

November 6th, 2025

## NEWS & UPDATES

---



### **Panoramix 3.0.48 Is Here!**

This release brings a fresh round of updates focused on customization, clarity, and smoother workflows across Panoramix. You can now personalize the Client Portal with custom home page colors and an enhanced layout configuration tool. The Account Summary report now includes total yield for each group, and the Client Reports area has been improved with new filtering options and clearer account details.

#### **Here's a full look at what's new and improved in version 3.0.48.0:**

- The Panoramix Client Portal has received another significant update! We've added the ability to customize the colors of the portal home page and enhanced the layout configuration setup tool in Panoramix.
- Enhanced the Account Summary report to include total Yield for each displayed group.
- Updated the Select Accounts submenu inside Client Reports to display the Account Number, Description, and Value along with the added ability to filter on the new fields and replace the clients displayed name with any selected account.
- Updated the Realized Gains report to include more grouping options.
- Added the ability to filter Qualified/Non-Qualified accounts in the Holdings Summary.
- Updated the Portfolio Dashboard Account and Holdings tiles to include a Gain/Loss column.
- Updated the Client Portal Portfolio Table's displayed data sort order to be consistent with the other displayed tables in the portal.
- Resolved an issue in the Edit Account Data screen where selecting Incomplete Accounts and Include \$0 Value filters were ignored.
- Fixed an issue in the Edit Account Data screen where Contact Categories and Payout Schedules displayed default data settings.
- Corrected an issue where the Allocation Values in the Household Allocation Module were not displayed correctly.
- Fixed a missing column header for Calendar Year 5 column in the Performance Summary report.
- Corrected an issue in the Account Performance History report where the Calendar Year 5 return did not display a value.

- Updated the Schwab import to handle new transaction types.
- Updated the First Clearing import to handle new transaction types.

Make sure to close all Panoramix windows and restart the app so you can get the latest updates!

[Check out the full Release Notes here](#)

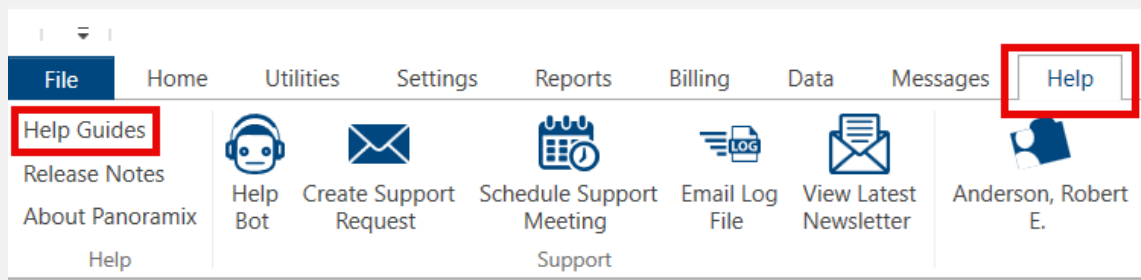
Didn't get the update? Use this [link](#) to download now!

## New Stuff / Tough Stuff

We've added a brand new section to our [Panoramix Help Guides](#) called **New Stuff / Tough Stuff**, featuring short, practical videos that walk through some of the most asked-about tools in Panoramix.

Current topics include Form ADV, Download Info Tile, Billing Grid, Deleting Assigned Fees and Payouts, My Benchmarks, and New User Notifications, with more on the way!

We encourage you to check them out! You can go directly to the [Help Guides page](#) or access it right from Panoramix by clicking the Help tab at the top and selecting Help Guides on the far left. It will take you straight to the page.



Make sure to bookmark the page for quick reference and easy access anytime you need a refresher. Because gaining a little extra knowledge is always a win!

## Panoramix Live Q&A: Get Answers on the Spot!

Got questions? Get answers right on the spot. Join our free Panoramix Q&A open forum and connect live with our support experts. No tickets, no wait. Just clear, direct help in real time. Drop into the Support Open Forum via Microsoft Teams and ask away!

**When:** Tuesday, November 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](#).

## Tips & Tricks: Moving an Account to a New Household

Ever had a client open a new account that was accidentally tied to the wrong household, or maybe a joint account that needs to be reassigned after one spouse opens their own? No need to recreate the account or lose history — you can easily move it to the correct household right within Panoramix.



### Here's how:

- Go to the client's Dashboard that currently holds the account.
- Click on the Portfolio tile (or any color section of the portfolio chart).
- Double-click the account you want to move to open the Edit Account window.
- Go to the Stakeholders tab.
- Click Add, and for Type, select Owner from the dropdown.
- Check the Primary Owner box, then use the search field to look up the last name of the new primary owner.
- Highlight the correct name from the list and click Save.

The screenshot shows the Panoramix software interface. The main window is titled "Portfolio for Robert E. Anderson". A "Portfolio" sidebar on the left lists various accounts. A red circle with the number "1" points to the "Accounts" list. A blue dashed box highlights one account with the text "DOUBLE CLICK THE ACCOUNT". A red circle with the number "2" points to the "Edit Account" window. The "Edit Account" window has several tabs: "Account Information", "Stakeholders", "Billing and Performance", "Insurance and Other Investment", "Notes", "Custom Fields", "Threshold Tracking", and "Other". The "Stakeholders" tab is active, showing a table of "Owners, Custodians and Trustees". A red circle with the number "3" points to the "Add" button. A red circle with the number "4" points to the "Type" dropdown menu, which is set to "Owner". A red circle with the number "5" points to the "Primary Owner" checkbox, which is checked. A red circle with the number "6" points to the search field, which contains the text "Last Name" and "anderson". A red circle with the number "7" points to the "Save" button. Below the search field, a list of names is shown, with "Laura Anderson (Client, Email Reports, G-B- 432 Main Dayton, OH 45454)" highlighted. A "Beneficiaries" section is also visible at the bottom of the "Stakeholders" tab.

- Next, highlight the previous owner's name and click Delete to remove their ownership of the account.
- Click Save again to finalize the changes.

Edit Account Save Cancel

Account Information Stakeholders Billing and Performance Insurance and Other Investment Notes Custom Fields Threshold Tracking Other 2

**Owners, Custodians and Trustees** Add Edit Delete

Name	Type	Primary Owner
Robert E. Anderson	Owner	<input checked="" type="checkbox"/>
Laura Anderson	Owner	<input checked="" type="checkbox"/>

**Beneficiaries and Insureds** Add Edit Delete

Name	Type	Percent
------	------	---------

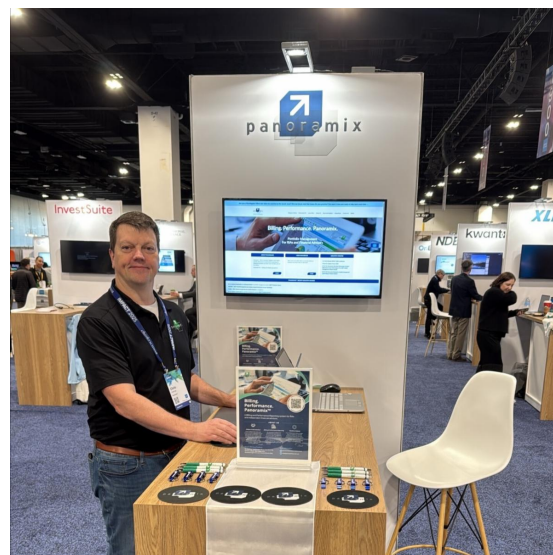
Note: If the household uses Household Billing, the new household's billing settings will automatically apply.

Once complete, the account will appear under the new household's portfolio.

## ✈ Wrapping Up at IMPACT 2025

Our team had an amazing time at IMPACT 2025 in Denver, CO! It was great connecting with familiar faces and meeting new ones throughout the week.

We're heading home with fresh ideas, great conversations, and plenty of excitement for what's ahead. We can't wait to see everyone again at the next one!



## Fall Back and Keep the Momentum Going!

As we “fall back” and gain an extra hour this season, let's turn that gain into another year at the top!

Panoramix has been ranked the #1 Portfolio Management Software in the T3/Inside Information Survey for seven straight years, earning a 9.42 satisfaction score and nearly doubling our market share.

Your feedback made that possible — help us keep the streak alive by

completing the 2026 T3 Survey. It only takes about 15 minutes!

[Take the 2026 T3 Survey here](#)

Thanks for helping Panoramix stay #1 year after year!

## A Curveball Worth Reading



With the LA Dodgers crowned champions of this year's Fall Classic, Joe Lucking takes the spirit of baseball season and turns it into something deeper.

He shares a story from his days on the pitcher's mound and connects it to what it means to keep learning, stay humble, and find gold in unexpected places. A quick, thoughtful read that ties America's favorite pastime to the wins that really matter.

[Read the full post here](#)

## \*Plan Ahead: Our Fall & Winter Holiday Schedule

Heads up! We'll be closed for the following holidays:

- **Thanksgiving** – November 27th & 28th
- **Christmas Eve** – December 24th (Half Day)
- **Christmas** – December 25th
- **New Year's Eve** – December 31st (Half Day)
- **New Year's Day** – January 1st, 2026

Enjoy the festive cheer and cozy nights, and be sure to check back for more holiday updates!

## Missed our last newsletter?

Here is what we covered in release 3.0.45:

- Added ability to customize dashboard layout used in Home page of Panoramix Web directly in the web app.
- Added a GIPS Summary screen to the Composite Blotter.
- Added an expanded parameter to the Generated Fees Grid, allowing grouping of displayed data by columns.
- Added several parameters to the Holdings with Transactions report, including the ability to hide zero value holdings, additional group by settings and to expand holding details.

[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](mailto: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!

Help Guides

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

Give More  
Feedback

Sapphire Software Services | 1470 Englert Rd | Eagan, MN 55122 US

[Unsubscribe](#) | [Update Profile](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!