



June 17th, 2025

NEWS & UPDATES



What's New in Panoramix 3.0.36

Panoramix 3.0.36 is now live! Some of the updates include a new option to set the Billing Cycle at the household level—making it easier to manage household billing without editing each account one by one. We've also added two new tiles to the Contact Dashboard: one for tax loss harvesting and another for checking account-level download status.

What else is new? Here are other updates and changes:

- Added a new tile to the Advisor Dashboard's list of available tiles. This one called Download Info. Selecting this tile from the Other Tiles list for the Dashboard displays several things by custodian/Rep ID (MasterID in the case of Schwab): The last date for which Panoramix downloaded a file, the last date for which that file contained account-level data, the last snapshot date (important for knowing the availability of accurate month-end performance reporting data), and other information specific to the custodian.
- Panoramix now uses holding prices by custodian rather than a common pricing file. Custodians rely on different pricing services and those services differ under certain circumstances. Therefore, if you have ABC Corp with both custodians A and B it is possible you will see different prices for the same day depending on the custodian's price.
- Added options for producing the Risk Metrics report, making it more flexible when printed in Landscape mode with fewer than all four charts selected.
- Enhanced the processing of the weekend cost basis and capital gains

- files for Fidelity for greater efficiency.
- Enhanced the processing of Schwab data around alternative investments for better tracking, reconciliation, and billing/reporting processing.
- Added processing efficiencies and data quality checks to annuity data received from DPL. Updated the Asset Mark integration to effectively and efficiently use the reformatted tax lot quantity field in the cost basis files.
- Improved the quality of the Billing Generated Fees Grid in cases where the advisor has selected the Tier on EOP New Only setting to reflect household average when there is a new account in the household and other conditions also exist.
- Added a real-time check to the add user defined (UDF) fields process to check for and reject duplicate descriptions to prevent the creation of multiple UDFs for identical purposes.
- Added parameters for a minimum amount to the buy or sell for trading and rebalancing in Panoramix Pro.

And if you're wondering about the new Download Info tile on the Advisor Dashboard, be sure to check out Andrea's Insider Tip for a quick walkthrough.

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

Double the Honor: Panoramix Named Finalist in Two Categories



We are pleased to share that [Panoramix Financial](#) is a two-times 2025 WealthManagement.com Industry Awards Finalist.

The Panoramix Finalist categories:

- Corporate Social Responsibility for our Carbon Neutral initiative
- Retirement Income Technology for our RMDs Enhancements.

See a full list of finalists here: [WM Industry Awards](#)

Congratulations to our fellow finalists who share our deep commitment to quality, innovation, and the advisors we serve. We are honored to be in such great company.

From Side Lake: Reflections on Tech, Trust, and the Unexpected

Chris Hastings is back with another edition of Reflections from Side Lake—this time fresh from the Synergy25 conference. It's a short read with a big takeaway about the balance between innovation and stability in advisor tech. [Read the post on LinkedIn](#)



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

On the Road with Panoramix

Summer's just getting started—and so is our conference season! Whether it's diving into new features or catching up face-to-face, we love connecting with the advisor community. Here's a quick look at where we've been and where we're headed:

SYNERGY25 Recap

We had a fantastic time at SYNERGY25 in Tampa! It was a full week of fintech conversations, hands-on demos, and great energy from the advisor community. A big thank you to everyone who stopped by our booth or joined us for our Tech Talk—we truly enjoyed connecting with you!



Next Stop: Insider's Forum

We're heading to New Orleans for Insider's Forum, September 23–25! Hosted by Bob Veres, this premier event brings together fiduciary advisors for thoughtful conversations, expert sessions, and strategic insights. Planning to attend? Come say hi—we'd love to connect and share 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, July 8th, 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](#).

Insider Tip: New "Download Info" Tile

Say hello to a smarter Advisor Dashboard!

We've added a new Download Info tile that gives you a behind-the-scenes look at your data feeds—organized by custodian and Rep ID (or MasterID for Schwab users).



With just a quick glance, you'll see:

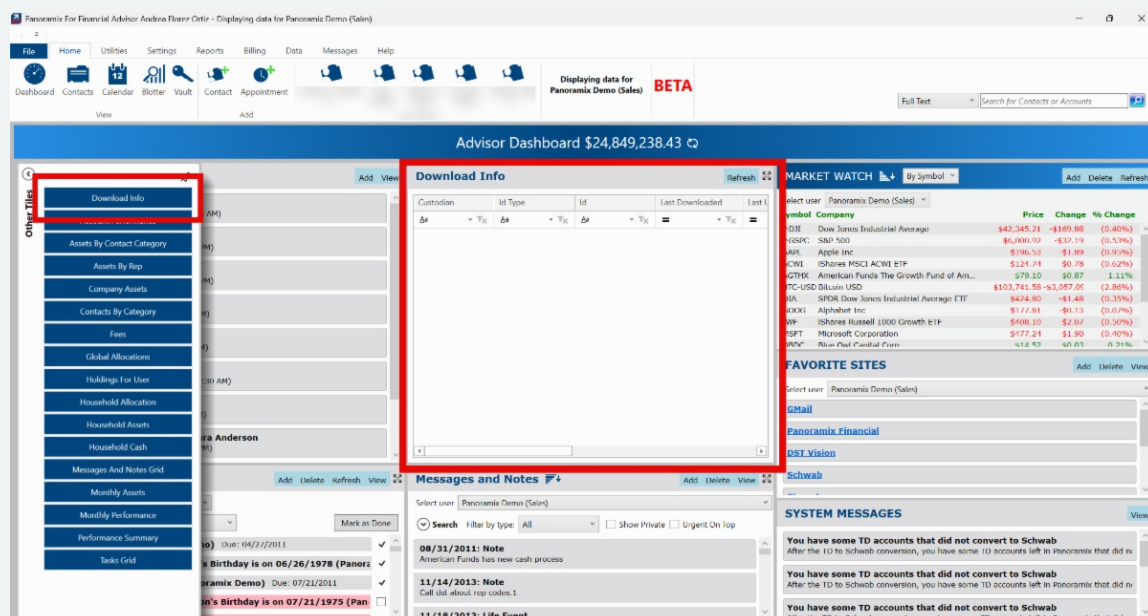
- The last date Panoramix pulled in files
- Show Rep Code/MasterID level data
- The latest snapshot date (a must for accurate month-end reporting!)
- And more custodian-specific details

It's a handy way to check the pulse of your data and make sure everything's flowing just right.

Want to take a peek? Click on Other Tiles on the left of your screen to open it up.

To keep it on your dashboard permanently, go to Settings > Dashboard Layout, drag it where you want it, and hit Save.

It's a quick and easy way to keep tabs on your data feeds—no digging required!



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

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!

Missed our last newsletter? Here's what we covered:

We kicked off summer early with updates designed to streamline your workflow and give you more flexibility across the board:

- A new “Download Info” tile for the Advisor Dashboard—get quick visibility into data feed activity by custodian and Rep ID.
- Added AdvicePay to the Third Party Data configuration menu, expanding your integration options.
- The ability to combine positions across multiple accounts when using non-account group parameters in single-timeframe performance reports.

Plus a few visual upgrades and behind-the-scenes fixes to keep things running smoothly.

Catch the full newsletter [here](#) »

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 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!

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