

Custom GPT Configuration Template

Build your own AI assistant in ChatGPT

GenFutures Lab | AI for Nonprofits Summit | Sacramento Mountains Foundation

How to use this template

This template maps directly to the Configure tab in ChatGPT's custom GPT builder. Fill in each section, then copy and paste the content into the matching fields.

1. **Plan first.** Define your goal, inputs and outputs before you open ChatGPT.
2. **Fill in the template.** Use the blank template on page 2. Write in plain English.
3. **Open ChatGPT.** Go to chatgpt.com, click your profile icon, then My GPTs, then Create a GPT. Select the Configure tab.
4. **Copy your content across.** Paste your Name and Description into the matching fields. Paste everything from Role through to Error Handling into the Instructions field.
5. **Add Conversation Starters.** These are the suggested first messages users see when they open your GPT.
6. **Upload knowledge files (optional).** If your agent needs reference documents (policies, templates, funder briefs), upload them in the Knowledge section.
7. **Enable capabilities.** Turn on Web Browsing if your agent needs to check live URLs. Turn on Advanced Data Analysis if it needs to process spreadsheets, CSVs or data files.
8. **Test at least three times** with different inputs before sharing.

Before you deploy: three questions

1. **What can go wrong?** AI can hallucinate facts, get the tone wrong, or miss context.
2. **Who checks the work?** Every output should be reviewed by a human before it reaches anyone external.
3. **What data is it seeing?** Be clear about what information you are sharing and whether it is appropriate.

What you need

- ChatGPT Plus (\$20/month) to create custom GPTs
- Free users can use GPTs from the GPT Store but cannot build new ones
- No coding or technical skills required

Step 1: Plan Your Agent

Before you configure anything, define these three things. This is the work that makes the build easy.

Goal	<i>What is this assistant for? What outcome should it produce?</i>
Inputs	<i>What information does the user need to provide?</i>
Outputs	<i>What should the finished result look like? What format and structure?</i>

Step 2: Configure Your GPT

Fill in each section below. Then copy and paste into ChatGPT's Configure tab.

Paste everything from Role through to Error Handling into the Instructions field.

Name	<i>A short, clear name for your GPT</i>
Description	<i>One or two sentences explaining what the GPT does and who it helps</i>

Instructions field (paste everything below into this single field)

Role	<i>You are [name], a [role] that helps [audience] achieve [outcome].</i>
Core Behaviour	<i>How should the agent communicate? What tone and approach?</i>
Output	<i>Structure every response as: [define the sections and format].</i>
Tools	<i>When should it browse the web? When should it avoid browsing?</i>
Rules	<i>What must it always do? What must it never do?</i>

Trigger / Action / Example (1)	Trigger: When the user does... Action: The agent should... Example: A sample response showing what good looks like.
Trigger / Action / Example (2)	Add more trigger/action/example blocks as needed for different stages of the workflow.
Error Handling	What should the agent do if information is missing, a link is broken, or a tool fails?

Conversation Starters	Write 2 to 4 suggested first messages that users will see when they open your GPT. Make them sound natural.
Knowledge Files	List any documents you plan to upload (policies, templates, briefs, guides).
Capabilities	Which capabilities will you enable? Web Browsing / Advanced Data Analysis / Image Generation

Worked Example: Funder Fit Check Assistant

This is the GPT we built during the session. Below is the planning and setup to show you how a completed template looks. The full instructions were configured live and are not included here.

Planning

Goal	Help nonprofits assess whether a funding opportunity is worth pursuing before they invest time in a full application.
Inputs	A funding opportunity (URL or pasted requirements) and a short description of the organisation.
Outputs	Eligibility checklist, fit rating (Strong / Partial / Weak), gap analysis, recommended next steps.

Configuration

Name	Funder Fit Check Assistant
Description	The user pastes a funding opportunity or describes a funder's requirements, then you ask them a few questions about their organisation. You then compare the two and tell the user whether it's worth applying, where the gaps are, and what to do next.

Instructions field: what we configured

During the session, we wrote detailed instructions covering all seven elements of the template. Here is a summary of what each section addressed:

Role	<i>Defined the agent as a funding readiness assistant for nonprofit teams, focused on assessing fit before application.</i>
Core Behaviour	<i>Set the tone to be practical, supportive and honest. Configured to ask questions one at a time and to be upfront when the fit is weak.</i>
Output	<i>Structured every assessment into four sections: eligibility checklist, fit rating, gap analysis and next steps.</i>
Tools	<i>Enabled web browsing for when users share funder URLs. Disabled when requirements are already pasted in full.</i>
Rules	<i>Included guardrails to distinguish must-have from nice-to-have criteria, and to focus on fit rather than judging the organisation.</i>
Triggers / Actions / Examples	<i>Three trigger/action/example blocks covering: (1) extracting and presenting funder criteria, (2) producing a traffic-light fit assessment, and (3) recommending concrete next steps.</i>
Error Handling	<i>Configured to handle broken links and incomplete information gracefully, proceeding with whatever is available.</i>

What the GPT produces

When a user submits a funding opportunity, the Funder Fit Check Assistant:

9. Extracts the key eligibility criteria and presents them as a numbered checklist, grouped into threshold (must-have) and preferred (nice-to-have) requirements.
10. Asks the user about their organisation one question at a time, covering size, location, policies, track record and capacity. (Unless the user adds an organisational profile to the GPTs knowledge base.)

11. Produces a traffic-light assessment: green for met, amber for partial, red for missing. Each criterion gets a rating, with an overall verdict of Strong Fit, Partial Fit or Weak Fit.
12. Identifies gaps, estimates effort for each (quick fix / needs time / may be a blocker), and suggests prioritised next steps.