



A Beginner's Guide to Prompting ERPure.AI

for SAP Business One

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Platform	SAP Business One (Service Layer)
Audience	New ERPure.AI users
Classification	Customer-Facing Documentation

Why prompt quality matters

ERPure.AI turns natural-language requests into direct Service Layer calls against your SAP Business One database. Unlike a generic chatbot, it's working against real transactional data — Business Partners, Items, Sales Orders, GL accounts — so the more precisely you describe what you want, the more accurately and efficiently it can act. A vague prompt forces the agent to guess or ask clarifying questions; a well-structured one gets you a correct answer (or a correctly executed transaction) on the first try.

This guide walks through the habits that make a prompt "good," then gives you a working set of example prompts for each of the core B1 modules, organised the way SAP itself organises them.

Where to prompt from

ERPure.AI's Web Chat is the primary and most capable way to interact with the agent today — and it's the same experience whether you access it in a browser or through the Web Chat embedded inside the Teams client, so use whichever front end is more convenient. The Document Intelligence Agent is a separate, purpose-built capability for extracting and processing data from documents (like incoming supplier invoices) — it isn't a general chat interface for querying or transacting in B1.

The five habits of a good ERPure.AI prompt

1. **Name the object type, not just the business concept.** SAP B1 has precise object names (Sales Order, A/R Invoice, Delivery, Goods Receipt PO) that map directly to underlying Service Layer entities. Saying "invoice" is ambiguous — do you mean A/R Invoice or A/P Invoice? Saying "create an A/R Invoice" removes the guesswork.
2. **Give identifiers, not descriptions, wherever you can.** A Customer Code, Item Code, or Document Number is unambiguous. A customer's trading name might match multiple Business Partner records (head office vs. branch, or similarly named companies). If you don't know the code, ask ERPure.AI to look it up first, then reference the result in your next prompt.
3. **Specify scope: dates, warehouses, branches, currencies.** SAP B1 is multi-warehouse, often multi-currency, and sometimes multi-branch. "Show me overdue invoices" is fine for a single-warehouse, single-currency SME; "show me overdue A/R invoices over 90 days for warehouse 01 in AUD" is unambiguous for anyone running a more complex environment.
4. **Say what you want done with the data, not just what data you want.** "List open Purchase Orders for vendor V10023" returns a list. "List open Purchase Orders for vendor V10023 and total the outstanding value by currency" returns something you can act on.
5. **Break multi-step transactions into a clear sequence when it matters.** For anything that changes state (creating a document, posting a payment, closing an order), tell the agent the sequence and any conditions — e.g., "only proceed if the customer's credit limit isn't exceeded." For read-only lookups this matters less; for anything transactional, be explicit.

A quick way to think about it: **write the prompt the way you'd write a one-line ticket for a trained AR clerk**, not the way you'd ask a colleague a casual question.

Prompting by core module

1. Business Partners (Customers, Vendors, Leads)

This is the master data almost everything else depends on, so getting BP prompts right pays off everywhere else.

- *Weak*: "Find John's company"
- *Better*: "Find the Business Partner record for customer name containing 'Acme' — show BP Code, Group, and Payment Terms"

More examples:

- "Create a new Customer BP with Code C20045, Name 'Riverside Timber Pty Ltd', BP Group 'Domestic Customers', Payment Terms 'Net 30', and Currency AUD"
- "Show me all Vendor BPs with no purchase activity in the last 12 months"
- "Update the credit limit for BP C10012 to \$50,000"
- "List all Business Partners flagged as Leads that haven't been contacted in 30 days"

2. Sales – A/R (Order-to-Cash)

Covers Sales Quotations, Sales Orders, Deliveries, Returns, and A/R Invoices/Credit Memos.

- "Create a Sales Quotation for customer C10045 with 10 units of Item A1001 at list price"
- "Convert Sales Quotation 3021 into a Sales Order"
- "Show open Sales Orders for customer C10045 that haven't been delivered"
- "Create a Delivery from Sales Order 5540, full quantities"
- "Base a new A/R Invoice on Delivery 8821"
- "List all A/R Invoices over 60 days overdue, grouped by customer, with total outstanding"
- "Create an A/R Credit Memo against A/R Invoice 9012 for the full amount, reason: pricing error"

Tip

SAP B1's document flow (Quotation → Order → Delivery → Invoice) is base-document driven. When you ask ERPure.AI to "base" a new document on an existing one, you're mirroring exactly what a user would do by clicking "Copy From" in the B1 client — this is usually more reliable than asking the agent to recreate a document from scratch.

3. Purchasing – A/P (Procure-to-Pay)

Covers Purchase Quotations, Purchase Orders, Goods Receipt PO, Returns, and A/P Invoices/Credit Memos.

- "Create a Purchase Order to vendor V20011 for 500 units of Item R2200, requested delivery date next Friday"
- "Show all open Purchase Orders older than 30 days with no goods receipt"
- "Create a Goods Receipt PO from Purchase Order 4410, quantities as ordered"

- "Base an A/P Invoice on Goods Receipt PO 6621"
- "List A/P Invoices due for payment in the next 7 days, sorted by due date"
- "Which vendors have price variances greater than 5% between PO price and A/P Invoice price in the last quarter?"

4. Inventory Management

Covers Item Master Data, Warehouses, Stock Transfers, Inventory Counts, and Inventory Transactions.

- "Show current on-hand quantity for Item A1001 across all warehouses"
- "Create a Stock Transfer of 100 units of Item A1001 from Warehouse 01 to Warehouse 03"
- "List all items below their reorder point in Warehouse 01"
- "Show me the item master details for SKU B3300, including UoM, item group, and preferred vendor"
- "Create an Inventory Count document for Item Group 'Raw Materials' in Warehouse 02"
- "Which items have had no sales or purchase movement in the last 180 days?" (a good dead-stock check)

5. Financials – General Ledger

Covers Journal Entries, Chart of Accounts, Financial Reports.

- "Post a manual Journal Entry: debit Account 5100-Freight Expense \$850, credit Account 1200-Bank AUD \$850, memo 'October freight recharge'"
- "Show the Trial Balance for October 2026"
- "List all GL accounts in the 'Cost of Goods Sold' account group with their current balances"
- "Show me the P&L for Q3 2026 compared to Q3 2025"
- "Find journal entries posted to Account 6000 in the last 30 days over \$5,000"

6. Banking

Covers Incoming Payments, Outgoing Payments, Deposits, Bank Reconciliation.

- "Create an Incoming Payment from customer C10045 for \$12,500, applied to A/R Invoice 9012, paid to Bank AUD"
- "Show unreconciled bank transactions for the AUD operating account in September"
- "List all Outgoing Payments made to vendor V20011 in the last 90 days"
- "Create an Outgoing Payment to vendor V20011 for \$4,200 against A/P Invoice 6621"

7. Production / MRP

Covers Bill of Materials (BOM), Production Orders, MRP runs.

- "Show the Bill of Materials for finished good FG-500"
- "Create a Production Order for 200 units of FG-500 using the standard BOM"

- "List all open Production Orders with a planned finish date this week"
- "Run an MRP recommendation report for Item Group 'Finished Goods' with a 6-week horizon"

8. Service Management

Covers Service Calls, Equipment Cards, Service Contracts.

- "Create a Service Call for customer C10045, equipment card EQ-3021, priority High, issue: 'unit not powering on'"
- "Show all open Service Calls assigned to technician 'J. Nguyen'"
- "List Service Contracts expiring within the next 30 days"
- "What's the service history for Equipment Card EQ-3021?"

9. Sales Opportunities / CRM

- "Create a Sales Opportunity for BP C10045, potential value \$75,000, expected close date end of Q4, stage 'Proposal'"
- "Show all open Opportunities by sales stage, sorted by potential value descending"
- "Which Opportunities haven't had any activity logged in 14 days?"

10. Reporting & Cross-Module Queries

ERPure.AI is often most useful when a question spans modules — this is where being explicit about scope really pays off.

- "Show top 10 customers by A/R Invoice revenue for FY2026, and their outstanding balance"
- "Compare gross margin by item group for Q3 2026"
- "List customers with open Sales Orders but an A/R balance over 90 days — these may need a credit hold review"
- "Show vendor spend by BP for the last 12 months, sorted descending"

Common beginner mistakes to avoid

- **Assuming ERPure.AI knows "which" record you mean.** If two customers are named similarly, give the BP Code.
- **Skipping the currency/branch context** in a multi-currency or multi-branch company — this is the single most common source of a "technically correct but not what I meant" answer.
- **Asking for an action and a report in one breath without separating them** — e.g., "create the invoice and tell me our total AR" is fine once you're comfortable, but as a beginner it's easier to debug two focused prompts than one that's doing two jobs.
- **Not using follow-up prompts.** You don't need to write the perfect prompt first time — ask ERPure.AI to look something up, then refine your next prompt based on what it returns. Treat it as a conversation, not a single command line.

- **Forgetting that document-flow relationships matter.** "Base this on" or "copy from" a specific document number is almost always more reliable than describing a transaction from scratch, exactly as it would be in the B1 client.

A simple prompt template to get started

**[Action] + [Object type] + [Key identifiers] + [Scope:
date/warehouse/branch/currency] + [What to return or how to confirm]**

Example: *"Create an A/R Invoice for customer C10045, based on Delivery 8821, warehouse 01, and confirm the document total before posting."*

Once you're comfortable with this structure, you'll find you can drop the scaffolding for simple lookups and reserve the full detail for anything that writes data back into SAP Business One.