



From Your Partners at Panoramix

As we push out our final release of 2023, we launch plans for a major revision to Panoramix in 2024. The first five to six releases next year will lay the foundation for **Panoramix 3.0** in May. This new version of Panoramix will not only update important foundational technology for better cybersecurity and ease of administration, it will contain multiple changes to the user interface (screens you see) to deliver a superior user experience.

A bit of holiday fun: November was a great month for most advisories. Nearly 70% of you saw your AUM increase by more than 5% and no one saw a decrease of even 1%. That's a 2023 first. Of those of you who hit that 5% growth mark, the average growth was 7.34% and one of you managed to add over 48% to your book without an acquisition. You are definitely on the nice list this year.

Be sure to read to the bottom of this newsletter, as we include some important news your custodian may not have relayed, and other important stuff.

Update to Panoramix Released

Report and blotter updates and enhancements dominate this release. More parameters, more sorting options, more information, greater consistency of the interface from one place to another. One specific call out: for your clients who use the Client Portal and where you have enabled the option to run Panoramix reports directly, your client now has the option to execute the report(s) for selected accounts, just as you do in the application interface.

[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



TDAI To Schwab Update **NEW STUFF**

With the TDAI to Schwab conversion Schwab made the default statement frequency quarterly. TDAI created monthly statements. This is a significant change, and they may not have had that high on their communication list to you. Certain regulatory requirements do force a monthly statement, and Schwab still creates those, but many of your clients have moved from monthly custodian reporting to quarterly. Schwab produces monthly statements for accounts containing options trading, ACATs in or out, ACH transactions, new accounts, and a handful of other things.

Remember that Panoramix gets a copy of Schwab statements and saves them in the Client's Document tool. You have the option to change that to the Client Portal, should you desire.



Residual transactions from TDAI are down to a mere trickle. It's not uncommon to go days without seeing any, and on a day when something does come in it affects between one and six accounts in one or two rep. codes. For most of you, residual transactions are now in the rear view mirror, and fading fast. We shall continue doing our best to get those transactions incorporated and reconciled for you, and 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, which we expect any day now. This is the final notice about residual transactions.



Panoramix is excited to share that our Vendor Due Diligence Questionnaire and Evidence Documentation (QED) are now available for free on Buckler Open VRM.

Buckler Open VRM Overview

<https://www.openvrvm.com>

We invite you to follow this process to access and review our QED for your due diligence vendor review needs.

Process (for new Buckler users - existing users log in and go to step three)

1. If desired, schedule an Introduction Call with Buckler Open VRM team using the link below.
2. Open a [free account](#).
3. Select your Vendors, including us - Sapphire Software Services Inc./Panoramix Financial.
4. Request access to Vendor's Questionnaire and Evidence Documentation (QED).
5. Perform your Vendor Risk Assessment.

Schedule a Call with Buckler Open VRM team

<https://calendly.com/d/yr8-zw8-q4p/open-vrm-demo>

A Free Platform

Buckler Open VRM is free for the first user. Additional users are \$19 per user, per month.

About Buckler Open VRM

Buckler Open VRM provides Vendors with an open environment to populate, manage, and share a pre-vetted security questionnaire and compliance evidence documents with their Clients in a private and secure location. This facilitates and accelerates the Vendor Due Diligence process for both Vendors and their Clients. Open VRM is a module of Buckler, the award-winning Cyber Program Management System.

This is our only method for sharing up-to-date due diligence documentation effective immediately.

2024 T3 Survey *Closes Saturday - 12/16/2023*

If you haven't already done so, there are still two days left to complete the annual T3/Inside Information WealthTech survey. 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 before the survey closes Saturday. 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.](#)



If you plan to attend the T3 conference at the Cosmopolitan of Las Vegas January 22 - 26, 2024 and you're looking to **save \$200** on the event, use the **discount code Panoramix200** at the appropriate registration point. Click these links for [conference](#) information and [registration](#) details.

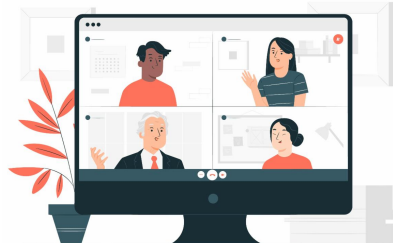
Notice: Panoramix Price Change in Effect

The time is at hand. If you've been glossing over this section since March, it is 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 top-notch 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 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, January 9, 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.

Thanks to everyone who participated in our last one of this year on the 12th. We're looking forward to what you have to say in the coming leap year.

[Register for the monthly forum here.](#) (If you've registered in the past there is no need to register again.)

November YOUNiversity session

In case you missed it, the November session is a holidays friendly 18 minutes long and is chock full of chewy goodness. [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.)

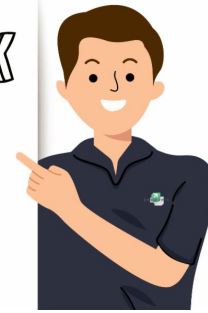


Helpful Hints for Panoramix

Did You Know?

Panoramix downloads copied of Schwab statements and other documentation. By default these documents go into the client's document vault into a folder called, oddly enough, Schwab Documents. You and other firm Panoramix users may access those PDF files from the Contact Dashboard's Documents tile or the Documents blotter.

PANORAMIX TIPS & TRICKS



Note that it takes Schwab up to five business days after document creation to make them available to Panoramix.

If you want to make these documents available to Client Portal users, you may do that. To do so you must be an administrator-level user of Panoramix. Your firm's primary username is always an administrator in Panoramix. Navigate to Settings>>Portal Settings>>Other Settings. Set the Display Schwab statements in portal checkbox to checked and Save.

Your change to using this option affects the entire firm. It is only effective for documents received from that point forward. Historical documents do not automatically move. You may either move them yourself via the Data>>View Data>>Edit Contact Folders tooling, or (if you have hundreds) you may contact us for help in moving them. To do so, use the Create Support Request tool under Help.

Whether you used the default location or save Schwab documents to the Client Portal, having them in Panoramix is a great resource for you. Remember to take advantage of it.

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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