



From Your Partners at Panoramix

Our developers are already deep into the effort of creating Panoramix 3.0. As a result, this release is one of a few in a row that are maintenance releases. Don't look for any splashy new features here, but do look for things that make Panoramix more stable, help with compliance issues, and remediate for known issues.

You may learn more about Panoramix 3.0 below, and in our upcoming webinar. Details on that also follow.

Panoramix Update Released

In addition to a variety of known-item remediation efforts, we introduce one feature guaranteed to help you with that annual ADV Amendment filing. Now you may select the specific custodian(s) for which to create the report. We heard from a few of you that you don't need to include those held-away accounts that you get fed from FANMail, ByAllAccounts and others. Now there's an easy way to exclude them without needing to set a flag for each and every account.



[Read all the enhancements here.](#)



Plus



FINAL 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.

Introducing Andrea Flores!

"Hi everyone, I'm thrilled to be joining the Panoramix team as a Client Care Specialist! I bring with me 10 years of experience in IT, where I've honed my skills in customer service and technical support. I'm particularly excited to apply my expertise in customer service to continue to elevate the excellent customer support that Panoramix provides its advisors, and I'm eager to learn more about the team's projects and goals."

That's right, you'll soon see a new signature block on many of those support emails, see a new face on those Teams-based support calls, and hear a new voice on the other end of the phone conversation, as Andrea takes on the role of taking care of our all you. Andrea, based in a suburb of Saint Paul, Minnesota, is a most welcomed addition to the Panoramix philharmonic.

Upcoming: Panoramix 3.0

Panoramix undergoes a major technology upgrade in May with the release of version 3.0. The core of the release is the upgrade from Microsoft's .NET Framework to .NET CORE. We'll also update some servers, third-party controls and tools, and toss in more than a few user goodies to boot. The upgrade in the base technology enables Panoramix to meet modern cybersecurity challenges, gain deployment flexibility, improve application throughput, and simply remain current with its own technology stack.

An important note for Windows 10 users: Panoramix 3.0 will not be tested on Windows 10 as it is already on Extended Life Support, with 100% phase out over the next year.

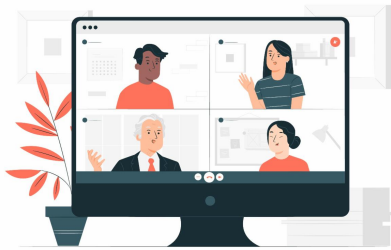
Penultimate Notice: Panoramix Price Change

It's all on our website at <https://panoramixfinancial.com/Account/RatePlan>. 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, March 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 overall with Chris, Joe, James, Andrea, Sean, and Jim. We'll answer the burning questions: 1) Is it Spring yet? and 2) Was it *ever* Winter? And we'll cover whatever Panoramix items you want to cover, too.

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

February YOUNiveristy session RESCHEDULED

We had to move our webinar from this past Tuesday to next week. Thanks for your patience. Pencil in 1:00 p.m. on Tuesday February 27th for the next push of a Panoramix YOUNiversity webinar session.

This session continues our "A -to-Z series," this time covering Payout Schedules. Chris offers an interlude related to Panoramix 3.0. We cover a few fun facts about performance reports in general and we close with a fun postlude you won't want to miss.

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?

How you configure the Panoramix Advisor and Contact Dashboards impacts performance more than anything else you do with Panoramix. The simpler the Dashboard configuration, the faster the load. The choice of which tiles you show, nearly always a trade-off between load time and seeing some bit of information, drives wait times more than any other configuration option. The question, then, becomes "Do I need to see this every time I load? For every Client?"

PANORAMIX TIPS & TRICKS



If that answer is "No," or "Not really," consider removing the tile from the Dashboard and accessing it on an as-needed basis. For Advisory Dashboard items, access them via File>>Other Tiles. For Contact Dashboard tiles select Other Tiles from the dashboard menu.

As a general rule, any tile that needs a performance number calculation, pulls data for any period longer than today, renders a graphic, or pings an internet service for current market conditions takes longer than those that do not do those things. And don't get me started on the "Recent Emails" tile. If you have an inbox and sent messages folder like mine and you have that tile pulling in recent messages for every client, plan on 15+ seconds to link to your email client, search for matching email addresses in the inbox and sent messages box, order them, and render on the screen.

As with many things, oftentimes it's best to de-clutter and simplify, simplify, simplify.

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 8 a.m. 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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