



May 2, 2024

NEWS & UPDATES



Latest Updates

Hold onto your hats, Panoramix fans! Panoramix 3.0 is just around the corner, but before we blast off, we've got some exciting updates for Panoramix 2.0 to make sure everything is running smoothly. Check them out!

- **New version 2.1.0.62 of Panoramix is available now!** On opening Panoramix, you will be prompted to download and install the latest update or if you are already in Panoramix, go to the Help tab and click the Check for Update Icon.
- **Batch Reporting Optimization:** Fasten your seatbelts! We've just optimized batch reporting for peak efficiency and performance. For a clear view of the new updates that will supercharge your data game, check the release notes!

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

Panoramix 3.0: Supercharged and Coming in Hot!! (May Release)

Get ready to level up your experience! Panoramix 3.0 blasts off in May with a complete tech overhaul that will revolutionize your workflow. Here's what's in store:

- **Fort Knox Security:** Protects you from modern cyber threats.
- **Lightning Speed Performance:** Experience smoother & quicker

workflows.

- **Secret Weapon Features:** We've got some game-changers under wraps that will take your data game to the next level. Stay tuned!

Nervous about making the jump? No worries! Panoramix 3.0 will be a separate installation, so you can keep trusty 2.0 running alongside it until you're comfortable making the switch. Think of it as a test flight before you commit to a full orbit change.

Panoramix 2.0 will be supported until the end of summer, giving you plenty of time to explore the exciting new features of 3.0! Keep an eye out for your Installation notification within Panoramix, and once you've taken it for a spin, let us know what you think!

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](#).

Should You Merge Records, or Associate Them?

In general, you should merge two contacts who are truly duplicates, and use associated contacts for others (such as husband and wife or Trust accounts with a separate Tax ID).

In Panoramix, a client is typically a person or business with a tax ID. From time to time things do go awry with tax ID numbers like:



- An external data feed may lack a tax ID entirely
- Manual entry of a tax ID on an account may be entered incorrectly

In cases such as these, the advisor will see duplicate clients in Panoramix, and they should be merged under the proper tax ID client.

In case of a Trust account with a separate Tax ID or a husband and wife, we recommend not merging these contacts but adding the contacts together as associated contacts because they really are two separate entities. This will show all of the accounts under each contact record.

So remember, merge clients that are truly the same person. Otherwise use associated contacts to combine them in a household.

How do you merge contacts or associate them with another? Click [here](#) to learn how! Available in the Panoramix FAQ pdf, pg. 41.

Financial Advisor Spotlight:

Calling all rockstar financial advisors! Are you making waves in the industry with innovative ideas or client wins? Do you have fresh insights to share with the community? This is your chance to step into the spotlight!

We're searching for advisors who are redefining financial planning and inspiring others. Send us a quick blurb about what you've been up to lately. It could be anything from a new approach to retirement planning to a client success story!

We can't wait to showcase your brilliance! Let's get your name out there and help you share your passion for financial wellness.

**Share Your Story With
Us!**

Panoramix Webinar: Unveiling Our Growth and Your Future Success!

Mark your calendars! On May 21st, we're hosting a Panoramix webinar you won't want to miss!

Join us as we explore Panoramix's incredible journey: We'll rewind to our beginnings, showcase how much we've grown, and share exciting plans for the future that will revolutionize your billing and performance.

But that's not all! We'll also be taking a deep dive into the **Portfolio Snapshot Report**, empowering you to leverage it and optimize your billing and performance reporting.

Ready to unlock the future of Panoramix with us? Subscribe to the [Panoramix YouTube](#) channel and click the notification bell to be alerted when the webinar link is live. See you there!

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**

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

Unsubscribe_sales@sapphiress.com

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

Sent by sales@panoramixmarketing.com powered by



Try email marketing for free today!