Company Name

Getting started with AI at work

A quick, friendly guide for finance and operations teams

Use your company's approved AI assistant to draft, summarize and untangle your day, with you always in control.

You don't need to "learn AI"

Think of the assistant as a sharp, endlessly patient new coworker who is great with words and never gets tired. You don't need special commands or training. You talk to it the way you would explain a task to a colleague: in plain English, with as much detail as you would give a person.

Ask it a question. Paste in an email and ask it to reply. Hand it a confusing document and ask what it means. If the first answer isn't quite right, tell it what to change. It's a conversation, not a one-shot search.

> ! **AI can be wrong.** Before you act on or send anything, check the facts: invoice numbers, vendor names, dates, dollar amounts and any policy claims.

Try these today

Written for work that is already on your desk. Copy one, swap in your own details (the parts in brackets), and read the result before you send it.

Soften a tense email before it goes out

Help me reword this email to a vendor so it stays professional and friendly but still gets the point across. Keep the meaning the same and don't add anything that isn't here: [paste your draft]

Explain a payment delay

Help me write a short, polite email to a vendor who is asking why invoice [number] hasn't been paid yet. The reason is [it's missing a purchase order (PO) number / it's pending approval]. Keep it clear and professional, and don't promise a specific payment date.

Ask for a corrected or missing document

Write a brief, friendly email asking a vendor to send a corrected [W-9 / signed form / invoice]. Explain that we can't set them up for payment until we receive it. Keep it short and clear.

Untangle a confusing message

I got this message and I'm not sure what they are actually asking for. Tell me in plain language: what they want, what they need from us, and what I should do next. [paste the message]

Summarize a long thread

Summarize this email thread. Tell me: the main issue, what has already been done, what information is still missing, and who needs to act next. [paste the thread]

How to get great answers

The trick isn't fancy wording. It's being clear. A good request has three simple parts:

1. **Say what you want.**
   "Help me write a reply…" or "Summarize this…"
2. **Give it the details.**
   Paste the email, the document, or the facts it should use.
3. **Say how you want it to sound.**
   "Keep it short and polite", "more formal", "plain language, no jargon".

And remember it's a conversation. If the answer isn't right, say so: "Make it shorter." "Warmer tone." "Take out the last paragraph." Go back and forth as many times as you like.

One quick before and after

Instead of
"Help me email this vendor."

Try
"Help me write a short, polite email to a vendor who is asking about invoice [number]. We can't pay it yet because it's missing a PO number. Ask them to send a corrected invoice with the PO, and don't promise a payment date."

Keep this out of the chat

Treat the chat like an email you wouldn't want forwarded. You almost never need sensitive details to get good help. **Never paste:**

- Bank account, routing or card numbers
- Social Security numbers or full tax ID numbers
- Health or medical information about anyone
- Passwords, or login and verification codes
- Anything marked confidential
- Personal details the task doesn't need

A handy trick: before you paste an invoice or an email, replace the sensitive numbers with "[account number]" or "XXXX". The assistant can still help with the wording or the problem without ever seeing the real digits. **When in doubt, leave it out.**

Use only what your company has approved

Use the assistant your company provides, signed in with your work account. A personal account on a public AI site does not carry your company's data protections. If you aren't sure which tool is approved, ask before you paste anything.

That's the whole idea: start with the work in front of you, tell the assistant what you need in plain words, and always give the result a read before it goes out.