



From Your Partners at Panoramix

Holy guacamole, it's almost July already! This newsletter is short and sweet. We have a note regarding reports and billing for July 1st, and a one-question poll we would love you to participate in. We pass along steady wishes to you in this turbulent market!

New Panoramix Release Today

Version 2.1.0.18 is ready for download!

[Read all the enhancements here.](#)

Lending our time to larger projects such as our latest integrations with AdvicePay and Onramp, this enhancement list isn't our boldest, but still powerful.

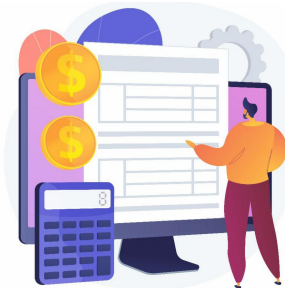
Did you know, with Onramp, you can get data on your clients' held-away assets? You know your clients are trading crypto, and with Onramp, you can see what they're doing with it!



Before You Run Billing & Reports

The 1st of the month lands on a Friday before a long holiday weekend. **Before running your billing or any EOM reports, please take note of the following:**

- Updated numbers for the end of quarter will not be available until **noon Central on Friday, July 1st**. Billing will be available to run at noon, and reports will pull updated EOM data by noon.
- We recommend waiting to run reports and billing until July 5th, so all last minute transactions coming down from custodians are reflected in your billing and your reports for your clients.
- Panoramix Support will be offline Monday, July 4th. We will be back online Tuesday, July 5th to meet all your support needs! Please see the Tips & Tricks section for the various ways you can reach us.



Poll: Are You Worried About Tech Consolidation?

There's been a lot of movement in the FinTech industry lately, making consolidation a big topic of conversation. Looking at your tech stack, and all of the current activity in the industry, are you worried about consolidation at all? [We'd love for you to tell us in this one-question multiple choice poll!](#)

Why do we ask, you wonder? Chris lost power for a couple of days this week, so he spent an... extensive... amount of time reading up on the latest FinTech news, including integrations and consolidation.

For instance, the subhead of [this particular article](#) stands out: "More than half of advisers say the lack of integration between their core applications is the biggest pain point with technology."

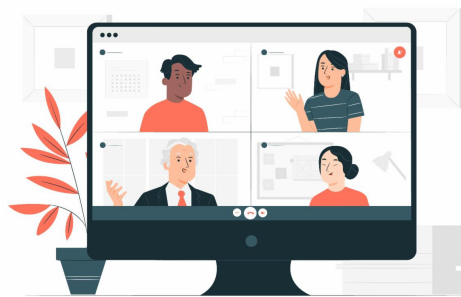
What do you think? We'd love to hear your thoughts on the topic. (This would be an excellent thing to discuss at our next monthly open support forum!)



Monthly Support Open Forum

Mark your calendar to join us for our next support forum on July 12 at 1:00 p.m. central time. This is an excellent hour to ask any support questions, or discuss the financial services industry with Chris, Joe and Adeena. Register below to receive access to our forums via email.

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



Tips & Tricks for Panoramix

Did You Know?

When you need to create a multi-condition filter on a single field, use the Custom selection from the field filter drop-down list.

This lets you create complex AND/OR conditions via a simple-to-use dialogue box. Want to see who hasn't logged into the Client Portal in the last 30 days? Create a Custom filter on the Contact's "Last Online Login" field to create a two-conditions or filter, one for Less than Last Month and the other for Equals (Blanks). When combined with an Equals (NonBlanks) filter on the "Online User" column, this shows you all clients who have a Client Portal ID who have either never logged in or who have not logged in in over a month.

Custom filters are very powerful, let us know your favorite! You can always contact us if you need help in setting one up, 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.](#)

ADEENA'S
TIPS &
TRICKS





Any recommendations for our newsletter and outreach? [Tell us what you want to see!](#)

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