



From Your Partners at Panoramix

Happy New Year everyone! We hope you had the chance to relax over the holidays, refresh, and start the year off right. We have quite a few items for you today, so happy reading! We hope you're staying safe with the er... crazy... weather and illness that's been going around.

New Panoramix Release Today

Version 2.1.0.7 is here! After you update, you should notice a quicker startup and other performance improvements. We made some updates to billing, including new PTE 2020-02 billing logic. Also note, our [Help Guides site](#) now holds an updated Billing Manual and a trading video for Panoramix Pro!

[Read all the enhancements here.](#)



T3 Survey is Live

The annual T3 customer satisfaction survey is open! Some of you have found us through this survey, so your support is a great benefit to us. If you are willing to dedicate 15 minutes of your day to fill it out, we would greatly appreciate it. Panoramix is listed as "Panoramix Pro" throughout.

[Take the T3 Survey here.](#)



Panoramix Support Center Updates

You may have seen the Calendly link to schedule a virtual meeting with Joe, before. Good news, Adeena has one now, too! We've also added a calendar to have multiple staff on a support call (this option is good for more in-depth matters). Below are the links to each.

- [Joe's Calendar](#)
- [Adeena's Calendar](#)
- [Multi-Support Staff Joint Calendar](#)



And remember, you can always call our Support line at 877-595-3282. This goes to Adeena's cell phone,

#GetToKnowYourCustomers Day

Oh, happy day! This holiday occurs on the third Thursday of every quarter. We want to get to know you and your clients better, so we have a couple of questions:

- **Would you be interested in filming a virtual case study with us?** We'd love to hear how you use Panoramix and share it with others. If you agree, the video would get your firm some attention on our website, social media, and on our YouTube channel. [Please email us if this sounds interesting to you.](#)
- **How would you like Panoramix to further personalize your clients' experience?** This quarter we're re-vamping our client portal and would love to hear suggestions as to what your clients want to see and do with their portfolio information online. The new client portal is due to go live in Q2. [Send us your feedback, please!](#)



New Episode of Fun with (Fill in the Blank)

Princesses and Non-Euclidians, oh my! In our latest episode, Sheldon and Amy take on the trials and tribulations of pending transactions.

[Watch the new episode here.](#)



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?

Are you someone who has to manually enter certain accounts into Panoramix? As you know, you can either manually add transactions to track the account, or you can update the account value. However, you can't do both.

If you want to track performance on an account level, you still have to enter one generic holding. We have nine identifiers priced at \$1 so you can easily track your values and performance. The identifiers are "GENERIC", followed by a number, specifically numbers 1 through 9.

An example: Enter the identifier "GENERIC3." If the

account is currently valued at \$3,000, then the holding should have 3,000 shares, at \$1 per share. As time passes, all you need to adjust is the number of shares. If you need to track gains, then you can add gains as a transaction with a price per share of \$0.

If you ever have questions regarding manual accounts, reach out anytime! You can schedule a video meeting, [email Support](#), 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!](#)