



From Your Partners at Panoramix

It's the home stretch of the year, folks! Congrats on making it to October, or in other words, through Q3 billing. We understand how current market volatility may be concerning to clients right now, but know we are here to help you when you need it.

New Panoramix Release Today

Version 2.1.0.26 is ready for download! Today's enhancement list is lengthy, with Mock Billing at the top.

Make sure to close Panoramix soon to update, or push the update by going to the Help tab and clicking "Check for Update."

[Read all the enhancements here.](#)



Partner Spotlight

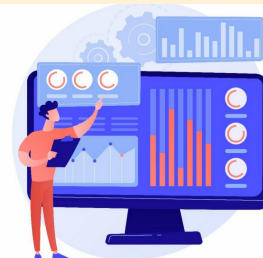
This month we want to highlight one of our Financial Planning partners, RightCapital! You can transfer financial data seamlessly between Panoramix and your financial plan. And, like us, they are independent! If you are looking for a great financial planning tool, be sure to check them out.

RightCapital

Possibly Switching Custodians?

Are you planning on switching custodians in the next year or so? We'd love to know!

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

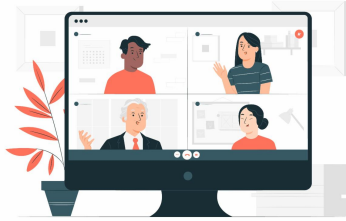


Panoramix Pro Access Ending

Panoramix Pro's exclusive free access period for current

Panoramix users ends on January 15, 2023. If you would like to continue to use Panoramix Pro please reach out to Sales@PanoramixFinancial.com and we can get you signed up.

[Learn more about Panoramix Pro here.](#)



Support Forum

Tuesday, Nov. 8 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 for the monthly forum here.](#)

Tips & Tricks for Panoramix

Did You Know?

Did you know we have a new "Send to Support" button in the reports screen?

If you run a report in Panoramix and see that something about the report is off, you can send the report to Support with one click! This way, submitting support requests regarding specific reports provides us with more information to resolve requests more quickly.

ADEENA'S
TIPS &
TRICKS



Look for the button in the bottom left-hand corner of the reports screen.

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.](#)

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