



From Your Partners at Panoramix

Exciting news. Panoramix is on the cusp of increasing our support staff. Watch for a formal introduction in our next newsletter.

More exciting news. The results of the 2024 T3/Inside Information Advisor Software Survey show that Panoramix not only increased market share, but achieved its highest overall satisfaction rating ever. 9.51 is also the highest rating of any of the "Mighty Mites" in any category in the entire survey. A profound *THANK YOU* to all of you who took time (we know it's a long survey) to complete the rating survey. The **V**ictory is a wonderful thing to celebrate. (Yes, that's **V**ictory because it's number 6.)

Even more exciting news. It was an honor to be featured in the Kitces Office Hours Software Showcase on January 19th. We had a great time preparing materials and being part of the presentation.

Panoramix Update Released

This is our final feature-laden release for a while. We're taking a bit of break from adding new features in order to work on the May 2024 planned release of Panoramix 3.0. That effort will bring about necessary upgrades to our core technologies. We'll still do three or four releases between now and then, and they will concentrate on strictly necessary things such as issue remediation. The majority of the work, and it is a vast quantity of work to be sure, will go towards the push to upgrade the core technologies that make up Panoramix. In May of 2020 we released Panoramix 2.0 after a seven month effort and 106 releases of the 1.x product. The 2.x product has had a good run, with what will end up being nearly 100 releases of its own. With 3.x we hope to position ourselves through 2027. Maybe even into 2028. In the meantime, we've endeavored to deliver a sufficient amount of chewy goodness to last you until May with this push.



[Read all the enhancements here.](#)



Plus



REMINDER: you need to prove to your auditors that you've done your due diligence related to your vendors. We receive hundreds of such requests every year. We have an easy - and industry standard - way for you to access our cybersecurity, disaster recovery, and other vendor due diligence documentation.

Panoramix makes our Vendor Due Diligence Questionnaire and Evidence Documentation (QED) available for free on Buckler Open VRM.

Buckler Open VRM Overview

<https://www.openvr.com>

Please 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.

2024 T3

As noted earlier, thank you to all who ranked Panoramix so highly in this year's software survey. We are truly thankful for the honor.



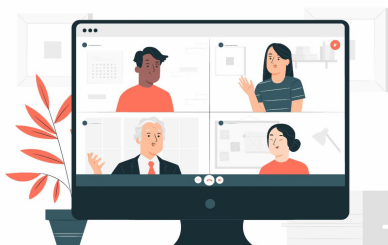
Antepenultimate Notice: Panoramix Price Change

It's all on our website at <https://panoramixfinancial.com/Account/RatePlan>. By the time the final notice runs we'll have been telling you about it for over a year. Those of you with licenses in place prior to April 1, 2023 and who have yet to renew in 2024 will see the new pricing upon renewal.



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, February 13, at 1:00 p.m. central.

Celebrate Valentine's Day a bit early in our second live support forum of 2024.

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

Note that Chris is a scratch from the starting lineup this time around because he will be off to the Sunshine State enjoying some family time. With any decent amount of luck we'll be joined by our new Customer Support Representative. Just don't expect them to handle questions just yet.

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

February YOUNiveristy session

Pencil in 1:00 p.m. on Tuesday February 20th for the next push of a Panoramix YOUNiversity webinar session.

One concept currently under consideration for this session is a continuation of our "A -to-Z series," this time covering Payout Schedules.



Remember that you may access all prior webinar recordings at any time via **Help>>Help Guides>>Webinars**. (Extra credit this month of you can tell us which Panoramix staffer celebrates a birthday on the 20th.)

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?

It's Form ADV Amendment season for many of you. Panoramix makes that process as easy as eating pie. Go to Reports>>SEC Reporting>>Form ADV.

From there set your end of month value, whether to include now-inactive contacts and contacts with zero-value portfolios, and pick how you want to count people - by client or by household. Next set your Type of Client values for lines a - n of the Form ADV using Contact Categories to report clients in the proper classification bucket. Use the Asset Type tab to set items i through xi based on the Security Types stored in Panoramix. Click Generate Excel Spreadsheet.

The result is a fully auditable, self, contained, multi-tabbed spreadsheet you may use to complete your Annual ADV Amendment filing based on the data in Panoramix.

As easy as eating pie.

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.

PANORAMIX TIPS & TRICKS



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 8 a.m. central.
- [Schedule a meeting with Joe here.](#)
- [Schedule a meeting with James 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!](#)

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

[Unsubscribe sales@sapphiress.com](mailto:sales@sapphiress.com)

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

Sent by sales@panoramixmarketing.com powered by



Try email marketing for free today!