



May 7th, 2026

NEWS & UPDATES

Server Upgrades Scheduled

We will be upgrading hardware this weekend. You may experience intermittent downtime between 9:00 AM and 12:00 PM Central Time on Saturday, May 9.

We appreciate your patience as we complete these improvements.

Panoramix Latest Updates Version 3.0.62

You asked, we delivered. This release includes continued enhancements to Panoramix Web as we expand functionality toward parity with the Desktop application, along with updates across reporting, billing, and data management. Highlights from this release are below:

Here's just some of what's new or improved in version 3.0.62:

- Added Fee Schedule settings to Billing menu in Panoramix Web.
- Fixed an issue with displaying Contact and Household names in the Summary section of the Income Blotter.
- Updated Betterment import to handle new transaction types.
- Updated Wedbush import to handle new transaction types.

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.

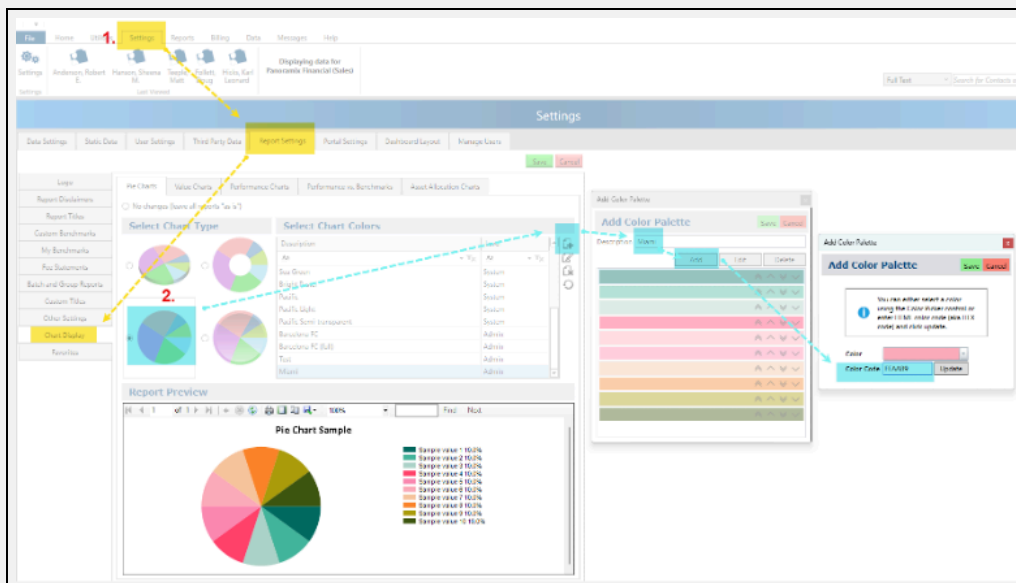


IMPACT hosted by Schwab
 October 27-29, 2026 | Boston, MA

Tips & Tricks: Custom Colors Available for Charts & Graphs in Panoramix

Did you know you are able to set custom colors for charts and graphs that will consistently show on client reports? Setting up custom colors can help visually declutter your reports. You can even go a step further to use colors specific to your company and logo, with the ability to input hex codes for even greater cohesion with your brand. Let's look below to see how this is done.

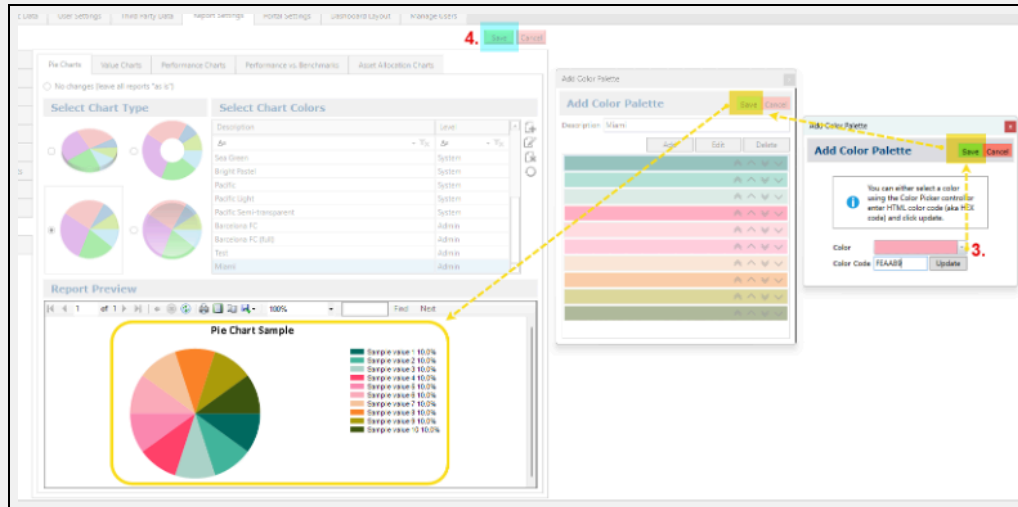
1. In Panoramix, select **Settings** > **Report Settings** > **Chart Display**
2. Select the style of chart you want to see on your reports, and then click the **Add** icon to **Add New Color Palette**. Name your palette, and then click **Add**. A new box will appear. Input the desired hex code into the **Color Code** field, and then select **Update**. This will show the color in the box above (**Bonus Tip**, you can click the drop-down box there for **Color Picker**, if you aren't picky about exact hex codes)



3. After selecting your color, click **Save**. This will load it into the **Add Color Palette** menu. Once you have added all the custom colors, click **Save** to add the new color palette to your **Chart Color** choices, and

load the **Pie Chart Sample**. (Side note, you will be asked to add at least 10 colors)

4. After verifying your colors are set the way you would like, click **Save** at the top to apply to your client reports.



Your custom color palette can be applied to Performance Charts, Asset Allocation Charts, and more! Connect with us through the Help Menu inside Panoramix to learn more about how to set specific colors to your client reports! To learn more about how custom colors can be applied to Portal Settings, check out this [New Stuff Tough Stuff video](#).

Reminder — New Stuff / Tough Stuff Video Series Available

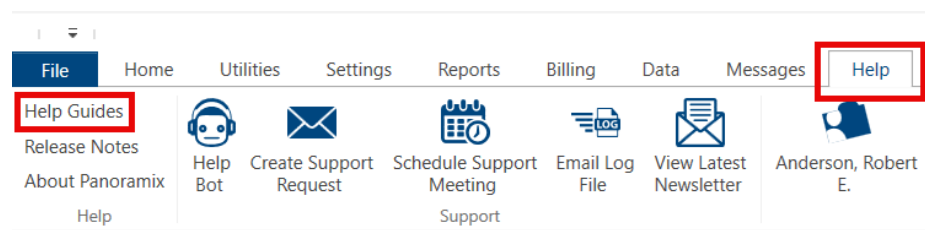
Don't miss our **New Stuff / Tough Stuff** video series: **quick, practical walkthroughs on FAQs and new features.**

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 3.0.60:**

- 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.

[Catch the full newsletter here »](#)



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