



From Your Partners at Panoramix

We're over the hill with the Schwabitrade conversion! This week brings exciting features in today's release, survey news and more. Thank you for being Panoramix supporters, and happy reading!

Today we bid adieu to our Customer Success Lead, Adeena. She's off to finish her double degree at Washington State University, and we wish her the best of luck! Moving forward, make sure to address all Support emails to Support@PanoramixFinancial.com.

Update to Panoramix Released

Version 2.1.0.48 is out! We have some notable additions and corrections today, detailed in our enhancement list.

The most exciting feature we add today is the ability to mark "Favorite" reports for quick access!

[Read all the enhancements here.](#)



New Kitces Research Report: The Technology That Independent Financial Advisors Actually Use and Like (2023)



An exciting new Kitces report is now available for your readership! Thank you for rating us so highly in the survey. Panoramix has been named the highest value Performance Reporting tool, with the second-highest satisfaction rating in the category!

[Read the Kitces study here.](#)

2024 T3 Survey Open Now!

It's that time of year again, the annual T3/Inside Information WealthTech survey is now live!

If you have 15-20 minutes to spare, we would love for you to contribute to this valuable industry survey. Advisors like you rely on the T3 Survey to make informed FinTech decisions for their advisory firm and to benefit clients.



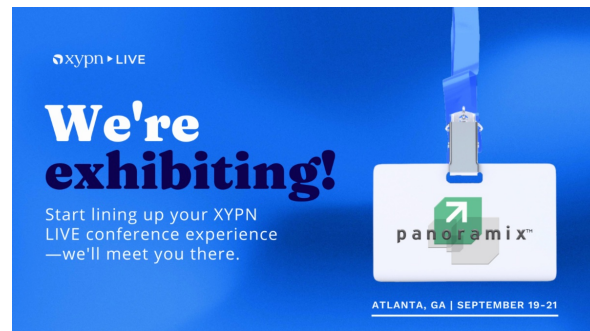
[Access the 2024 T3 Survey here.](#)

Catch us at XYPN Live

Next week Chris and Jim are heading to Atlanta, Georgia to exhibit at XYPN Live!

XYPN Members can receive an annual \$500 discount with their Panoramix or Panoramix Pro subscription.

[Check out the conference details here.](#)



Notice to Windows 10 Users

Applications such as Panoramix and Schwab Advisor Center may prompt for installation when opened following a Microsoft Windows 10 system update released in August. In addition, your stored username and password may be blank. We regret the inconvenience of this condition. It is beyond our control.

The details are here: <https://learn.microsoft.com/en-us/windows/release-health/status-windows-10-22h2#apps-deployed-via-clickonce-might-prompt-for-installation-when-opened>

There are two solutions to this in the short term. At this time, we do not recommend the Known Issue Rollback procedure mentioned in the KB article above as there is the potential for other unknown and unintended consequences of that action.

Solution one: Upgrade to Windows 11.

Solution two: Launch the Windows Task Scheduler tool and locate the Microsoft Windows App Compatibility Appraiser background task service in the list. If it is running, right click it and select End. Right click on it (again) and select Disable. Then reinstall Panoramix. <https://answers.microsoft.com/en-us/windows/forum/all/permanently-disabling-windows-compatibility/6bf71583-81b0-4a74-ae2e-8fd73305aad1>

Once Microsoft fixes the underlying problem, you may reenable the task.

As a reminder, Microsoft's Windows 10 end of life support is October 14, 2025. Mainstream support ended with the release of version 22H2 on October 18, 2022.



TD to Schwab Conversion Complete!

On September 2, 2023, Schwab completed its merger with TD Ameritrade. Thanks to the diligent work of the Schwab team, this transition went very smoothly. There will be some lingering transactions from TD for the next few weeks, but otherwise you you should be fully converted to Schwab as far as Panoramix goes.

If you have any questions, feel free to join our next Support Forum (see below) or email us at Support@PanoramixFinancial.com.



Notice: Panoramix Price Change in Effect

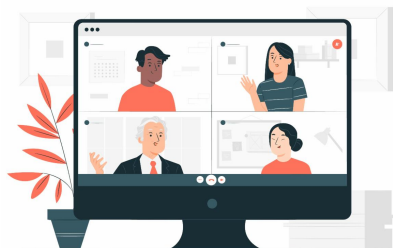
Effective with renewals starting January 1, 2024 (and new customers as of April 1, 2023) Panoramix and Panoramix Pro costs have increased. The new pricing is available on our website at <https://panoramixfinancial.com/Account/RatePlan>.

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.



Join Our Support Forum

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

This is an excellent hour to ask any questions related to Panoramix, or discuss the financial services and fintech industries with Chris, Joe, Sean, James and Jim.

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

Helpful Hints for Panoramix

Did You Know?

We have an Asset Change Summary report that you can use to see assets added from new clients, assets withdrawn by departing clients, net deposits and withdrawals from existing clients, and change in assets due to market movement!

This handy report can be found under the reports tab, via Advisor Reports. Find the "Asset Change Summary" report. Adjust your parameters before running. If you check "Include Account Details," you'll see a breakdown of the accounts!

PANORAMIX TIPS & TRICKS



Asset Change Summary ▼	Run Report	Export to Excel	⬆ Select Report Parameters
			Begin Year 2023 Month
1 of 1 100% Find Next			
Asset Change Summary			
from 7/31/2023 to 8/31/2023			
Total Client Assets	\$20,664,638.01		
Assets Added from New Clients	\$0.00		
Assets Withdrawn by Departing Clients	\$0.00		
Net Deposits and Withdrawals from Existing Clients	\$1,266,416.43		
Change in Assets Due to Market Movement	(\$475,029.65)		
Total Client Assets - End of Period	\$21,456,024.79		

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. Several functions to assist you are available under the Help tab in Panoramix.

Email Support

Visit Help
Guides

View Webinars

- Email the Support team at Support@PanoarmixFinancial.com.
- Call the Support phone line at **877-595-3282**. Panoramix staff come online at 8am Central.
- [Schedule a meeting with Joe here.](#)
- [Schedule a meeting with James here.](#)
- [Schedule a meeting with multiple Support staff here.](#)

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