



April 11, 2024

NEWS & UPDATES



Latest Updates

While we gear up for Panoramix 3.0, we still want to make sure Panoramix 2.0 is in tip-top shape! Here are some new updates and fixes you should know about.

- **New version 2.1.0.61 of Panoramix is available now!** If you haven't updated to the latest version, go to Help > Check for Updates or update from the Log in Screen by clicking the Check for Updates button.
- **Panoramix Gets Colorful!** In a recent update, we added some vibrant new features worth mentioning. You can now customize the colors of your pie charts, value charts, and performance charts. This means you can personalize your visual aids to highlight what matters most to you. Want to make your Performance Summary pop? Choose a fiery red! Tracking Portfolio Information? A calming blue might be perfect. Just head to Settings > Report Settings > Chart Display and start exploring the color palette!

Check out all the Release Notes [Here](#).

Panoramix 3.0: Faster, Safer, and More! (May Release)

Get ready for a major upgrade! Panoramix 3.0 launches in May with a complete tech overhaul. This means:

- **Stronger Security:** Protects you from modern cyber threats.
- **Faster Performance:** Experience smoother & quicker workflows.
- **Deployment Flexibility:** Run Panoramix where you need it most.
- **Exciting New Features:** We've got some surprises in store for you!

Heads up, Windows 10 users: Due to its limited support, Panoramix 3.0 won't be tested on this version.

Q&A Live! Get the Inside Scoop: Panoramix Support Open Forum

Free Panoramix Q&A! Learn from the experts and get your questions answered directly. Join our Support Open Forum via Microsoft Teams.

When: Tuesday, May 14, at 1:00 p.m. Central

**Reserve Your Spot
Now!**

(If you've registered in the past there is no need to register again.)

And remember that you may access all prior webinar recordings at any time in the Help Guides [Here](#).

Build Your Dream Report Group in 3 Easy Steps!

Ready to create custom reports that show exactly what you need? Report Groups are here to save the day! Here's how to build yours in just three steps:



Pick a Practice Client: Start by choosing a test client. Open the Client Contact. Select "Client Reports". This is your playground to experiment!

Craft Your Perfect Report: Play around with all the options! Select the report you want, and experiment with as many parameters as you want from the list on the right. Choose the columns you want, set benchmarks, and customize the charts until you're thrilled with the results.

Save Your Masterpiece: Once you've got it perfect, click the "Add to Group" button at the bottom. You can either create a brand new group for this report or

add it to an existing one. Pro tip: Use the "End of Last Period" checkbox to automatically set the date for future runs – no more maintenance needed!

Now you can run this amazing report combination, with all your saved settings, anytime you want! Use it for a single client, or even batch it up for a whole group!

Financial Advisor Spotlight:

Michael Kitces interviews Hans Blake of Intelligent Investing

This month, Michael Kitces chats with Hans Blake of Intelligent Investing, who uses his custom software, Intelligrations®, to help high-net-worth clients navigate retirement. They discuss how he prioritizes client goals, minimizes behavioral risks, and built Intelligrations® from scratch to automate data entry. Learn how this husband-and-wife team provides a white-glove approach to a complex transition.

Check out the full podcast [here](#)!

Plan Ahead: Our Summer Holiday Schedule

Heads up! We'll be closed on these summer holidays:

- Memorial Day, May 27th
- Juneteenth, June 19th
- Independence Day, July 4th
- Labor Day, September 2nd

Enjoy the sunshine and make sure you check back for more updates!

Need Help? We're Here for You!

Panoramix is always here to help! Packed with handy tools under the Help tab, it can streamline your workflow and make those to-do lists a breeze. And remember, we understand that questions may arise throughout the month. Here's how to reach our friendly customer support team when you need us most:

**Email Support
Now**

- Email the Support team at Support@PanoramixFinancial.com.

- Call the Support phone line at 877-595-3282 available starting at 8 a.m.
- [Schedule a meeting with Joe](#)
- [Schedule a meeting with James](#)
- [Schedule a meeting with multiple Support staff](#)

Need a quick refresher?

Click the buttons below to explore even more resources – Panoramix is your one-stop shop for getting things done efficiently!

**Visit Help
Guides**

View Webinars

Get Social With Us!



Got 15 seconds?

Please share your feedback by selecting one of the responses below.
Tell us what you liked and how we can make Panoramix better.

How did you like this month's newsletter?

Love it!

Mehh, It's Ok.

Hate it.

**Give More
Feedback**

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