February 27th, 2025

NEWS & UPDATES

Flipping to the Latest Version – 3.0.29.0 is Here!

We're serving up a fresh stack of enhancements, hot off the griddle! Our latest update is packed with improvements to make your experience smoother than syrup on a short stack. Be sure to **restart Panoramix** to get the latest version and enjoy all the new features! Just like pancakes, updates are best served fresh.

Here's what's new:

- **Added Enhanced Summary client report**
- **Completed initial work on custom chart colors** for asset classes, asset types, and security types—currently available in the Enhanced Summary report.
- **Added 7-year and 10-year time segments** to all applicable reports.
- **Added the ability to display full account numbers in reports**
- **Added ability to assign categories to transactions** – currently, these can be manually edited in the "Edit Transaction" screen and displayed in the Transaction Blotter.
- **Updated Schwab import to handle new transaction types**

Enjoy these updates, and don't forget to celebrate National Pancake Day with your favorite syrup!

Click here to see the full Release Notes.

We Need Your Help!

To better understand advisory usage patterns, we've created a quick, two-question survey that will help us define a baseline. We would like to have every active Panoramix user complete this survey based on their own usage. The first question is simply how many hours per week do you actively use Panoramix? The second is how many pages of paper do you print to paper on a quarterly basis?

Please click the button and complete the survey!

Take the Surevey Now!

Panoramix YOUniversity is Now Live!

Our latest webinar is now ready to view at your leisure. In this session we spend about 25 minutes taking a "deep dive" into supplementing the Blotters with Excel and Word.

Watch the Webinar Now!

And if you missed the November class on covering the tax features in Panoramix, you can **catch it here**.

Where to Find Us: Upcoming Industry Events

We love meeting our users in person! Here's where you can find us in the coming months. Stop by to say hello, see what's new with Panoramix, and get answers to your questions!

March 3rd - 6th, 2025: The T3 Conference has been bringing together financial advisors, tech innovators, and industry leaders for over 20 years. Focused exclusively on advisor technology, this event helps firms stay ahead with cutting-edge solutions and insights. Don't miss the chance to explore the latest advancements shaping the future of wealth management!

Join us May 27-30 in Tampa, FL, for SYNERGY25—an RIA-focused event packed with insights, training, and the latest advisor tech. Stop by to connect with the Panoramix team, get tips, and see what's new!

Change in focus, fewer hours

Effective April 1st **Joe Lucking, Director of Operations**, will reduce his work schedule to **8:00 a.m. to 5:00 p.m. central time Tuesday through Thursday**in a long-planned step toward full retirement in 2027. The change means less time on direct support and more focus on making Panoramix's award-winning orientation material and help documentation better and geared toward last year's 3.0 release. Direct advisor support remains a hallmark of Panoramix and we have a terrific staff in place to provide that while Joe cuts back to part-time/semi-retirement. "It's been a fantastic full-time gig for me and I am truly grateful for the stellar work of the team here and for our dedicated advisors," Joe said. "I'll still be around the majority of the time, even as I make time to equally enjoy other interests. I'm thankful for being in a time and place in Panoramix history where I am able to make this change. And, I must point out that in spite of the effective date, it's not an April Fool's joke. It's going to happen."

Q&A Live! Get the Inside Scoop: 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, March 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 remember that you may access all prior webinar recordings at any time in the Help Guides Here.

Save Time with Batch Reporting!

Generate multiple reports at once with Batch Report Groups in Panoramix—quick, efficient, and hassle-free! Here's how:

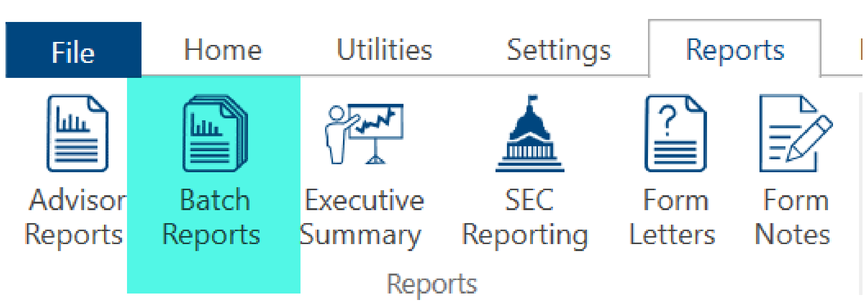
1. Create a Report Group – Go to Reports > Batch Reports, click the menu next to Report Groups, and select Add. Name your group.

2. Add Reports – Select your group, click the menu next to Reports, and choose Add. Pick your reports, set parameters, and save.

3. Set Delivery Options – In the Settings tab, choose how to distribute reports (portal, email, print, etc.) and check Use Delivery Options.

4. Generate Reports – In the Report Filter in Settings, select clients, and then bottom left of the window click Generate, and let Panoramix do the rest!

Save time and streamline your workflow today! For more details, check out the full Batch Reporting Manual or our Reports Tab video.



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

Stay Ahead with Panoramix!

Don’t miss out on the latest product updates, expert insights, and strategies to keep your firm at the top.

Be the first to know about new features
Gain expert strategies from industry leaders
See behind the scenes at Panoramix

Follow us on LinkedIn today and stay ahead of the curve!

Missed our last newsletter? Here’s what you missed:

- **Portfolio Snapshot (Enhanced)**: Option to hide “Top 10 Holdings” section or display notes marked as “Display on Other Reports.
- **Holding Summary Report**: Added a secondary grouping parameter to the landscape version.
- **Trade Summary Report**: Now displays a trade’s timestamp.
- **RMD Blotter**: Account Description and Account Registration Type columns now display without selecting “Include Account Info.”

Read more: February 6th, 2025 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

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