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Serenic Navigator is a powerful financial management and business operations software product designed specifically for larger nonprofit organizations, international NGOs and the public sector. Certified for Microsoft Dynamics NAV, Serenic Navigator offers a solid core product that is easily navigated and fully integrated with a suite of extended financial and business operations products.

## **BASIC SYSTEM FUNCTIONS**

Due to its more complex structure, Serenic Navigator is best installed by a professional. The vendor expects a streamlined version of the product, Navigator Online, intended for small to mid-sized organizations, to be available in a SaaS (Software as a Service) version in early 2011.

Built on Microsoft Dynamics NAV technology, Serenic Navigator is a role-based product that offers a user interface similar to other Microsoft products. Initially, the Role Center structure may feel foreign to those used to a more traditional user interface; the benefits of the structure quickly become apparent. Each employee can easily customize their own role center, which provides them with easy access to frequently used program functions and system links. This structure also prevents cluttered screens, as each employee only has access to modules and features that fall within their own job parameters.

Serenic Navigator offers a Core Financials suite that includes GL, AP, AR and Cash Management functions along with other prominent features such as Advanced Allocations, Budgeting/Forecasting, Inventory, Fixed Assets, and Procurement & Sales Orders. Other key features include both Multi-Currency and Multi-Language capability, an integrated Excel report writer, Financial Reporting, Workflow Management with Approvals, and complete Microsoft Office integration. Optional products include AwardVision (grant management), CommunityCare (consumer

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When setting up account structures, with the ability to use up to 100 alphanumeric characters to define each account. Serenic easily handles multiple transactions and utilizes the Role Center structure for easily assigning specific transactions types relevant to each employee. Users will also enjoy excellent budgeting options, including transaction-based or multi-year budget types. Budgets can be set up using a variety of parameters including daily, weekly, monthly, quarterly or annually. Budgets can also be easily customized by establishing specific rules for each budget maintained.

Nonprofits that wish to track donors would find DonorVision helpful. DonorVision tracks constituent/donor information, campaign appeals, and any related designations, so management can easily keep track of top-level donors and appeal/campaign success.

For those dealing with grants, AwardVision will easily track and manage multiple grants, including maintaining funding information, sub-recipients, proposals and subsequent awards.

Each fund in Serenic Navigator is automatically balanced at both the fund and fund class level. Full accounting customization allows users to set up and maintain multiple entities using a calendar that is specific to that entity. Serenic also contains an excellent audit trail function that offers users a detailed list of all system transactions. Payments can be made electronically by creating an EFT file, and remote personnel can access and enter vital information by using the various portals available. Serenic also expects to offer Navigator Online, a streamlined SaaS version of Navigator, in early 2011, making the system accessible to small to mid-sized organizations with multiple locations. Navigator Online will not include all the features available in the Navigator on-premise product, but if an organization outgrows the functionality found in Serenic Navigator Online, they will be able to easily and cost-effectively transition to the on-premise version. 5

# MANAGEMENT FEATURES

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user group or groups, as needed. Finally, user levels are assigned that determine what level of information the user can access.

Spending limits are easily assigned in the appropriate budget. The AR module easily tracks credit levels and allows personnel to notate any collection activity. Users will find DonorVision an excellent resource for tracking any fundraising activity. The Constituent Card allows users to easily record as much or as little information about donors as desired. The Workflow with Approvals feature allows for sharing documents that typically need multiple approvals, eliminating lost documents while increasing efficiency. 4.75

## FINANCIAL STATEMENTS & REPORTING

Serenic Navigator contains a solid selection of core financial reports that can be easily customized as needed. Users can drill down to originating entries on all financial statements. Charts and graphs can also be easily added to financial statements for a more polished, professional appearance.

Serenic contains both FASB 116 & 117 reporting capabilities, and AwardVision contains excellent grant reporting capability with reports such as Award Expenditures and Award Restrictions available. All reports can be easily exported to both Microsoft Word and Excel, and can be emailed to recipients, as well. Jet Reports, an Excel report writer, fully integrates with Navigator to increase report customization capabilities, and the export tool simplifies the entire process. 5

## INTEGRATION/IMPORT/EXPORT

Full product integration with Microsoft Office allows Serenic users to utilize these products to their fullest. Data is easily moved between programs for easy data import and export. Serenic Navigator is a fully integrated product, with all modules and

features working together. Built on Microsoft SQL, Serenic can easily integrate with a

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product support plans are available. 5

## SUMMARY & PRICING

Serenic Navigator pricing begins at \$3,000 per user for the Flagship Financial Management product, with the Complete Financial Suite starting at \$6,000. Though Serenic Navigator does require a significant financial investment, larger organizations will find the benefits of increased efficiency and scalability worth the investment.

### 2010 Overall Rating 5

Technology

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