August 3, 2023 | Volume 37


# From Your Partners at Panoramix

The SchwabiTrade conversion date approaches, but we're ahead of the curve! Account numbers have already been changed in Panoramix.

Today's release is a mighty one, with some significant changes highlighted below. Don't hesitate to reach out with any questions as you adapt to the the new functionality in Panoramix.

## Update to Panoramix Released


Version 2.1.0.45 is out! We have some big changes in this release that you should know about right away:

**Changes to Midterm Billing**
In this release, we made an adjustment to midterm billing. Panoramix was including the first date, “Accounts Added After”, rather than anything after that date. If you entered in Accounts Added After 6/30/2023, it would include an account that was added on 6/30/2023. We changed that behavior to start including accounts the next day (7/1/2023). If you are currently using midterm billing and you already realized this and were using the 1st of the month (7/1/23) as Accounts added After, then going forward, change that to the end of the prior month.

**New "Request a Meeting" Button**
We've changed the ribbon row of the Help Menu to remove a seldom-used item, which is still available under Utilities, in order to add the ability to request a meeting with Support, and to make it easier to send us log files when we request them from you.

**Revisions to Static Data and Other Grids**
This release includes several changes to Settings > Static Data and similar list functions in Panoramix. Not only is there a new look to the list, you shall always see Add, Edit and Delete actions buttons (as appropriate to the list) from which to select. Gone are the "click in this little space below the last row to add an item" and "check that box and Save to delete a row from the list." Not only will this make it far easier for new advisors to learn Panoramix, the change brings consistency to the way it works across the platform.

[Read all the enhancements here.]

## TDA CONVERSION UPDATE: Account Number Changes Are Here

Panoramix has been ahead of the curve in preparing for the upcoming TD Ameritrade conversion to Schwab. Come Labor Day weekend, all we'll have to do is change the custodian name!

**NOTICE: We have changed TD account numbers in Panoramix to Schwab account numbers.**

All reports still show the TD account number until the official switch Labor Day weekend. However, you now see the new Schwab account number on the Portfolio Dashboard.

We are trying to do as much as possible prior to Sept. 6th, so we can minimize risk. Receiving the account mapping from Schwab enabled this transition, which now provides us with a full month end (plus a little extra time) to adjust with the new account numbers if necessary.

There's more information on this conversion process in our May webinar.

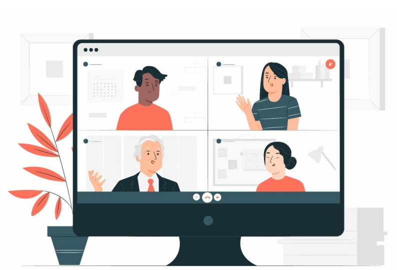
If you have any specific questions regarding the transition for your firm, feel free to join our next Support Forum (see below) or email us at Support@PanoramixFinancial.com.

## 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, August 8, 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, Sean, Adeena, James and Jim.

Register for the monthly forum here.


## August Webinar

Our August webinar is right around the corner! Panoramix YOUniversity sessions are short lessons in using key Panoramix features. In this session, we will be covering billing settings, from A to Z!

Sign up below to be emailed a link to the pre-recorded webinar once available.

Register for the webinar here.

# Tips & Tricks for Panoramix

## Did You Know?


You can bulk edit account data! If you need to make several changes to multiple accounts across different clients, you can do so in one screen.

This is a great way to "check a lot of boxes" at once, for setting Qualified or Discretionary flags, for example.

To make bulk edits, go to the Data tab > Edit Account Data. Make sure to Save any changes you make!

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!

Any recommendations for our newsletter and outreach? Tell us what you want to see!