



TradeOne CRM · 2026

One system for **every** **stage of growth**

TradeOne CRM is an all-in-one business platform that helps your team manage leads, orders, field visits and deliveries — all from one connected system. Standard, Professional and Enterprise plans built to match your team's size, support needs and deployment preference.

WHAT'S INSIDE

One CRM. Every part of the job.

From the first field visit to final delivery, every TradeOne CRM plan runs on the same connected core.



Visits

Geo-tagged field visits with daily logs, scheduling and reminders — always know who went where.



Leads

Manage leads, track follow-ups, and move prospects through a visual, prioritized pipeline.



Orders

Create, approve and track orders end to end, with full history on every account.



Delivery

Real-time dispatch monitoring with delivery proof and delay alerts the moment they happen.



Analytics

Live dashboards and custom reports that turn field, sales and delivery data into decisions.

Standard

Everything your team needs to manage customers, sales, deliveries and daily operations.

Web + Android Mobile App Priced per user — no fixed user limit

PEOPLE & FIELD TEAM MANAGEMENT

Employee Management — manage your employees & team info in one place

Attendance Management — track employee attendance

Leave Management — manage leave requests & records

Beat Plan & Visit Management — plan customer visits & field activities

Field Activity Tracking — track what your field team is doing

LEAD & CUSTOMER MANAGEMENT

Lead & Inquiry Management — record & manage new enquiries & prospects

Customer Management — maintain customer info & business history

Follow-ups & Activities — never miss an important follow-up

Lead-to-Customer Tracking — track prospects through the sales process

TASK & TEAM COLLABORATION

Task Creation & Assignment — assign work & monitor responsibility

Task Approval Flow — real-time approval for required tasks

Task Reminders & Notifications — keep pending work visible

Task Status & Progress — know what's done and what's pending

Internal Task Chat — discuss work directly within tasks

Document & File Sharing — keep task-related files together

TEAM COMMUNICATION

One-to-One Chat — communicate instantly with team members

Group Chat — create teams & department groups

Real-Time Messaging — keep business communication in one place

Company Announcements — share important updates org-wide

SALES MANAGEMENT

Quotation Management — create & manage customer quotations

Sales Order Management — manage confirmed sales orders

Salesperson-wise Sales Tracking — monitor individual performance

ROUTE & DELIVERY OPERATIONS

Optimized Route Planning — plan efficient routes for field teams & deliveries

Geo-Enabled Delivery Tracking — track delivery activities using location-based info

Delivery Approval Workflow — manage & approve delivery activities through a defined process

PAYMENT & COLLECTIONS

Managed directly in TradeOne — no ERP required

Payment Collection Management — record & monitor customer payment collections

Outstanding Management — track pending customer payments

Customer Ledgers — view customer-wise balance information

Aging-wise Outstanding Reports — identify overdue payments by age

PURCHASE & INVENTORY

Purchase Order Management — manage purchase orders

Product Management — maintain product information

Inventory Management — monitor stock levels

Stock Inward & Outward — track movement of goods

EXPENSE MANAGEMENT

Automatic Expense Tracking — record & monitor business expenses

Travel & Field Expenses — track employee travel & field expenses

Other Expenses & Overheads — manage other business expenses

BUSINESS DASHBOARDS & REPORTS

Business Dashboards — a quick view of important business info

Sales Reports

Employee Performance Reports

Visit Reports

Expense Reports

Inventory Reports

SMART FOLLOW-UP & REMINDER MANAGEMENT

Inquiry Follow-ups & Reminders

Quotation Follow-ups & Reminders

Payment Outstanding Follow-ups & Reminders

Purchase Follow-ups & Reminders

Task Follow-ups & Reminders

Best for: businesses that want one platform to manage their people, leads, customers, sales, purchases, inventory, deliveries, collections and daily team activities — without needing an ERP. One TradeOne platform across Web & Android Mobile — with your business data and activities available to your team wherever they work.

MOST POPULAR

PLAN 02 · PROFESSIONAL / CUSTOM SAAS · HIGHER-TOUCH SERVICE

Professional

Everything in Standard — plus ERP integration and higher-touch, dedicated service.

Web + Android Mobile App Priced per user — no fixed user limit

✓ Everything in Standard is included — every feature below is a Professional-only addition.

ALREADY INCLUDED FROM STANDARD

People & Field Team

Leads & Customers

Tasks & Collaboration

Team Communication

Sales Management

Route & Delivery

Payment & Collections

Purchase & Inventory

Expense Management

Dashboards & Reports

Follow-ups & Reminders

DATA MIGRATION & INTEGRATION

Data Migration Assistance — help moving agreed business data into TradeOne

ERP Integration* — connect TradeOne with supported ERP systems, so payments, orders & inventory sync automatically

System Integration Support — assistance integrating supported external systems

ENHANCED BUSINESS ASSISTANCE

Priority Support — faster attention to important support requirements

Dedicated Implementation Contact — a designated contact for implementation & coordination

Priority Enhancement Queue — enhancement requests receive priority review

Training & Administrator Enablement — structured training for users & admins

On-Demand Database Backup — request additional backups when needed

Go-Live Health Check — review readiness before going live

Custom Branding — apply agreed business branding, where applicable

Best for: businesses that already run an ERP and want it connected automatically, plus a dedicated contact and priority service. One TradeOne platform across Web & Android Mobile — with your business data and activities available to your team wherever they work.

*ERP integration pricing is separate — starting at \$699 one-time, subject to ERP API availability, required data access, and agreed data volume/sync scope. See pricing details at the end of this guide.

Get more done with **Jenefa AI**

Jenefa AI works alongside TradeOne CRM to take repetitive work off your team's plate, so they spend more time selling and less time on admin. Available as an add-on to every plan.

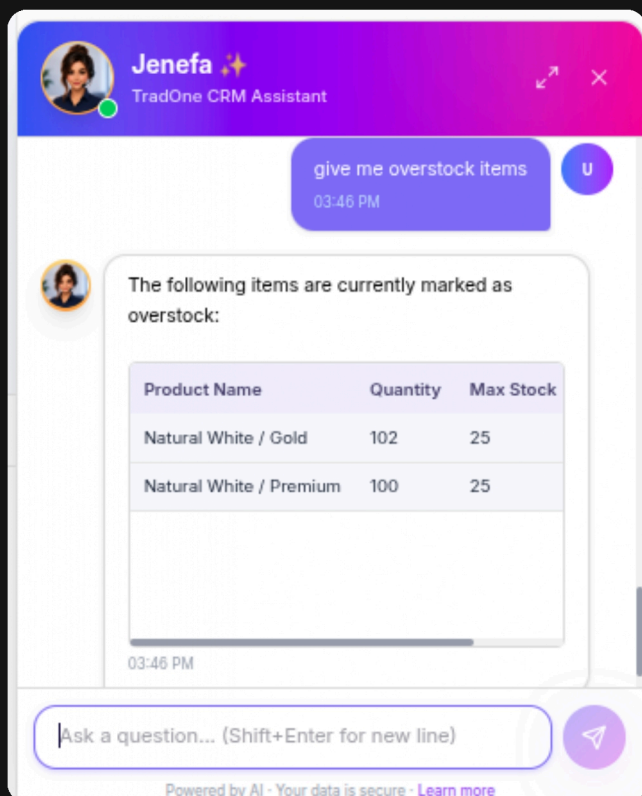
- ✓ Cuts down manual data entry across leads, orders & visits
- ✓ Surfaces insights from your CRM data, so decisions are faster
- ✓ Speeds up routine follow-ups and reporting tasks

Jenefa AI pricing for each plan is at the end of this guide.

See Jenefa AI in action

Real conversations from inside the TradeOne CRM dashboard — no reports to build, no menus to dig through.

• "Give me overstock items"



Jenefa ✨
TradOne CRM Assistant

give me overstock items
03:46 PM

The following items are currently marked as overstock:

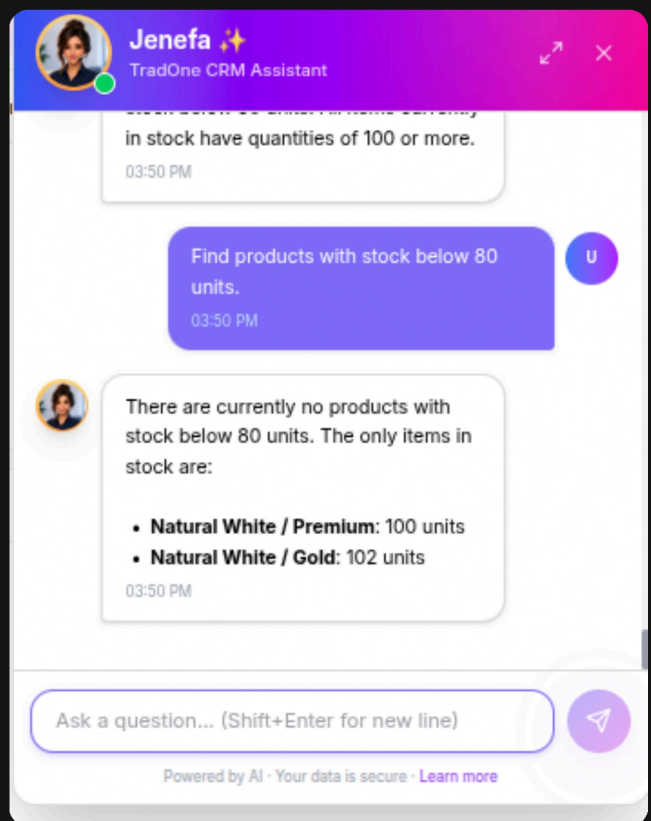
Product Name	Quantity	Max Stock
Natural White / Gold	102	25
Natural White / Premium	100	25

03:46 PM

Ask a question... (Shift+Enter for new line)

Powered by AI · Your data is secure · [Learn more](#)

• "Find products with stock below 80 units"



Jenefa ✨
TradOne CRM Assistant

Find products with stock below 80 units.
03:50 PM

There are currently no products with stock below 80 units. The only items in stock are:

- **Natural White / Premium:** 100 units
- **Natural White / Gold:** 102 units

03:50 PM

Ask a question... (Shift+Enter for new line)

Powered by AI · Your data is secure · [Learn more](#)

Built for how field-sales & distribution businesses actually work

If you run a field-sales, distribution, or trading business, the real problem isn't finding a CRM — it's that your CRM tracks leads while your field visits, delivery routes, collections and inventory all live in separate spreadsheets or separate tools. TradeOne brings all of it into one platform your whole team uses, every day.

What you need	TradeOne	Zoho CRM	Odoo	HubSpot
Plan & track field visits	✓ Built in	Separate product (Zoho FSM)	Included in suite, needs setup	Not included
Staff attendance & leave	✓ Built in	Separate product (Zoho People)	Included in suite, needs setup	Not included
Delivery routes & live tracking	✓ Built in	Not included	Included in suite, needs setup	Not included
Track who owes you money	✓ Built in	Separate product (Zoho Books)	Included in suite, needs setup	Not included
Purchase orders & inventory	✓ Built in	Separate product (Zoho Inventory)	Included in suite, needs setup	Not included
Team chat & task discussion	✓ Built in	Separate product (Zoho Cliq)	Included in suite, needs setup	Not included
One app for your whole team	✓ Yes	No — several apps/logins	Several apps within the platform	CRM only

Can your field team's visits be planned and tracked?

With TradeOne, yes — right out of the box. With Zoho or HubSpot, you're looking outside the core CRM. With Odoo, it's there, but needs broader setup.

Can you see who's paid and who still owes you?

TradeOne shows this natively, on every plan. Zoho needs Zoho Books. Odoo needs Accounting configured. HubSpot doesn't offer this.

How many logins does it take to run your business?

TradeOne: one. The others: often two or more separate products, even from the same vendor

Zoho and HubSpot are strong at what they're built for — managing a sales pipeline. Odoo can technically do everything TradeOne does, spread across its wider suite. TradeOne exists because field-sales and distribution businesses don't need a broader suite — they need the specific things that run their business, working together, without the setup.

Comparison is based on publicly available competitor pricing and feature information as of September 2026. As competitor offerings, pricing and packaging may change over time, customers are encouraged to verify the latest information with the respective vendors before making purchasing or business decisions based on this comparison.

CHOOSE YOUR PLAN

Simple, transparent pricing

Priced per user, so you only pay for the team you have. Already run an ERP? Choose Professional. Don't have one, or don't need TradeOne to talk to it? Standard covers everything else — including tracking payments and outstanding balances, right inside TradeOne.

STANDARD SAAS

Standard

\$7

/user/mo, billed annually or \$10/user/mo billed monthly

Save 30% annually

Web + Android app · No fixed user limit

Full feature list is earlier in this guide — people & field management, leads, tasks, sales, route & delivery, payments & collections, purchase, inventory, expenses, dashboards & more.

Jenefa AI add-on: \$2 /user/mo

Most Popular

PROFESSIONAL / CUSTOM SAAS

Professional

\$10

/user/mo, billed annually or \$12/user/mo billed monthly

Save ~17% annually

Web + Android app · No fixed user limit

Everything in Standard, plus ERP integration with automatic sync, a dedicated contact, priority support, training, custom branding and more.

Jenefa AI add-on: \$3 /user/mo

ERP Integration: starting at \$699, one-time

ENTERPRISE

Enterprise Custom Pricing

Talk to sales for pricing

Unlimited users · Your infra or ours

✓ Everything in Standard & Professional

✓ Unlimited users, no per-user billing

✓ Full configuration assistance

✓ Deploy on your infrastructure or ours

Jenefa AI add-on: Custom, quoted by scope

Prices shown are per active user, in USD. Annual billing includes a discount over the monthly rate. ERP integration is priced separately from the subscription — final cost depends on the ERP and integration requirements

Compare plans

A side-by-side view of what's included at every level.

What's included	Standard \$7/user/mo	Professional \$10/user/mo	Enterprise Custom
Users	Pay per user	Pay per user	Unlimited
Deployment	TradeOne CRM cloud	TradeOne CRM cloud	Your infra or ours
Core CRM modules & workflows	✓	✓	✓
Data import & integrations	✓	✓	✓
Onboarding & product/security updates	✓	✓	✓
Route planning & delivery	✓	✓	✓
Payment collection & outstanding tracking	✓	✓	✓
Support level	Email	Priority	Per your SLA
Data migration assistance	—	✓	✓
ERP integration, with auto-sync*	—	✓	✓
Dedicated implementation contact	—	✓	✓
Training & admin enablement	—	✓	✓
Custom branding (where applicable)	—	✓	✓
Configuration & architecture assistance	—		✓

*ERP integration is billed separately — starting at \$699 one-time, subject to ERP API availability, required data access, and agreed data volume/sync scope.

JENEFA AI · STANDARD

\$2

/user/mo

No fixed user limit

JENEFA AI · PROFESSIONAL

\$3

/user/mo

No fixed user limit

JENEFA AI · ENTERPRISE

Custom

Quoted by scope

Good to know

- Prices are per active user, billed monthly or annually (annual billing saves you money) — you only pay for the team you have.
- Enterprise is quoted individually based on your scope — your consultant will share a formal quote.
- On self-hosted Enterprise deployments, servers, networking, database, backup infrastructure and security are the customer's responsibility, unless a separate managed-service agreement is signed.
- ERP integration is a one-time fee, separate from your subscription, priced by ERP and data scope.

Ready to see TradeOne CRM **in action?**

Your sales consultant can walk you through a live demo and help you pick the right plan for your team.

WEBSITE

tradeonecrm.com

REQUEST A DEMO

tradeonecrm.com/contact

WHATSAPP

wa.me/9909022418

