



From Your Partners at Panoramix

It's nearly fall, y'all! Today we have a short poll about the upcoming TD and Schwab merge. Please take a moment to complete it if you custodian with TD, so we can better prepare you for the transition.

New Panoramix Release Today

Version 2.1.0.25 is ready for download! The star of today's release is a new feature under the Billing tab, the "Account Billing Info" screen!

[Read all the enhancements here.](#)



Ask Panoramix: What are your questions and concerns regarding the TD/Schwab merge?

Have a minute to take a quick poll? We'd love to know what questions or concerns you may have about the upcoming TD/Schwab merge. Click the link below to take part in this one-question poll:

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



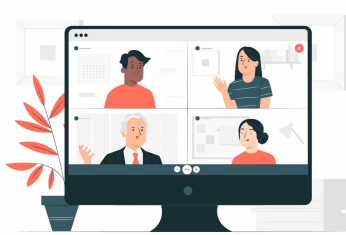
Watch Now: Joint Webinar with AdvicePay

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.

[Watch the webinar here.](#)

Support Forum

Tuesday, Oct. 11 at 1 p.m. Central



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

[Register Here](#)

Tips & Tricks for Panoramix

Did You Know?

Did you know you have the ability to make report parameters appear vertically rather than horizontally in Panoramix? Simply go to the Settings tab, then Report Settings > Other Settings. Check the box, and hit Save!

There are also a variety of other settings you can adjust under Settings > Report Settings.

ADEENA'S TIPS & TRICKS



Data Settings	Static Data	User Settings	Third Party Data	Report Settings	Dashboard Layout
Logo					
Make "As of Today" report date equal last business day ☐					
Report Disclaimers					
Adjust reports in batch for duplex printing ☐					
Report Titles					
Include Date/Time Stamp in Footer ☐					
Custom Benchmarks					
Display parameters vertically ☐					
Fee Statements					
Enable auto-justify columns ☒					
Batch and Group Reports					
Disable display of custodian in account description ☐ 					
Enable asynchronous batch processing ☒					
Custom Titles					
Other Settings					
Pie Chart Display					

If you ever have questions, reach out anytime, we're here to help you! Panoramix is stocked full of tools to may your day-to-day workflow smooth and efficient.

- 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!](#)

[Unsubscribe sales@sapphiress.com](#)
[Update Profile](#) | [Constant Contact Data Notice](#)

Sent by sales@panoramixmarketing.com powered by



Try email marketing for free today!