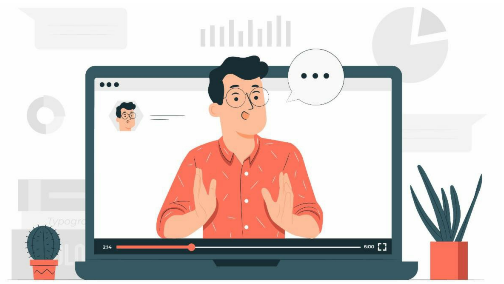
August 11, 2021 | Volume 5

From Your Partners at Panoramix

Surprise, we released the latest version of Panoramix one day early! News wise, we have nothing new this week, as we're patiently waiting for the results of the 2021 Wealthies Awards (the awards ceremony is on September 9th) and getting ready for our big reveal happening at the T3 Conference in Denton, TX!

Our October calendar is filling up with requests for Q3 billing run assistance,book a meeting now if you want in.

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. (And perhaps some upcoming features?) 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

Version 2.0.0.28 of Panoramix is out! We have some small but mighty corrections in this one, so make sure to update soon so your software runs fully as it's supposed to.

Read all the performance enhancements here.

T3 Registration Advisory BOGO!

Advisories can save BIG on T3 registrations! A buy one, get one deal is on-going now!

Not attending with a coworker? 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?

The Blotters tool is one of the most useful tools in Panoramix! Practically any kind of data can be searched and sorted in our 16 different blotters. Sums, contacts, dates, documents, you name it!

Some of the blotters, such as the Accounts and Holdings blotters, have an "Additional Criteria" panel to expand or refine data searches. Find it on the far right side of your window. Here, you can add client info, contact info, or account inception and close dates to your data results. You can also search by custodian, account type, rep code, and more. You can also set a minimum inception or last trade dates.

The Blotters are complex but extremely useful! If you ever want a Blotter tutorial (great for gathering information for audits) schedule a video meeting with Support. Email, call or text, we're here for you!

Get social with us!

Any recommendations for our newsletter and outreach? Tell us what you want to see!