

November 26, 2024

NEWS & UPDATES



A Bountiful Harvest of Updates: Panoramix 3.0.20 is Here!

Happy Thanksgiving from the Panoramix team! We're grateful for your continued support and trust. This month, we've been hard at work to bring you a more robust and reliable Panoramix experience.

This latest release brings a host of improvements and bug fixes, including:

Enhanced Reporting and Billing:

- **Holding Summary Report:** Now provides granular details on individual holdings, offering flexible grouping and sorting options.
- **Remainder Fee Override:** Set a total household fee and bill the rest to AdvicePay or as an invoice.
- **RMD Blotter:** The RMD Remainder field has been added to provide more comprehensive RMD tracking.

Client Portal Enhancements:

- **Performance Visualization:** The "Performance Over Time" chart provides a visual representation of client portfolio performance.
- **Account Value Tracking:** The "Monthly Account Values" chart or data table offers insights into account value fluctuations.

Expanded Integration and Import Support:

- **Altruist Trade File Exports:** Enhanced integration with Altruist to streamline data transfer.
- **Brokerage Import Updates:** Improved support for new transaction types from Schwab, TradePMR, Apex, Pontera, and DST.

Bug Fix:

- **Client Portal Link:** Resolved an issue causing a broken link on the client portal.

We hope these enhancements make your financial journey smoother and more efficient. As always, we welcome your feedback and suggestions.

Click [here](#) to see the full Release Notes.

Panoramix: Your Secret Weapon for Tax Season

In November's YOUNiversity webinar, we unveil the hidden power of Panoramix to simplify your tax planning process. Discover how to leverage its robust tools to efficiently manage RMDs, analyze income and capital gains, and identify tax-saving opportunities.

Key Takeaways:

- Master the RMD Blotter and other powerful tools.
- Optimize your tax strategy with data-driven insights.
- Stay ahead of tax changes with Panoramix's future enhancements.

Remember: While Panoramix empowers you, consulting with tax professionals is essential for personalized advice. Watch the full webinar [here](#).

What's around the corner?



Panoramix will be flying out to Dallas, TX in 2025 for the T3 event for financial advisors and technology innovators. This in-person gathering brings together industry leaders to advance tech adoption, keep advisors ahead of the curve, and deliver better outcomes for the financial advice industry. We encourage all advisors to attend! We'll see you 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).

To register and unlock your savings click [here](#).

Take the 2025 T3/Inside Information Software Survey

Have you ever wondered how your firm's tech stack compares to others in the industry? Now's your chance to provide valuable insights and help shape the future of financial technology. [The 2025 T3/Inside Information Software Survey](#) is a quick and easy way to rate the software and services you use on a scale of 1-10. Your feedback will help identify industry trends, best practices, and areas for improvement.

Click [here](#) and take the survey today!

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, December 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](#).

New File Naming Flexibility for Batch Reports!

We heard your frustrations! No more headaches with unchangeable batch report file names. Our amazing development team has created a super flexible system to meet your needs.



Want more control? Now you can customize the file names to perfectly match your filing system.

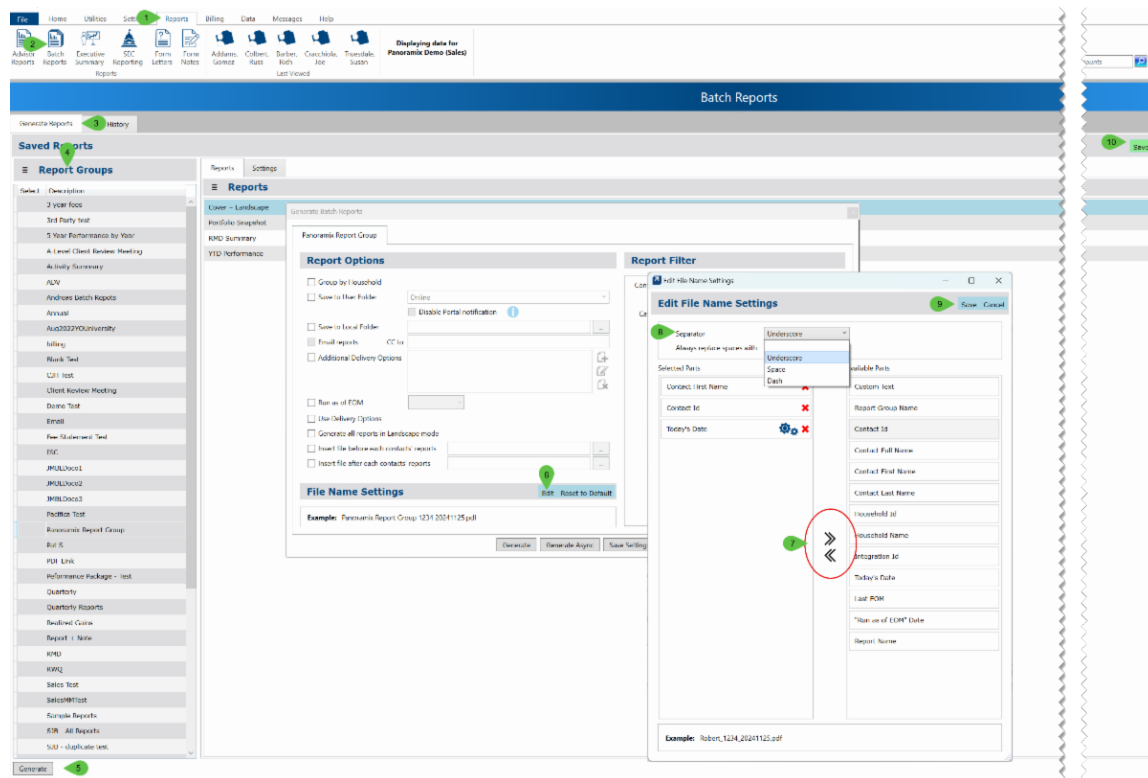
Here's how it works:

- Go to **Reports > Batch Reports > Generate Report** tab.

- Choose your desired reports and click **"Generate."**
- In the "Generate Batch Reports" window, find "File Name Settings" and click **"Edit."**
- Build your ideal file name! Use the arrows (you can drag and drop too!) to move elements like Contact ID, Contact Name, Household Name, and date into the "Selected Parts" section.
- Drag and drop to arrange the order within "Selected Parts."
- Spice it up! Add separators like underscores, dashes, or spaces.
- See a live preview in the "Example" section.
- Click **"Save"** when your masterpiece is complete.

That's it! Now your batch reports will have clear, organized file names that make sense for you.

Still have questions? Contact our friendly support team at support@panoramixfinancial.com.



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 3.0.19 Update!** bringing a fresh batch of improvements to your billing experience.
- **Panoramix 3.x: A Success!** Panoramix Press Release
- **Q&A Live! Panoramix Support Open Forum:** Join the support forum! Register now to get your questions answered!
- **Logo Swap:** Give your Panoramix a new look!

Read more: [October 31st, 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!



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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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