



From Your Partners at Panoramix

This release really starts to get to the CORE of what Panoramix 3.0 is all about. The release addresses a handful of remediation items and provides the underpinnings for some very important technology changes we will fully implement in May. (And, this may be our shortest newsletter of all time, so stick to the end for the tips and tricks. Something you should always do.)

Panoramix Update Released

Even as the coding team is busy with what will become 3.0, they've torn themselves away to address a few critical remediation issues that have come to light since February 22nd.

[Read all the enhancements here.](#)



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.

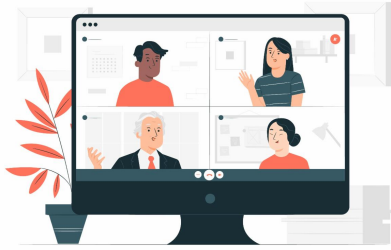
FINAL Notice: Panoramix Price Change

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



Join Our Support Forum

Tuesday, April 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 overall with Chris, Joe, Andrea, Sean, and Jim. But not James this time, as he will be spending spring break in sunnier climes with the family whilst we remaining toil away back in the homestate.

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

Remember that you may access all prior webinar recordings at any time via **Help>>Help Guides>>Webinars**.

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.)

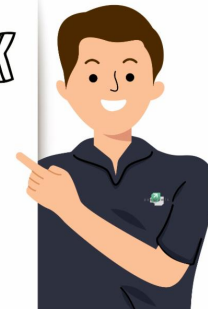
Helpful Hints for Panoramix

Did You Know?

Discretionary vs Non-Discretionary Accounts

Filling out the ADV form can get tricky, especially when it comes to discretionary authority. While custodians don't provide a discretionary flag for accounts, you can easily set this designation within Panoramix.

PANORAMIX TIPS & TRICKS



Just navigate to Data >> View Data >> Edit Account Data. Select 'Load' with the 'All' parameter selected. Then, check the 'Discretionary' box for all your discretionary accounts and save the changes. This ensures accurate reporting on your ADV form. **Did you know?** We also have an awesome ADV tool under Reports >> SEC Reporting >> Form ADV to streamline the entire process! Check it out on our Youtube channel <https://youtu.be/gEUGtPDsbWw>

Happy Reporting!

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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