

Are you looking for an additional custodian or interested in seeing what's available? Join us on August 1st to hear how Betterment's cutting-edge technology can help you scale your practice and deliver a high-quality, personalized client experience. We have a new integration with Betterment and we will be demonstrating their platform in this joint webinar!

When: Thursday, August 1st, at 1:00 PM Central

**Reserve Your Spot
Now!**

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, August 13th, 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](#).

Managing Users in the Client Portal

Need help managing users in your client portal? We've got you covered! Today, we're diving into the steps to add and remove users.



Who can make changes?

Only advisors can modify user access within the client portal tab of a contact's information and of course your handy dandy Panoramix Support team can help.

Adding and removing users:

You'll want to add a new user when a client is setting up their portal for the first time or if their email address changes.

1. Locate the client and click **"Edit"** in their contact information.
2. Go to the **"Client Portal"** tab.
3. Click **"Add User"** and enter the new email address.
4. Click **"Send Invitation."** The client will receive an email to set a password. Once the password is set, the client can access the portal.
5. If a client's email address changes, you'll need to remove the old email

address after adding the new one. Highlight the old email address and click "**Remove Access.**"

Important: The invitation link and portal login link are different and invitation links do expire, so be sure to bookmark the correct one.

And that's it! All the client's documents and reports will be accessible through the new email address.

Do you have any questions about managing users in the client portal? Let us know!

— 10TH ANNUAL — 2024 Wealth Management.com Industry Awards

Panoramix named a 2024 Wealth Management Awards Finalist in three categories!

Three Times a Charm!

Panoramix is thrilled to announce that we've been named a finalist in three categories of the 2024 Wealth Management Industry Awards! We're honored to be recognized for our work in Compliance, Retirement Planning, and Workflow Automation. Check out the full list of finalists [here](#).

Nominated for:

- **Technology Providers: Business Support Systems Workflow Automation**
- **Technology Providers: Compliance**
- **Technology Providers: Retirement Income Technology**

Plan Ahead: Our Summer Holiday Schedule

Heads up! We'll be closed one more holiday this summer:

- 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 AM CST.
- [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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