



From Your Partners at Panoramix

2022 is near... are you ready? We only have a few items for you today, since we're wrapping the year up ourselves. If you're going to need a meeting with support around the end of the quarter, [hop on our calendar](#) before it gets too full. We're always happy to help you run billing!

New Panoramix Release Today

Version 2.1.0.4 is out! Enjoy the rush of some core performance improvements in this last release of 2021. We also moved some functionality around. When you work your Incomplete Accounts list from now on, go to the Edit Account Data tab (five tabs down from what you've been doing since 2015) and filter the account list for Incomplete Only with the radio button.



[Read all the enhancements here.](#)

Billing & Reports Reminder

Billing and updated reports are always available to run after **Noon central** on the first day of the month, even on a holiday. However, custodians can run backdated or corrected transactions for the first few days of the month (especially year-end), which can affect billing. For this reason, we update snapshots on the second and fifth days of the month.

Because the new year is over the weekend this year, we will not get any last-minute corrected transactions until the morning of January 4th. If you feel you might have some lingering dividends or other transactions that didn't make in on the 31st, **it would be best to wait until after Noon central time on the 5th of January** to run your billing and reports to account for any year-end adjustments your custodians may process after the calendar flips. While billing may be available on Jan. 1, Support will not return to the office until Monday, Jan. 3 to answer any questions you may have.

Lastly, a fact that isn't meaningful until it is: Panoramix cannot be accessed from outside of the US. Our servers are locked down and will only allow traffic from IP addresses within the United States. Panoramix staff cannot run your billing for you, so please plan accordingly if you are planning to be away from your home base in the new year. We can however help you run billing *with* you, which we would be happy to do!

Important Compliance Change: PTE 2020-02

If you: 1) have tiered fee schedules; and 2) have household portfolios comprised of both qualified and non-qualified accounts determining the tier, then this is for you. You must comply with the Department of Labor PTE 2020-02 rules clarifying compliance with Section 406 of ERISA and IRC Section 4975. Our last release included changes to help you comply. You need to take specific actions to ensure compliance too. Make sure your qualified accounts are properly tagged as such via Data>>View Data>>Edit Account Data. More information to follow in the Billing manual as the regulatory implementation date approaches.



T3 in Texas in 2022, Here We Come

Have any plans for the first week of May? Come join us in Denton, Texas for the annual Technology Tools for Today conference for advisors! If you're making plans, let us know so we can stash some goodies for you. Hope to see you there!

[Read about T3 and register here.](#)



Tips & Tricks for Panoramix

ADEENA'S TIPS & TRICKS



Did You Know?

The primary username of a firm controls many global settings in Panoramix, including the logo on reports and the text in various emails generated within Panoramix. Individual username accounts may override these settings, customizing the email text etc. To maintain consistency for these settings, set them with the firm's primary user account and don't override them at the individual user level. There is no need for each username account to have copies of the exact same logo, email text, etc. Yet, the capability is there in case you want flexibility.

If you ever have questions regarding settings, reach out anytime! You can schedule a video meeting, [email Support](#), call, or text. We're here for you!

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