



From Your Partners at Panoramix

Happy fall! We hope you're ready for changing leaves and pumpkin spice everything (a certain CEO and customer service employee are)! We have a few goodies in the lowdown this week.

Our October calendar is filling up with requests for Q3 billing run assistance. [book a meeting now](#) if you want in.

We're a Wealthies Winner

On September 9th, Chris was in New York to accept our 2021 Wealthies Award for Corporate Social Responsibility! We're honored to be the recipient of this prestigious industry award. Who knew, being a lean, green, socially responsible RIA machine pays off!

[Read the announcement here.](#)



The Big Announcement You've Been Waiting For

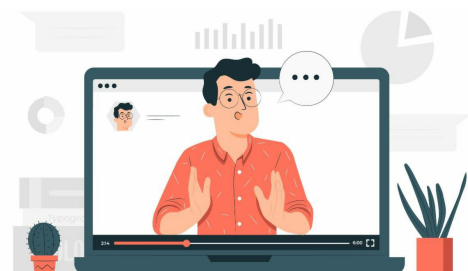
We have a date! The big reveal we have been working on for months will occur the week of October 25th. You might log into Panoramix one day to find some additional functionalities. Have you noticed any of the sprinkles we've left behind in the meantime?



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 2.0.0.31 of Panoramix is out! We've got some corrections and small additions in this one. Be sure to check out our new Help Guides site! Our intern Colby spent his summer constructing it before heading back to school for the year.

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



Tips & Tricks for Panoramix



Did You Know?

Do you use Household Billing? If you want to bill the same way for every account in a household, this can save you some hassle!

Simply select someone as Head of Household, and enter "Household Billing" from their Client Dashboard. Select your parameters, save, and those settings are applied to every member of the household.

If you ever want guidance with billing, we always love to sit in with you! Sometimes we can teach you new tricks, and sometimes we come up with ways to improve the software. Feel free to schedule a video meeting with [Support](#) anytime. 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!](#)