise in data, I believe this event will be of great interest to you. We will be discussing the latest advancements in Excel and how it can revolutionize data management and analysis in the logistics industry. As someone who has authored books on data, your insights and perspectives would be invaluable during our discussions.

I look forward to having you join us at this event and sharing your expertise with fellow industry leaders. Please let me know if you are able to attend, and I will ensure that a spot is reserved for you.

Best regards,

Richard Nero

Hi Rick,

I hope this email finds you well. I wanted to personally invite you to our upcoming event, 'ChatGPT and Excel,' which will be held at The Ned in London on 22nd November at 6pm. As a skilled Excel user and CIO in the Pharmasector, I believe this event will greatly benefit you.

During the event, we will explore the powerful combination of ChatGPT and Excel, showcasing how these technologies can enhance data analysis and decision-making in the pharmaceutical industry. We will have industry experts sharing their insights and practical demonstrations of how to leverage these tools effectively. It will be a valuable opportunity to network with like-minded professionals and gain new perspectives on optimizing data management.

Hi Mynda,

I hope this email finds you well. I wanted to personally invite you to our upcoming event, 'ChatGPT and Excel', which I believe would be of great interest to you as a CFO in the Retail sector. The event will be held at The Ned in London on 22nd November at 6pm.

As a famous Excel YouTuber, I'm sure you're always looking for ways to enhance your Excel skills and stay ahead in the industry. This event will provide you with valuable insights on how ChatGPT can be integrated with Excel to streamline financial analysis and decision-making processes. It's a great opportunity to network with like-minded professionals and gain practical knowledge from experts in the field.

I look forward to seeing you there and discussing the exciting possibilities that ChatGPT and Excel can offer to CFOs in the Retail sector. Please let me know if you have any questions or if there's anything else I can assist you with.

Best regards,
Richard Nero

...the event and discussing how these
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...s anything else I can assist you with

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popular on TikTok, I thought you mig
nce your Excel skills through this uni
e latest advancements in ChatGPT an
analysis and financial modeling usin
ghtful and interactive, offering valua
chnologies for greater efficiency and
s.

eing you at the event and exchanging
s in the industry. Please let me know
e's anything else I can assist you wit

You have just automated the
instant creation of **hyper**
personalised emails

You deserve a pay rise, a
promotion or **perhaps both**



What if we wanted a **VBA macro** to **send all those emails???**

EXCEL AUTOMATION WITH CHATGPT

Sending Bulk Emails



Here's one I prepared earlier

Link in the comments



RICHARD NERO

Karan Singh and 292 others

31 comments • 47 reposts

Reactions



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SWIPE >>>

If you enjoyed that please repost
so your network can enjoy it too

**Follow for more Excel +
ChatGPT automation tips**



Or save it so you can come back to it



Richard Nero

Top Voice x 4 | Finance Systems
Consultant | Excel Trainer | Power
Platform Pro | Event Organiser

PS: Comment 'GPT'
for a copy of the file

