BASIC SYSTEM FUNCTIONS – 5 Stars

The web-based version, Serenic Navigator Express, removes the need for Serenic personnel to install and configure the system. System implementation is wizard-driven, with ongoing product support provided by Serenic support staff as needed, though some initial training could be beneficial. Assistance with implementation is available if requested. Using Serenic Navigator Express, the user interface and setup screens are easily navigated, with users able to easily set up a working account structure.

The use of Microsoft common navigation tools, including the ribbon design, makes system navigation straightforward and familiar, with Home, Actions, Navigate, and Report functions at the top of the screen. Clicking on one of these options will produce an updated ribbon with the appropriate options displayed. Click on the 'new' option found within each function to add additional customers and accounts. All data entry screens contain a Help option as well as easy-to-access menu lookup options.

Serenic Navigator Express includes core financial modules such as GL, AP, AR, and Cash Management, as well as Line Allocations, BudgetVision, Fixed Assets, Financial Reporting, and Grant Management. In addition to those features, the Essentials version of Serenic Navigator includes Purchase Orders, Batch Allocations, Expense

DonorVision is available as an add-on product that will integrate with all versions of Serenic Navigator. The scalability of the product is unparalleled, with users able to add modules and upgrade to a more robust version easily, without losing any data. Running on Microsoft Dynamics, Serenic also offers excellent integration with all Microsoft Office products.

CORE NFP/FUND ACCOUNTING CAPABILITY – 5 Stars

In the GL Dimensions section, users can create an account structure that suits their needs. Each version of Serenic Navigator is designed to manage both GL and Fund Accounts with Restrictions, with users able to set up additional Dimensions such as cost centers or programs that they need to track. This structure eliminates the need for a long account structure, relying instead on categorizing natural accounts, funds with restrictions, programs, departments, etc. separately. Serenic Navigator can process multiple transaction types easily, including vendor invoices and payments, customer invoices and receipts, bank reconciliations, regular and recurring journal entries, sales credit memos, deposits, and fixed asset depreciation and other related entries. Serenic Navigator lets users centralize and store source documents and correspondence as file attachments at both the transaction (invoice, journals, etc.) and the master record (i.e., funding source, grant, customer, etc) level. Staff members can set up notes for records and pages that include links to internal guidelines, laws and regulations, or even photos, how-to videos, and other "unstructured" information.

A simplified budgeting feature allows users to track and view multiple budgets simultaneously, create subplans, and create multiple versions of a budget to determine the most suitable version. Users can create multi-year budgets, and original budgets can be viewed as a reference point. Serenic Navigator Enterprise offers more advanced budget features, suitable for those with more complex needs.

Serenic DonorVision can be used with any edition of Serenic Navigator and provides

invoices as Word docs and email directly to customers. All three editions of Serenic Navigator can be accessed via the cloud or from an Internet connection.

MANAGEMENT FEATURES – 5 Stars

Serenic Navigator Enterprise allows users to customize their Role Center with Snapshot reports that will display on the Role Center interface, including Key Performance Indicators (KPIs) such as Expenses by Program, or Expenses by Month. The Financial Overview displays all contributions, award and grant data, and other revenue, as well as related program expenses. The Multiple Version Creation function, available in all versions of the product, can be used during budget creation, allowing users to enter multiple versions of a budget using varying starting figures to create the best scenario and include full justification notes. For those requiring more enhanced budgeting capability, Serenic Navigator Enterprise can provide complete budget what-if scenarios, including the use of user defined calculations for budget line-items. Serenic offers excellent system security, with user access determined by the role assigned, so users will only have access to features and functions that fit within the parameters of their role. For increased flexibility, Serenic offers both full and limited use licenses. Limited user licenses facilitate use by occasional users and can be configured for expense entry, requisitions, purchase orders, budgeting, workflow approvals and report viewing. The AR module tracks invoice aging, and DonorVision keeps a handle on past due pledges.

The excellent DonorVision add-on module manages all organizational fundraising activity, including donor cultivation, donation levels, donor campaigns, pledges, and thank you letters. Users can also choose to attach relevant documents to a donor file, with the ability to attach relevant documents available throughout any version of Serenic Navigator.

FINANCIAL STATEMENTS & REPORTING – 5 Stars

Each Serenic Navigator version offers excellent reporting capability, with reports

Serenic reports can be exported to a variety of formats, including Microsoft Word and Excel, or saved as a PDF. Accessibility of budget-to-actual comparison reports for department heads and directors can be published out on a scheduled basis or provided in real-time via Limited User license.

INTEGRATION/IMPORT & EXPORT – 5 Stars

Built on Microsoft Dynamics NAV, Serenic Navigator offers the latest in integration with Microsoft Office products, including Excel and Word, allowing reports, invoices, and other documents to be saved as Word, Excel, or PDF files. Ability to easily import from .txt and .csv is supported to bring in entries from third-party products and eliminate duplicate data entry. Serenic Navigator Enterprise users can also easily copy/paste in the journal entry and other transaction entry forms to and from Microsoft Excel. Additionally, all pages can be easily sent to Excel, Word or HTML or copied as a link to share with coworkers. Any list screen or query-style view when exported to Excel can be 'refreshed' for current data figures with appropriate permissions. Finally, all transaction and master records offer the ability to add supporting documentation in original format via drag and drop, including Outlook messages, scanned invoices, letters, etc. All Serenic modules and add-ons integrate seamlessly, and users can upgrade to a more powerful version of the product if necessary.

HELP/SUPPORT – 5 Stars

Serenic Navigator systems offer thorough help functionality throughout the system. A series of videos are available for new system users, as are user manuals for quick reference. Users can visit the Serenic customer portal to download recent software updates and fixes. Updates and fixes are automatically applied to online deployments of the system. The user portal also offers quick access to the Support area, with users able to choose from a variety of support options as needed. The Knowledge Center can help with common FAQs, and additional resources, including white papers, are

small and growing, mid-size and large nonprofit organizations.

Best Fit – Powered by Microsoft Dynamics NAV, Serenic Navigator is available in three versions, Express, Essentials, and Enterprise, and is well-suited for the smallest to the largest nonprofit organizations. Serenic Navigator Express and Serenic Navigator Essentials are only available as a cloud-based SaaS, but the Enterprise edition is available as a cloud-based, hosted, or on-premise version.

Strengths

- Product available in 3 versions
- Pricing levels make product accessible to just about any nonprofit
- Available as Saas, Hosted, or On-Premise product
- Solid integration with DonorVision
- Fairly small learning curve

Potential Limitations

- Some training is necessary

2014 Overall Rating: 5 Stars

Accounting • Auditing • Nonprofit