



From Your Partners at Panoramix

Summer heat in Minnesota is presently dampened by Canadian Wildfire smoke, and we've got a smokin' hot newsletter for you this time 'round. From epic release tidbits to awards announcements, to integrations and helpful tips and tricks and everything in between, enjoy. Summer is short in the northland, and summer releases are easily counted on one hand. Now is the time to take note of what you will use from the first of them.

Update to Panoramix Released

Version 2.1.0.40 is out!

As we mentioned above, we have a LOT in this update. Prepare for some hefty changes to billing, of which improve and add to your current capabilities. Take a peek at the release notes below to prepare yourself, and [reach out to us](#) if you have any questions.

[Read all the enhancements here.](#)



Partner Spotlight - My Virtual COO

Do you need assistance to identifying, planning, and implementing solutions to boost your people, productivity, profitability and growth, all with less effort, stress and costly missteps? My Virtual COO is here to help, by providing C-Suite expertise!

Nurturing a Culture of Collaboration: A great COO understands the importance of fostering a productive, collaborative culture within the organization. By breaking down silos and encouraging open communication, we empower synchronous and asynchronous collaboration, share knowledge, and build strong relationships. This improves teamwork and results.

Aligning Goals: COOs align business goals with a strategic, thoughtful improvement plan and outlines the efforts of individuals and teams. COOs establish clear objectives, provide the necessary support and resources, document the What-Why-When-Who, and empower teams to boost self-accountability and ownership of work. Most importantly, COOs show appreciation for meaningful contributions and communications.

Cultivating Professional Development: A COO recognizes the importance of investing in the professional growth of individuals within the organization. By prioritizing professional development, we enhance the capabilities of individuals and foster a culture of continuous



learning.

Inspiring Innovation and Creativity: We firmly believe in the power of innovation and creativity. By encouraging individuals to experiment with new ideas and embrace calculated risks, we create an environment that breeds innovation. We understand the varied learning skills, tap hidden talent, inspire ideation and design thinking, and recalibrate involvement to accelerate innovation. When done well, this results in breakthrough solutions and game-changing advancements.

[Get expert advice with Jen](#)

[Learn more about MVCOO with Strategist Sydney](#)

[Move your business forward with Fractional COO, Megan](#)

Upcoming Holiday Closures

Panoramix Support staff will be offline the following days:

- Monday, June 19th in observance of Juneteenth.
- Tuesday, July 4th in observance of Independence Day.
- Support coverage will be limited on Monday, July 3rd, due to the holiday weekend.

Please direct **all** Support inquiries to Support@PanoramixFinancial.com to ensure coverage, or submit a request under the Help tab in Panoramix.

Before You Run Billing & Reports

The 1st of the month lands on a Saturday over a holiday weekend. Before running your billing or any EOM reports, please take note of the following:

- Updated numbers for the end of quarter will not be available until noon Central on Saturday, July 1st. Billing will be available to run at noon, and reports will pull updated EOM data by noon.
- **We recommend waiting to run reports and billing until July 5th** so all last minute transactions coming down from custodians are reflected in your billing and your reports for your clients.

If you will need assistance with your billing run, please be mindful of reduced support coverage around the holiday, and be sure to direct all emails to Support@PanoramixFinancial.com.

Notice for Interactive Brokers, OPS and AXOS Users

Due to the timing of when these custodians send daily files, we will not have complete data for the end of the month until Monday, July 3rd. In addition, our data processes will not be done running until noon on Wednesday, July 5th. Therefore, if you wish to run reports and billing with complete, accurate data, we advise waiting until after noon on July 5th. So, give yourself a long holiday weekend!

Panoramix Named Finalist in 2023 Wealthies Awards

We're thrilled to announce we have been named finalists in the Wealth Management Industry awards, for the seventh year running! Judges combed through more than 1,000 entries to select finalists, and we're proud to hold two, one in each of these categories:

- Retirement Income
- Business Support Systems - Workflow Automation

Winners will be announced at the awards ceremony in New York City on Sept. 7th. Check out the [list of finalists](#) or see more details on WealthManagement.com.

P.S. - With these, Panoramix is an 18-time finalist over those seven years!

 Wealth
Management.com
2023 Industry Awards
Finalist

Next-Gen Wealth Management is here with Panoramix + Apex

We're proud to announce a powerful integration with [Apex](#)

Fintech Solutions! Leveraging Apex's flexible APIs, RIAs using Panoramix can now open new accounts, fund them, and onboard new clients in a fully digital, end-to-end process that serves as a complete fintech solution.



Read the [press release here](#). To learn more about this supercharged integration and discuss a custodial switch to Apex, reach out to our team via Support@PanoramixFinancial.com.

Upcoming TDA Conversion

This topic is covered in our May webinar.

Preparation for the big conversion date continues. We have kept up on the work to make the transition as easy as possible for you, and are on track to be ready when the 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.

As previously mentioned, Schwab *will* include the date of birth and taxpayer IDs in masters transferring from TD to Schwab. They *will not* include this data in new Schwab masters. To download those dates and IDs to Panoramix, you will need to make a request to Schwab Advisor Platform Support.

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.

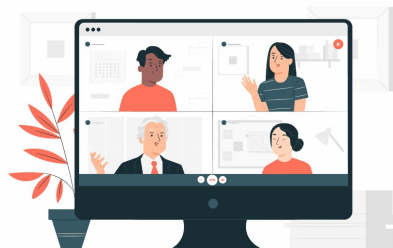
Notice: Panoramix Price Change in Effect

Effective with renewals starting January 1, 2024 (and new customers as of April 1, 2023) Panoramix and Panoramix Pro costs have increased. The new pricing is available on our website at <https://panoramixfinancial.com/Account/RatePlan>.



We've done our best to simplify our pricing, keep our costs the very lowest in the industry, and continue to provide a superior product and support. It's been four years since our last price change and in that time the fees we pay to access and process data as well as other costs have escalated. This price increase will enable us to maintain the high level of quality and service that we have always provided.

If you need assistance determining your 2024 renewal date, please contact Support@PanoramixFinancial.com.



Support Forum

Tuesday, July 11, 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.](#)

Tips & Tricks for Panoramix

Did You Know?

Customer Support is a priority for us at Panoramix, which is why we work hard to be sure you receive top-notch guidance using our software. You can email or call, submit a Support Request or schedule a meeting with us anytime, but we also have an entire website dedicated to instructions on how to use Panoramix! We're always updating the content of our Help Guides, since our system continuously evolves.

ADEENA'S TIPS & TRICKS



Help Guides
Release Notes
About Panoramix
Help



Support
Request



Check For
Update



Fix Update
Permissions



View Latest
Newsletter

Support

Above is a shot of our Help tab in Panoramix. Under this tab, you can access our [Help Guides website](#), see what version of Panoramix you're on, check to see if there are any software updates available, send us a support message, and even view the latest newsletter and release notes!

Our [Help Guides site](#) is stocked full of written instruction, video tutorials, webinars, newsletters and more. It is a searchable website, too! For instance, if you're looking for information on how to bill for "Leap Year," a search will produce the Billing FAQ document, newsletters, and a training video!

We're working hard to add more content to our [Help Guides site](#), but it's not perfect. If you can't find answers to your questions through searching, please reach out to us.

Panoramix Help Guides

FAQ



Login and Passwords



Dashboard



Contacts



Blotters



Client Portal



Panoramix Pro



Reports



Billing



Portfolio and Accounts



Integration and Imports



Orientation Videos



Webinars



Newsletters



If you ever have questions, 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 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!



Sapphire Software Services | 1470 Englert Rd, Eagan, MN 55122

[Unsubscribe](#) sales@sapphiress.com

[Update Profile](#) | [Constant Contact Data Notice](#)

Sent by sales@panoramixmarketing.com powered by



Try email marketing for free today!