



From Your Partners at Panoramix

Happy Spring! 'Tis a busy season and the end-of-quarter is quickly approaching. Please note the following:

Billing can be run on April 1 at Noon Central.

We highly recommend you wait one to two days to run your billing to make sure all transactions, dividends and splits come through from the custodians, and for your third-party imports to be presenting accurate, day-of data. Waiting a couple of days avoids the possibility of corrections, which saves you extra work after the fact.

If you would like help running your billing, please book a meeting with Support via the links at the bottom of this email.

New Panoramix Release Today

Version 2.1.0.11 is ready to download! An entirely new framework for advisory-wide performance reporting was implemented in this release and we paved the way for more complex trading abilities later. Another update to the client portal will be deployed separately in a few days.

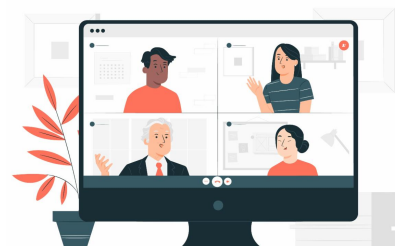
[Read all the enhancements here.](#)



Monthly Support Open Forum

Thank you to those who joined us for a successful first open forum! We covered some great Support topics and look forward to what you will bring us next time. Mark your calendar to join us on April 12 at 1pm Central. Register below to receive the link to join the forum on the day of.

[Register for our Monthly Support Forums here.](#)



Client Spotlight Series

Would you be interested in filming a case study with us? We'd love to hear how you use Panoramix and share it with others. The video could direct attention to your firm via our website and social media channels.

[Watch the latest case study with Solomon API.](#)

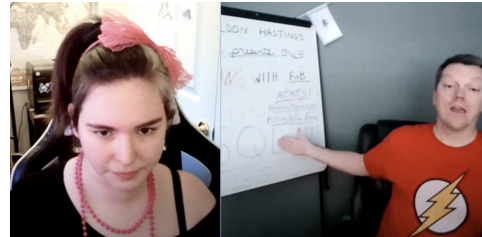
[Let us know if you're interested in doing a case study with us.](#)



Fun With SQL

Have you ever wondered how Panoramix works? In this episode, Sheldon and Amy dive into the world of SQL, the coding language that makes Panoramix *click.*

[Click here to watch Sheldon's favorite episode so far.](#)



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?

Do you use the "Hide \$0 Balances" setting? It will hide both \$0 holdings and accounts. This particular setting is remembered every time you open Panoramix, meaning it stays on until you turn it off and vice versa. When you're searching for a particular account, especially if it's empty, keep this setting in mind if you can't find it!

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

**ADEENA'S
TIPS &
TRICKS**



- Email the Support team at Support@PanoramixFinancial.com.
- Call Adeena on the Support phone line at 877-595-3282, or call/text her cell directly at 360-702-7718. She comes online every day 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!](#)