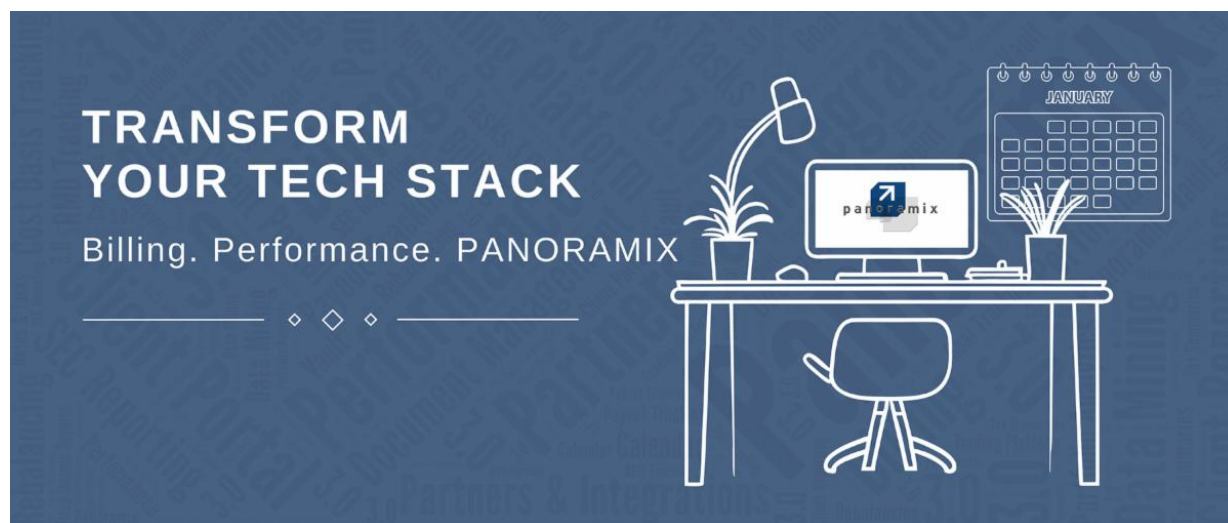




January 16, 2024

## NEWS & UPDATES

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### A Sparkling Start to 2025: Panoramix 3.0.24 Has Arrived!

Happy New Year! We're excited to kick off 2025 with some exciting updates from Panoramix. To help you hit the ground running in 2025, this month's enhancements and fixes are designed to bring fresh energy and innovative tools to your workflow, helping you start the year strong.

We're thrilled to introduce several new features to enhance your experience, and here are a few highlights:

- **Household-Level Account Performance:** The Account Performance Tile now offers the flexibility to display data at the household level, providing a more comprehensive view of client performance.
- **Single Account View on Performance Reports:** You can now easily view the performance of individual accounts within the Year-to-Date (YTD) performance report, giving you a more granular understanding of client portfolios.
- **Manual Risk Score Input:** Enhanced flexibility with the ability to manually add risk scores to both contacts and accounts, allowing for more

customized risk assessments.

- **Mobile Device Compatibility:** Resolved an issue that prevented the Panoramix web app from displaying correctly on mobile devices, ensuring seamless access and a user-friendly experience across all platforms.

We hope these updates add a fresh spark to your financial journey, making it smoother and more efficient than ever. Your feedback and suggestions are the fireworks that light our path forward—keep them coming!

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

### **Be a Trailblazer in Financial Tech – Join the 2025 T3/Inside Information Software Survey Today!**

We welcome a brand-new year brimming with potential, now's the perfect time to contribute to the evolution of financial technology. Ever wondered how your firm's tech stack measures up? This is your chance to find out—and to make your voice heard as we set the stage for innovation in 2025!

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

We understand that your time is valuable. The T3 survey is an important industry initiative, and your participation helps drive positive change in the financial technology landscape.

[Click here to take the 2025 T3 survey today!](#)

Let's kick off 2025 with collaboration and growth. Let us know how Panoramix stacks up for your firm! Together, we'll build a brighter, smarter future for the financial world.

**T3 2025: The Panoramix Team is Ready for Dallas!**

As we embark on a new year filled with promise, Panoramix is thrilled to announce our presence at the T3 event in sunny Dallas, TX. This premier gathering for financial advisors and technology innovators will set the stage for a successful 2025. Join us as we explore groundbreaking solutions, champion tech adoption, and pave the way for a brighter future in the financial advice industry.

T3 is the perfect opportunity to gain valuable insights, connect with industry leaders, and kickstart your year with a renewed sense of purpose. Let's embrace the spirit of new beginnings and shape the future of financial technology together in Dallas.

### **Kick Off 2025 with Big Savings – Exclusive Discount for Panoramix Users!**

As a valued Panoramix user, you're eligible for a special discount on your Financial Advisor registration.

**Discounted Rate: \$999**

**Regular Rate: \$1099**

[Register now](#) and use code **Sapphire200** to save **\$200** on your Financial Advisor registration!

### **New Year, New Connections: Follow Panoramix on LinkedIn!**



We're excited to connect with you on LinkedIn! Follow our company page to stay up-to-date on the latest Panoramix news, industry insights, and exciting developments.

Here's what you can expect to find on our LinkedIn page:

- Updates on our latest products and services
- Thought leadership pieces from our industry experts
- Insights into our company culture and values
- By following us on LinkedIn, you'll be the first to know about everything happening at Panoramix as we embark on this new year.

Click here to follow us: [Panoramix Financial](#)

We look forward to connecting with you on LinkedIn!

# 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, February 11th, 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.)

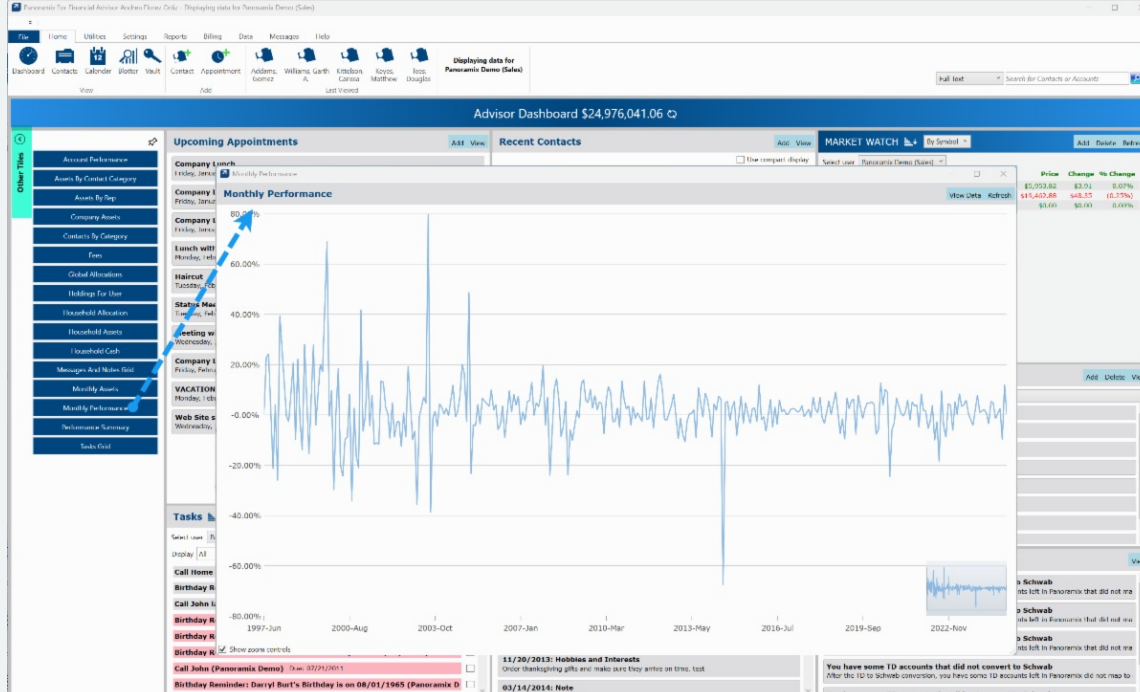
And don't forget—you can revisit all our prior webinar recordings anytime in the [Help Guides Here](#). Bring your questions and your New Year's resolutions for success, and join us for a session designed to help you succeed!

## Maximize Your Dashboard Experience

Your **Advisor Dashboard** is your personalized command center, built from customizable tiles that display key data. When you log in, it's the first screen you encounter. I encourage you to customize it to fit your specific needs and showcase the most important information for you.

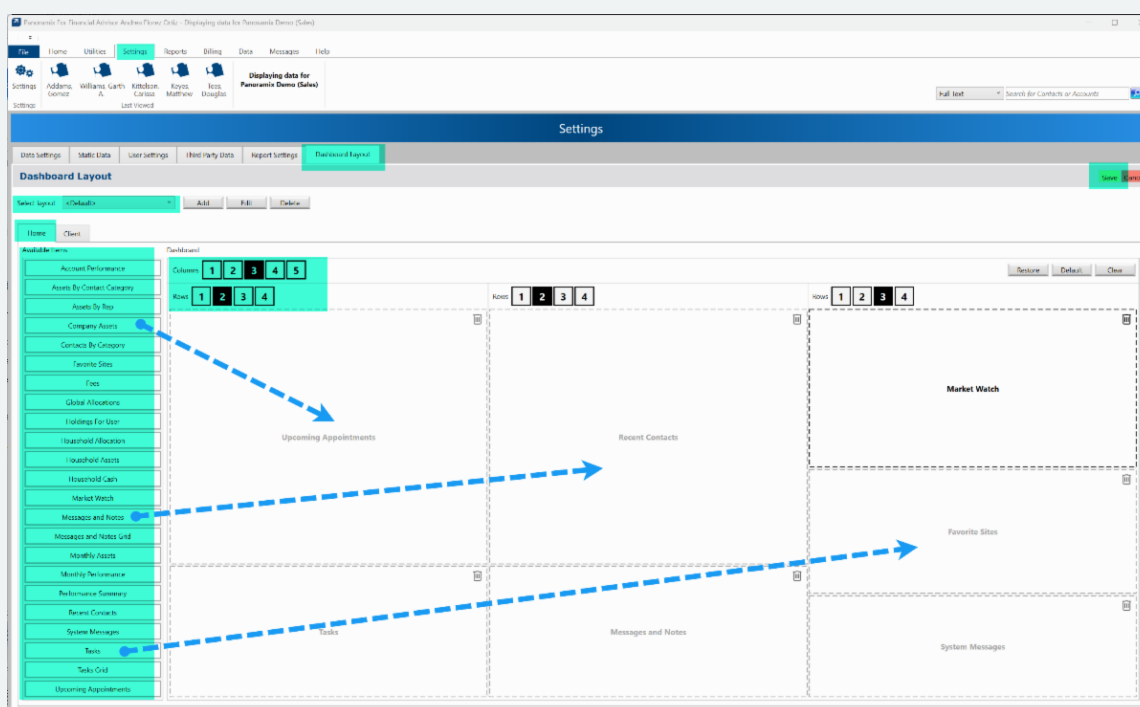


To explore all available tiles, simply click the arrow in the **"Other Tiles"** section on the right side of your screen. This expands the Tiles Menu, where you can browse options ranging from account performance to comprehensive performance summaries. To view any of the tiles, simply click on it and it will open in a separate window.



For permanent changes, navigate to **Settings > Dashboard Layout**. Here, you can create a new layout or modify the existing one. You can also customize the client dashboard within this section. To add new tiles to your layout, simply drag and drop them into your desired position. You can even adjust the size of each tile to fit your preferences, with up to 5 columns and 4 rows available.

**Keep in Mind:** While adding more tiles can provide valuable insights, it's important to be mindful of potential impacts on dashboard load times. Carefully consider the tiles you choose to add to ensure optimal performance. Once you've arranged everything perfectly, click "Save" in the top right corner to apply your changes!



I encourage you to experiment and discover how much easier it is to find the information you need. If you have any suggestions for new tiles that would be particularly valuable, please don't hesitate to let us know. For a deep dive into the tiles check out the [Tons of Tiles Webinar here](#).

Have questions? Contact our friendly support team at [support@panoramixfinancial.com](mailto:support@panoramixfinancial.com).

## Missed our last newsletter? Here's what you missed:

- **New Dashboard Widgets:** Enhance your workflow with new dashboard widgets for managing custom fields and analyzing household allocations.
- **Enhanced Reporting:** Gain deeper insights with improvements to the RMD Summary and Security Cost Basis Blotter reports.
- **Improved Integrations:** Benefit from enhanced integrations with Altruist and TradePMR, including support for new transaction types.
- **Two-Factor Authentication Update:** Increase account security with the option to choose from multiple two-factor authentication methods.
- **Bug Fixes:** Experience smoother performance with the resolution of various issues, including those related to the Client Portal and model symbols.

Read more: [December 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](mailto: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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