



From Your Partners at Panoramix

Happy Get to Know Your Customers Day! This week we decided to call up one of our customers to get to know them a little better, and share our appreciation for them on our social media channels. It was a wonderful, enlightening conversation, and may even lead to big enhancements in Panoramix. This holiday is a quarterly event we'd like to continue, so if you'd like volunteer to participate, we'd love to hear from you! In the meantime, check out some of the epic enhancements we have in store for you today.

New Panoramix Release Today

Version 2.1.0.19 is ready for download! In this update we've added lots of goodies such as an interface with RBC for daily direct downloads, rebalancing abilities, a new Performance Snapshot report, and new pie charts to display on reports.

[Read all the enhancements here.](#)



Thinking about switching custodians? We're here to help!

Have you ever asked your vendors about changing custodians? It's not unreasonable to do so. In fact, even we have been approached about the topic before.

Industry movement can be worrisome and intimidating, but you should feel confident and in control of your tools and workflow. If you feel something is off or that a change is on the horizon, we're here to help you out. Something like switching custodians can be daunting, but we will work with you to find the best option for your firm and do what we can to keep the transition smooth.

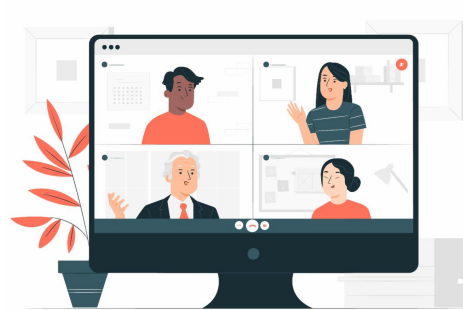


Monthly Support Open Forum

Mark your calendar to join us for our next support forum on August 9th 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.](#)

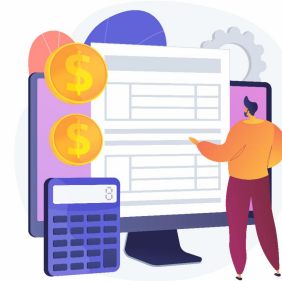


Panoramix Billing in the News

Did you catch Panoramix in the news last week? Both WealthManagement.com and InvestmentNews.com caught wind of our latest billing enhancements! We've been working hard to make our billing system even better for you.

[Wealth Management Morning Memo](#)

[Investment News Fintech Bytes](#)



Tips & Tricks for Panoramix

Did You Know?

Have you ever attempted to bill an account that has recently been added to Panoramix, but have it not generate any fees, or even appear in the billing list? There are a few different things that would prevent this, but once reason is related to the account holdings and transactions.

- An account with no value cannot be billed.

This is because Panoramix needs a value for the account in order to create fees. If the account does actually have a value, but is not yet showing in Panoramix, you can add a temporary value to it to run your billing. Either manually enter a value for the account, or, add a transaction for one cent. Either of these will produce a fee in your billing run. Just make sure to adjust your temporary fix afterwards when the account updates in Panoramix!

- If the account transactions are dated in the quarter following your billing date, the account will not generate any fees for that previous quarter.

This means, if you're billing an account in Q2, but the transactions within are dated in Q3, no fees will generate for that Q2 billing, because there wasn't any activity for the account in Q2. If you need to bill the account in Q2, a backdated transaction will generate a fee for the account.

Adding new accounts to Panoramix can be tricky sometimes, but 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.](#)





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