



October 31, 2024

NEWS & UPDATES



Happy Hauntingly Productive Quarter! ☐

Just like a spooky season surprise, we've been hard at work behind the scenes to bring you some frightfully fantastic updates to Panoramix 3.0.18.0! Get ready to be spooked by our latest enhancements and bug fixes!

Here are a few of our favorite treats:

- **Enhanced Customization:** Greater control over file names for batch reports and fee statements.
- **Improved Portfolio Analytics:** New Portfolio vs. Benchmark chart for deeper insights.
- **Bug Fixes:** Resolved issues with account rebalancing and data imports.

Click [here](#) to see the full list of ghostly goodness.

Panoramix 3.x: A Howling Success!

Panoramix 3.x Release Fuels Record Sales Quarter! We're thrilled to share some exciting news: Panoramix 3.x has been a huge hit! In fact, the month following its release was our best sales month ever, all thanks to new clients choosing Panoramix.

Key Features of Panoramix 3.x

- **Enhanced Reporting:** Create more visually appealing and informative client reports.
- **Automated Billing:** Streamline billing processes and save time.
- **Seamless Integrations:** Connect with other tools to improve efficiency.
- **Improved Security:** Protect sensitive client data with advanced security features.
- **User-Friendly Design:** Navigate the platform with ease.
- **Faster Performance:** Experience quicker processing times.

Your decision to partner with Panoramix puts you ahead of the curve. With our cutting-edge technology, you're well-equipped to boost efficiency, drive growth, and deliver exceptional client experiences. Thank you for choosing Panoramix!

See the full Press Release [here](#).

Haunting Happenings: Panoramix's Upcoming Events



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.

What's around the corner?



Don't miss the T3 Technology Conferences 2025, the ultimate Halloween treat for financial advisors. Dive into the latest tech trends, network with industry leaders, and learn how to boost your practice. Panoramix will be there!

Early Bird Rate Extended!

Register by November 27th and use code **Sapphire200** to save \$200 on your Financial Advisor registration (Early Bird-\$999, Standard-\$1099).

Click [here](#) to register and unlock your spooky savings!

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](#).

Spooky Logo Swap

Want to give your reports a frightening new look?

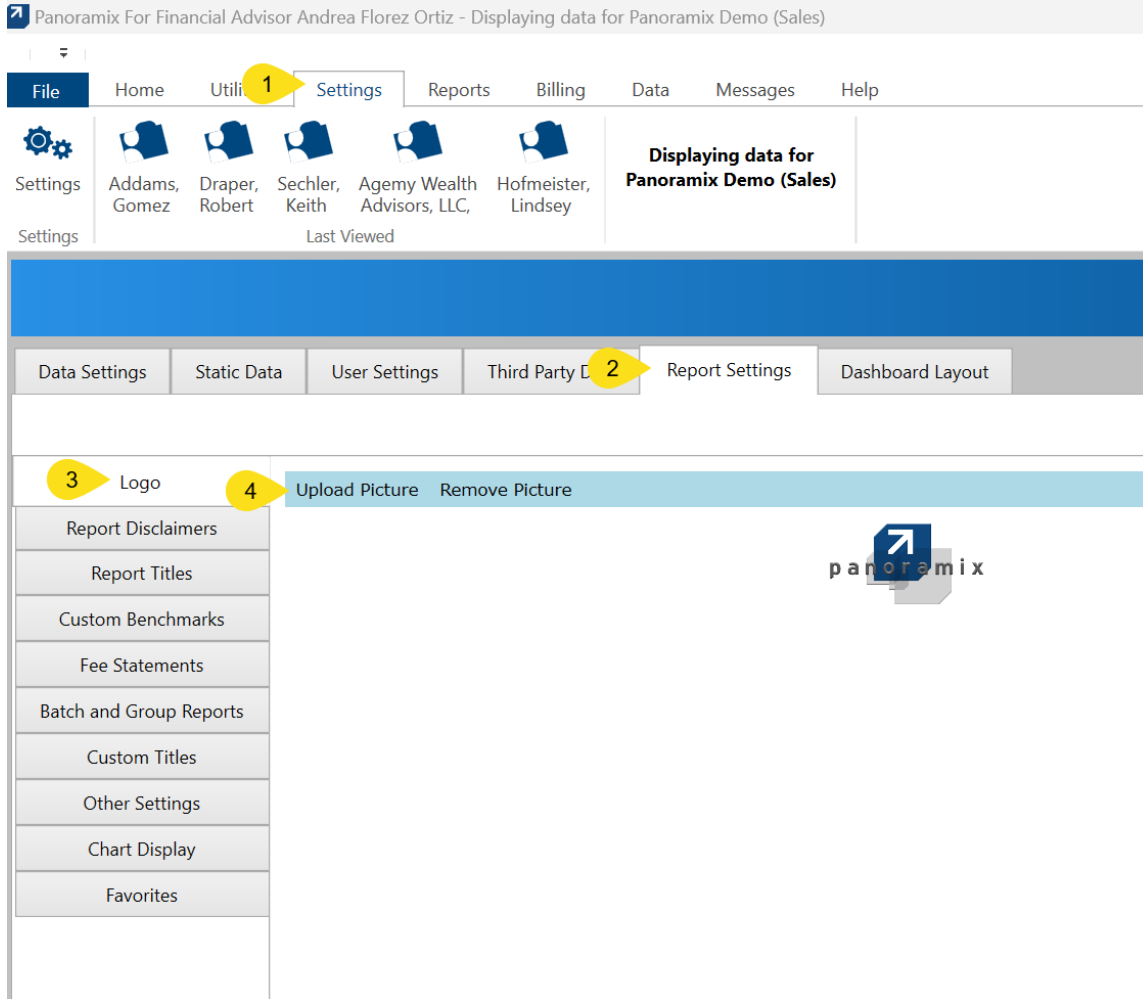
Swap out the old Panoramix logo for your own ghoulish creation! Just head over to the **Settings** tab (1), **Report Settings** tab (2) , select the **Logo** section (3) on the left and use the spooky **Remove Picture** and **Upload Picture** (4) buttons to add your new logo.



A few things to note:

A **PNG** file is the most boo-tiful choice for your logo. It's a real treat for your reports, as it's both efficient and maintains color integrity. Plus, it's the fastest loading format, so you won't have your readers waiting around like a scaredy-cat.

Your logo can be in .JPG, .BMP, or .PNG format. While BMP files can be a bit of a monster to work with, and JPEG files aren't the best for logos, a PNG file is the perfect spellbinding solution. Ideally, your PNG file should be around **300 pixels wide**.



Plan Ahead: Our Fall & Winter Holiday Schedule*

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

- 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 3.0.17 is now available!** bringing a fresh batch of improvements to your billing experience.

- **Fall Foliage of Conferences:** Panoramix's Upcoming Events, IMPACT 2024
- **Q&A Live! Panoramix Support Open Forum:** Coming up 11/12/2024! Register now to get your questions answered!
- **(Bonus) Blotter Buddies #2:** Blotter Overview in Panoramix

Read more: [October 10th, 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.

Is the content of this email relevant to you?

Yes

No

Give More
Feedback

Sapphire Software Services | 1470 Englert Rd | Eagan, MN 55122 US

[Unsubscribe](#) | [Update Profile](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!