

February 5th, 2026

## NEWS & UPDATES

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### **Panoramix Latest Updates Version 3.0.56**

February is here already! Before you kick back to watch the big game, take a look at the latest list of refinements, small enhancements, and fixes designed to keep things running fumble free.

#### **Here's a full look at what's new and improved in version 3.0.56:**

- Enhanced the Asset Map to allow users to apply values stored in Asset Map to previous End of the Month data.
- Added to the Bulk Trade menu the ability to buy, sell or allocate individual holding positions by percentage of account or percentage of held positions
- Added the ability to display Last Account Aggregated date on the Account Snapshot and Account Performance History reports.
- Added the ability to hide zero value holdings and accounts in the Portfolio Dashboard on Panoramix Web.
- Added the ability to select specific accounts when generating a Report Group on Panoramix Web.
- Added the ability to include images and tables to the HTML editor for email signature, portal invitation email, and new document notice emails.
- Updated the Allocation Performance Summary report to reflect performance by the allocation start date.
- Updated the Clients with Symbol and Clients with Identifier reports to allow displaying all active accounts even when they do not hold the specified position(s).
- Updated the "Show Folders in Portal" Associated Contact setting to reflect on both sides of the relationship.

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!

## Last Call: T3 Survey Closes February 9

As we begin the new year, this is your last chance to share your feedback through the 2026 T3 Survey.

If you have a few minutes before it closes, your input provides real advisor input 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 \(closing February 9th\)](#)

## Panoramix on the Road



### T3 Technology Conference 2026

📍 March 9-12, 2026 | New Orleans

We're excited to be part of the T3 Technology conference again this year and look forward to connecting with so many of you in person.



### SYNERGY26 hosted by TradePMR

📍 June 2-5, 2026 | Washington, D.C.

At SYNERGY26, advisors come together to connect, learn, and explore practical strategies and tools shaping the future of wealth management.

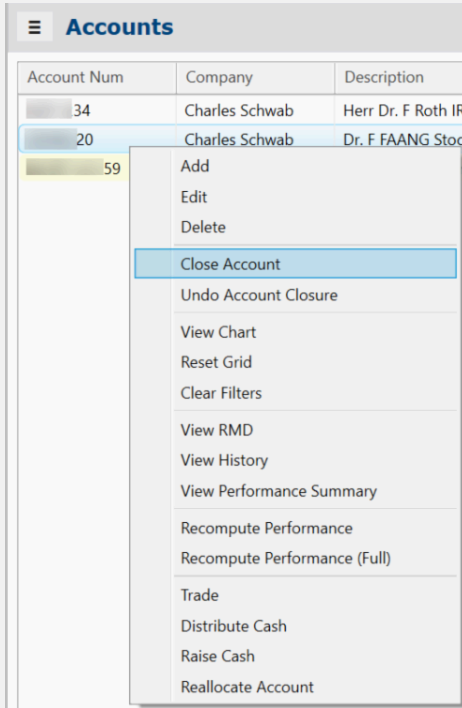
## Tips & Tricks: Close Account Screen (& Undo Close Account)

You shouldn't have to struggle to manually close an account, and now you don't have to. **In our last release, we greatly enhanced the manual Close Account process, combining multiple steps into one simple screen with a single action button.**

Begin by opening the **new Close Account screen** as follows.

1. Confirm from the information displayed that this is the account you want to close.
2. Pick your closing date option: As of today, as of the date data was last downloaded to the account (most likely, and the default selection), or another date.
3. Determine whether you want to disable future downloads and/or recompute performance, both checked by default because that's most likely what you do want.
4. Save the change. Panoramix completes the process asynchronously, meaning that you'll be free to go do other things while the program works

in the background to complete the string of tasks. You'll be notified when the process completes.

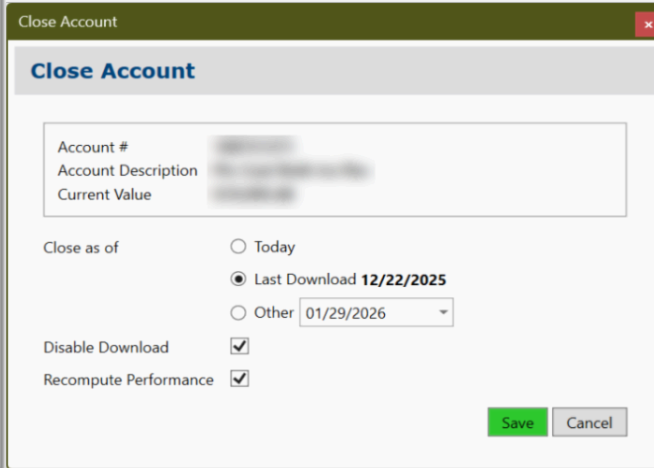


Account Num	Company	Description
34	Charles Schwab	Herr Dr. F Roth IR
20	Charles Schwab	Dr. F FAANG Stock
59		

Context menu for account 20:

- Add
- Edit
- Delete
- Close Account**
- Undo Account Closure
- View Chart
- Reset Grid
- Clear Filters
- View RMD
- View History
- View Performance Summary
- Recompute Performance
- Recompute Performance (Full)
- Trade
- Distribute Cash
- Raise Cash
- Reallocate Account

Highlight an account in the Accounts List of the Portfolio Dashboard and either right-click on the account and select Close Account from the context menu, or select Close Account from the identical menu from the Hamburger Menu.



**Close Account**

Account # [blurred]  
Account Description [blurred]  
Current Value [blurred]

Close as of:  Today  
 Last Download **12/22/2025**  
 Other 01/29/2026

Disable Download   
Recompute Performance

**Save** **Cancel**

### A note on Recompute Performance.

Have you ever wondered whether you need to complete the Full recompute? Well, **we've taken the guesswork out of the workflow for closed accounts.** If the close date is in a prior month, we'll recompute the performance for that/those month(s) automatically, removing the zero-balance snapshots along the way. No more guesswork on your part.

Also, the astute observer of the image will also notice a **new menu selection: Undo Account Close.** It does exactly what you think it will do.

Happy manual account management.

## Partner Spotlight: Your Cyber Life

Cybercrime is no longer a "What If" risk for RIAs; it's a **WHEN.**



Cybercrime has become one of the fastest-growing business risks facing RIA's. From phishing and ransomware to account takeovers and social engineering, today's threats don't just target systems; they target firm reputation, employees, vendors, and clients.

At **Your Cyber Life**, our mission is to equip advisors, their teams, and their clients with the knowledge and tools needed to stay ahead of today's rapidly evolving digital threats. Through practical education and real-world insights, we help turn awareness into action, empowering your organization to recognize risks early, respond with confidence, and build stronger cybersecurity habits by including both employees and clients as part of the cybersecurity strategy.

### How we help clients:

- Cybersecurity educational videos featuring AI voice narration across a wide range of cyber risk topics.

- Practical cybersecurity guides covering best practices and what to do when fraud happens.
- Built for easy sharing, the platform enables clients to spread cybersecurity education to family and friends, all while keeping your firm's brand front and center
- The platform's shareable structure creates organic growth opportunities by incorporating a client referral tool for lead generation
- We include one live, client-facing virtual webinar that covers how cybercrime works, highlights the most common client threats, reviews cybersecurity best practices, introduces the YourCyberLife platform, and provides a live Q&A with the option to record the session for ongoing use in client onboarding and education

### How we help employees:

- Cybersecurity education tailored specifically for RIAs and their employees
- Cybersecurity guides and resources for employees, including best practices and AI guidance
- Trackable analytics to verify employee video completion
- CFP cybersecurity CE (Target Q1 26)
- Cybersecurity Vendor Network: Connecting you with top cybersecurity vendors to strengthen and streamline your firm's defenses

Interested in learning more? Please contact Danny Schwartze at [Danny@YourCyber.Life](mailto:Danny@YourCyber.Life) or visit our website at YourCyber.Life.



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

Got questions? We've got answers. Connect live with support experts during our free Panoramix Q&A open forum. No tickets, no wait. Just clear, direct help in real time. Join the Support Open Forum via Microsoft Teams and ask away!

**When:** Tuesday, February 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.)

Access prior webinar recordings at any time in the Help Guides [Here](#).



### **Don't Forget — New Stuff / Tough Stuff Video Series Available**

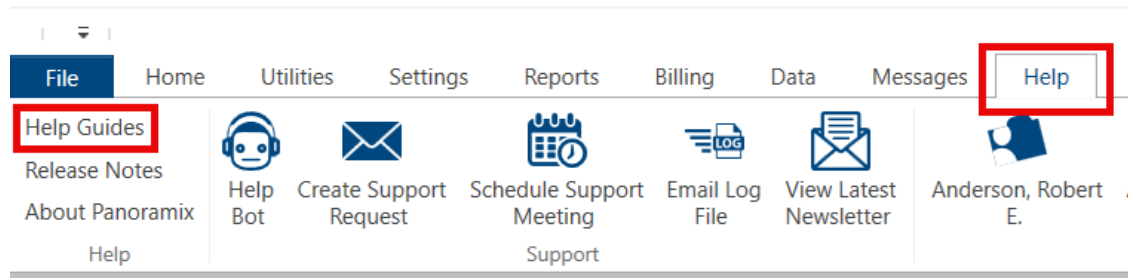
Reminder! Our **New Stuff / Tough Stuff** video series is available and continues to be a great resource for quick, practical walkthroughs on commonly asked questions and new features.

#### **Recent videos cover topics like:**

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

Earlier video topics include Form ADV, the Download Info Tile, the Billing Grid, My Benchmarks, New User Notifications, and more.

Access **New Stuff / Tough Stuff** videos anytime from the Help tab inside Panoramix by selecting Help Guides — or directly from the Help Guides page.



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

## 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](#)

## 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

July  
17

## Plan Ahead: Our Spring & Summer Holiday Schedule

We'll be closed for the following holidays:

**Good Friday:** April 3rd, 1/2 Day

**Memorial Day:** May 25th

**Juneteenth:** June 19th

**Independence Day:** July 3rd

**Labor Day:** September 7th

## Missed our last newsletter?

Here are a few highlights from release 3.0.54:

- Added an SEC Audit menu to the SEC Reporting menu. This report will give detailed security information that has been requested in SEC audits.

- Added the ability to filter data in the Portfolio Dashboard for each of the Account, Holding, and Transaction grids.
- Enhanced the Close Account menu to allow users to select a close date, disable data download connection, and recompute account performance as of the selected closed date.
- Added Undo Account Closure as an account menu option.

[Catch the full newsletter here »](#)



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