



May 29th. 2025

NEWS & UPDATES



Sun's out, Panoramix 3.0.35 is in!

Panoramix 3.0.35 is live and loaded with updates to help you tidy up your billing and reporting before summer kicks in. Whether you're getting ahead on quarterly tasks or wrapping up client prep, this release is worth the reboot. Just restart your app to get the latest version.

Need a hand? Reach out anytime at Support@PanoramixFinancial.com or (877) 595-3282.

Here's a look at what's included in this release:

- Added a right-click menu to the Transactions, Accounts, Holdings, Contacts, and Household blotters to allow editing directly in the blotter.
- Enhanced Portfolio Snapshot report to include Recent Transactions and Recent Deposits/Withdrawals.
- Enhanced Account Snapshot report, replacing "Top 10 Holdings" with Recent Transactions and Recent Deposits/Withdrawals.
- Added ability to display household members' DOB and TaxID in the Household Contacts client widget.
- Added ability to display Account Benchmarks in the Portfolio Returns client widget.
- Enhanced Holdings Summary to combine same positions by Symbol/Identifier when grouped.
- Updated Asset Allocation, Holdings Summary, and Fixed Income Summary to display total group percentages.
- Added Account Registration Type as a "group by" option in reports with

- grouping enabled.
- Advisor notification emails from Client Portal uploads now include the file's location.
- Updated the Realized Gains report to reflect the earliest transaction date as the period start.
- Added a new warning when attempting to view a “special” client without proper permissions.
- Fixed an error when using Additional Criteria in the Panoramix Web transaction blotter.
- Fixed an issue where the hide logo in footer setting didn't work in the Client Portal.
- Resolved an issue where documents in the advisor vault wouldn't save after changes.
- Removed decimal from the message showing days remaining until a password change is required.
- Corrected an issue where a contact's DOB was visible in the client widget despite PII view restrictions.
- Fixed a bug where login URLs on Panoramix Web didn't retain location after login.

Final bell's ringing! To see these updates, close all Panoramix windows and relaunch the app. Click [here](#) to see the full Release Notes.

Reflections from Side Lake

With summer underway, our CEO Chris Hastings returns with his seasonal series, Reflections from Side Lake—a thoughtful blend of leadership insight, industry perspective, and a touch of northwoods cabin wisdom. New reflections are shared every few weeks, so keep an eye on LinkedIn for the latest.

In his first post of the season, Chris explores the theme of Transitions:

“Transitions are never simple, even the good ones. But when you have the right destination—and the right support—the journey becomes a little easier.”

Read more → <https://lnkd.in/gkNcEHXN>



Want more updates like this? [Follow us on LinkedIn](#) to stay connected.

We're live at SYNERGY25 in Tampa!

If you're attending, come by and say hi—we're at the booth all week sharing tips, answering questions, and showcasing what's new in Panoramix. Huge thanks to everyone who joined us for our Tech Talk yesterday! If you missed it, stop by and we'll be happy to catch you up.



Where to Find Us: Upcoming Industry Events

Class might be winding down, but we're still out and about! Catch us at upcoming events to see what's new with Panoramix, get your questions answered, and connect with the team in person. We always love seeing our partners face-to-face—no hall pass required!



We're excited to attend **Insider's Forum, September 23–25 in New Orleans, LA!**

This top-tier conference—hosted by Bob Veres—brings together fiduciary advisors for thoughtful discussions, expert-led sessions, and future-focused strategy. If you're planning to attend, come say hi! We'd love to connect, share tips, and show you what's new in Panoramix.

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, June 10th, 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](#).

Blotter Power Users, Rejoice!

You can now right-click directly within the **Transactions, Accounts, Holdings, Contacts, and Household blotters** to access a new menu of options—no more switching tabs to get things done.



With this update, you can copy to clipboard, open or edit contacts, and much more. Each blotter has its own tailored menu, giving you the tools you need right where you need them!

Just right-click, make your changes, and keep moving. It's a small change with a big impact on your workflow!

Panoramix For Financial Advisor Andrea Flores Ortiz - Displaying data for Panoramix Demo (Sales)

File Home Utilities Settings Reports Billing Data Messages Help

Dashboard Contacts Calendar Blotter Vault Contact Appointment Contact23, A Anderson, Robert E. Kennedy, Aaron Sparger, Kade O'Toole, Meghann

Displaying data for Panoramix Demo (Sales) BETA

Blotter

Transactions Accounts Holdings Contacts Households Performance Composites Model Notes Tasks Fees Security Cost Basis Documents RMD Realized Gains Account Ownership Income Security Values Account Month End Values Assets by Account

Display accounts: ☒ As of Today ☐ EOM 03/2024 Load Load Async Export Data

group by area Drag a field here to group by that field

Account Number	Account Description	Custodian	Rep Code	Account Value	Cash Value	Last Cash Valuat	Account Type	Registration Ty
35434535	IRA			\$68962.50	\$0.00		Security	Individual
34534534534	Test			\$32760.00	\$0.00		Annuity	
T456	Testorama			\$11000.00	\$0.00			
CJHTEST3	Test Upload				\$0.00		Security	Individual
D18476354	Disability			\$3333.00	\$150002.00	1/12/2021	Disability	Insurance Comp
564689745h4764	Bob's Roth			\$16102.00	\$0.00		Security	Roth 401K (func
346545645	Bob's IRA			\$12000.00	\$0.00		Security	IRA (non-protot
A74653542	Joint Account			\$480851.20	\$0.00		Security	Joint - Commun
B7563453543	Robert's 401k			\$84096.72	\$0.00		Security	Beneficiary IRA
B86735232	Bob's Personal S			\$998293.60	\$0.00		Security	Individual
398457356345	Fixed			\$29900.00	\$0.00		Fixed Annuity	Bank
PL0001	Proteus Liquid a			\$120000.00	\$120000.00		Real Estate	Bank
E401kHA	Bob's Employer			\$10000.00	\$10000.00	5/31/2021		401K (non-prot
INDEX0001	Bobs Index			\$120000.00	\$120000.00	11/8/2021	Fixed Annuity	Conservator
ETF	Inherited Pension			\$11850.00	\$0.00		Security	Beneficiary IRA
123456	Test Account	Test Annuity Compan		\$0.00	\$0.00		Annuity	
A75655343.1	Laura's 401k	Charles Schwab	SS5123	\$145711.82	\$0.00		Security	401K (fund prot
QQQ	QQQ				\$0.00			
RT1234	Risk Tester	Charles Schwab	CJH	\$14917.00	\$0.00		Security	Individual

Reset Entire Grid Reset Sorting and Grouping Refresh Group Headers Expand Groups Collapse Groups Reset Filters Show All Fields

Explore the right-click menu next time you're in a blotter—you might be surprised what's there!

Learn at Your Pace: Panoramix YOUNiversity



Whether you're a new user or a seasoned pro, our Panoramix YOUNiversity webinars are packed with practical tips and real examples to help you get the most out of the platform. From billing and reporting workflows to integrations and customizations, each session walks through real advisor use cases—no fluff, just clear steps.

Missed a session? You can always watch on demand—like our latest one on using Excel and Word with Blotter, or revisit tax features in Panoramix from

Watch the Webinar Now!

Pair webinars with our in-depth Help Guides for a full training toolkit—available anytime under the Help tab!

Check out the Webinar Playlist on [Youtube](#) or you can find them on our [Help Guides](#) Page!

Plan Ahead: Our Summer Holiday Schedule

Heads up! We'll be closed these holidays this summer:

- 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!

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!

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

While you were spring cleaning, we were fine-tuning! Our latest updates included:

- A fresh new visual indicator on the Head of Household dashboard, making it easier to spot who's who at a glance.
- A new landscape mode for Fee Invoices, perfect for packing in more detail without sacrificing clarity.
- And a helpful check to prevent deletion of asset classes and types that are part of blended allocations—because no one likes breaking things by accident.
- Summer's heating up, and so are the upgrades. Stay tuned! ✨

Read more: [May 8th, 2025 Newsletter](#)

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 support meeting with James & Andrea](#)

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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Tell us what you liked and how we can make Panoramix better.

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No

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