



From Your Partners at Panoramix

May this March carry the luck of a four-leaf clover for you! Today we have a great release and a couple of notices, one of which is updated. At the base of today's newsletter, courtesy of Joe, we've included a fun fact for Pink Floyd fans. Happy reading!

New Panoramix Release Today

Get that download started! New Mail Merge field, updates to reports, customizable fields and more. Also note our ADV Amendment reporting tool, available upon request.

Read about our several other enhancements in version 2.1.0.33 below.

[Read all the enhancements here.](#)



2024 Leap Year Calculations Have Begun

If you bill monthly in advance using actual days, leap year calculations for said billing began yesterday, March 1, 2023.

With today's release, we add two options for leap year, applicable to advisories billing with Actual Days calculations. You may now either:

- Engage a calendar-year based leap year using the billing period start date; or
- Always use a denominator of 365 and ignore leap year altogether.

Each of these options come with warnings and caveats, so check your compliance requirements before engaging, just as you would with nearly all billing options.

For more information, visit the Help Guides and search "Leap" or directly open the Billing FAQ document. Information is located on page 2. If you have any other questions, feel free to email us at Support@PanoramixFinancial.com.



UPDATED: Taxpayer IDs and birth dates in Schwab

Schwab recently made a change to their decision to not include the date of birth and Taxpayer ID in downloads of master accounts:

Moving forward, Schwab **will include the date of birth** in the downloads of each master account.

Social Security Numbers/Taxpayer IDs **will NOT be included**. To download those IDs to Panoramix, you will need to make a request to Schwab Advisor Platform Support.



As before, this is applicable to incoming clients, as well as accounts transferring from TD Ameritrade. In the PDF linked below, if you click "let us know" in the bottom right-hand corner of page 8, your email client will open with a template to request this download.

[More information is available here.](#)

Upcoming TDA Conversion

We're seeing an increase of inquiries regarding the upcoming merge of TDA into Schwab. Here is what we can tell you so far:



Ameritrade

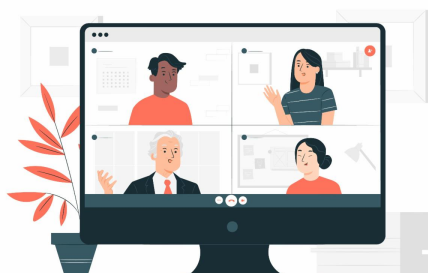
- We have been, and will continue doing the work to make the transition as easy as possible for you. We are on track, and will be 100% ready when the big day comes.
- Although our goal is to have the Panoramix portion of this conversion seamless to you, you will have some other work to complete on the custodial end. These items will need to be completed closer to the conversion date. We'll do the research to understand these steps to help you complete them.
- As we become aware of actions you can take in preparation, or become aware of any pertinent information, we will share such with you.

If you have any specific questions regarding the transition for your firm, feel free to join our next Support Forum (see below) or email us at Support@PanoramixFinancial.com.

Panoramix YOUiversity

February's session is ready for viewing! If you want to learn about Payout Schedules in Panoramix, or how you can unlock fee-for-service billing via our integration with AdvicePay, this session is for you!

[Watch the webinar here.](#)



Support Forum

Tuesday, March 14, 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.

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

T3 Conference Registration Discount

Have any plans March 13-16? You should! The 2023 T3 Conference is taking over the JW Marriott Tampa Water Street hotel in Tampa, Florida. We've already got our assignment on the conference floor, look for us at booth #312!

Join us, here's \$200 off your registration!



Enter discount code **Sapphire200** before selecting a registration type.

Tips & Tricks for Panoramix

Did You Know?

FanMail limits passwords to 12 characters. It doesn't stop you from using 12 characters, it simply truncates whatever password you create to those 12. But in Panoramix, if you enter a 14-character password for FanMail that you don't know is truncated, we can run into a problem, as it won't work for the connection.

ADEENA'S TIPS & TRICKS



FanMail allows a limited set of "special characters" in its passwords, permitting @ # % & () \ ? _ = and + whilst **prohibiting** ! \$ ^ * < > | ~ ` and all other less common ones. It's common for people to include the bang symbol [!] as part of a password, or to use letter substitutions that replace either s or S with \$. This is not allowed in a FanMail password. Sure, it'll work for human login to the site, but when we try to connect programmatically that ! or \$ (for example) is simply dropped from the string and therefore the password will not match, resulting in an access failure.

Long story short, when you create or change your FanMail password, be mindful of the length and characters you use.

If you ever have questions, reach out anytime, we're here to help you! Panoramix is stocked full of tools to make 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 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!](#)

"There's no Dark Side of the Moon, really.

As a mater of fact, it's all dark. The only thing that makes it look light is the sun.

Pink Floyd's *Dark Side of the Moon* came out 50 years ago yesterday. That was some Time ago. I'm sure it made them a great deal of Money. I wish I could say Us and Them, but I cannot, because for many of us it led only to Brain Damage. Syd Barrett and Rick Wright, of course, will celebrate from The Great Gig in the Sky, whilst Roger Waters and David Gilmour don't talk to each other, let alone Speak to Me (/Breath...) and it's debatable which touring band

with each one of them might Eclipse the other in terms of authenticity. I suppose on any given night it could be Any Colour You Like, but now I must be On the Run."

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