



# A Guide to Effective Prompt Writing

## INTRODUCTION

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A prompt is how you tell ERPure.AI what you want it to do.

Because ERPure.AI connects directly to your SAP B1 system, your prompt:

- Defines what data to use
- Specifies what analysis or action to perform
- Controls how results are returned

What makes ERPure.AI prompts different

Unlike general AI, ERPure.AI prompts are:

- Business-specific (sales, inventory, finance, vendors, etc.)
- Data-driven (they query your SAP database)
- Action-capable (they can draft or create documents)

## Purpose of This Guide

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This guide is designed specifically for customers using **ERPure.AI**, an AI assistant that connects to SAP Business One. It explains how to write effective prompts to get accurate insights, automate tasks safely, and improve day-to-day operations.

ERPure.AI acts like a knowledgeable SAP B1 analyst — but it relies on *your instructions*. **The clearer your prompt, the better the result.**

## Table of Contents

|                                                         |   |
|---------------------------------------------------------|---|
| INTRODUCTION .....                                      | 1 |
| Purpose of This Guide .....                             | 1 |
| How ERPure.ai Works (Customer Context) .....            | 3 |
| 1. Core Principles of Good Prompting .....              | 3 |
| 1.1. Be Specific and Business-Focused .....             | 3 |
| 1.2. Always Include Timeframes .....                    | 3 |
| 1.3. Use SAP Business One Terms .....                   | 4 |
| 1.4. Define Filters Clearly .....                       | 4 |
| 1.5. Tell It How to Format the Output .....             | 4 |
| 1.6. Keep Requests Focused .....                        | 4 |
| 2. Common Customer Use Cases .....                      | 4 |
| 2.1. Sales Insights .....                               | 4 |
| 2.2. Outstanding Receivables.....                       | 5 |
| 2.3. Inventory Visibility .....                         | 5 |
| 3. Purchasing .....                                     | 5 |
| 3.1. Profitability .....                                | 5 |
| 3.2. Customer Risk.....                                 | 5 |
| 4. Creating or Drafting Documents (If Enabled) .....    | 5 |
| 5. Structuring Better Prompts (Advanced).....           | 6 |
| 6. Avoiding Common Mistakes.....                        | 6 |
| 7. Iterative Prompting (How Customers Should Work)..... | 6 |
| 8. Safety Guidelines (Important) .....                  | 7 |
| 9. Customer Prompt Checklist .....                      | 7 |
| ERPURE.AI QUICK CHEAT SHEET .....                       | 8 |

# How ERPure.AI Works (Customer Context)

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ERPure.AI can:

- Retrieve data (sales, inventory, financials)
- Analyse trends and exceptions
- Assist with reporting
- Draft or create documents (if enabled)

It depends on:

- Clear SAP Business One terminology
- Defined timeframes
- Explicit instructions

**Think of it as:** a fast, precise assistant — not a mind reader.

## 1. Core Principles of Good Prompting

### 1.1. Be Specific and Business-Focused

**Weak:**

Show me sales

**Strong:**

Show total sales revenue for January 2026 by customer, grouped by region

### 1.2. Always Include Timeframes

ERPure.AI performs best when dates are defined.

**Avoid:**

recent, lately, this period

**Use:**

last 30 days  
January 2026  
FY2025

### 1.3. Use SAP Business One Terms

Use correct terminology to avoid misinterpretation:

- AR Invoice (not just “invoice”)
- Sales Order
- Business Partner (Customer/Supplier)
- Item
- Warehouse

**Example:**

Show open AR invoices for Business Partners in Queensland

### 1.4. Define Filters Clearly

Tell ERPure.AI exactly what to include or exclude.

**Example:**

Show sales for February 2026 excluding cancelled invoices and returns

### 1.5. Tell It How to Format the Output

**Example:**

Return as a table sorted by highest revenue

### 1.6. Keep Requests Focused

Break large requests into smaller steps when needed.

## 2. Common Customer Use Cases

### 2.1.Sales Insights

Show total sales revenue by customer for the last 90 days, excluding cancelled invoices

## 2.2. Outstanding Receivables

List all open AR invoices over 30 days overdue with customer name and outstanding balance

## 2.3. Inventory Visibility

Show stock on hand, committed, and available for all items in the Brisbane warehouse

## 3. Purchasing

Show items below minimum stock level with no open purchase orders

### 3.1. Profitability

Show gross profit by item group for FY2025

### 3.2. Customer Risk

List customers exceeding their credit limit with current balance and limit

## 4. Creating or Drafting Documents (If Enabled)

ERPure.AI may support creating documents such as:

- Sales Orders
- Purchase Orders
- AP/AR Invoices

### Best Practice

Always be explicit and request confirmation.

#### Example:

Draft (do not post) a sales order for customer ABC Pty Ltd with:

- Item: X
- Quantity: 10
- Price: \$50

## 5. Structuring Better Prompts (Advanced)

For complex requests, structure your prompt:

**Example:**

Objective: Identify slow-moving inventory

Timeframe: Last 6 months

Conditions: No sales but stock on hand

Output: Table with item code, description, stock value

## 6. Avoiding Common Mistakes

**✗** Vague prompts

Show profit

**✓** Clear prompt

Show net profit based on AR invoices for February 2026 excluding tax and freight

**✗** Missing filters

Show invoices

**✓** Clear prompt

Show open AR invoices for March 2026 with outstanding balance over \$1,000

**✗** Mixing document types

Show orders and invoices together (without clarity)

**✓** Clear prompt

Show sales based on AR invoices only (exclude sales orders)

## 7. Iterative Prompting (How Customers Should Work)

Start simple, then refine:

1. Show sales by customer
2. Add timeframe
3. Add filters (e.g., exclude cancelled)

This approach improves accuracy and trust.

## 8. Safety Guidelines (Important)

When performing actions:

- Use “draft” instead of “create” when testing
- Double-check values (prices, quantities, dates)
- Confirm before posting documents

**Example:**

Draft only. Do not post until I confirm.

## 9. Customer Prompt Checklist

Before sending your prompt, check:

- Did I include a timeframe?
- Did I specify the correct SAP document type?
- Did I define filters clearly?
- Did I specify output format (if needed)?
- Is the request simple and focused?

## ERPURE.AI QUICK CHEAT SHEET

### Data Queries

- “Show sales by customer for last 30 days”
- “List open AR invoices over 30 days overdue”
- “Show stock on hand by warehouse”

### Financial Insights

- “Show gross profit by item group for FY2025”
- “Show monthly revenue trend for last 12 months”

### Inventory

- “Show items below minimum stock level”
- “Show available stock for item X across all warehouses”

### Exceptions

- “List customers over credit limit”
- “Show overdue invoices over 60 days”

### Document Drafting

- “Draft a sales order for customer X with 5 units of item Y”
- “Draft an AP invoice for supplier Z dated 15 March 2026”

### Pro Tips

- Always include a timeframe
- Use SAP terms (AR Invoice, Business Partner, etc.)
- Say “exclude cancelled” when needed
- Ask for “draft” before creating documents

## FINAL THOUGHT

The best results from ERPure.AI come from **clear, structured, and specific prompts**. Treat it like a skilled assistant — the better your instructions, the better your outcomes.