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877-737-3642

www.serenic.com

From the [June 2013 review](#) of non-profit accounting systems.

Best Fit: Serenic Navigator from Serenic Software is well-suited for mid-sized to large nonprofit organizations, government entities, and other Non-Government Organizations (NGOs). Completely integrated, Serenic offers users a robust financial management suite of products; although the recent development of Serenic Navigator Online means that even smaller nonprofits can benefit from this scalable product.

Strengths

- Excellent budget capability
- Scalable, with impressive selection of add-on modules
- Available as a Windows Client or SaaS subscription
- Solid integration with Microsoft applications
- Excellent reporting capability

Potential Limitations

- Cost can be prohibitive
- Learning curve may be steep
- Requires a solid time commitment to set up

Serenic Navigator is a powerful product, optimally designed for larger nonprofit organizations. Powered by Microsoft Dynamics NAV, Serenic Navigator is available as a client/server software product, or can be delivered as a SaaS subscription.

BASIC SYSTEM FUNCTIONS: 4.75 Stars

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There are several significant enhancements that have been made in Serenic Navigator 2013, including a major enhancement to the Windows Client – which was formerly known as the Role Tailored Client. These enhancements were made to make system navigation easier and include the addition of a Ribbon design, which replaces the Action Pane. The addition of new keyboard shortcuts makes data entry more efficient. Serenic's use of Role Centers means true custom interface design for each user, creating links to modules, custom views, and even customization of the ribbon function to create the user interface desired.

This method eliminates the need to display modules and system functions that will never be utilized, eliminating clutter. In addition, these Role Centers can now also be accessed from a new Web Client and SharePoint Client. Each "client" can display the Role Center, giving users three options to access their data.

Fact boxes are found in data entry screens, and provide users with a quick look at related data for that particular module and function. Serenic's Starter Pack for nonprofits includes Advanced Allocations, BudgetVision Basic, Core Financials – which includes GL, AP, AR, Fixed Assets, Multi-Currency, Multi-Language, Purchase Order, Purchase Requisitions, and Workflow with Approvals.

Serenic Navigator's Extended Pack includes AwardVision, BudgetVision Calculations and Assumptions, BudgetVision Approvals, and Deposits and Loans. Other products available include DonorVision, for managing donations, Human Resources, and Payroll. Full integration with Microsoft Office, as well as with all add-on modules provides Serenic users with the ability to scale up the product by adding more features and functions as needed.

CORE NFP/FUND ACCOUNTING CAPABILITY: 5 Stars

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multiple versions of any budget, providing the opportunity to analyze various scenarios when creating budgets.

Users can easily post budget adjustments and view the original budget as well, and the optional Approvals feature ensures that all budget changes get the necessary approvals prior to system posting. Multi-year budgets are easily created and managed, and the Budget by Quantity feature provides users with the ability to provide specific units of measure or amounts to any budget, providing more comprehensive financial detail.

Serenic DonorVision manages all donor interaction including personal data, donation levels, campaign participation, and all communications. AwardVision allows users to manage multiple grants from pre-award submission to post-award reporting. Serenic also contains automatic fund balancing capability for all funds and fund classes, with each fund tracked separately for more accurate reporting. Funds can be maintained in multiple fiscal years if desired.

Serenic contains excellent audit trail functionality, with all data and transactions recorded and easily accessible by report. Users can pay vendor invoices electronically, and new Web Client and SharePoint client interfaces provide users with anytime access to system data. Serenic Navigator Online is ideal for smaller nonprofits, and is available as a SaaS subscription.

MANAGEMENT FEATURE: 5 Stars

Serenic offers business intelligence solutions that allow users to create custom reports, snapshots, key performance indicators, and scorecards with at-a-glance metrics. Users can view data such as budget versus actual expenditures, fundraising activity, programs, and budgeting, as well as overall organization performance from a department or organizational view.

Users can create multiple versions of one budget to view a “what-if” scenario, with

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tracks all outstanding balances and provides users with the details needed to implement and follow up on all outstanding balances.

DonorVision easily manages all organizational fundraising activity, including donor cultivation, donation levels, campaigns, and thank you letters. Users can also attach relevant documents to a donor file, creating a comprehensive historical record for each donor.

FINANCIAL STATEMENTS & REPORTING: 5 Stars

Serenic Navigator contains an excellent selection of financial reports. All reports are easily customized, and contain drill down/filtering capability. Nonprofit specific reports such as Statement of Financial Position, Statement of Activities, and Statement of Functional Expenses are created using a wizard, which provides further customization capability.

The account structure in Serenic allows users to create FASB 116 & 117 reports, along with IRS 990 reports. AwardVision provides excellent grant management capability and allows users to create custom reports for each fund. Serenic reports can be exported to a variety of formats, including Microsoft Word and Excel, HTML, or saved as a PDF. Users can also email reports to recipients if desired.

INTEGRATION/IMPORT&EXPORT: 4.75 Stars

Serenic offers easy integration with all Microsoft applications including Excel, Word, Outlook, OneNote, and PowerPoint. Serenic also integrates with all add-on modules and various third-party applications as well. This same easy integration with Microsoft applications strengthens data import and export capabilities. Users can easily add to Serenic's Flagship Financial Management product at any time.

HELP/SUPPORT: 5 Stars

Serenic Navigator offers users excellent Help functionality throughout the product

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The Starter Pack from Serenic Navigator currently runs \$13,000 and includes licensing for 3 users. The Extended Pack runs \$12,000 for a single user, with additional full user licenses running \$5,000 each. Limited users can also be purchased for \$1,000. Online subscription pricing for the Serenic Navigator Starter Pack is \$588 per month, and includes 3 full users, 5 limited users, and the Microsoft Azure hosting fees.

The Extended Pack subscription price is \$376 per month. Additional full users can be purchased at \$122 per user/per month, and additional limited users are available for \$18 per user/per month. Serenic Navigator is a comprehensive, complex product that can truly shine. An excellent choice for larger nonprofits, the advent of the online SaaS version allows smaller nonprofits to utilize this excellent product as well.

2013 Overall Rating: 5 Stars

Accounting • Auditing • Nonprofit • Technology

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