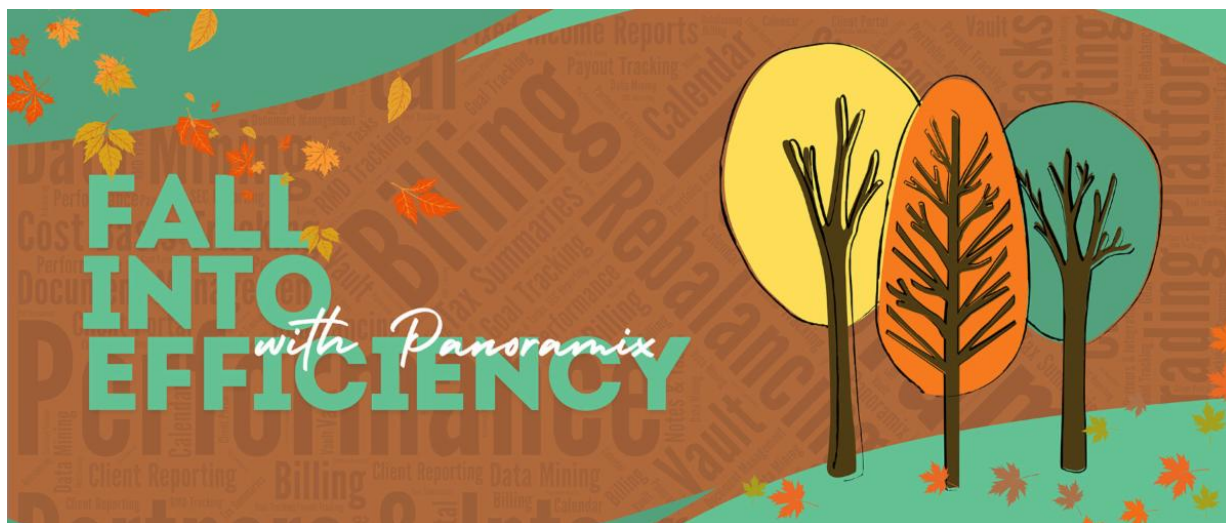




October 10, 2024

NEWS & UPDATES



Leaves are falling, and so are updates!

Panoramix 3.0.17 is here, bringing a fresh batch of improvements to your billing experience. Don't miss out on the latest features – be sure to restart your app to get the update. Have questions or need assistance with the new version? Our support team is ready to help. Contact us at Support@PanoramixFinancial.com or (877) 595-3282.

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](#).

Fall Foliage of Conferences: Panoramix's Upcoming Events



Heading to XYPN in Minneapolis! Excited to connect with financial advisors from around the country at the XYPN Conference in Minneapolis on October 16th! We'll be diving deep into the latest trends and best practices in financial planning. Looking forward to learning, networking, and bringing back valuable insights to our clients. See you there!

What's Next?

We're excited to be part of IMPACT 2024 in San Francisco! As Charles Schwab has said, "IMPACT is heading to San Francisco, and we're as excited as ever to support you as you serve your clients." We'll be there November 19-21, connecting with financial advisors and learning about the latest industry trends. Stop by our booth and say hello! We can't wait to see you there.

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, November 12th, 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 Episode #2:

Blotter Overview in Panoramix

Blotters are a crucial tool in Panoramix for ad hoc querying and reporting. They allow you to access and analyze various data points related to your clients, transactions, accounts, holdings, and more.



Key Blotters and Their Functions:

- **Transaction Blotter:** Focuses on transactions like buys, sells, dividends, and distributions. It can be used to analyze fund movement activity for individual clients or across your entire book of business.
- **Accounts Blotter:** Provides a snapshot of your book of business as of a specific date. You can use it to answer questions about account exclusions, fee overrides, and account characteristics.
- **Holdings Blotter:** Offers a more granular view of your holdings, including exposures by security type, asset class, or model. It's useful for analyzing account allocations and identifying potential risks.
- **Contacts Blotter:** Contains information about your clients and other contacts. You can use it to search for contacts based on various criteria, such as job title or location.
- **Households Blotter:** Provides a roll-up view of household information, including member count and portfolio value.
- **Performance Blotter:** Offers a Gibbs-compliant view of performance across your book. You can analyze performance by account, category, group, or model.
- **Fees Blotter:** Helps you understand the fees charged to your clients. It provides information on fees by account, household, or other criteria.

Remember: Each blotter has its own specific use cases and functionalities. By understanding how to use these tools effectively, you can gain valuable insights into your business and better serve your clients. For more info, check out our [Blotter Buddies: Episode #2](#) video for a deeper dive into blotters and how to maximize their use.

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 3.0 Feedback:** They're looking for feedback on the new Panoramix platform. Share your successes, challenges, and feature requests.

- **Panoramix/Apex Integration:** A new integration with Apex Fintech Solutions enables digital account opening, funding, and trading functionalities directly through Panoramix.
- **CEO Reflection:** CEO Chris Hastings reflects on the transition from Panoramix 2.0 and shares a "Reflections from Side Lake" post on LinkedIn.
- **(Bonus) Blotter Buddies:** A quick guide on using Panoramix Blotters for generating custom reports.

Read more: [September 19th, 2024 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

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.

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