



September 19, 2024

NEWS & UPDATES



Panoramix 3.0: A Check-In

How's the transition going?

Now that Panoramix 2.0 is officially retired, we're curious to hear your thoughts on Panoramix 3.0. Have you encountered any challenges or issues? Is the new platform meeting your expectations?

Share your feedback:

- **Success stories:** Have you achieved any positive outcomes or efficiencies using Panoramix 3.0?
- **Challenges:** Are there any areas where you're facing difficulties or frustrations?
- **Feature requests:** What features or improvements would you like to see added to Panoramix 3.0?

Share Your
Feedback

Your insights are valuable to us as we continue to refine and enhance the platform. And check out all **Release Notes** [Here](#).

Partner Spotlight: Apex Advisor Solutions

APEX

Advisor Solutions™

Meet **Apex Advisor Solutions**, a division of Apex Fintech Solutions, which empowers the future of wealth management with an advanced tech ecosystem, including digital custody and clearing provided through Apex Clearing Corporation. Focused on helping advisors unlock new paths to organic growth, these solutions include the next-level advisory UI, Apex Astra™, and API-enabled collaborations.

Launched in June 2023, the **Panoramix/Apex integration** enables fully digital account opening and funding via online ACH transfers, automatically generates deposits and withdrawals, and enables clients to move money through the Panoramix portal. Clients will receive related documents, such as tax information, account statements, and trade confirmations. Additionally, advisors may directly submit billing information and management fees from Panoramix to Apex. Trading, facilitated via Apex APIs, enables advisors to deliver trades directly from Panoramix to Apex, while electronically monitoring trade confirmations.

Questions about these new capabilities? Reach out to **Jim Schwieters** at 612.423.4427 or Jim.Schwieters@PanoramixFinancial.com or **Megan Hausmann** at mhausmann@apexfintechsolutions.com

Our CEO Chris Hastings, reflects on sunsets and new beginnings. ☐

Reflections from Side Lake offers a poignant exploration of life's sunsets, both literal and figurative. As our CEO bids farewell to Panoramix 2.0 and his time at the tranquil Side Lake, he delves into the bittersweet beauty of endings and the anticipation of new beginnings.

Check out his last "Reflections from Side Lake" LinkedIn post for 2024.

[Read more](#)



Q&A Live! 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, October 8th, 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](#).

Blotter Buddies: A Quick Guide to Panoramix Blotters

What are Blotters?

Blotters are customizable lists that help you generate ad hoc reports in Panoramix. They're like versatile tools

that can be tailored to your specific needs.



How to Use Blotters

1. **Identify the right blotter:** Choose from the various blotter options available by going to Home Tab> Blotter and viewing the list of blotters on the left of your screen.
2. **Set your criteria:** Use filters and operators to refine your search. For example, you might filter by date, location, or specific values.
3. **Customize your view:** Select the fields you want to display and how they're organized.
4. **Perform calculations:** Use functions like SUM, AVERAGE, or COUNT to analyze your data.
5. **Save your setup:** Create a saved configuration for future use.

Example: Finding Clients Over 75 with \$1M+ AUM

To answer this complex question, we used the **Holdings blotter**. We filtered by age, location, and asset value, then calculated the total assets per household.

Use our awesome step by step [Blotter Buddies: Episode #1](#) video to lead you through this example.

Key Takeaways

- Blotters are powerful tools for generating custom reports.
- Experiment with different blotters and filters to find the best approach for your needs.
- Save your setups to streamline future reporting tasks.

Plan Ahead: Our Fall & Winter Holiday Schedule*

Heads up! We'll be closed for the following holidays :

- MEA Weekend, October 17th & 18th (Light Staff)
- Thanksgiving, November 28th & 29th
- Christmas Eve, December 24th (Half Day)
- Christmas, December 25th
- New Year's Eve, December 31st (Half Day)
- New Years Day, January 1st

Enjoy the festive cheer and cozy nights, and be sure to check back for more holiday updates!

Missed our last newsletter?

No worries! Here's a quick recap of what you missed in our previous issue:

- **Panoramix 2.0 retired:** Upgrade to Panoramix 3.0.
- **Panoramix Financial celebrates 9 years:** We're here to help.
- **Panoramix nominated for awards:** Thank you for your support.

Read more: [August 29th Newsletter](#)

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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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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