



From Your Partners at Panoramix

Can you believe it's almost August already? We're amping up for the T3 conference in September, working hard on our big reveal. Our October calendar is filling up with requests for Q3 billing run assistance, [book a meeting now](#) if you want in!

My529 Data Almost Ready

We are in the final stages of setting up a direct interface with My529! If you're interested in getting your My529 data in Panoramix, just reach out and let us know.

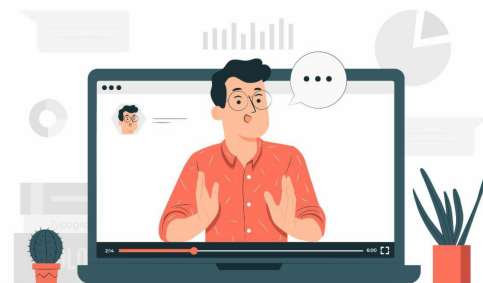
[Contact support here.](#)



August Webinar Series

Our August webinar series is approaching, mark your calendar! We'll be going over all the tiles available for the Advisor and Contact dashboards. Join us on August 17 at 10am or 2pm, or August 18 at noon, all times Central.

[Register for any of the webinars here.](#)



New Panoramix Release Today

Another corrective release is out in the wild! You won't find anything massively exciting in the release notes for the next couple months, as we're focusing efforts on building some EPIC additions! The big reveal will happen at the T3 conference in September.

[Read all the performance enhancements here.](#)



Panoramix T3 Registration Discount

Save \$100 on your T3 registration with the discount code **T3PANO2021**. Enter before choosing your registration type for this great deal. Let us know you'll be in Denton with us in September and we'll give you some extra perks! See you there!

[Register for the 2021 T3 Conference here.](#)



Tips & Tricks for Panoramix



Did You Know?

There are multiple ways you can add documents to the client portal. In turn, your clients can add documents to their portal, too!

Firstly, any report you run can be directly saved to the portal--whether it's a single report or a batch. Fee statements can be directly saved to the portal, too. There is also a dashboard widget that enables you to directly add files to the portal for any client you're on. You can also save documents for all clients to see via the Vault > Online Documents.

Remember, never hesitate to reach out to [Support](#). Email, call or text, we're here for you!

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