



From Your Partners at Panoramix

Happy April! In many parts of the US April showers bring May flowers. In Minnesota we look forward to this April's snow and continued March-like weather yielding to spring sometime soon. Even our Washington-based contingent felt the blast of a late-season snow recently. With today's newsletter we include a blizzard of important information regarding your computer operating system and cybersecurity practices - which, for good reason, top the list of active industry concerns.

As we wrap up the details for the annual T3 conference in Denton, TX over the first week of May, we also work on content for our next YOUNiversity session and busily develop content for our next release in mid-May. As we pack for Texas, we pack this release and newsletter full for you.

New Panoramix Release Today

Version 2.1.0.13 is ready to download! Today's release includes some top requested items, so get excited!

Welcome to cryptocurrency holdings. With the new **integration with Onramp**, you can obtain cryptocurrency holdings data. This is a new custodial interface for Panoramix.

Among the other listed enhancements is an email opt-out parameter to disable the New Documents to Portal notification emails on a temporary basis.

[Read all the enhancements here.](#)



You may now also disable the availability of reports on the Client Portal on a client-by-client basis, see Riskalyze scores in blotters, and so much more. Seamore says click below to learn more.

Notice on Windows 10 Version 20H2

Plan ahead!

Microsoft may end support for your operating system (OS) earlier than you think. Windows 10 version 20H2 servicing support ends in a mere 19 days. That means no more security patches for that version of Windows 10, making your environment vulnerable to exploitation.

Older hardware may not be able to upgrade to Windows 10 version 21H2, the latest (and perhaps last) version of Windows 10. All Windows 10 support ends in under 3.5 years—that's not much longer than we've been in the



pandemic times.

Incidentally, Windows 8.1 *extended support* ends in under nine months. You must be under a special Microsoft contract for this. If you are, we should know about it. Panoramix does no testing on the 8.1 OS.

All Windows 10 support ends in under 3.5 years. Check here to see when support for your OS will end: [Windows 10 Home & Pro Modern Lifecycle Policy](#)

Protect Against Potential Cyberattacks

On March 21, 2022, President Biden released a [statement warning US companies of an increased threat level for cyber-attacks from Russia](#). In addition, the Securities and Exchange Commission (SEC) enforces identity theft rules commonly referred to as [Regulation S-ID](#) (17 CFR 248.201 – 202).

At Panoramix we take cybersecurity very seriously. We're continuing to do our part to comply with the president's urgent request.

If you're interested in receiving a document which details what we see as an advisory-level security implementation in Panoramix which meets both SEC and the president's objectives, [send us a request](#) and we'll make sure you receive it.



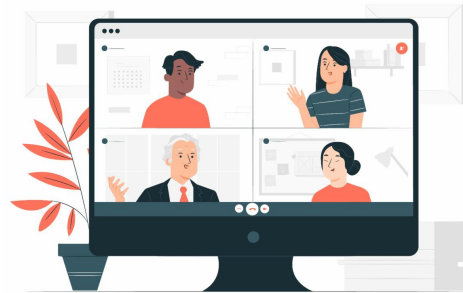
[Email Support](#) to request a fact sheet detailing advisory-level security implementation in Panoramix.

Monthly Support Open Forum

Thank you again to those who joined us for another great support forum! Our top discussion focused on the differences between typical householded billing and the Household Billing override, a common misconception.

Mark your calendar to join us for our next support forum on May 10 at 1:00 p.m. central time. Register below to receive access to our forums via email.

[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 have you share your story and hear how you use Panoramix as part of that story. We do our best to keep your time commitment low and give you free access to the resulting content for your own use.

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

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



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!



Tips & Tricks for Panoramix

Did You Know?

Do you look at the cover page of your batch reports and wish you could add or subtract content, or even spice it up visually?

This you can do! If you are okay with not displaying the client name on the cover page (since it repeatedly appears within), you can design and build your very own custom cover page and upload it to Panoramix. Use any program you're comfortable designing in, or a free web program, and create your own sparkling cover page. (You can contact Adeena, who has a background in design, for further tips.)

ADEENA'S TIPS & TRICKS



Just like how you add any other PDF to Panoramix, simply open the report group you want to add your cover page to, and click "Add" under the hamburger menu. Locate the file on your computer, upload, and move it to the front of your batch group. Ta-da! You now have a shiny cover page to catch the glowing eyes of your clients.

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 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.](#)

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