AXITHORN

Zoho Premium Partner

Case Study · MES hardware and software

Hellenic Systems Case Study

How Hellenic Systems automated its management reporting and runs the business end to end with Zoho One

Hellenic Built Around You

Hellenic Systems moved customer records, support, installation and return jobs, software development and management reporting off Excel, Word and an old on-premise JIRA and onto Zoho One, delivered by Axithorn.

INDUSTRY	LOCATION	REACH	ZOHO ONE USERS
MES hardware and software for food and manufacturing	South Woodham Ferrers, Essex, UK	130+ sites across the UK and Europe	34 (July 2026 renewal)
ZOHO PLATFORM			
Zoho One			

OVERVIEW

From Excel, Word and on-premise JIRA to one Zoho platform

Hellenic Systems Limited is a UK provider of MES hardware and software for food and manufacturing. It has been trading since 1988 and serves more than 130 sites across the UK and Europe. Customer records, price lists and trackers were held in Excel and Word, and support and development ran on an old on-premise JIRA.

Axithorn delivered **Zoho One** for Hellenic, starting with Zoho CRM and Zoho Books in 2023 and then configuring a lot of Zoho CRM, Zoho Projects and Zoho Analytics, alongside Desk, Inventory and Sprints. Management reporting is now automated in Zoho Analytics, every installation and hardware return (RMA) job is logged in Zoho, and software development runs in Zoho Sprints.

Zoho products used

Zoho One · Zoho CRM · Zoho Projects · Zoho Analytics · Zoho Desk · Zoho Books · Zoho Inventory · Zoho Sprints

Key takeaways

01
Management reporting, automated
Full management reporting now runs in Zoho Analytics, replacing manual spreadsheet trackers.

02
Every job logged
All installation and hardware return (RMA) jobs are logged in Zoho, from the RMA web form through to delivery notes.

03
Development off JIRA
Software development runs in Zoho Sprints, with the team's JIRA tickets migrated across.

04
One platform, fewer manual steps
Automations take routine steps off staff, and Zoho now supports the business end to end.

34
Zoho One users at the July 2026 renewal

7
Zoho apps in use under Zoho One: CRM, Projects, Analytics, Desk, Books, Inventory and Sprints

100%
of installation and hardware return (RMA) jobs logged in Zoho

5
management reporting areas automated in Zoho Analytics: sales, project backlog, financial forecasting, time tracking and maintenance ratios

EXECUTIVE SUMMARY

MES specialists since 1988, now run on one connected platform

Hellenic Systems has supplied MES hardware and software to food and manufacturing sites since 1988. Today it serves more than 130 sites across the UK and Europe, from its base in South Woodham Ferrers, Essex.

Hellenic engaged Axithorn in 2023 to move off an Excel and Word-based CRM and an old on-premise JIRA. It had 34 Zoho One users at its July 2026 renewal.

Company profile

Company	**Hellenic Systems Limited**
Sector	**MES hardware and software for food and manufacturing**
Founded	**Trading since 1988**
Location	**South Woodham Ferrers, Essex, UK**
Serves	**130+ sites across the UK and Europe**
On Zoho since	**2023**

> Hellenic has been building MES systems for food and manufacturing since 1988, and today our hardware and software runs on more than 130 sites across the UK and Europe. From the kill line with CARCASE to factory orders with FOPS and recipes with FORMIX, most of what we deliver is tailored to how each customer's plant actually runs. That's what Built Around You means to us, and we wanted our own systems to work the same way: one platform, set up around how we run, that could grow with us.

Pete Rhodes
Business Unit Leader, Hellenic Systems

PROBLEM STATEMENT & KEY CHALLENGES

Customer records, price lists and development all lived in separate, ageing tools

Customer records, product price lists and the maintenance tracker were held in Excel and Word. Support and software development ran on an old on-premise version of JIRA plus a separate ticket system, and Hellenic wanted to bring this into Zoho.

Information came from multiple users and systems, so data was not always up to date and the numbers did not always agree. In 2023 Hellenic needed a system that could grow with the business and handle everything end to end, for every department and process, and engaged Axithorn to deliver it.

What was in place before

- Customer records in Excel and Word
- Product price lists in spreadsheets
- A maintenance tracker in Excel
- Paper job sheets for site visits and returns, uploaded to internal drives
- An old on-premise JIRA for support and development
- A separate ticket system

1 **Records in Excel and Word**

Customer records, product price lists and the maintenance tracker were held in spreadsheets and documents rather than one system.

2 **Ageing JIRA**

Support and software development ran on an old on-premise JIRA alongside a separate ticket system.

3 **Paper job records**

Site visits and returns were recorded on paper, with no process to follow a job from end to end.

4 **Out-of-date, inconsistent data**

Information was not always up to date, with discrepancies between what different users and systems held.

> The same customer could look different depending on whose spreadsheet you opened. Site visits and returns were on paper and uploaded to our internal drives, which took a lot of time and admin, and there was no process to follow a job from end to end. We spent too long reconciling numbers and chasing paperwork.

Paul White
Head of Operations, Hellenic Systems

EVALUATION OF THE PROBLEM

One platform under one subscription

Axithorn recommended Zoho One so that sales, finance, support, projects and development could run on one platform under a single subscription. All-employee pricing made the full bundle cheaper than licensing apps individually.

For the development team, Hellenic trialled Zoho Projects and Zoho Sprints against JIRA, and noted the apps were already included in its subscription at no additional cost.

STEP 1

Recommendation

Zoho One recommended so every department could share one platform and one subscription, at a lower cost than individual apps.

STEP 2

Trial against JIRA

Hellenic trialled Zoho Projects and Zoho Sprints against JIRA, and noted the apps were already included in its subscription at no additional cost.

PROPOSED SOLUTION

Zoho One, with CRM, Projects and Analytics at the centre

Zoho One gave Hellenic sales, finance, support, projects and development on one platform. Axithorn configured Zoho CRM, Zoho Projects and Zoho Analytics in depth, and added Desk, Books, Inventory and Sprints along the way.

Why Zoho was the right fit

- One subscription covering sales, finance, support, projects and development
- All-employee pricing cheaper than licensing apps individually
- Zoho Projects and Zoho Sprints already included at no additional cost
- Zoho Sign included for contracts, where Salesforce and DocuSign signing tools were paid add-ons

Zoho CRM

Accounts, products and customer-level price lists, quoting and opportunities, with a discount approval process. A contracts module with renewal reminders, and contracts sent for signing through Zoho Sign. Scheduled sales reports.

SOLVES

Customer records and price lists held in Excel and Word.

Zoho Projects

Won deals flow into a sales order and a delivery project in Zoho Projects, with its own WorkDrive folder. From there a job can split into separate orders for a client, or spin off a Zoho Sprints ticket when bespoke development is needed. Installation, hardware supply, professional services and repair jobs all run as projects, each linked to its sales order. Timesheets split customer chargeable, customer non-chargeable (utilisation) and internal hours, and support tickets pass in from Zoho Desk.

SOLVES

No process to follow a job from end to end.

Zoho Analytics

Full, automated management reporting. Dashboards cover sales, project backlog, financial forecasting, time tracking and maintenance ratios, alongside a revenue recognition report and a Sprints development dashboard. Examples include forecast by month, un-forecasted orders and net PS value by owner.

SOLVES

Manual spreadsheet trackers and out-of-date data.

Zoho Sprints

Used by the whole software development team, including Professional Services (PS) work allocated to developers. About 9,000 tickets moved off the old JIRA server, and bespoke work now arrives as a Sprints ticket linked to the order.

SOLVES

Old on-premise JIRA.

Zoho Inventory

Used for RMAs: a web form that issues an RMA number, RMA quote templates and RMA delivery notes. Full stock control, tracking goods in, goods out and stock in transit, is planned for 2027.

SOLVES

Paper-based returns.

Zoho Desk and Zoho Books

Support ticketing, finance, delivery notes and purchase orders, with a Desk to Projects ticket process.

SOLVES

A separate ticket system and disconnected finance steps.

> **Every account, price list, quote and opportunity now lives in Zoho CRM. Discounts go through an approval process, contracts go out for signature from the same record, and when we win a deal operations can see it coming before the order lands.**

Sam Purssell
Head of Commercial, Hellenic Systems

> Moving about 9,000 tickets off our old JIRA server put the whole development team on the same platform as sales and support. When a customer orders bespoke work it comes through as a Sprints ticket linked to the order, so developers see the commercial context, not just the task.

Nas Ghouri
Head of Development, Hellenic Systems

IMPLEMENTATION

Delivered in phases from 2023, one area at a time

Axithorn delivered Zoho in stages, starting with CRM and Books and adding apps as the business was ready. Integrations include a JIRA data migration, Microsoft Dynamics 365 F&O (fields in place, integration in progress), Microsoft Outlook and GitHub.

Each management reporting change came with a short how-to video saved to a Training Resources folder in Zoho WorkDrive.

DELIVERY

Since Oct 2023

Phased delivery from kick-off in October 2023, with new processes still being added.

OCT 2023

CRM and Books

- Zoho CRM and Zoho Books set up

EARLY 2024

Support and projects

- Zoho Desk and Zoho Projects added
- Support backlog moved from JIRA into Zoho
- Upgrade to the full Zoho One bundle

FROM SEPT 2024

Management reporting

- Sales, PS, timesheet and revenue recognition dashboards
- Refined with Hellenic's operations and finance teams

2025

Development in Sprints

- About 9,000 JIRA tickets migrated into Zoho Sprints
- Sprints dashboards added in Zoho Analytics
- User training in April 2025

LATE 2025 TO 2026

Contracts, RMA and orders

- Contracts module
- RMA processes and delivery notes
- Purchase order process through Books and Inventory
- Preparation for the Dynamics F&O link

2027 (PLANNED)

Approvals, stock and AI

- Sign-off and approval on opportunities as they close
- Pipeline linked through to stock control in Zoho Inventory
- Zoho's AI connector (MCP) feeding Claude and ChatGPT for further analysis, at no extra cost

Hurdles along the way

THE HURDLE

Data was not up to date, and information from multiple users and systems did not agree.

HOW WE HANDLED IT

Axithorn consolidated it into one platform, so everyone works from the same up-to-date records.

THE HURDLE

Standard Zoho configuration did not fit Hellenic's needs and workflows.

HOW WE HANDLED IT

Axithorn reworked the standard configuration around how Hellenic actually works.

Additional services delivered

JIRA data migration | How-to videos in Zoho WorkDrive | User training | Automation builds

> Hellenic wanted one place to run the business, not another bolt-on. We started with CRM and Books, then added reporting, support, projects and development as the team was ready, and automated the routine steps as we went.
>
> **James Welch-Thornton**
> Managing Director, Axithorn

RESULTS

Reporting automated, every job logged and the business on one platform

Full management reporting is in place and automated in Zoho Analytics, replacing manual spreadsheet trackers. Leadership now works from up-to-date figures in one place instead of reconciling data from several users and systems, and staff spend far less time on manual reporting and chasing.

Pete Rhodes, Hellenic's Business Unit Leader, said in March 2025 that Zoho was used "in most departments", and by December 2025 described it as running "our business end to end". Contracts are sent for signing from Zoho, delivery notes are working well, and a purchase order process runs in Zoho.

One

platform replacing spreadsheets, an old on-premise JIRA and a separate ticket system

Automated

management reporting across sales, projects, forecasting, time and maintenance

Fewer

mistakes from re-keying, and no more relying on out-of-date sources to be accurate

Management reporting

Full management reporting is automated in Zoho Analytics, and the leadership team runs from the monthly forecast, sales dashboards and backlog dashboards.

Jobs and returns

All installation and hardware return (RMA) jobs are logged in Zoho, from the RMA web form through to RMA delivery notes.

Development in Sprints

Software development runs in Zoho Sprints instead of an old on-premise JIRA.

Everything connected

With every module connected it becomes one process. Projects can see upcoming opportunities, contracts can see upcoming projects, and every department has a view of what's coming their way.

Looking ahead

- A customer order portal, targeted to go live by the end of 2026
- Sign-off and approval on opportunities as they close, targeted for January 2027
- The pipeline linked through to stock control in Zoho Inventory, and the Microsoft Dynamics 365 F&O link
- Zoho's AI connector (MCP) feeding Claude and ChatGPT for further analysis at no extra cost, and AI in Sprints

> Zoho now runs our business end to end. Axithorn didn't hand us a standard setup: they reworked it around how we work, one department at a time. A won deal now flows into a sales order, a delivery project and, where there's bespoke work, a Sprints ticket for the developers, so every department can see what's coming towards them. Our management reporting builds itself instead of being pulled together by hand, and because everything sits on one platform we can plug it straight into AI tools for deeper analysis.

Pete Rhodes
Business Unit Leader, Hellenic Systems

AXITHORN

Axithorn is a UK-based Zoho Premium Partner. Every implementation is designed and delivered by senior consultants, not resold off the shelf: Zoho One rollouts, CRM and sales, finance and ERP, analytics and AI, integrations and custom development, migration and ongoing managed support.

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YOUR ZOHO PARTNER

Ready to run your business on one platform, implemented properly?

Book a free consultation

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