

- Added the Account Search utility to Panoramix Web.
- Added the ability to refresh the displayed data in the Download Info menu.
- Added the Model and Benchmark columns to the Holdings Blotter.
- Added the ability to select multiple Rep Codes when generating the Schedule 13F report.
- Added a notification to Account Search screen when the user is trying to open an orphaned account.
- Added the ability to track the last viewed date of a document that is in the client portal.
- Added a new parameter to use either whole or fractional shares when generating bulk trades.
- Added a new parameter to bulk trading to allow users to include accounts and holdings that are marked as Exclude from Rebalancing.
- Added the ability to allow users to move fee transaction to a newly created expense holding for fees that are not considered management fees.
- Added color coding of positions displayed in Portfolio Dashboard that are marked as Exclude from Rebalance.
- Updated Pie Charts where groupings with less than one percent of the total were grouped under the “Other” slice.

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.

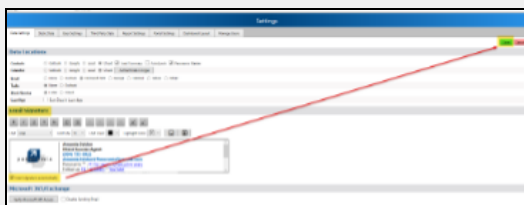
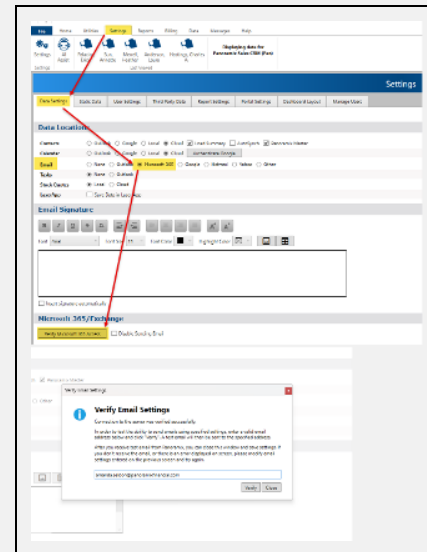


SYNERGY26 hosted by TradePMR
 📍 June 2–5, 2026 | Washington, D.C.

IMPACT hosted by Schwab
 📍 October 27-29, 2026 | Boston, MA

💡 **Tips & Tricks: Microsoft 365 Replacing Classic Outlook**

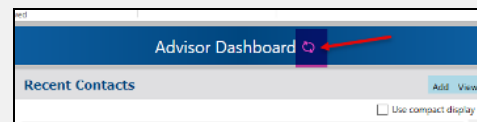
With Classic Outlook being replaced by Microsoft 365, many users may notice changes when sending emails through Panoramix. This update requires both local email integration and re-established security permissions through Microsoft 365. In certain cases, emails may no longer send automatically through the desktop Outlook application or may get held in Drafts instead of being delivered. To address this, follow the steps below to update your email integration settings, found in Panoramix under **Settings > Data Settings > Email**. Select **Microsoft 365** and then **Verify Microsoft 365 Access**. This will open a browser window for you to verify your Microsoft 365 login, as well as open a new box in Panoramix prompting you to enter your email address to send a test email.



Next, copy and paste your **Email Signature** in the box that appears below, and select **Insert signature automatically**, if that is your preference, and then select **'Save'**. Next close & re-open Panoramix to

ensure the settings are applied, then navigate back to **Settings > Data Settings > Verify Microsoft 365 Access** to send yourself another test email. This will ensure your email signature is being sent properly.

Please Note: You may periodically be prompted to re-verify your Microsoft 365 integration settings for security purposes. This is because Microsoft 365 uses modern authentication, which relies on secure tokens instead of a one-time login. These tokens can expire, especially after password changes, system updates, or periods of inactivity.



👤 Reminder — New Stuff / Tough Stuff Video Series Available

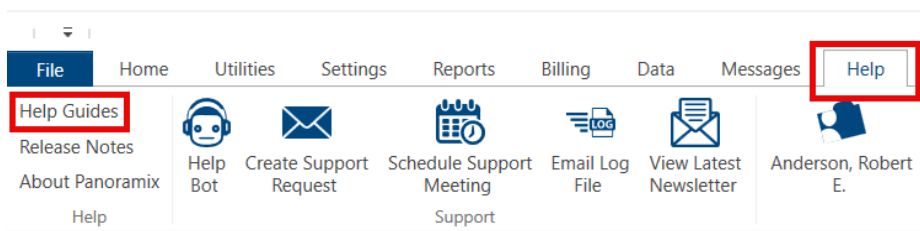
Don't miss our **New Stuff / Tough Stuff** video series: **quick, practical walkthroughs on FAQs and new features.**

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

- Closing Accounts
- Client Portal Custom Colors
- SEC Audit Reporting Tool
- FacetAI Intro

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

Access all of 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!



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, May 12th, 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](#).

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.

- 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:

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 3.0.59:**

- 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.

[Catch the full newsletter here »](#)



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