

Deciding When to Add Purchasing to an ERP Rollout

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Assessing How Your Team Buys Today

Start by mapping the buying process your team already follows before you decide whether Purchasing belongs in the first rollout of Sherkety ERP & Website Platform. This is less about software features and more about the real steps people take from “we need something” to “the supplier has been paid.”

Look at the full path of a typical purchase:

1. Who notices the need for an item or service?
2. Who asks for approval?
3. Who chooses the supplier?
4. Who sends the order?
5. Who confirms delivery?
6. Who checks the supplier invoice?

If these steps happen through email, chat messages, spreadsheets, or verbal requests, your buying process is still informal. In that case, you should note where delays usually happen. For example, one person may keep a spreadsheet of supplier prices, another may send orders by email, and finance may receive invoices without any matching order record. That usually means the team is working without a shared purchasing workflow.

If your team already uses clear stages such as **Draft**, **Approved**, **Ordered**, and **Received**, Purchasing is more likely to fit naturally into your rollout. The same is true if buyers already depend on formal documents such as purchase requests, purchase orders, goods receipts, and supplier invoices.

You should also check whether buyers need supplier details in one place, including:

- Payment terms
- Lead times
- Minimum order quantities

- Supplier contact details
- Previous order history

When these details are scattered across inboxes and files, Sherkety ERP & Website Platform becomes more valuable earlier in the rollout.

[SCREENSHOT: worksheet or planning view showing a simple buying flow from request to approval to supplier order to receipt]

For a feature-level view of what the Purchasing area offers, refer back to [Exploring Purchasing Features From the App Page](#). Here, the goal is to decide whether your current buying habits are structured enough—or messy enough—to justify adding it now.

Recognizing When Supplier Coordination Requires Purchasing

Supplier coordination is often the clearest sign that Purchasing should be included early. A small business with a few occasional suppliers can often manage orders through email and basic records. That changes once buyers must track multiple suppliers, compare quotes, follow up on delivery promises, and keep a reliable order history.

You are likely ready for a dedicated purchasing workspace when your team needs to answer questions like these quickly:

- Which supplier gave the best price last time?
- Which order is still waiting for delivery?
- Did the supplier send the full quantity or only part of it?
- Who approved this order before it was sent?
- Which supplier usually delivers on time?

When that information lives in separate spreadsheets, inboxes, and chat threads, coordination becomes hard to manage. Buyers spend too much time searching instead of ordering. In Sherkety ERP & Website Platform, this is the point where supplier records, order history, and receipt tracking become part of the evaluation instead of a “nice to have.”

Approval routing is another strong signal. If a department manager must approve a request before a buyer sends the order, or if larger purchases need extra review, Purchasing should usually be considered from the start. Without a structured process,

teams may place orders before approval is clear, or finance may receive invoices for purchases nobody formally confirmed.

Recurring supplier tasks that often justify Purchasing include:

- Comparing supplier prices for the same item
- Tracking promised delivery dates
- Following up on delayed orders
- Recording partial deliveries
- Keeping supplier-specific buying terms together

[SCREENSHOT: purchasing evaluation notes showing supplier list, delivery dates, approval points, and order tracking needs]

If your team is already dealing with requests for quotation, supplier comparisons, formal order approval, and delivery follow-up, Purchasing is no longer just an optional add-on. It becomes part of how buyers stay organized and how managers stay in control.

Deciding Based on Inventory and Replenishment Needs

Inventory needs often decide the timing of a Purchasing rollout. If your business keeps products in stock, replenishes shelves or warehouses, or depends on incoming deliveries to fulfill customer demand, Purchasing should usually be evaluated alongside Inventory rather than later.

Start by identifying which of these situations fits your business:

Buying pattern	What it usually means for rollout timing
You buy only when a customer order comes in	Purchasing may be delayed if supplier volume is low
You keep regular stock on hand	Purchasing is usually needed earlier
You manage both stocked and non-stocked items	Purchasing should be reviewed carefully with Inventory

For stocked items, buyers often need more than a supplier name. They need item-level details such as:

- Preferred supplier
- Unit cost
- Lead time

- Reorder quantity
- Expected delivery date
- Incoming shipment visibility

These details matter because replenishment is not just about placing an order. It is about knowing what is already on the way, what is running low, and when stock will arrive. If buyers cannot connect orders to incoming receipts, stock planning becomes guesswork.

Manual replenishment usually breaks down when teams start asking questions such as:

- Do we already have an order in progress for this item?
- When will the next delivery arrive?
- Which supplier should we use for this product?
- How much should we reorder based on normal demand?

That is the point where Purchasing should move into the main ERP evaluation. In Sherkety ERP & Website Platform, this matters especially if you are already reviewing inventory visibility, stock movements, or replenishment workflows from earlier inventory documents such as [Exploring Inventory Visibility and Warehouse Overview](#).

[SCREENSHOT: planning comparison showing stocked items, preferred suppliers, reorder quantities, and expected receipts]

If incoming stock receipts need to tie directly to supplier orders, delaying Purchasing can create gaps in receiving, stock availability checks, and replenishment planning.

Comparing Rollout Scenarios for Simple and Complex Procurement

Not every business needs Purchasing in phase one. The right timing depends on how formal, frequent, and cross-functional your buying process is. A simple procurement setup can often wait. A complex one usually should not.

A delayed rollout is often reasonable when the business has:

- Low supplier volume
- Few monthly purchases
- No stocked inventory
- Minimal approval requirements
- Little need for formal purchase orders

- Finance processes that do not depend on matching orders to invoices

In that situation, you may evaluate other areas first and leave Purchasing for a later phase. For example, a service-focused business that buys occasional office supplies or ad hoc external services may not need structured supplier workflows immediately.

An early rollout makes more sense when the business needs:

- Purchase requests before buying
- Multi-step approvals
- Frequent supplier comparisons
- Ongoing replenishment
- Visibility into order status and delivery performance
- Better control over what was ordered, received, and invoiced

The biggest difference between “evaluate without Purchasing” and “include Purchasing from the start” is control. Without it, supplier onboarding may stay informal, order history may remain scattered, and approval rules may continue outside Sherkety ERP & Website Platform. With it, buyers can evaluate whether supplier records, order controls, and receiving steps fit the business from day one.

A practical way to decide is to place your organization into one of these rollout groups:

Rollout choice	Best fit
Phase one	Formal buying, stock replenishment, approvals, invoice matching
Phase two	Moderate supplier activity, some structure, but not business-critical yet
Exclude from shortlist for now	Very low buying volume and mostly informal purchasing

[SCREENSHOT: phased ERP rollout plan showing Purchasing marked as phase one, phase two, or later]

If your procurement maturity is already growing faster than your current tools can handle, delaying Purchasing may only postpone a problem you already feel today.

Checking Whether Purchasing Must Connect to Finance and Operations

Purchasing becomes much harder to postpone when it needs to connect directly with finance and day-to-day operations. If your team expects purchase orders to flow into

receiving, supplier invoices, and payment review, then Purchasing should usually be part of the same evaluation as those connected workflows.

Start by asking whether your process depends on these links:

- A purchase order is created before anything is bought
- A receipt is recorded when goods arrive
- A supplier invoice is checked against what was ordered
- Finance approves payment only after the order and receipt are confirmed

This is where three-way matching becomes important: the order, the receipt, and the supplier invoice must all agree before payment moves forward. If your finance team already expects that level of control, leaving Purchasing out of the initial rollout can create a gap between what buyers do and what finance needs to verify.

Operational dependencies also matter. Purchasing should be considered early if your business needs any of the following:

- Landed costs added to incoming goods
- Budget controls before purchases are approved
- Project-based purchasing for specific jobs or departments
- Receiving at more than one location
- Coordination between warehouse teams and buyers

These are not isolated tasks. They affect how teams receive goods, review invoices, and track spending. Once finance and operations are already being designed in Sherkety ERP & Website Platform, adding Purchasing later may require reworking decisions about approvals, receiving steps, and supplier invoice handling.

[SCREENSHOT: workflow diagram showing purchase order, goods receipt, supplier invoice, and payment review]

If your ERP evaluation already includes inventory receiving, warehouse coordination, or accounts payable controls, treat Purchasing as part of the same conversation. It is much easier to evaluate those connected steps together than to bolt them on after other teams have already finalized their processes.

Using a Readiness Checklist to Decide if Purchasing Belongs in the Evaluation

Use this checklist to make the final decision. If you answer “yes” to several of these points, Purchasing should probably be included now in your Sherkety ERP & Website

Platform evaluation.

Include Purchasing now if your team needs:

- Supplier records with contact details, terms, and order history
- Formal purchase orders instead of email-only buying
- Approval steps before orders are sent
- Receipt tracking when goods arrive
- Matching between purchase orders, receipts, and supplier invoices
- Visibility into expected delivery dates
- Preferred supplier details tied to items
- Incoming purchase orders to support inventory planning
- Better control over partial deliveries and open orders

You can usually delay Purchasing if most of these statements are true:

- Buying volume is low
- Purchases are occasional and simple
- You do not keep stocked inventory
- Orders do not require formal approval
- Finance does not depend on purchase-order-based controls
- Supplier coordination is manageable through basic records

When you speak with vendors or review demonstrations, ask them to show the exact workflow your team uses or wants to use. Do not settle for a general overview. Ask to see:

1. Request or quote creation
2. Purchase order approval
3. Order confirmation and tracking
4. Receipt entry
5. Supplier invoice matching

[SCREENSHOT: evaluation checklist with yes/no decision points for approvals, receipts, supplier records, and invoice matching]

This approach keeps the decision practical. You are not choosing Purchasing because it sounds advanced. You are choosing it because your buyers, warehouse staff, and finance team need a connected workflow that basic tools can no longer support.

Overview

This document helps you decide whether the Purchasing module should be part of your initial ERP shortlist, added in a later phase, or left out for now. The focus is not on setup steps inside Sherkety ERP & Website Platform. Instead, it is on recognizing the business conditions that make Purchasing necessary.

Use this guide when your team is already comparing ERP modules and trying to avoid one of two common mistakes:

- adding Purchasing too early when buying is still simple and informal
- delaying Purchasing even though supplier coordination, stock replenishment, and invoice control already depend on it

The decision usually comes down to four areas:

- how structured your buying process already is
- how many suppliers and orders your team manages
- whether inventory depends on incoming supplier orders
- whether finance needs purchase orders, receipts, and invoices to match

If you have already reviewed the Purchasing app page, this guide builds on that decision point rather than repeating feature descriptions. For that earlier product view, see [Exploring Purchasing Features From the App Page](#). If you still need broader context on where Purchasing fits among ERP use cases, see [Understanding Purchasing Module Positioning and Use Cases](#).

As you read, compare each section to your current process. The goal is to decide whether Purchasing belongs in phase one, phase two, or outside the first rollout discussion entirely. That makes your ERP evaluation more realistic and helps you avoid selecting modules based only on future plans rather than current operational needs.

Prerequisites

Before using this guide to make a rollout decision, make sure you already have a basic picture of how your organization buys goods and services today. You do not need a formal process map, but you should be able to answer a few practical questions about who buys, who approves, and how orders are tracked.

Gather these inputs first:

- A list of the teams or people involved in buying

- Examples of recent supplier orders
- Notes on whether approvals happen before orders are sent
- A simple count of how many active suppliers you manage
- A note on whether you keep stock, buy on demand, or do both
- A summary of how finance checks supplier invoices before payment

It also helps if you have already reviewed the public ERP module content in Sherkety ERP & Website Platform, especially the Purchasing materials that explain benefits and feature scope. These related documents are the best starting point:

- [Discovering the Purchasing Module From Inventory and App Pages](#)
- [Understanding Purchasing Benefits and Buyer Actions](#)
- [Exploring Purchasing Features From the App Page](#)

You do not need admin access to use this guide. It is intended for decision-makers, buyers, operations leads, and finance stakeholders who are evaluating rollout timing.

After you finish this document, continue with [Understanding Purchasing Module Positioning Within the ERP Suite](#) to place Purchasing in the wider Sherkety ERP & Website Platform rollout plan.