

November 25th, 2025

## NEWS & UPDATES

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### Grateful for You, and Excited to Share Our Latest Updates 3.0.51

As we take this month to say thank you, we're excited to share a set of updates shaped directly by your feedback. This release includes one of our most requested enhancements: the ability to customize the Client Dashboard layout and the modules displayed in Panoramix Web, with more module options on the way. You'll also see improvements across reporting, trading, performance, RMD calculations, and system accuracy. From generating Composite Blotters as of any date to smoother batch report behavior and fixes to position-level performance, these refinements reflect our ongoing commitment to supporting your work. We're grateful for the guidance you continue to provide and hope these updates make your day a little easier.

#### Here's a full look at what's new and improved in version 3.0.51:

- Added ability to customize the dashboard layout and modules used in Client page of Panoramix Web. More modules to be added in later releases.
- Added the ability to generate Composite Blotter as of any date.
- Updated IRR computation on short sales and options to improve overall report generation speed.
- Added the infrastructure to handle custom pricing for manually entered securities.
- Added summary functions to columns displayed on a grid in Trading Current Requests screen.
- Added a visual indicator when viewing a Head of Household's Client Dashboard on Panoramix Web.
- Added Last Trade Date field to Panoramix APIs.
- Added a Show Password Icon to Client Portal login page.
- Resolved an issue with performance calculations for individual positions when the security is sold out and purchased again later.
- Resolved an issue in Portfolio and Account Snapshot reports where

investment chart displays incorrectly when using an account performance start date and generating report “As of Today”.

- Corrected an issue where remaining portfolio RMD remaining in RMD Summary report did not match account remaining totals.
- Fixed an issue where generating a batch report on Panoramix Web and Client Portal would return blank.
- Corrected an issue in Bulk Trading where positions were added to Trade Request outside of model.
- Resolved an issue in Holdings with Transactions report where Select Accounts parameter to filter to report was not recognized.
- Resolved an issue where drawdown does not compute correctly for withdrawals in Risk Metrics report.
- Corrected an issue in RMD calculations where RMD factor is less than one.
- Fixed an issue where Trading History does not display data when using today’s date.
- Resolved an issue in Portal Settings where selecting Default Layout did not set layout as intended.
- 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!

## What’s New on the Web

PanoramixWeb.com now includes a customizable Client Dashboard, giving you more control over what you see the moment you log in. Here’s where to find the new modules and how to adjust your layout:

### Where to Find the New Modules

You’ll see the available tiles directly on the left of the Client Dashboard when you open a client on Panoramix Web. The default layout will look familiar and new modules will now appear in the Other Tiles list.

The screenshot displays the Panoramix Web interface for a client named Robert E. Anderson (Head of Household). The dashboard is divided into several sections:

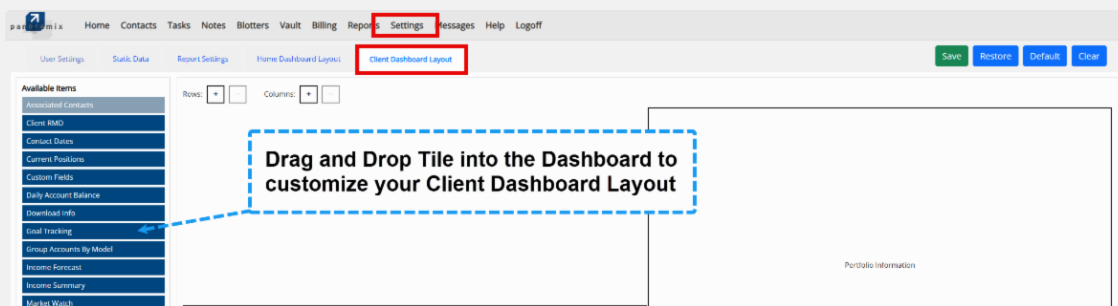
- Client Reports:** A menu on the left side, highlighted with a red box, listing various reports such as Client RMD, Contact Dates, Current Positions, Custom Fields, Daily Account Balance, Download Info, Goal Tracking, Group Accounts By Model, Income Forecast, Income Summary, Market Watch, Performance Over Time, Portfolio Reports, Portfolio Value Chart, Portfolio Values, Recent Transactions, Risk Rating, and Tax Loss Harvest.
- Contact Information:** A section displaying personal and business details for Robert E. Anderson, including DOB, phone numbers, and email addresses.
- Portfolio Information:** A section showing a Risk score of 79 and a Portfolio Value of \$2,279,267.61, accompanied by a donut chart representing asset allocation.

### How to Customize Your Dashboard

To change your layout, click Settings from the menu bar and go to the Client Dashboard Layout tab

## From there, you can:

- Select which modules you want to display
- Rearrange modules into your preferred order
- Add or remove modules as needed



These updates were shaped by your feedback, and we're grateful to continue improving your experience on the web.

## Partner Spotlight

We've completed an interface from our recently enhanced Client Portal with Dunham Trust and DTC Cash. For more information on DTC Cash, see below:



If your money is idling why not put it to use through Dunham Trust Company and DTC Cash? You can start earning 3.09% APY in DTC Cash with one stop access up to \$60 million in FDIC Insurance.

DTC Cash offers up to \$60 million in FDIC Insurance by allocating deposits across a network of FDIC insured banks. This cash management account provides stability, daily liquidity, and convenience. DTC Cash delivers what we believe is a competitive yield and increased insurance protection.

Dunham Trust Company is an advisor-friendly, client-focused trust company with a history of providing exceptional service. Our team focuses on building a relationship to understand your plan for the future.

For more information, please visit <https://www.dunhamtrust.com/Pages/dtccash>.

## Your Support Means Everything to Us

As we take this month to reflect on what we're grateful for, we want to thank you for being part of the Panoramix community. Your feedback, your trust, and the time you spend sharing your experiences with us all play a huge role in helping Panoramix grow and improve.

If you have a few minutes, we'd truly appreciate your voice in the **2026 T3 Survey**. Your input helps guide future enhancements and ensures we continue

building a platform that supports the way you work.

[Take the 2026 T3 Survey here](#)

Thank you for your continued partnership — we're grateful for you!

## New Stuff / Tough Stuff: Created With You in Mind

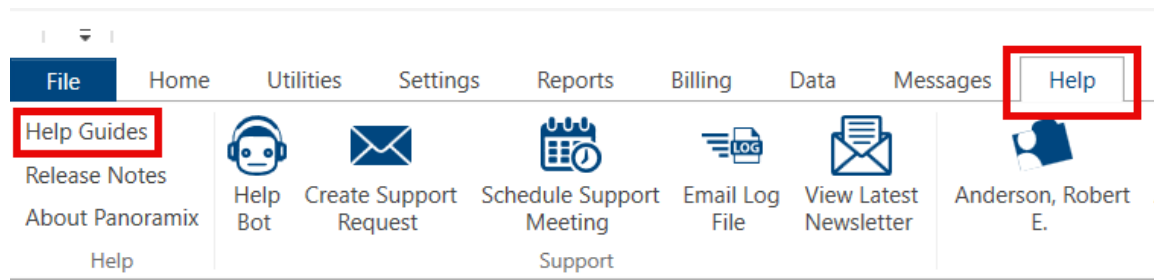
As part of our month of gratitude, we're excited to share a brand-new addition to the Panoramix Help Guides, a section called **New Stuff / Tough Stuff**. This resource was built directly from your feedback and the questions we hear most often, and we're truly grateful for the insight you continue to share with us.

This new section features short, practical walkthrough videos on some of the tools advisors ask about the most. Current topics include:

- Form ADV
- Download Info Tile
- Billing Grid
- Deleting Assigned Fees & Payouts
- My Benchmarks
- New User Notifications

...and more are already in the works.

We hope these quick videos make your day a little easier. You can access New Stuff / Tough Stuff directly from the [Help Guides page](#), or simply click the Help tab inside Panoramix and select Help Guides on the left. It will take you straight there.



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!

Thanks again for continuing to share what you need — it helps us keep improving.

## 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, December 9th, 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](#).

## Final Bills for Closed Accounts

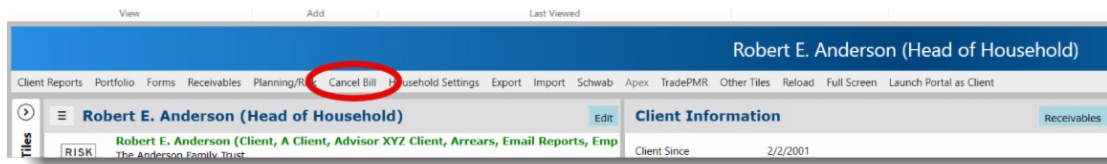
A client closes an account mid quarter, and now you need to calculate the prorated fee or issue a reimbursement. The good news is that Panoramix makes this easy. The **Cancel Bill** option lets you recreate that final billing period and produce an accurate refund in just a few steps!



## How to Run a Final Bill or Reimbursement

### 1. Open Cancel Bill

- Go to the Client Dashboard and click **Cancel Bill** under the blue ribbon.



### 2. Update Your Settings

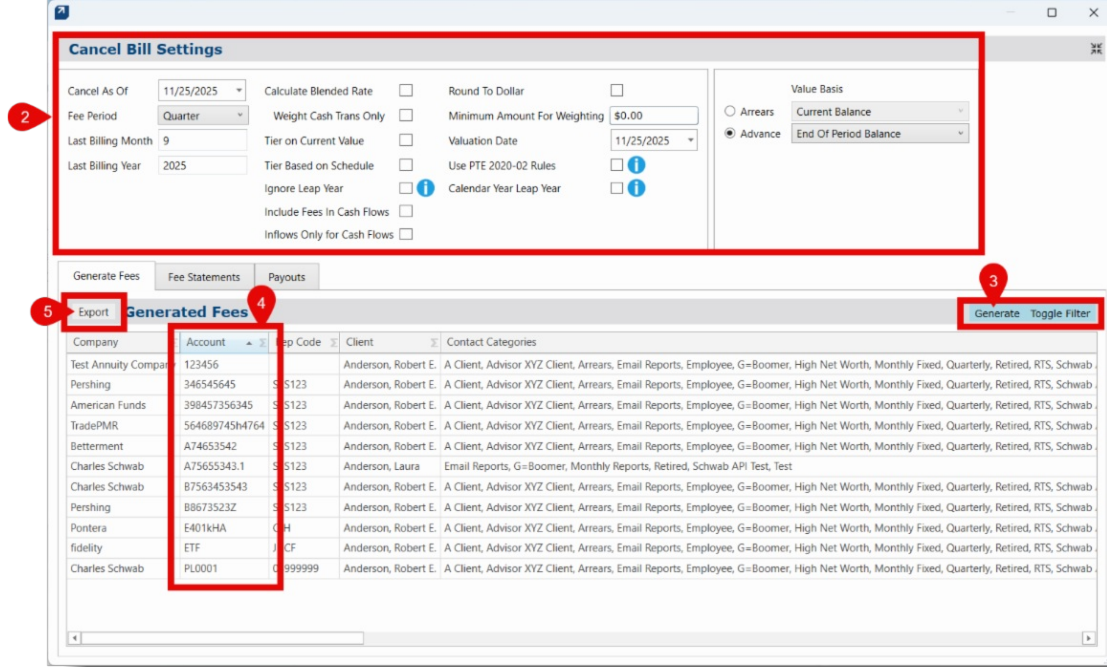
- Cancel as of date: Account close date
- Fee Period: Quarter
- Last Billing Month/Year: Last period billed
- Calculate Blended Rate: Check
- Valuation Date: Leave blank
- Value Basis: Match your regular billing method (Example: Advance End of Period Balance)

### 3. Generate and Review

- Click Generate to preview results.
- Use the toggle on the Accounts column to remove any accounts that should not be included.

### 4. Export Your File

- Once the list is correct, export the results and use the file to process the refund with your custodian.



This process works well for closed or de linked accounts and keeps your final billing accurate and easy to document. A screenshot is included below to help you quickly identify the settings on your next run.

## ❄️ 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 are a few things we covered in release 3.0.48:

- The Panoramix Client Portal now supports customizable home-page colors, along with an improved layout configuration tool for easier setup.
- The Account Summary report has been enhanced to include total Yield for each group.
- The Select Accounts menu in Client Reports now shows Account Number, Description, and Value, with new filtering options and the ability to replace the displayed client name with a selected account.
- The Realized Gains report now offers additional grouping options, and the Holdings Summary report includes a new filter for Qualified vs. Non-Qualified accounts.

## 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

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Feedback



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