GROSS MENDELSOHN

ACCOUNTING | TECHNOLOGY | WEALTH ADVISORY

GROSS MENDELSOHN

Partner Case Study

See how Gross Mendelsohn uses Cosmos to help Business Central clients modernize reporting, reduce implementation pressure, and deliver board-ready reports.

> *“Cosmos delivers a product we confidently recommend to our clients. Cosmos consistently provides reliable, intuitive financial reporting, supported by outstanding customer support.”*

Michael T. Marinaro
CPA, Partner, Gross Mendelsohn

WHY DID YOU BECOME A COSMOS PARTNER?

To Give Business Central Clients the Reporting They Expect

Many Gross Mendelsohn clients are migrating from legacy ERP systems, such as Microsoft Dynamics GP, to Business Central. While Business Central offers a stronger cloud ERP foundation, clients still expect the financial reporting functionality they had before, including multi-company, multi-department, and division-level reporting.

To Support Board-Ready Financial Reporting

For smaller organizations, standard Business Central reports may be enough. But for clients that need polished, meaningful, board-ready reports, from Excel-based financial statements to Power BI dashboards, Gross Mendelsohn needed a reporting solution that could close the gap without adding unnecessary complexity. Cosmos quickly became a practical reporting solution for many of GMA's Business Central clients.

To Reduce Pressure During Business Central Implementations

Gross Mendelsohn's team is focused on getting Business Central live, configured, and adopted. Cosmos' white glove service helps reduce the reporting burden during implementation while providing customers with the reports, training, and support they need to move forward confidently.

To Partner with a Team They Trust

Gross Mendelsohn had tested multiple reporting solutions before selecting Cosmos. What stood out was not only the product but also the responsiveness, onboarding, support, and hands-on team behind it. As an extension of the Gross Mendelsohn offering, Cosmos was a natural fit because of how they service partners and their customers.

> *"Cosmos' white-glove service has been a valuable complement to our implementation process. It helps clients get the reports they need while their teams begin learning the system."*

Nancy J. Schafer
Business Central Consultant, Gross Mendelsohn

AN INDEPENDENT AUDIT, TAX, AND ADVISORY FIRM BUILT AROUND BETTER BUSINESS SYSTEMS

Gross Mendelsohn (GMA) is an independent audit, tax and business advisory firm serving privately held businesses, nonprofits, families and entrepreneurs throughout the Mid-Atlantic. Alongside its core accounting, tax and advisory services, GMA offers technology consulting services that help clients select, implement and support ERP and CRM systems.

The firm's ERP practice supports a range of business management solutions, including Microsoft Dynamics GP, Microsoft Dynamics 365 Business Central, NetSuite, Sage 100, and other systems. For many clients, GMA helps guide the move from legacy, on-premises ERP platforms to modern cloud-based solutions like Business Central.

That migration experience gives the team a practical view of what clients need after implementation. A successful ERP project is not only about getting transactions into the system. It is also about helping finance and leadership teams get meaningful information back out.

As Nancy Schafer explains, "I love reporting because it helps our clients better understand their day-to-day financial operations."

> *"I think one of Cosmos' biggest strengths is the team. If you ask a question and someone doesn't know the answer, they know who does. Everyone can step in and help."*
>
> **Nancy J. Schafer**
> **Business Central Consultant, Gross Mendelsohn**

WHY GMA CHOSE COSMOS TO HELP MOVE CLIENTS FROM LEGACY ERP TO MODERN CLOUD REPORTING

For clients moving from Dynamics GP to Business Central, reporting was often the most common adjustment to make. Finance teams were used to Management Reporter and Excel-based outputs supporting rolled-up financials, multi-company and multi-department reporting, and workbook tabs for different divisions. As Michael Marinaro explains, clients expected the same reporting functionality in Business Central, and “looked different.”

Before standardizing on Cosmos, GMA tested larger reporting platforms, other point products, and customized reports directly in Business Central. Some were too heavy for smaller companies; others added complexity for consultants and clients. Cosmos became the practical fit for several reasons:

- Best fit for Business Central clients: The solution delivers meaningful financial reporting without adding friction to the implementation.
- White glove service: Cosmos builds the foundational reports during the project, freeing GMA’s consultants to focus on configuration, change management, and go-live. Clients who want to self-serve can; clients who want additional guidance from GMA benefit from an easier-to-support foundation.
- Responsive support: Tickets are often answered within an hour, and the team knows who to escalate to when deeper expertise is needed.
- Right-sized for the client base: Cosmos fits most Business Central clients without being too much or too little.
- Internal adoption: The GMA team completed Cosmos training, and the firm plans to evaluate Cosmos as part of its own move to Business Central.

As Marinaro puts it, “Just being able to know there’s a product out there that we can confidently recommend to our clients has been the biggest thing for us.”

A REPORTING PARTNER GMA CAN RECOMMEND WITH CONFIDENCE

> *“For partners implementing Business Central, Cosmos is worth looking at. The onboarding gets your team up to speed quickly, the support is strong, and the white glove service gives you something valuable to offer your clients.”*
>
> **Michael T. Marinaro**
> **CPA, Partner, Gross Mendelsohn**

Cosmos gives GMA a reporting solution that fits the way its clients are modernizing. As organizations move from legacy ERP systems to Business Central cloud, Cosmos helps preserve the financial reporting experience teams depend on while providing a more modern, intuitive, and supportable platform.

For GMA, the value is not just the software. It is the confidence of knowing they have a partner who can help clients build reports, answer questions quickly, support Power BI needs when required, and reduce the reporting burden during Business Central implementations.

That confidence is why GMA frequently recommends Cosmos for Business Central projects where advanced financial reporting is a priority. Clients get a reporting solution they can use. GMA gets a partner who supports both the implementation team and the client. And finance teams get a clearer path from legacy ERP reporting to modern cloud-based reporting.