



From Your Partners at Panoramix

September is right around the corner... which means the 2022 Wealthies are, too! We have a great release for you today, with some useful notes in this newsletter. If you can spare a minute, take our performance reporting poll!

New Panoramix Release Today

Version 2.1.0.23 is ready for download! This update includes some great additions and overhauls to deliver a more customized, user-friendly Panoramix experience.

[Read all the enhancements here.](#)



What method of performance reporting do you show your clients?

Have a minute to take a quick poll? We'd love to know what kind of performance reporting metrics you use with your clients. Click the link below to take part in this one-question poll:

[Answer the one-question poll here.](#)



Partner Highlight: RedTail

Shoutout to one of our CRM partners, RedTail! Our integration with RedTail ensures that your client details seamlessly flow between your CRM and Panoramix. Did you know you can run Panoramix reports directly in RedTail?



The Wealthies are Next Week!

Pretty soon Joe is going to be packing his bags for his trip to New York City for the 2022 Wealth Management

Awards! We've been honored again with FOUR finalist nominations. The winners will be announced live on Sept. 8.

[Check out our finalist nominations here.](#)



Upcoming Webinars & Forum

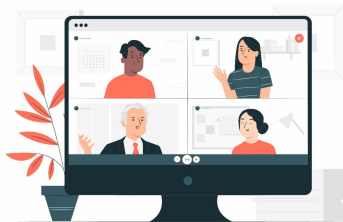


Joint Webinar with AdvicePay

Wednesday, Sept. 7 at 2 p.m. Central

Fee-for-service billing is now available in Panoramix through AdvicePay! This webinar will show you how this powerful integration can bring your advisory up to the next level.

[Register Here](#)



Support Forum

Tuesday, Sept. 13 at 1 p.m. Central

This is an excellent hour to ask any support questions, or discuss the financial services industry with Chris, Joe and Adeena.

[Register Here](#)

Watch Now: Panoramix YOUiversity

Our August session of Panoramix YOUiversity covers benchmarks and many new features in Panoramix! Carve out some time to learn about report features, tools like mail merge in batch reports, billing changes, and more.

If you've never viewed one of our webinars/YOUiversity recordings before, this one is a must. If you're a session veteran, don't miss this one and welcome back to class.

[Watch the latest session here.](#)



Tips & Tricks for Panoramix

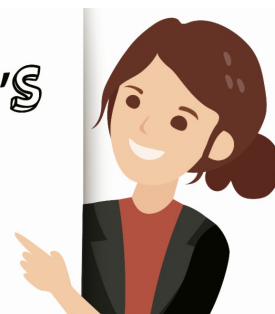
How to get your support request answered faster:

When submitting support requests, the best way to get a quicker response is to provide the Support team the most amount of detail possible.

For example, if you email stating you're having an issue with a report, we'll need details, such as the following, to determine which of the dozens of reports we could have a problem with:

- A client, advisor, or batch report?
- Which report specifically?
- What parameters did you run for the report?

ADEENA'S
TIPS &
TRICKS



- What aspect of the report is incorrect, and how?
- Which client did you run the report for?

Great detail is also necessary for questions regarding performance. In order to dig into the vast amounts of data at our fingertips, we need to know which client you're looking at, the account(s), and how you think the performance is off.

One last thing--if your support requests references something you can send as an attachment, these are greatly beneficial!

As always, if you ever encounter something you feel is odd in Panoramix, please let us know! We watch our Support box and actively work in the software to ensure everything is operating as it should for you. However, we still need your help to catch any pesky bugs we miss along the way.

- 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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