February 10, 2022 | Volume 13

From Your Partners at Panoramix

Happy February, all! Not only is this release chock-full of things you need, we need your input on two things. First, we would like to know what you want from the Client Portal. Second, would you use an open meeting drop-in for Q&A or live demonstrations? See below for opportunities regarding both. We greatly appreciate your feedback. Please help us help you!

New Panoramix Release Today

Version 2.1.0.8 is here! We added a full-screen view to hide the toolbar for client screen-share meetings, enhanced the Security Values blotter, added the portfolio value to statements, and more. Make sure to click "Check for Update" to get these goodies and corrections working to your advantage!

[Read all the enhancements here.]

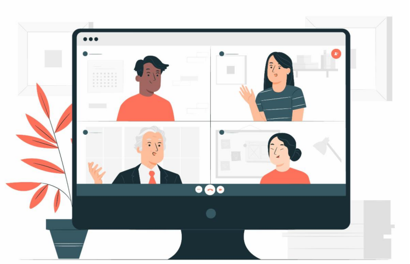
T3 Survey is Live

t3 Technology Tools for Today

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.]

Ask Us Anything Open Forum



If Support was to host a monthly call, where you could pop into an open video meeting anytime to get tutorials on anything from asset mapping to blotters or billing, and ask any and all questions about Panoramix, would you utilize this opportunity?

[Click here to answer "Yes" or "No."]

Help Shape Our New Client Portal

In what ways do you want Panoramix to further personalize your clients' experience? This quarter we're completely 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. What tools or values would you like to see added? What functionalities do you want to have? How can our client portal help you as an advisor?

Send us your feedback, please!

Panoramix YOUniversity Next Monday

Our next session of Panoramix YOUniversity is coming up next week! Make us your lunch date for Valentine's Day on Feb.14th at Noon central and learn all about cost basis. Click here to watch the trailer.

Sign up to receive an email when the session is ready for viewing.

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

Did You Know?

Do you want results from a client report, for multiple clients, in one rolling PDF, for your records? This is doable with a batch report!

Under Batch Reports, create a report group to run, or use an existing group. Establish your report settings and click "Generate." In the window that opens, decide if you want clients to receive the reports you're going to run. If they aren't getting the batch, uncheck all the delivery options under "Report Options." When you're done, click "Generate."

Once the reports are done processing, a small window will appear giving you the option to "View PDF" or "Save PDF." Click one of these buttons, and you will get one running PDF of every report in this batch! You can do whatever you wish with this PDF on your local computer. If you want to upload it to a secure space, you can always add it to your Panoramix Document Vault.

If you ever have questions, reach out anytime, we're here to help you!

- Email the Support team at Support@PanoramixFinancial.com.
- Call Adeena on the Support phone line at 877-595-3282, or text her cell directly at 360-702-7718.

She comes online everyday at 8am Pacific/10am Central.

- Schedule a meeting with Adeena here.
- Schedule a meeting with Joe here.
- Schedule a meeting with multiple Support staff here.

Get social with us!

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