



## Here's just some of what's new or improved in version 3.0.59:

- Debut release of Panoramix AI Assist powered by Panoramix FacetAI. Current features include navigation, data views, creating and editing data, along with providing general information and answering questions.
- Added the Find Account screen to Panoramix Web (located in Data tab)
- Updated billing in Panoramix Web to generate requests asynchronously.
- Added the Totals tab to billing on Panoramix Web, a custodian summary view available after billing is generated.
- Added the Billing 'Other Settings' menu to Panoramix Web.
- Added the ability to generate the Schedule 13F Report by rep code.

Close all Panoramix windows and restart the app so you get all the latest updates!

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

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

### 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 on the Road




**SYNERGY26 hosted by TradePMR**

 June 2–5, 2026 | Washington, D.C.



**IMPACT hosted by Schwab**

 October 27-29, 2026 | Boston, MA

## 💡 Tips & Tricks: Annual Performance Summary

Are you noticing a negative return on your **Annual Performance Summary**, even though your account is showing a large market return or addition? You could have the “**Show Fees**” setting unchecked, which would exclude any fees taken out of the account. This small change can pack a big punch, and could be the reason why you are scratching your head wondering why  $1 + 1 \neq 2$ .

The screenshot displays the 'Annual Performance Summary' for 'The Andersons family' from 12/31/2024 to 12/31/2025. The interface includes a 'Report' dropdown menu, 'View Report' and 'Print Report' buttons, and a 'Select Report Parameters' sidebar. The sidebar has three numbered callouts: 1. 'Show Fees' checkbox checked under 'Display Options'; 2. 'View Report' button; 3. '+' icon next to an account row. The main table shows columns for Value On, Additions/Withdrawals, Net Income, Market Savings, Value On, Fees/Comms, Net Gain/Loss, and Basic Return. A 'Groups' dialog box is open at the bottom right with 'Expanded' selected.

To enable this parameter, select the desired client and open **Client Reports**. Select **Annual Performance Summary** from the drop-down list of reports, and ensure your dates and benchmarks are correctly set.

Next:

- 1) Under **Display Options**, check the box next to **Show Fees**
- 2) Now select **View Report**
- 3) You can expand accounts at the + icon, to see detailed information for each account.

💡 **Bonus Tip:** to see the detailed view automatically, under **Display Options** in **Groups**, select the check box for **Expanded**.

## 📝 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, April 14th, 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.)

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

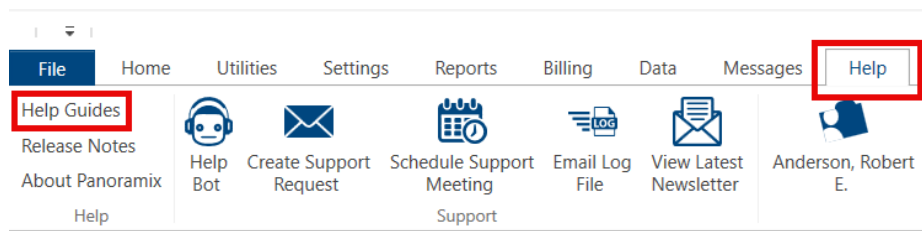
Don't miss our **New Stuff / Tough Stuff** video series: **quick, practical walkthroughs on frequently asked questions and new features.**

### **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
- Client Portal Custom Colors
- SEC Audit Reporting Tool

*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

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 just a few **highlights from release 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.

[Catch the full newsletter here »](#)



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