

## CUSTOMER PROFILE

Religious governance organizations such as archdiocese and dioceses operate in a variety of scenarios. Whether control of financial information is centralized, de-centralized, or a combination of both, their needs are best met by an integrated financial and revenue management solution. Strong financial reporting, the ability to manage individual church/parish deposit and loan activities, the management of bill-back transactions for services rendered, and the ability to support the business relationships between the governance operation and the local churches and schools are just a few of the features critical to their ability to serve their missions.

## SOLUTION

Many archdioceses and dioceses have selected Serenic Navigator, certified for Microsoft Dynamics NAV, as the system best suited to provide the flexibility, scalability and business application depth they require.

## BENEFITS

- Increased functionality, including a common, flexible fund accounting solution
- Advanced budgeting capabilities and automated workflow processing
- Drill down capabilities consistent throughout
- Central standard reporting options eliminating multiple reports
- Interface with investment, and deposit and loan management system
- Microsoft look and feel provides easier training and use

# Serenic<sup>®</sup> Navigator Improves Financial Control For Archdioceses and Dioceses



## Diocese of Fargo

The Diocese of Fargo was founded in 1897 and includes 13 schools, 136 parishes in the eastern half of North Dakota, with 102 priests serving a Catholic population of 85,570. Prior to implementing Serenic Navigator, the organization struggled to find an accounting software product that could handle both the routine and specific requirements needed in the three different types of entities it serves: a traditional diocesan multiple funds and multiple department structure, a foundation structure, and a deposit and loan structure.

*“Serenic Navigator has the flexibility and functionality to handle all of our needs in one program, with the underlying power to meet everyday and unexpected needs as they arise.”*

### — DIOCESE OF FARGO

“As a result, we had to bandage products or elements of products together, duplicate entry efforts, and manually track and/or enter routine items,” said Scott A. Hoselton, the finance officer at the Diocese of Fargo. “Serenic Navigator has the flexibility and functionality to handle all of our needs in one program, with the underlying power to meet everyday and unexpected needs as they arise.”

Prior to implementation, the diocese hoped to save about one week’s time per year. Hoselton estimates the organization is actually saving four weeks per year on the Investment Management (Deposit and Loan) portion of Serenic Navigator alone, with additional savings in other areas.

## Catholic Diocese of Orlando

The Diocese of Orlando was established in 1968, and originally included 50 parishes and served 128,000 Catholics. Because of the explosive growth of the Orlando metropolitan area, engendered by the opening of Walt Disney World and other tourist destinations, the diocese became one of the fastest growing in the nation. Today, it includes 80 parishes, 10 missions, and 37 schools spread over nine counties of Central Florida. It serves a population of approximately 800,000 Catholics.

In early 2008, the diocese needed to replace its existing AS400 system with software that would provide the advanced budgeting capabilities, automated workflow processing, and investment management capabilities required to effectively manage the fund accounting needs of the diocese.

"We were impressed by Serenic's focus and commitment to the diocesan community" said Jack Paige, director of IS and technology for the Diocese of Orlando. "Serenic's Investment Management product, for example, is a fully integrated component of the Serenic Navigator financials solution and is a great fit for our Diocesan Savings and Loan program. This was not something we could find in other products. And since Serenic Navigator is based on the powerful Microsoft Dynamics NAV system, we will also have full integration with Microsoft Office. After talking to other Serenic clients and completing an intensive review of the product, we are confident that Serenic Navigator will empower us to provide the level of accountability and transparency our constituents deserve."

*"We were impressed by Serenic's focus and commitment to the diocesan community."*

— DIOCESE OF ORLANDO

## About Serenic Software

Serenic Software develops and delivers mission-critical ERP software solutions for public service organizations including: K-12 school districts/boards, public sector, nonprofits (NPOs), and international non-governmental organizations (NGOs). Serenic is a Gold ERP and ISV vendor and a development partner for Microsoft. Serenic public service solutions are trusted by over 1,000 organizations around the globe. You can learn more about Serenic Software at [www.serenic.com](http://www.serenic.com).



USA | Canada | UK  
marketing@serenic.com  
[www.serenic.com](http://www.serenic.com)

TF: 877.737.3642  
TEL: 303.980.6007

