September 2, 2021 | Volume 6

From Your Partners at Panoramix

Whoa, it's September? That means it's almost time for the Wealthies Awards! Chris will be attending the award ceremony in person the night of the 9th to see if one of our four nominations is a winner. Watch our social media channels to see if we win!

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

Susan Town, Consultant for Hire

Today we're highlighting Susan Town, who currently works for one of our clients doing data reconciliation.

If you're looking for ongoing help to verify Panoramix matches your custodian, or with security reviews for trading, billing reconciliations and uploads, or even general ops and custodian support, Susan is your gal! She currently validates data in TD, Schwab, Fidelity and LPL. We've loved working with her, and she would love to work with you, too!

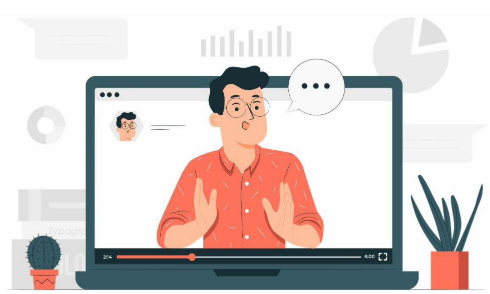
If you would like to chat with Susan and learn more, send her an email at susan@tandemhq.com, or reach out to us at Support.

T3 Conference Postponed

All the best laid plans, eh?

The 2021 T3 Conference has been postponed until 2022. But that doesn't mean we're postponing the exciting event *we* have planned! Stay tuned for details on our big announcement.

November Webinar Series



Our November webinar series is approaching, mark your calendar! We'll be going over those top secret enhancements that we haven't announced yet. Join us on November 16 at 10am or 2pm, or November 17 at noon, all times Central.

Registration link to follow.

New Panoramix Release Today

Version 2.0.0.29 of Panoramix is out! We have some great little additions in this one, including a new value basis to billing, some new filter options in the Transaction blotter, and a Qualified parameter to some reports. Make sure you get that update downloaded!

[Read all the performance enhancements here.]

Tips & Tricks for Panoramix

Did You Know?

Do you need to check how much you've charged your clients in fees? We have a blotter for this specifically!

Go to the Blotter > Fees. Enter your desired date, and in the Additional Criteria Expander, check "Include Contact Info." Then click "Load." From here, you can use the columns to narrow down your results by quarter, state, or any other parameter. You may also see the sum of your fees using the sum button in the column header. If you wish to reduce the number of columns you see, you can utilize the "Fields" expander on the right. This screen is completely customizable to obtain whatever numbers you need, and you can export to Excel!

The Blotters are complex but extremely useful. If you ever want a Blotter tutorial (great to do if you're in an aui, 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!]