



From Your Partners at Panoramix

[Intro stuff]

Update to Panoramix Released

Yes, we know the dangers of revamping a user experience. From time to time we have to do it. In this case we simply have too many Client Reports to conveniently fit a screen, so we nested some related content together. Knowing this was in the offing a few releases ago is one reason why we introduced Report Favorites then. Keep your own list manageable with Favorites and let us manage the rest of the list. We've added more charting options, parameters, RMD options, Blotter fields, created a better Outlook integration, improved Mail Merge functionality, and even fixed an issue or two along the way.



It's an impressive enhancement list.

[Read all the enhancements here.](#)

Panoramix Support **Holiday Schedule**



Second helping on this notification. It's time to plan for the upcoming holidays. Please note the following about Panoramix Support availability.

- November 23 **AND** November 24 - Closed for Thanksgiving
- December 22 - Closed after Noon central time
- December 25 - Closed
- December 29 - Closed after Noon central time
- January 1 - Closed

The final release of 2023 is presently set for the evening December 14.

TD To Schwab Update

TDAI residual transactions continue on a sporadic basis and will for another two weeks or so. These are mostly corporate actions such as dividends, splits, and reorganizations. The cash effects of these transactions are reflected at Schwab the following day (in most cases). This continues until about



Ameritrade

December 5. We are doing our best to get those transactions incorporated and reconciled for you, but if you see anything questionable, please let us know at: Support@PanoramixFinancial.com. We won't stop looking for the TDAI files until we receive the all clear from Schwab.

2024 T3 Survey *Still* Open

It's that time of year again, the annual T3/Inside Information WealthTech survey is **live for another week or so**. To those of you who've already filled out the survey, our deepest thanks. If this remains on your to do list, please plan 15 - 20 minutes. We are aiming to both increase our survey market share and retain our highest satisfaction ranking (for the sixth year running). [Access the 2024 T3 Survey here.](#)



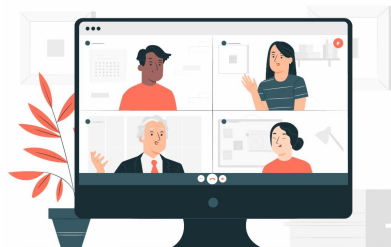
Notice: Panoramix Price Change in Effect

The time is getting closer. If you've been glossing over this section since March, it may be time to give this a closer read. While all new customers have been on the new rate structure since April 1, renewals starting January 1, 2024 will just begin to see the price change. 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 and other costs have escalated. This price structure enables us the ability 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, December 12, at 1:00 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.](#)

November YOUiversity session

We dropped our latest recording earlier today. [Here's direct link.](#)

Today's class covers several topics:

- Chris covers performance reporting for fixed income investments and discusses your client email integration
- Billing A to Z gets an update (already)
- We cover Fee Schedule overrides
- Billing Best Practices gets a focus
- Two Blotter topics make the list
- and we wrap up with a look at how your account and transaction history truly matter



Register for future webinars [here](#). (If you've registered for any of these at any time in the past there is no need to register again. You're still on the list.)

Helpful Hints for Panoramix

Did You Know?

A frequent question remains "Do I have to maintain my Asset Map in Panoramix? The truthful answer is "No, you don't *have* to." However, here's an example of something that can happen if you don't. You have a rule set up to exclude all Security Types of Cash or Cash Equivalents from billing. You're not using the Panoramix Asset Map to assign Security Types to your holdings. Custodian A has holding X classified as a Mutual Fund and Custodian B has that same holding classified as Cash or Cash Equivalents.

Suddenly you're not billing your clients in the same manner because for clients using Custodian A are not being billed for holding X and those with Custodian B are based on the rule. Auditors take a dim view of that and would call it "a finding." Solution? Use the Panoramix Asset Map to apply consistent classifications to your holdings. Think this only affects multi-custodial advisories? Think again. Even within a single custodian there can be different classifications for the same holding, and sometimes that is up to the whim of a custodian's employee tagging a trade transaction a certain way.

PANORAMIX TIPS & TRICKS



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@PanoramixFinancial.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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