

Manage Master Data - AI Insights User Guide

AI Insights Integration by Integrated Business Planning Solutions LLC

Disclaimer

This guide documents the AI Insights integration features provided by Integrated Business Planning Solutions LLC. These custom AI capabilities (ZAIPROMPT, ZAIINSIGHT, ZPERESET) are available after implementing our AI Insights integration within your standard SAP IBP Manage Master Data application. The features, functionality, and user interface described herein are subject to change as our integration evolves. We continuously improve and enhance our AI-powered capabilities based on user feedback and technological advancements. Please refer to the latest documentation and release notes for the most current information.

Overview

After implementing the AI Insights integration from Integrated Business Planning Solutions LLC, your standard SAP IBP Manage Master Data application gains AI-powered capabilities. These custom attributes allow you to generate real-time insights about your master data records (products, customers, locations, etc.) using natural language prompts powered by the Perplexity API.

AI Insights Integration Attributes

The integration adds three custom attributes to your Manage Master Data application:

- **AI Prompt (ZAIPROMPT):** Ask questions about your master data records in natural language
- **AI Insight (ZAIINSIGHT):** View AI-generated responses with cited sources
- **Prompt Reset (ZPERESET):** Clear conversation history to start fresh
- **Bulk Edit:** Update multiple records simultaneously using standard SAP IBP functionality

Prerequisites

Before using the AI Insights integration, these three attributes (ZAIPROMPT, ZAIINSIGHT, ZPERESET) must be added to the relevant Master Data Types (e.g., Product, Customer, Location, Location Source) in your SAP IBP system. This configuration is completed as part of the AI Insights integration implementation.

When to Use This Feature

- Market research and competitive analysis

- Customer intelligence and segmentation
 - Location and supply chain analysis
 - Trend analysis and forecasting
 - Quick fact-checking and verification
 - Strategic sourcing and supplier insights
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Page 1: Accessing the Bulk Edit Feature

Step 1: Select Master Data Records

1. Navigate to your **SAP IBP Manage Master Data** application
2. Select the Master Data Type you want to work with (Product, Customer, Location, etc.)
3. Filter or search for the records you want to analyze
4. Select the records by checking the boxes next to each ID
5. The selection count appears in the header (e.g., "3 selected records")

Step 2: Open Bulk Edit

1. Click the **Edit** button in the toolbar
2. Select **Bulk Edit** from the dropdown menu
3. The Bulk Edit dialog opens, showing:
 - Green confirmation banner with number of records selected
 - Three editable attributes: ZPERESET, ZAIINSIGHT, ZAIPROMPT

Understanding the Bulk Edit Dialog

The dialog displays three attributes you can modify:

Attribute	Purpose	Input Type
ZPERESET	Clear prompt history	Checkbox (X to clear)
ZAIINSIGHT	AI-generated insights	Read-only / Generated
ZAIPROMPT	Your questions/prompts	Text input (Value)

Clear Values Checkbox:

- Checked (): Keeps existing values and adds/updates new content
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Page 2: Setting Prompts and Generating Insights

Writing Effective Prompts

Enter your question or instruction in the **ZAIPROMPT** attribute. Be specific and business-focused.

Example Prompts by Master Data Type:

Product Master Data:

give me an approximation of US sales for Sharpie markers

Differentiate with SC Johnson products in the marker category

What are the top 3 competitors and their market share?

Customer Master Data:

Analyze the retail landscape for this customer type in the Northeast region

What are typical order patterns for customers in this segment?

Location Master Data:

find a test market in US for launching new consumer products

What are the logistics costs and lead times for shipping to this location?

Location Source Master Data:

Assess supply chain risks for sourcing from this region

Compare alternative sourcing locations for cost and reliability

Best Practices for Prompts

DO:

- Be specific about what you want to know
- Include relevant context (geography, timeframe, metrics, master data type)
- Reference the specific master data record when relevant
- Ask one clear question per prompt
- Use business terminology appropriate to your industry

DON'T:

- Ask vague questions like "tell me about this"
- Combine multiple unrelated questions
- Use overly technical jargon without context
- Forget to specify which aspect you're analyzing (market, competition, logistics, etc.)

Applying Your Changes

1. **Enter your prompt** in the ZAIPROMPT attribute (type "Value")
2. **Check ZPERESET** if you want to clear conversation history (mark with X)
3. **Leave ZAIINSIGHT** as is - the system will populate this after prompt execution
4. Click **Apply** to save your changes
5. Click **Cancel** to discard changes and close the dialog

Viewing Generated Insights

After applying your prompts:

1. The bulk edit dialog closes
2. The system processes your prompts through the Perplexity API

3. **ZAIINSIGHT** attribute populates with AI-generated responses
 4. Insights appear in the data grid for each selected record
 5. Hover over insight text to see the full response with sources
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Page 3: Using the Reset Feature

Understanding ZPERESET

The **ZPERESET** attribute allows you to clear the conversation history and start fresh. The system remembers your previous prompts to provide contextual responses, but sometimes you need to begin a new line of questioning.

When to Use Reset

Check the **ZPERESET** box (mark with X) when you want to:

- Start a completely new line of questioning
- Switch topics or product focus areas
- Clear context from unrelated previous queries
- Get a fresh perspective without prior conversation influence

Conversation Flow Examples

Without Reset (Building on Previous Context):

Prompt 1: "What is the market size for fine point markers?"
Prompt 2: "Who are the main competitors?"
→ AI understands you're still discussing fine point markers

With Reset (Starting Fresh):

Previous context: Asked about product market size
[Check ZPERESET box with X]
New Prompt: "What are typical customer demographics for this retail location?"
→ AI treats this as a completely new, independent question

Recommended Usage Patterns

Don't Use Reset When:

- Building detailed analysis across multiple prompts for the same topic
- Doing progressive research (overview → details) on the same master data record
- Exploring related aspects of the same analysis
- Asking follow-up questions about previous insights

Use Reset When:

- Switching between different analysis types (e.g., market analysis → logistics analysis)
- Moving from one master data type to another (e.g., Product → Location)
- Changing topics completely (e.g., competitive analysis → sourcing strategy)
- Previous context might confuse new questions

Troubleshooting**If insights are not relevant:**

- Make your prompt more specific (see Prompt Guide)
- Try using ZPERESET to clear confusing prior context
- Ensure you're asking business-focused questions appropriate to the master data type

If insights are not generating:

- Verify your prompt is clear and complete
- Confirm you clicked "Apply" not "Cancel"
- Check that all selected records were processed

If you need to edit a single record:

- Select only that one record before opening Bulk Edit
 - Alternatively, use standard Edit mode for individual records
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Quick Reference

Three-Step Process:

1. **Select** master data records in the grid
2. **Bulk Edit** → Enter ZAIPROMPT → Check ZPERESET if needed
3. **Apply** → View ZAIINSIGHT results in the grid

Attribute Summary:

- **ZAIPROMPT**: Your question (what you want to know)
- **ZAIINSIGHT**: AI answer (what the system tells you)
- **ZPERESET**: Clear history (start fresh)

Works with all Master Data Types:

- Product
- Customer
- Location
- Location Source
- And any other configured master data types

Remember:

- Be specific in your prompts
- Use ZPERESET when changing topics
- Review the Perplexity Prompt Guide for advanced techniques
- Insights include cited sources for verification

For more detailed prompting strategies, refer to the Perplexity API Business Prompt Guide.

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This guide covers the AI Insights integration features (ZAIPROMPT, ZAIINSIGHT, ZPERESET) added to standard SAP IBP Manage Master Data. For general SAP IBP master data management operations, refer to standard SAP IBP documentation.

