

February 26th, 2026

## NEWS & UPDATES

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### **Panoramix Latest Updates Version 3.0.57**

You asked, we listened. With this release we've continued to refine and improve tools to improve workflows and simplify tasks. Look at the latest list of refinements, enhancements, and fixes designed to keep things running smoothly. Take note of the new advisor-requested update to the Schedule 13F reporting tool. Now easily generate the Schedule 13F report by rep code.

#### **Here's just some of what's new or improved in version 3.0.57:**

- Added new advisor report "Composite Performance Summary."
- Separated the Exclude from SEC/Schedule 13F account and holding settings into two separate settings. (See Tips & Tricks section below.)
- Added the ability to use custom allocation color for charts and graphs on client reports.
- Added the ability to generate the Schedule 13F report by rep code.
- Updated Client Portal to allow clients to create folders.
- Updated the Client Portal charts and tiles to include clients with the Household Portal Only contact setting.
- Updated the RMD Blotter to display accounts with manually entered values for Inherited Accounts.
- Added the ability for Primary and Admin users to see all asynchronous requests for all users.

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!

**Will We See You at the T3 Technology Conference Next Month?**


Our team will be at T3 in March. Stop by and see us in **Booth 318**. We'd love to greet you in person!

And be sure to check out our **Platinum Super Session: "AI as a Teammate, Not a Miracle: The Panoramix Approach to Practical AI"** on Wednesday March 11, where you'll get a firsthand look at how we're implementing AI at Panoramix.

## Panoramix on the Road




### T3 Technology Conference 2026

 March 9-12, 2026 | New Orleans



### SYNERGY26 hosted by TradePMR

 June 2-5, 2026 | Washington, D.C.

## Tips & Tricks: New Level of SEC Reporting Exclusions

Prior to today's release, Panoramix offered one level of exclusion for SEC reporting. Setting the Exclude From Schedule 13F/SEC flag removed the Account or Holding from all SEC reporting. With the recent addition of the SEC Audit tab under Reports > SEC Reporting, that single setting proved as no longer adequate. Therefore, we've split it into two settings. **Please Note: If you previously had these Account or Holding level settings established, we have set both values to "equal true" so that you won't notice any changes with the release. Similarly, if the flag was not set prior to this release, neither flag is set now.**

We did split the Schedule 13F exclusion from all other SEC exclusions with a new flag with this release, so that going forward you have the flexibility to set one and not the other or neither or both for Accounts and Holdings.

Through Version 3.0.56.0

**Edit Account**

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

Exclude From Financial Planning   
Exclude From Portal   
Display as "Other Investment"   
**Exclude From Schedule 13F/SEC**   
Exclude From Allocation   
Exclude From Rebalancing   
Editable In Portal   
Do Not Buy List

**Edit Holding**

Holding Information Cost Basis Realized Gains Fixed Income

Broker Name: HDF1234  
Account Number: 898340711  
Identifier: 898340711  
Product Code: MPMFX  
Description: Mairs & Power Funds Trust - Mairs & Pow  
Type: ETF  
Asset Class: U.S. Mid Cap Stocks  
Asset Type: U.S.  
Shares: 5033.197000  
Cost Basis: \$514,338.20  
Value: \$918,256.46  
Last Price: \$182.4400000000

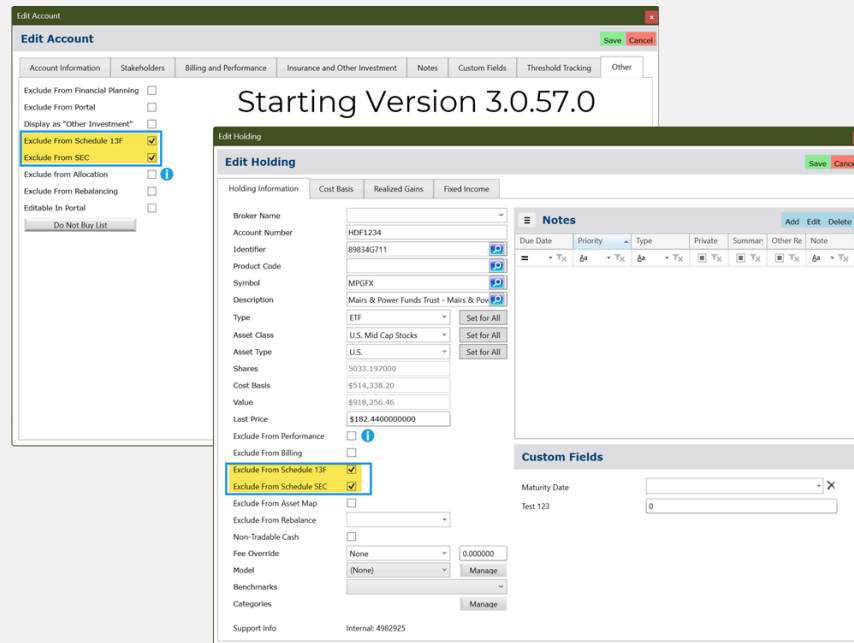
Exclude From Performance   
Exclude From Billing   
**Exclude From Schedule 13F/SEC**   
Exclude From Asset Map   
Exclude From Rebalance   
Non-Tradable Cash   
Fee Override: None (0.000000)  
Model: (None) Manage  
Benchmarks: Manage  
Categories: Manage

Notes

Due Date	Priority	Type	Private	Summary	Other Re	Note

Custom Fields

Maturity Date:   
Test 123: 0



## Key Takeaway

To reiterate, the **Exclude From Schedule 13F** flag removes the account or holding only from 13F reporting. The **Exclude from SEC** flag removes the Account or holding from all other SEC report creation processes.

## Notice: Schwab Expands Account Numbers to Nine Digits

Panoramix users can rest easy. No fretting over Panoramix's ability to handle the expanded nine-digit account numbers from Schwab required on your part.

We fully anticipate seeing these new account numbers by December of this year. We are already 100% ready to go on our end. And because of that, you are too. Take that one off your worry list. Sleep well.



## 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, March 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](#).



## Reminder — New Stuff / Tough Stuff Video Series Available

Don't miss our **New Stuff / Tough Stuff** video series. It's a great resource for **quick, practical walkthroughs on frequently asked questions and new features.**

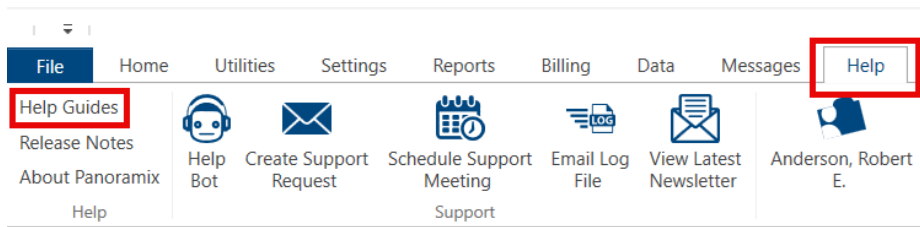
→We've just added **two new videos featuring Client Portal Custom Colors and the new SEC Audit reporting tool.**

**New Stuff/Tough Stuff Video Series Topics include:**

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

*Earlier videos cover Form ADV, the Download Info Tile, the Billing Grid, My Benchmarks, New User Notifications, and more.*

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



**Pro Tip:** 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](#)



## 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 just a few highlights from release 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.

[Catch the full newsletter here »](#)



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