March 3, 2022 | Volume 14

From Your Partners at Panoramix

Well look at that, it's already March! This week we have some exciting items in our release, a few new videos for you to watch, and a few other items we'd like you to join us for.

We understand it's a busy time with tax season, and end of quarter approaching, in addition to the current state of the market. Please don't hesitate to reach out if we can help you with anything. And this week in Tips and Tricks (at the bottom of this email), we've noted a couple of client reports that can prove useful if you have some uneasy clients wondering about their portfolios.

New Panoramix Release Today

Version 2.1.0.9 is ready for you to upload! When you visit our notes at the link below, you'll see we're laying the groundwork for our new client portal! (If you have input on this, please see the client portal entry below!) You'll notice we're implementing new widgets to start. We've also made some corrections to existing pieces in Panoramix, and added a few minor enhancements.

[Read all the enhancements here.]

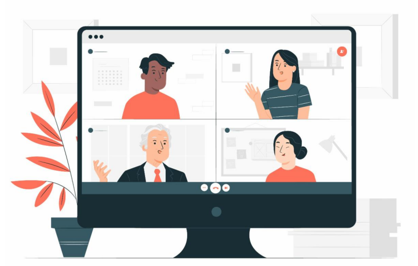
Introducing the COO Society, Over at PFI Advisors

Are you in the market for some help in regard to some of the more operational aspects of your firm? Or maybe you're looking specifically for a digital consulting platform? Well, we'd like to introduce you to Matt Sonnen and the COO Society, powered by PFI Advisors!

"RIAs often focus all of their time and energy on their clients and often neglect the back office management of their business. The COO Society is the only digital training ground designed to educate RIA owners and their staff of these all-important functions clients never see, and are therefore often overlooked. The COO Society helps RIAs develop the skills to manage the operational and HR aspects of their firms, tie operations decisions to compliance requirements, improve workflows and increase the overall scale, efficiency, and profitability of the firm."

[Click here to learn more about the COO Society and what early adopters are saying about it](#).

Join us for a Support Open Forum



Join us Tuesday, March 15th at 1pm Central for our first open Support forum! Chris, Joe and Adeena will be available to answer any questions you have about Panoramix and/or walk you through items such as billing, blotters, setting up your client portal and anything else you can think of.

Or, maybe you haven't eaten lunch yet and just need some cool peeps to talk to.

[Click here to register for our Monthly Support Forum](#).

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? We're open to any and all feedback you can give us.

[Send us your feedback, please!](#)

Panoramix YOUniversity: Cost Basis Available

Our next session of Panoramix YOUniversity is available for your viewing leisure. This one focuses on cost basis vs. investment. [View the session here.](#)

[Register to receive an email when our webinar videos are ready for viewing.](#)

Fun With Billing: Value Basis

Wait, "nobody was *permanently* harmed in the making of this video?" Oh boy, what are Sheldon and Amy up to now?

[Click here to watch Sheldon and Amy's take on Billing: Value Basis.](#)

Final Call: T3 Survey is Live

The annual T3 customer satisfaction survey is still open for another couple of weeks. 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.]

Technology Tools for Today

Will you be joining us for the T3 conference in May?

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, we'd love to meet you in person and stash some goodies for you. Hope to see you there!

Read about T3 and register here.

Tips & Tricks for Panoramix

Did You Know?

Are your clients wondering about the state of their portfolios in this volatile market?

We have two client reports that may prove useful if you would like to look at performance over a short time period.

Start by selecting a client, and entering their dashboard. In the menu, select "Client Reports" to open the report window. On the far upper-left, click on the report dropdown. There are two reports that could prove useful:

1. Statement > Generic Statement
2. Performance > Generic Performance

Run the reports to any specification you desire. If you wish, you could also create a batch report to see this report for all clients.

If any clients are super uneasy with their account performance, we do have the ability to look up daily account values in our "back-end" system. Email Support to request those values. In the near future, we will be adding a daily balance client report.

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!