



From Your Partners at Panoramix

Happiest of holidays to one and all. Before we settle in for a bit of time off to enjoy those holidays, we have one more release for the year. We started 2022 by releasing version 2.1.0.06. We wrap up the release year with 2.1.0.30. No one delivers more. Or more often.

New Panoramix Release Today

Version 2.1.0.30 will soon be ready for download! Some significant and important work on billing systems and related in this release, as well as a number of process improvements and a cool new UI feature you'll want check out.

[Read all the enhancements here.](#)



Happy Holidays

A few reminders about the year-end holidays. Panoramix Support will be closed the afternoons of December 23 and 30, and all day on December 26 and January 2.

Year end processing will not be complete until Noon central time on January 1, 2023. Any billing or performance reporting run prior to that time will certainly be suspect. If you have accounts with held-away custodians who typically report late, then wait until those results are in before running billing and report batches.



2nd Notice: 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.



2023 T3/Inside Information Survey Open

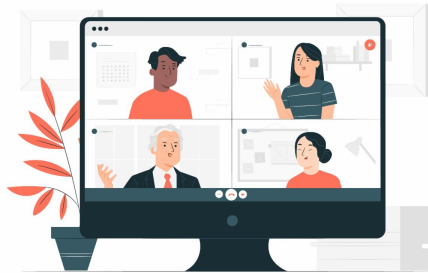
The 2023 T3 Annual Advisor Survey is open! We would *greatly* appreciate if you could complete this survey. It is a valuable tool to the advisor profession and financial services industry as a whole. **We are listed in Portfolio Management as Panoramix or Panoramix Pro.**



Per Bob Veres of Inside Information:

"We're hoping you'll take a few minutes to tell us what you're using and what you think of the elements of your tech stack; just click on a button in the categories that you're using and skip the rest."

[Access and take the survey here.](#)



Support Forum

Tuesday, January. 10 at 1 p.m. Central

This is an excellent hour to ask any support questions, or discuss the financial services and fintech industries with Chris, Joe, Adeena, James and Jim. No scheduled releases between now and then.

[Register for the monthly forum here.](#)

Tips & Tricks for Panoramix

Did You Know?

The speed with which Panoramix loads the Advisor and Contact Dashboards largely depends on which tiles you have selected for the dashboard. Some tiles are much more resource intensive than others. As a general rule, any tile that displays performance information or timelines of trends will be more resource intensive than ones that don't.

Also, it takes far less time to load a 3 X 2 screen configuration than it does to load a 5 X 4 configuration.

In fact, in timed tests, the most complex Contact Dashboard configuration took about **1000 times longer** to load than did the simplest. You have a lot of control over the speed of the application. And just because a tile isn't loaded doesn't mean you cannot see the information. Simply select Other Tiles from the Contact Dashboard menu or from the File menu if you're on the Advisor Dashboard, select the tile you want to see and it loads in real time. For something you determine you don't need to see for everyone every time you load the Contact, a two-click operation can save you a lot of time--especially when added up over a year of use.

Happy New Year!

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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