

August 29, 2024

NEWS & UPDATES



Back-to-School Tech Upgrade ☐ ☐

As the first bell rings and students head back to class, it's essential to ensure your technology is equipped for the academic journey ahead. **Panoramix 2.0 will be officially retired on September 8th, 2024.** While Panoramix 3.0 is primarily being tested on Windows 11, you can still use it on Windows 10.

Why Windows 11?

Because Windows 10 and 11 are similar in design, Panoramix 3.0 should function smoothly on both operating systems. However, there's a small chance you might encounter minor bugs or discrepancies on Windows 10 that weren't discovered during our testing on Windows 11.

If you encounter any issues on Windows 10, please let us know and we'll do our best to resolve them promptly.

Please ensure you're familiar with the new platform to avoid any disruptions to your workflow. If you haven't already, [Install](#) Panoramix 3.0 now!

And check out all **Release Notes** [Here](#).

☐ Panoramix Celebrates 9th Anniversary: Back to School for Your Billing and Performance Needs!

Panoramix Financial is celebrating its 9th anniversary and feeling extra sharp! We're grateful for our Panoramix team, our advisors, and our strategic partners. Working together makes us better every day. Just like a good back-to-school supply list, our team has all the tools and knowledge you need to achieve your billing and performance needs! Don't hesitate to reach out for any support. We are always happy to help! Email our Support team at: Support@PanoramixFinancial.com.

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

Back-to-School Success: Panoramix Nominated for Industry Awards

As we head back to school and count down to the Wealth Management Awards ceremony in September, we're thrilled to have been nominated for multiple 2024 Wealth Management Industry Awards!

We're honored to be recognized for our contributions to Compliance, Retirement Planning, and Workflow Automation. Your trust and support have been instrumental in our success.

Click [here](#) to see the full list of finalists and learn more about these prestigious awards.

Let's make this school year a success together!

Q&A Live! Back-to-School Panoramix Support Open Forum

Are you feeling test-anxious about using Panoramix? Don't worry, we've got

you covered! Join our **free Q&A session** and get your questions answered by our expert teachers!

When: Tuesday, September 10th, 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](#).

Back-to-School Panoramix Tips: Ace Your Batch Report Delivery

Feeling a little lost in the Batch Report maze? Don't worry, we've got your compass. Here are some top-notch tips to help you ace your Panoramix Batch Report delivery game.



- **Set the Stage for Success**

To ensure each client's preferred delivery method is set, double check your work! Go to Data tab > **Edit Contact Delivery Options**, click the Load button, select your client's preferred delivery method then click Save.

- **Creating the Report Group and Adding Reports.** (If you already have your batch report groups, skip this step)

Go to **Reports tab > Batch Reports > Generate Reports tab** Click the **hamburger icon** next to "Report Groups." Select **Add** and name your new report group. Now select your newly created batch report group from the list on the right. Click the **hamburger icon** next to the "Reports" heading, click **Add** and Select the report from the dropdown menu, configure your parameters and click the green **Save** button to add them to your group.

- **Delivery Options: The Good Stuff!**

In order for the **Use Delivery Options** to work properly, you also need to check the desired delivery methods, these are (check all that apply):

Save to User Folder. Saves reports to the client's online portal.

Save to Local Folder. Saves reports to your local computer.

Email Reports: Sends reports via email.

*Once you have selected the delivery methods, don't forget to also check the "Use Delivery Options" check box.

PRO TIPS:

* If you only want to **only save reports locally**, select "Save to Local Folder" and

do not select "Use Delivery Options."

*To avoid reports for clients with \$0 accounts, check the "Skip Clients with \$0 Accounts" option under Report Filter > MISC.

Want more information check out our [Group and Batch Reporting Quick Reference Guide](#) or the [Group & Batch Report Manual](#).

The screenshot shows the 'Reports' settings page. The 'Report Options' panel on the left contains several settings: 'Group by Household' (unchecked), 'Save to User Folder' (unchecked), 'Save to Local Folder' (unchecked), 'Email reports' (checked) with a 'CC to' field, 'Additional Delivery Options' (unchecked), 'Run as of EOM' (unchecked), 'Use Delivery Options' (unchecked), 'Generate all reports in Landscape mode' (unchecked), and 'Insert file before each contacts' reports' (unchecked). The 'Report Filter' panel on the right has tabs for 'Contacts', 'Accounts', and 'Misc'. Under the 'Misc' tab, there are checkboxes for 'Clients Only' (unchecked) and 'Skip Clients with \$0 Accounts' (unchecked).

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](#)

[View Webinars](#)

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