



Suspension of Competition Acquisition Request

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1. Fully describe the product(s) and/or service(s) being requested.

Panoramic Software offers PAPro, a web-based application specifically developed for Public Administrator's Offices. Hosted by Panoramic Software, PAPro provides a comprehensive system for case management, asset tracking, and estate accounting for persons who have died intestate. It enables the Fresno County Public Administrator's Office to efficiently generate a variety of accounting reports, monitor appraised values for all case-related assets, and maintain detailed case notes. The system also enhances user accountability by tracking individual contributions and updates within each case.
2. Identify the selected vendor and contact person; include the address, phone number and e-mail address for each.

Panoramic Software Inc.
32932 Pacific Coast Highway
#14-482
Dana Point, Ca 92629
Primary Contact: Jeff von Waldburg, President and CEO
Email: jeff@panosoft.com
(877) 558-8526
3. What is the total cost of the acquisition? If an agreement, state the total cost of the initial term and the amounts for potential renewal terms.
 - One-Time Implementation: \$65,000.00
 - Data Conversion: \$50,000.00Support Services:
 - Years 1–3: \$2,500.00 per month for a total of \$90,000
 - Optional Years 4–5: \$2,625.00 per month for a total of \$63,000
 - Optional Custom development \$32,000Total Estimated Cost (Including Optional Years 4–5 and Custom Development): \$300,000.00
4. Identify the unique qualities and/or capabilities of the service(s) and/or product(s) that qualify this as a Suspension of Competition acquisition.

PAPro is a web-based application developed by Panoramic Software, designed specifically for Public Administrator offices. Unlike traditional server-based systems, PAPro's cloud-hosted platform allows users to access the system easily whether they are working remotely or on-site at a property. This flexibility is especially beneficial for fieldwork and supports greater file storage capacity. One of PAPro's standout features is its inventory tracking capability. Public Administrator staff can log and photograph estate assets directly on-site, while also tracking the location of each item throughout the case. The system automatically records user activity, including who is logged in and what changes are made, complete with timestamps. This creates a built-in audit log that enhances supervisory oversight and accountability. The platform also introduces functionality that was previously unavailable—such as the ability to upload photos and documents directly into specific sections of a case. This ensures that all case-related materials are stored in one centralized system, making them easier to locate and manage. Additionally, PAPro includes an internal messaging feature that allows users to assign tasks or requests to one another, helping to streamline workflow and improve communication.

During setup and implementation, users are assigned specific roles that define their access levels. This role-based access control is a critical security measure, ensuring that confidential information is only accessible to authorized personnel. PAPro represents a significant upgrade from the current system in use. It replaces outdated processes, such as dot matrix check printing, with more efficient laser-printed checks. The interface is also more user-friendly and intuitive, making it easier for staff to navigate and perform their tasks. Notably, Panoramic Software is one of only two vendors offering software tailored to Public Administrator offices. Over 90% of California counties have adopted PAPro. In contrast, the alternative vendor, Computrust, has seen limited adoption, with some counties opting to develop their own systems instead. The web version of Computrust—also used for the Fresno County Coroner's CME website—has been the subject of ongoing user complaints regarding functionality and reliability.

Given its modern features, strong user satisfaction, and widespread adoption, PAPro is clearly the preferred choice for modernizing the Fresno County Public Administrator's Office.

5. Identify from Administrative Policy #34 what circumstances constitute a Suspension of Competition.
- In an emergency when goods or services are immediately necessary for the preservation of the public health, welfare, or safety, or for the protection of County property.
 - When the contract is with a federal, state, or local governmental agency.
 - When the department head, with the concurrence of the Purchasing Agent, finds that the cost of preparing and administering a competitive bidding process in a particular case will equal or exceed the estimated contract amount or \$5,000 whichever is more.
 - When a contract provides only for payment of per diem and travel expenses and there is to be no payment for services rendered.
 - When obtaining the services of expert witnesses for litigation or special counsel to assist the County.
 - When in unusual or extraordinary circumstances, the Board of Supervisors or the Purchasing Agent/Purchasing Manager determines that the best interests of the County would be served by not securing competitive bids or issuing a request for proposal.

6. Explain why the unique qualities and/or capabilities described above are essential to your department.
- The implementation of PAPro is essential for our department to effectively manage our growing caseload and fully meet our responsibilities. With its modern user interface and robust features, PAPro will significantly improve our current workflow by reducing the time spent manually creating spreadsheets and forms for reporting purposes.

This upgrade is especially critical now, as our contract with the current vendor, CompuTrust, is nearing expiration. Without a replacement system in place, our department risks being left without the necessary tools to manage cases and perform estate accounting functions. PAPro offers a timely and comprehensive solution that ensures continuity of operations while enhancing efficiency and accountability.

7. Provide a comprehensive explanation of the research done to verify that the recommended vendor is the only vendor with the unique qualities and/or capabilities stated above. Include a list of all other vendors contacted, what they were asked, and their responses.

There are currently only two vendors that provide software specifically designed for Public Administrator offices: Panoramic Software and CompuTrust. This has been confirmed through conversations our staff have had with Public Administrator representatives from other counties during professional conferences. While a few counties have opted to develop their own custom systems, that approach is not feasible for our department due to the technical resources and long-term support such a solution would require. After a thorough evaluation process, we believe that PAPro, developed by Panoramic Software, is the best fit for our department's operational and reporting needs. We reviewed a detailed proposal, participated in virtual demonstrations, and had hands-on experience with a test environment of the PAPro system. The features and capabilities of the software align closely with our case management responsibilities and reporting requirements.

During our evaluation, we requested demonstrations of specific reporting functions—particularly those related to case notes—and Panoramic was able to show us exactly how those reports are generated within the system. They also provided a sample report for our review. Additionally, we submitted a list of detailed questions regarding both current processes and desired features. Panoramic responded to each question with clear and definitive answers. We also inquired about the possibility of integrating e-signatures and generating auto-populated forms based on client data. Panoramic confirmed that e-signatures could potentially be implemented as a customization, pending further discussion. They also demonstrated that the system can generate forms that automatically populate with specified client information.

In contrast, our experience with CompuTrust was less favorable. While they provided a virtual demonstration and access to a test site for their web-based program, CTI, the test environment was largely non-functional. Many of the features we attempted to use either did not work as intended or were completely inoperable. When we raised these concerns, CompuTrust assured us that the issues would be resolved by the time we went live, but they did not provide a working demonstration to support that claim. We also asked CompuTrust about e-signature capabilities and were told that it was not something they could offer. When we inquired about auto-populating forms, their response was vague, stating that “almost anything is possible,” but that it might incur additional costs.

After comparing both vendors, it is clear that Panoramic's PAPro is the better fit for our department. They were more responsive to our questions and concerns, demonstrated a deeper understanding of Public Administrator workflows, and have a proven track record with the majority of California counties already using their system. PAPro represents a much-needed technological upgrade for our department and will provide the tools necessary to manage our caseload efficiently and securely.

teresa.burgamy 9/18/2025 2:25:56 PM

Requested By:

IT Manager

Title

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I approve this request to suspend competition for the service(s) and/or product(s) identified herein.

Brandon.Pursell 9/18/2025 3:35:50 PM

[\[✕ Sign\]](#) Double click!

Department Head Signature

rblackburn 3/30/2026 3:46:52 PM

[\[✕ Sign\]](#) Double click!

Purchasing Manager Signature