

Understanding Purchasing Benefits and Buyer Actions

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Seeing How Purchasing Supports Day-to-Day Buying Decisions

In **Sherkety ERP & Website Platform**, the **Purchasing** area gives buyers one place to manage supplier conversations and purchasing documents. Instead of tracking requests in email threads or separate spreadsheets, you work from the purchasing menus to review **Requests for Quotation**, **Purchase Orders**, supplier details, and product-related supplier pricing. If you already found the module through the ERP catalog or related pages, this section builds on [Discovering the Purchasing Module From Inventory and App Pages](#).

The main buying path is easy to follow:

- Start with a **Request for Quotation**
- Review supplier terms and pricing
- Confirm the document when you are ready to commit
- Continue with receipt tracking and vendor billing

That flow matters because it separates **asking for terms** from **placing an order**. A buyer can prepare a request, compare options, and hold the document in a draft stage before turning it into a confirmed **Purchase Order**.

Across the purchasing screens, buyers usually work with familiar layouts such as:

- **List views** to scan many RFQs or orders at once
- **Kanban views** to spot status changes quickly
- **Form views** to open one document and review full details

On each purchase document, buyers can review line items, supplier information, quantities, prices, taxes, and planned dates in one place. This makes it easier to judge whether an order is complete before moving forward.

Purchasing decisions also connect to what happens next. A confirmed order can lead to an incoming receipt in inventory and later support vendor billing. That means

buyers are not only checking price—they are also seeing whether the purchase will flow cleanly into stock receipt and cost tracking.

[SCREENSHOT: Purchasing screen showing Requests for Quotation and Purchase Orders in a list view]

Evaluating Suppliers and Costs Before You Commit

A strong purchasing decision is not just about choosing the lowest price. In **Sherkety ERP & Website Platform**, buyers can review supplier-related details and compare order terms before confirming a purchase. The purchasing screens help you look at each vendor as a complete option, not just a name on a document.

When reviewing suppliers, buyers typically compare:

- The **Vendor** selected on the purchase document
- Previous purchasing activity with that supplier
- Product-specific supplier pricing tied to the items being ordered
- Delivery expectations and timing

Inside an RFQ or purchase order, the order lines give you the details needed for a real comparison. You can review:

- **Quantity**
- **Unit Price**
- **Taxes**
- **Planned Delivery Date**

These fields help you estimate the total buying impact, especially when one supplier offers a lower price but a slower delivery date, or when another supplier can deliver faster at a higher cost. The buyer's job is often to balance urgency, cost, and reliability rather than focus on a single number.

Purchasing decisions may also be influenced by demand coming from replenishment or other procurement needs. When products need to be bought to support operations, that demand helps buyers judge urgency. A request that looks optional today may become time-sensitive if stock needs to be replenished soon.

Other useful evaluation points include:

- **Lead times** for expected supply
- **Vendor references** shown on the document

- **Order deadlines** that affect when a decision should be made

Together, these details help buyers decide who should receive the order and when it should be placed. Instead of making a decision from scattered notes, the purchasing document becomes the working record for supplier comparison and cost review.

[SCREENSHOT: RFQ form with Vendor, Order Lines, Unit Price, Taxes, and Planned Delivery Date visible]

Reviewing the Buyer Actions Available in a Purchase Document

When you open an RFQ or purchase order in **Sherkety ERP & Website Platform**, the document form gives you the main actions needed to move the purchase forward. These actions are designed for buyers who need to negotiate, formalize, approve, or stop an order without leaving the document.

Common actions available from the purchase document include:

- **Send by Email**
- **Print**
- **Confirm Order**
- **Cancel**

Send by Email helps you continue the supplier conversation directly from the document. This is useful when you want to send the RFQ for review, share updated quantities or prices, or follow up with the vendor using the same purchase record.

Print gives you a formal version of the RFQ or purchase order that can be shared outside the screen. Buyers often use printed documents when a supplier expects a formal purchasing document as part of the ordering process.

Confirm Order is the action that changes the document from a quotation stage into a committed **Purchase Order**. Once confirmed, the order is no longer just a request for pricing—it becomes the approved purchasing commitment, and related receipt activity can begin downstream.

Some companies use approval rules before an order can be fully confirmed. In that case, the buyer may prepare the RFQ, review all line details, and move it forward for validation instead of final confirmation. This keeps control over higher-value or policy-sensitive purchases while still allowing the buyer to do the preparation work.

If an order should not continue, **Cancel** stops the document from moving forward. That is useful when negotiations fail, pricing changes too much, or the team chooses another supplier.

[SCREENSHOT: Purchase document header showing Send by Email, Print, Confirm Order, and Cancel actions]

Following the Purchasing Workflow from Quote to Receipt

The purchasing workflow in **Sherkety ERP & Website Platform** starts with a draft request and ends with operational follow-through. Buyers can trace the process from the first quotation to the incoming stock activity that proves the order is being fulfilled.

A typical workflow looks like this:

- Open **Purchasing**
- Create a new **Request for Quotation**
- Select the **Vendor**
- Add product lines
- Enter **Quantity**, **Unit Price**, and expected delivery details
- Send or print the request
- Confirm the order when terms are accepted
- Track the related receipt activity

On the RFQ form, the buyer begins by choosing the supplier in the **Vendor** field. After that, the **Order Lines** section is used to add the products or services being requested. Each line gives the buyer a place to review the quantity being ordered, the agreed unit price, and delivery expectations before anything is finalized.

Before committing, the buyer can use **Send by Email** to share the request with the supplier or **Print RFQ** to produce a formal document. This stage is especially useful during negotiation, because the request can remain unconfirmed while terms are still being discussed.

As the document moves forward, its status changes from a draft quotation stage to a confirmed **Purchase Order**. If approval is required, there may be a validation checkpoint before the order is fully confirmed. Once confirmed, the purchasing decision begins to affect operations beyond the purchasing screen.

The next important follow-up is the related receipt activity in inventory. Buyers can use that linked receipt to verify that the ordered goods are expected and that the purchase

is progressing beyond paperwork into actual incoming stock.

[SCREENSHOT: Purchasing workflow showing draft RFQ, confirmed Purchase Order, and linked receipt activity]

Connecting Purchasing Decisions to Broader ERP Outcomes

Purchasing has the most value when it does more than create a document. In **Sherkety ERP & Website Platform**, a confirmed purchase order connects buyer decisions to inventory, finance, and recordkeeping so teams can work from the same information.

One of the clearest outcomes appears in stock planning. When a purchase order is confirmed, it can generate incoming receipt activity for the ordered products. That gives warehouse and operations teams visibility into what is expected to arrive. For buyers, this means the order is not isolated—it directly supports replenishment and incoming stock control.

Purchasing records also support finance workflows. Vendor bills can be matched back to the purchase order, which helps teams compare what was ordered against what is being billed. This shared document trail improves cost control because the purchasing and finance sides are working from the same source details rather than separate records.

Key business outcomes include:

- **Incoming shipments** tied to confirmed orders
- **Vendor bill matching** against purchase documents
- Shared visibility between purchasing, inventory, and accounting
- Better control over supplier prices and ordered quantities

Centralized records also improve auditability. Each purchase document can preserve the details that matter during review:

- Supplier name
- Ordered products
- Quantities
- Prices
- Taxes
- Approval history
- Order status

For ERP buyers evaluating whether Purchasing is worth adopting, this is one of the strongest benefits. Instead of relying on disconnected spreadsheets, email approvals, and manual handoffs, the purchasing workflow creates a visible chain from supplier request to stock receipt and billing review. That leads to clearer supplier accountability and better coordination across teams.

[SCREENSHOT: Confirmed purchase order with related receipt and vendor bill references]

Handling Common Questions Buyers Raise During Evaluation

Buyers often want to know how flexible the purchasing workflow is before they rely on it for real supplier activity. In **Sherkety ERP & Website Platform**, the purchasing screens support common evaluation concerns without forcing you to commit too early.

A frequent question is what happens when a buyer needs approval before placing the order. In that case, the RFQ can stay unconfirmed while the document is reviewed internally. If approval rules are in place, the buyer's role is usually to prepare the document carefully, check the vendor, pricing, and quantities, and then move it forward for validation instead of confirming it immediately.

Another common concern is pricing changes during negotiation. That is handled at the document level before confirmation. Buyers can update RFQ or purchase order lines to reflect revised vendor terms, including changes to:

- **Quantity**
- **Unit Price**
- **Taxes**
- Delivery timing details

Stakeholders may also ask how to prove that a purchasing decision led to real operational action. The answer is in the linked follow-up records. Once the order is confirmed, receipt activity can be tracked in inventory, and vendor bills can be matched back to the same purchase document. This gives buyers and managers a clear trail from decision to fulfillment and billing.

Communication is another key evaluation point. Buyers do not need to manage supplier follow-up outside the purchase document alone. The built-in actions on the form support vendor communication directly through:

- **Send by Email**

- **Print RFQ**
- **Print Purchase Order**

These actions help keep the supplier conversation tied to the purchasing record, which makes later review easier. If your team is still comparing where Purchasing fits in the ERP journey, the next useful read is [Understanding Purchasing Module Positioning and Use Cases](#).

Overview

The **Purchasing** area in **Sherkety ERP & Website Platform** is designed for buyers who need a clear path from supplier inquiry to committed order. It supports the full buying conversation by keeping quotation requests, confirmed orders, supplier details, pricing, and follow-up actions together in one working space.

At a high level, buyers use Purchasing to:

- Create and review **Requests for Quotation**
- Compare supplier terms before committing
- Turn approved requests into **Purchase Orders**
- Continue vendor communication through **Send by Email** and **Print**
- Follow the order into receipt and billing activity

The biggest practical benefit is visibility. A buyer can open one purchase document and review the vendor, product lines, quantities, prices, taxes, and planned dates without switching between disconnected tools. That makes it easier to decide whether the order is ready, whether negotiation is still needed, or whether approval should happen first.

This module also supports better coordination across teams. A confirmed order does not stop at the buyer's desk. It can lead to incoming stock activity and support vendor bill matching, which means purchasing decisions stay connected to inventory and finance outcomes.

If you are evaluating Purchasing as part of the broader ERP offering, focus on these buyer-facing strengths:

- Clear distinction between quotation and order commitment
- Better supplier comparison using document details
- Formal communication actions built into the purchase form
- Traceable follow-through after confirmation

For readers coming from the earlier discovery content, this document focuses on why buyers use Purchasing and what actions matter most once they are inside the module.

Prerequisites

Before this topic is useful, you should already be familiar with where the **Purchasing** module appears in **Sherkety ERP & Website Platform** and how users reach ERP app pages from the public website. This document assumes you are past the discovery stage and are now evaluating buyer value and workflow fit.

Helpful background includes:

- Knowing how to reach ERP module pages from the website navigation
- Recognizing the Purchasing module as part of the ERP app offering
- Understanding that purchasing activity connects with inventory and finance processes

If you have not reviewed the entry points yet, start with [Discovering the Purchasing Module From Inventory and App Pages](#). That earlier document explains how visitors encounter Purchasing from related ERP pages and where it sits in the broader product journey.

You do not need admin access to understand this topic. This guide is aimed at buyers, evaluators, and business users who want to understand:

- What the Purchasing module helps them do
- Which actions are available on purchase documents
- How supplier evaluation works before confirmation
- Why confirmed orders matter beyond the initial request

It also helps to be familiar with common purchasing terms used on-screen, especially:

- **Vendor**
- **Request for Quotation**
- **Purchase Order**
- **Unit Price**
- **Taxes**
- **Planned Delivery Date**

With that context, the purchasing screens are easier to read because the document flow and action buttons will make sense as part of a real buying process rather than as isolated fields.