

December 19, 2024

NEWS & UPDATES



A Frosty Flurry of Updates: Panoramix 3.0.21 Has Arrived!

As the winter chill sets in and snowflakes begin to dance in the air, we're here to warm your month with the latest highlights, insights, and news from Panoramix. Cozy up with a cup of cocoa as we share updates, key dates, and helpful tips to inspire you through the season. Let's unwrap what's new and noteworthy this month!

This month's enhancements and fixes bring exciting updates to help you work smarter and more efficiently:

- ***New Dashboard Widgets:** Easily manage data with the Editable Custom Fields Contact Dashboard widget and gain insights with the Household Allocation Advisor Dashboard widget.
- ***Enhanced Reporting:** The RMD Summary report now includes the RMD Remainder, and Security Type has been added to the Security Cost Basis Blotter for better tracking.
- ***Improved Integrations:** Introducing the Altruist Billing Export File and updates to the TradePMR import to handle new transaction types.

- ***Two-Factor Authentication Update:** Enjoy greater flexibility by choosing from multiple authentication methods—email, text, or authenticator app—at login. (See our Insider Tips section for more info!)
- ***Bug Fixes:** Resolved issues with Client Portal layouts, symbols in models, and more to ensure smoother performance.

We hope these updates make your financial journey even smoother and more efficient. As always, your feedback and suggestions are invaluable to us—keep them coming!

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

Help Shape the Future of Financial Tech – Take the 2025 T3/Inside Information Software Survey

As the winter winds bring reflection and planning for the year ahead, now's the perfect time to contribute to the evolution of financial technology. Ever wondered how your firm's tech stack measures up? Here's your chance to find out—and to make your voice heard!

The **2025 T3/Inside Information Software Survey** is your opportunity to rate the software and services you rely on daily, including Panoramix! We're always striving to be the best in the business, and your feedback plays a vital role in shaping the tools that drive success for financial professionals like you.

In just a few minutes, your insights can help uncover industry trends, highlight best practices, and spark innovation for the future.

Let's make this season one of collaboration and growth. [Click here to take the survey today](#), and let us know how Panoramix stacks up for your firm! Together, we'll build a brighter, smarter future for the financial world.

Panoramix is Heading to Sunny Dallas for T3 2025 – Let's Connect!



While much of the country may be bundled up this winter, Panoramix is heading to the warmth of Dallas, TX, in 2025 for the T3 event for financial advisors and technology innovators. This dynamic in-person gathering brings together top industry leaders to explore cutting-edge solutions, drive tech adoption, and deliver better outcomes for the financial advice industry.

It's an unmissable opportunity to stay ahead of the curve, gain fresh insights, and connect with fellow professionals shaping the future of financial technology.

We encourage all advisors to join us in sunny Dallas—where big ideas and innovation are always in season. See you there! ✨

✨ Early Bird Rate Extended – Warm Up to Big Savings!

Don't miss out on the chance to save this winter! Register now and use code Sapphire200 to save \$200 on your Financial Advisor registration.

Early Bird Rate: \$999
Standard Rate: \$1099

Act fast and secure your spot before the savings melt away!

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

Important Cybersecurity Notice

At Panoramix, protecting your data is our top priority. As part of our commitment to cybersecurity, we've implemented measures to block foreign IP addresses and those flagged in over 40 cybersecurity databases. While these protections enhance security, they may cause issues if you're using certain VPN clients.

If you encounter login difficulties, here's what you can do:

1. **Disable VPN Temporarily:** If your network is secure (e.g., behind a firewall or secured router with strong WEP), you can turn off your VPN while working in Panoramix. However, ensure this complies with your company's security policy.
2. **Recycle Your VPN:** Restart your VPN to obtain a new IP address and try again. This may not always work and could require multiple attempts.
3. **Switch VPN Providers:** Use a different VPN service to see if it provides a usable IP address. Be mindful of your company's security requirements when doing so.
4. **Request Temporary Whitelisting:** Email your IP address to Support@PanoramixFinancial.com to request a temporary whitelist. This

process may take up to two hours and is valid for 48 hours or until your VPN changes the IP. Any suspicious activity will result in immediate blocking by our hosting partner.

We're actively working on long-term enhancements to improve this process while maintaining robust security. Thank you for your understanding as we prioritize safeguarding your data. For more details, feel free to reach out to our support team.

✳️ Q&A Live! Panoramix Support Open Forum – Start the New Year Right!

Kick off the year with our free monthly **Panoramix Q&A session!** Connect with the experts, get your questions answered, and uncover tips to make the most of your software. Whether you're fine-tuning your workflow or exploring new features, we're here to support you every step of the way.

When: Tuesday, January 14th, at 1:00 p.m. Central

Where: Microsoft Teams

Reserve Your Spot
Now!

(If you've registered in the past there is no need to register again.)

And don't forget—you can revisit all our prior webinar recordings anytime in the [Help Guides Here](#). Bring your questions and your winter spirit, and join us for a session designed to empower your success! ❄️

✳️ Enhanced 2FA Options – Security with Flexibility

This winter, we're excited to roll out an update to **Two-Factor Authentication (2FA)** in Panoramix, making your login experience more secure and flexible than ever!



Why is 2FA so important? It adds an extra layer of security by requiring not just a password, but also a second step (like a code from your phone) to access your account. This significantly reduces the risk of unauthorized access—even if someone has your password.

Now, instead of being limited to one authentication method, you can choose from **email, text, or an authenticator app** each time you log in. This added

convenience ensures your account stays safe while giving you the freedom to pick the method that works best for you.

Here's how to enable and manage your 2FA settings:

1. Go to **Settings > User Settings > Password and Login**.
2. **Enable 2FA:** Check the "Enable Two-Factor Authentication (2FA)" box if you haven't already.
3. **Set Up Your Methods:** Select your preferred 2FA methods by checking the boxes next to email, text, and/or authenticator app.
4. **Verify:** Enter your information for each method, click the **Verify** button, and wait for the green check mark to appear.
5. **Save Changes:** Once your methods are verified, click the green **Save** button in the top-right corner.

The screenshot shows the 'Settings' page for a user named 'Coolidge, Calvin'. The 'User Settings' tab is active, and the 'Password and Login' sub-tab is selected. The 'Enable Two-factor Authentication (2FA)' checkbox is checked. A red box highlights the 2FA methods section, which includes 'Email', 'Text', and 'Authentication App'. Each method has an 'Enabled' checkbox, a 'Primary' radio button, and a 'Verified' status with a green checkmark and a 'Verify' button. A red arrow points to the 'Enable Two-factor Authentication (2FA)' checkbox, and a green checkmark is shown next to it.

At login, simply click the **"Try another method"** box to choose how you'd like to authenticate and follow the prompts.

This update makes staying secure as simple and adaptable as layering up for a winter day. Take a moment to adjust your settings and enjoy the flexibility of picking the method that suits you best. Stay safe, stay warm, and stay secure! ❄️

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

Plan Ahead: Our Winter Holiday Schedule ❄️

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

- 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? Here's what you missed:

*Panoramix 3.0.20 Update Highlights:

- Enhanced reporting features, such as the RMD Blotter and Holding Summary Report.
- New tools for account value tracking and performance visualization in the Client Portal.
- Expanded integration support with Altruist, Schwab, and others.

*YOUiversity Webinar Recap:

- Key tips for leveraging Panoramix during tax season, including mastering the RMD Blotter and optimizing tax strategies.

*Exciting Upcoming Event:

- Panoramix is heading to the T3 Conference in Dallas, TX, in 2025—mark your calendar to join us!

*New File Naming Flexibility for Batch Reports:

- Customize batch report names to suit your filing system with an easy-to-use interface.

Read more: [November 26th, 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](#)

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