



May 30, 2024

NEWS & UPDATES



Level Up Your Operations: Panoramix 3.0 Unveils Supercharged Billing & Performance Tools□

Get ready to transform your financial advisory practice! Panoramix 3.0 is here, and it's a game-changer. We've taken everything you loved about Panoramix 2.0 and supercharged it with a suite of innovative features designed to make your life easier and your results more impactful.

Optimize your workflows, boost efficiency, and unlock deeper performance insights – all with the power of Panoramix 3.0 at your fingertips. Install it today and experience the future of financial management! We can't wait to hear how Panoramix 3.0 helps you reach new heights.

- **Download with ease:** Simply click [here](#) to head to our download page and get started with the installation process today!
- **Master the installation:** Gain a deeper understanding with our in-depth [YOUiversity webinar](#). Released earlier this week, it provides a step-by-step guide to navigate you through the installation seamlessly.
- **Support at your fingertips:** Our dedicated support team is always available for any additional assistance you may require. Feel free to reach out directly at Support@PanoramixFinancial.com.

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. 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!

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

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

Friendly Reminder

Ameritrade and Schwab have completed all phases of their integration and are operating as one company on Schwab's technology platforms, they will be shutting down the Veo One[®] platform.

Veo One platform access and its associated sFTP data feeds will be discontinued on July 22, 2024.

Partner Spotlight: Betterment for Advisors



We're excited to introduce you to Betterment for Advisors, the modern all-in-one custodian that can help you scale your practice and deliver a personalized client experience with cutting-edge technology.

Betterment's advisor solution combines custody with software for digital client onboarding, automated trading and tax loss harvesting, and additional features like cash management and 401(k) services. With our new integration, all Betterment account information feeds into Panoramix for a seamless reporting experience.

Betterment's team is focused on pairing tech with dedicated service for every advisor. Firms that use their platform have access to a relationship manager, onboarding and implementation specialists, an experienced customer support team, and more.

With Betterment, you can say goodbye to inefficient workflows and poor service. [Learn more here](#) about how you can save time, cut administrative costs, and grow better with an all-in-one custodian.

Non-paid non-client of Betterment. Views may not be representative, see more reviews at the [App Store](#)

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, June 11th, 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](#).

Open and Shut Case: Fixing Accounts Left Open in Panoramix

Have you ever noticed an account seemingly hanging around in Panoramix even though your custodian says it's closed? This can happen because some custodians exclude inactive accounts from their daily downloads. Here's a quick guide to ensure your Panoramix records stay clean:



1. **Find the Account:** Locate the closed account in the Accounts list of your Portfolio Dashboard.
2. **Mark it Closed:** Right-click and select "Close Account" from the menu. Choose the appropriate closing date and confirm.
3. **Recalculate Performance:** Right-click again and select "Recompute Performance" to remove any post-closure history.
4. **Prevent Future Downloads:** Open the "Edit Account" screen and check the "Do not download" box under Download Information. This stops any late transactions from messing with your closed account data.
5. **Save the Changes:** Click "Save" to keep your Panoramix records accurate and tidy!

Following these steps ensures your closed accounts are properly reflected in Panoramix, giving you a clearer picture of your overall portfolio performance.

Panoramix Webinar: Unveiling Our Growth and Your Future Success!

It's Here! 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, demonstrating how you can 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:

- 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**

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

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