

December 18th, 2025

## NEWS & UPDATES

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### Panoramix Latest Updates Version 3.0.52 ❄️

We're closing out the year with updates designed to help you head into 2026 with confidence. This release brings continued enhancements to Panoramix Web, including new modules on the Client Dashboard page, added flexibility in the Client Portal with Household Salutations, and expanded tools like recompute performance options directly from account menus. We've also introduced a new Large Text User-Defined Field to support longer entries and made behind-the-scenes performance calculation improvements to keep reporting accurate and reliable. All of it is aimed at making your day-to-day work smoother as you prepare for the year ahead.

#### Here's a full look at what's new and improved in version 3.0.52:

- Continuing from release 3.0.51.0, additional modules were added to the Client Dashboard page of Panoramix Web.
- Added the ability to display Household Salutation as displayed name on the Client Portal.
- Added the recompute performance functions to account menus on Panoramix Web.
- Updated IRR and TWR calculations to better handle holding-level performance for positions that were fully sold out and later repurchased.
- Added a new User-Defined Field type, "Large Text", used for long form text entries.
- Changed the User-Defined Field type, "Boolean Field" label to "Yes/No (checkbox)".
- Added the Price to the Holdings menu inside the Portfolio Dashboard.
- Updated performance reports to display benchmarks based on ordering set in My Benchmarks settings.
- Updated the way AUM is calculated in the GIPS Summary module of the Composite Blotter to include manually entered accounts and exclude

- accounts marked as Exclude from 13F.
- Corrected an issue where 7-year and 10-year column labels did not display on performance reports.
- Resolved an issue with the Trade Summary report did not use appropriate Contact Category parameters when generating on Panoramix Web.
- Resolved an issue with the Model Details report did not use appropriate Models parameters when generating on Panoramix Web.
- Resolved an issue with the Accounts in Model report did not use appropriate Models parameters when generating on Panoramix Web.
- Resolved an issue with the Accounts in Composite report did not use appropriate Composites parameters when generating on Panoramix Web.
- Updated Goldman Sachs 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 – More Videos Available**

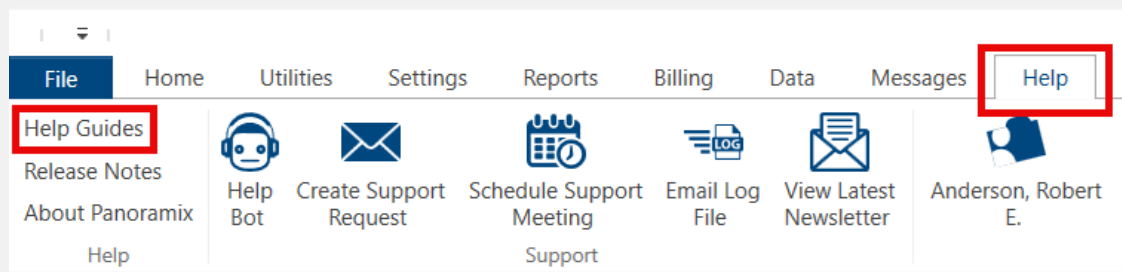
We've added more content to our New Stuff / Tough Stuff section in the Panoramix Help Guides. This area continues to grow based on your feedback and the questions we hear most often.

You'll now find additional short, practical walkthrough videos, including:

- Average Daily Balance (Last 30 Days)
- Net Gains
- Average Month-End
- Ending Balance with Prorated Flows
- Weighted Flows Only

These videos join previously released topics like Form ADV, the Download Info Tile, the Billing Grid, My Benchmarks, New User Notifications, and more.

You can access New Stuff / Tough Stuff from the [Help Guides](#) page, or by clicking the Help tab inside Panoramix and selecting Help Guides on the left—it will take you straight there.



Make sure to bookmark the page for quick reference and easy access anytime



## 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, January 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](#).

## Customize Your Dashboard Layouts

Want to see the information that matters most as soon as you log in? Panoramix lets you customize your **Dashboard Layouts** so your data works the way you do.



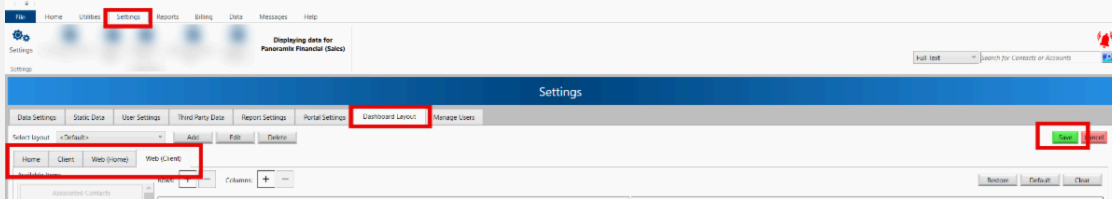
You can add, remove, and rearrange tiles such as Account Performance, Assets by Rep, Global and Household Allocations, Monthly Performance, Tasks, and more. You can also adjust **rows and columns**, and create **multiple layouts** to compare different views and keep the one that fits your workflow best.

### Desktop App

In the Desktop app, dashboard customization is available for all dashboards, including:

- Advisor Dashboard
- Client Dashboard
- Web Home Dashboard
- Web Client Dashboard
- Client Portal Layout (Settings > Portal Settings)

To update a dashboard layout in the Desktop app, go to **Settings > Dashboard Layout** and tailor each view to highlight what you want to see right away—whether that's performance, allocations, or daily tasks.

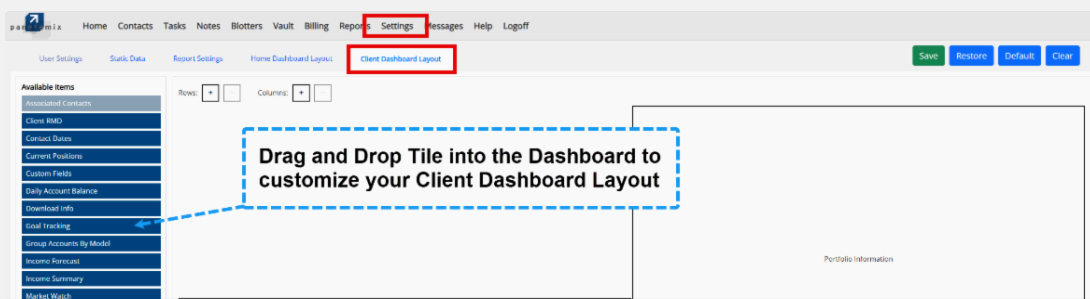


## Panoramix Web

In Panoramix Web, customization is available for:

- Web Home Dashboard
- Web Client Dashboard

To update a dashboard layout in Panoramix Web, go to **Settings** and select **Home Dashboard Layout** or **Client Dashboard Layout**.



A few minutes of setup can make your dashboards cleaner, faster, and more useful every day.

## Help Shape What's Next for Panoramix

The 2026 T3 Survey is currently open, and this is one of the most impactful ways to share what's working well for you—and what you'd like to see improved.

If you have a few minutes before the survey closes, your input helps highlight real advisor needs and influences how technology providers like Panoramix prioritize future enhancements. Your perspective helps ensure the tools you rely on continue to evolve in ways that support your day-to-day work.

👉 [Take the 2026 T3 Survey here \(survey closing soon\)](#)

Thank you for taking the time to share your feedback and help shape what's next.

## ❄️ Plan Ahead: Our Fall & Winter Holiday Schedule 🍂

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

- **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 3.0.51:

- Added ability to customize the dashboard layout and modules used in Client Dashboard 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.

[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?

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