



April 15th, 2025

NEWS & UPDATES



Panoramix Version 3.0.31.0 – Latest Updates & Improvements!

This update brings new tools to help you work more efficiently and improve report accuracy. You can now download Batch Report history to Excel, easily hide inactive or \$0 accounts, and narrow down client lists using Contact Categories in your integrations. We've also resolved several data and display issues to ensure more reliable performance across the platform.

Release Highlights:

- Batch Report history can now be downloaded to Excel.
- New filters for Inactive Clients and \$0 Accounts in Edit Account Data.
- Contact Category filters added to Redtail, Wealthbox, Nitrogen, and Zoho.
- Changed default benchmark behavior to reinvest dividends; added report option to control this.
- Fixed repeated colors in Account Performance Summary chart.
- Corrected blank Account Owner field when contact is a company.
- Fixed incorrect values in Account Performance widget when "As of Today" is off.
- Resolved doubled values in Household Cash widget.
- Fixed money weighted return errors when grouped by allocation, group,

or category.

- Accounts marked “Exclude from Performance” now removed from Performance Blotter.
- Inactive accounts are now hidden in Performance Blotter.
- Removed ability to add quotes to Salutation and Nickname fields.
- Fixed note import issues from Redtail and Wealthbox.
- Resolved AdvicePay authorization errors.
- Fixed Schedule 13F errors in multi-user setups.
- Fidelity import now supports new transaction types.
- Altruist import now supports new transaction types.

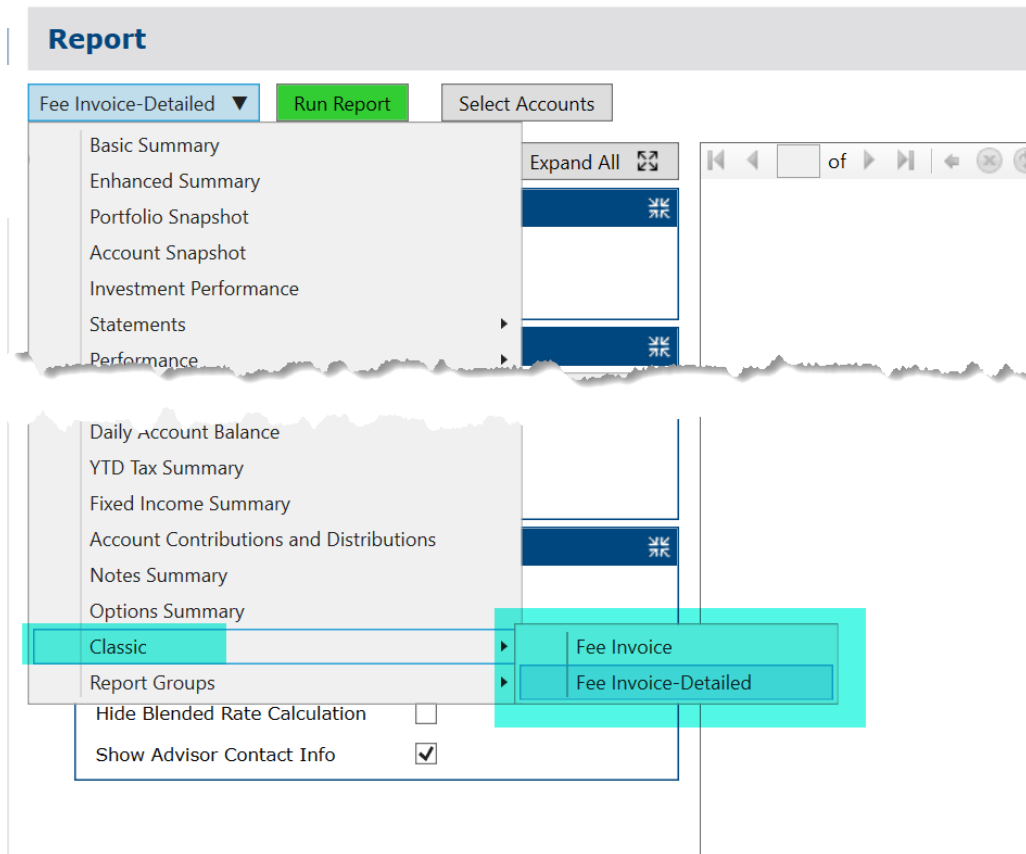
Click [here](#) to see the full Release Notes.

A Fresh Look for Fee Statements!

We’ve given Fee Statements a mini makeover!

Fonts and layouts have been updated to create a cleaner, more cohesive design that aligns with the rest of your reports. The new versions will automatically replace your existing Fee Statements in Panoramix — including those saved in Batch Reports and Favorites.

Prefer the old format? No problem! The previous versions of Fee Invoice and Fee Invoice - Detailed have been moved to the Classic group in the Reports dropdown. Moving forward, all classic report versions will live there. If you'd like to keep using a classic version, just manually swap it back in.



Get ready for a more polished experience — your reports just got a glow-up!

Last Call: 2025 Kitces Advisor Tech Survey



Time's almost up! The 2025 Kitces Research Survey on Advisor Technology Use is closing soon. Join hundreds of advisors sharing how they use technology in their practices — your insights help shape the future of advisor tech.

Why participate?

- Help the advisor community make smarter tech decisions
- Get exclusive early access to the final report once it's published

Take the [2025 Kitces Research Survey](#) now and be part of the conversation before it wraps up!

New in Panoramix: Play Stocks and Bonds!



Looking for a brain break between billing runs? Check out our new mini game, **Stocks and Bonds**, now tucked under **File > Fun > Stocks and Bonds**. Strategically invest in 10 different securities, buy and sell each round, and try to outsmart your opponents to become the wealthiest stockholder. It's fast, fun, and surprisingly competitive. Who said finance can't be a game?

Where to Find Us: Upcoming Industry Events

We love meeting our partners 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!



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!

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, May 13th, 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](#).

Reminder: Joe Lucking's Schedule Changes In Full Effect!

As of April 1st, Joe Lucking, Director of Operations, works a Tuesday–Thursday, 8 AM–5 PM CT schedule as he transitions toward full retirement in 2027. He focuses on enhancing Panoramix's orientation materials and help documentation, while our dedicated team continues to provide top-notch advisor support.

Since Joe is in the office less, please remember to email Support@PanoramixFinancial.com to ensure nothing gets missed!

In Case You Missed It: Panoramix YOUiversity is Now Live!



Our latest webinar is now available for on-demand viewing! In this 25-minute session, we take a deep dive into supplementing Blotters with Excel and Word.

Watch the Webinar Now!

Plus, if you missed our November session on Panoramix tax features, you can

catch up [here](#).

♂ Who's the Head of Household? Panoramix Needs to Know!

It's easy to assume reports will go to the right client when sending in bulk—but in Panoramix, one small setting can make all the difference. If you're grouping by household when running batch reports, it's crucial to set a **Head of Household** to avoid misdirected communications.



Why this matters:

When using the **"Group by Household"** option in Panoramix to send reports, the system delivers the report to the client marked as Head of Household. If no Head is selected, Panoramix will choose a member of the group at random—which can lead to reports being sent to the wrong person or not delivered at all.

How to set the Head of Household:

1. Go to the Client Dashboard.
2. Click the "Edit" button in the Contact Information Tile.
3. Check "Head of Household."
4. Click "Save."

Pro Tip: Always double-check that a Head of Household is selected before sending batch reports or portal documents.

Want to dig deeper into householding in Panoramix?
[Check out the Billing Manual](#) for a full walkthrough on setting up households, selecting the Head of Household, and understanding how this impacts both reporting and billing.

Pages 7–9 — Household Setup:

Explains how to assign clients to a household, and how the “Head of Household” affects reporting and billing delivery.

Pages 11–12 — Fee Schedules and Householding:

Covers how fees are calculated across households and how grouping by household impacts tiered billing and reports.

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!

Plan Ahead: Our Summer Holiday Schedule

Heads up! We'll be closed one more holiday this summer:

- Good Friday, April 18th 1/2 day
- Memorial Day: Monday, May 26
- Juneteenth: Thursday, June 19
- Independence Day: Friday, July 4
- Labor Day: Monday, September 1

Enjoy the sunshine and make sure you check back for more updates!

Missed our last newsletter? Here's a few things you missed:

- Fixed IRR and TWR calculations for options and short sales.
- Resolved issue with Performance Summary advisor report not displaying.
- Fixed error when duplicating Report Groups with PDFs or Word docs.
- Corrected Top 10 holdings in Portfolio Snapshot to reflect report date, not

current value.

Read more: [March 20th, 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!

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