

PHS West

Customer Case Study

Learn how a motorized tug and medical cart manufacturing company uses Cosmos to manage orders, schedule reports, and save time in Business Central.

“Cosmos has made it much easier to pull bookings reports at the end of every month. What used to take me half a day now takes a minute!”

Tara Turner, Business Support Manager
PHS West

Results



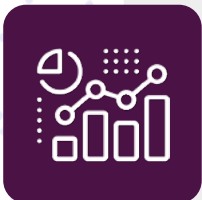
Built for Business Central

PHS West was looking for a solution that worked better with Business Central than what they were using. They found a reporting platform built explicitly for Business Central in the cloud, which brings the performance and accessibility they need.



Simplified Report Creation

After struggling with manipulating reports in Jet Reports, PHS West wanted a user-friendly reporting system that everyone could easily access. One of the features that stood out in Cosmos was the easy report scheduling setup.



Power BI Integration

PHS West uses Power BI for creative dashboards and data visualizations – but they could never use it with Jet Reports. Now, they can pull a Cosmos report into Power BI and create custom charts and KPIs for their reports and dashboards.

Reporting Challenges

PHS West provides motorized tugs and medical carts that help employees transport heavy materials and equipment within their facilities. Specializing in healthcare, material handling, and data centers, PHS West has built a strong reputation for offering innovative products and services that enhance workplace safety.

Since implementing Business Central in 2021, the small manufacturing company used Jet Reports for all their financial and operational reporting. However, they faced issues with licensing, slow support responses, and rising customization costs. At the [Innovia Customer Conference](#) in 2023, they were pleasantly surprised to meet Cosmos.

According to Tara Turner, the Business Support Manager at PHS West, “What really piqued our interest was that Cosmos is cloud-based and specifically designed for Business Central.” Following the conference, PHS West contacted their partner, Innovia Consulting, and connected with Cosmos. The demo impressed them, and they decided to switch to this cloud-based reporting platform.

Reporting Challenges

Existing Problems:

Limited report design options in Jet Reports

Licensed-based access limited options for administrative support

Heavy reliance on external consultants for report customization

Slow support for Jet Reports

No Power BI integration

Looking For:

Cloud-based reporting solution built for Business Central

More accessibility to everyone in the company

Faster, more responsive support

A user-friendly system with less technical complexities to reduce reliance on consultants

“What really piqued our interest was that Cosmos was cloud-based and literally made for Business Central.”

Tara Turner, Business Support Manager
PHS West

Cosmos Impact

The training and implementation process for PHS West went smoothly, culminating in a successful go-live in October 2023. They applied several pre-built reports from Cosmos out of the box and had additional custom reports developed to meet their specific reporting requirements.

As the Business Support Manager, Tara oversees monthly bookings and orders. When asked about her experience so far, she said, "Cosmos has made it much easier to pull booking reports at the end of every month. What used to take me half a day now takes a minute!" Before adopting Cosmos, Tara had to manually keep track of what was booked and billed. Now, she quickly generates and schedules the reports she needs, including a partial shipping report in Cosmos.

Since go-live, Tara has also taken full advantage of Cosmos' Power BI integration functionality. PHS West had previously used Power BI as a standalone solution with Jet. Today, she can pull a Cosmos report directly into Power BI and customize it with charts, KPIs, and other data visualizations for faster data analysis and decision making.

Beyond the system's cloud functionality, ease of use, and [Power BI integration](#), PHS West emphasizes the exceptional support as a key aspect of their satisfaction with Cosmos. "The Cosmos team's responsiveness and support level have been outstanding," explains Tara. "Not only have they been excellent educators, but they have been readily available to answer questions, troubleshoot issues, and create custom reports."

"The Cosmos team's responsiveness and support level have been outstanding. Not only have they been excellent educators, but they have been readily available to answer questions, troubleshoot issues, and create custom reports."

Tara Turner, Business Support Manager
PHS West