

Integration Issues

MS Outlook

If you see a message with the following text (image to the right) when you are accessing clients in Panoramix, it is a result of security settings in Outlook. It is not a Panoramix issue. It is an Outlook issue. As of this writing, this link had a good explanation, and resolution set depending upon your version of Outlook. <https://www.ryadel.com/en/how-to-stop-the-outlook-a-program-is-trying-to-access-pop-up/>. Another resource is <https://support.microsoft.com/en-us/office/i-get-warnings-about-a-programaccessing-email-address-information-or-sending-email-on-my-behalf-86cc5ece-379e-45e3-b8eb3fefba09946b>

“A program is trying to access e-mail address information stored in Outlook. If this is unexpected, click Deny and verify your antivirus software is up-to-date. For more information about e-mail safety and how you might be able to avoid getting this warning, click Help. Allow access for 1 minute I Deny Allow Help.”



MoneyGuide Pro

If your MoneyGuide Pro integration fails suddenly, it may be that you changed your Panoramix password and it is no longer in synch with MoneyGuide. Access MoneyGuidePro and select the **User Options** in the *Admin Group*, followed by **Partner Options** (left menu). Locate Panoramix and click the **Add/Edit Panoramix Login** link, change the password to match your new Panoramix password and click **done**.

DST FANMail

How do I set up a DST interface via FANMail?

To begin downloading DST accounts via FANMail, start by opening a free FANMail account. There is a link to a procedure document in Panoramix on the FAN Mail tab mentioned in the next paragraph.

From the Settings tab, access Third Party Data and FAN Mail. Check Enable FAN Mail downloads, set your file retention desires, enter your username and password credentials for the FANMail account and Save changes.

What does it mean when accounts stop downloading via FANMail?

You will know that the download is no longer working by checking the Last Download Date for the account (there are a number of ways to do this, including using the Account blotter or looking at the Edit Account screen). If an account is no longer downloading it means that some combination of the custodian, branch code, and/or rep code is not properly established with www.dstfanmail.com. Correcting the issue there will begin the flow of transactions again.

Is a DST FANMail connection considered a custodian data feed for purposes of Panoramix licensing?

Yes.

Riskalyze: How do I use the Riskalyze Scores from the Custodian Portfolio and not the Panoramix Portfolio?

Sometimes you will have accidentally—or on purpose—created a Panoramix portfolio in Riskalyze and you don't want to use that portfolio. Instead you want to use the Riskalyze scores from the portfolio Riskalyze obtained from your custodian. In order to facilitate this within Panoramix, you need to first ensure that the **Settings, Third Party Settings, Riskalyze**, settings state to retrieve Riskalyze scores only.

The screenshot shows the Panoramix application interface. At the top, there's a navigation bar with tabs: Home, Utilities, Settings (selected), Reports, Billing, Data, and Help. Below this is a sidebar with icons for Settings, Montoya, Inigo, Anderson, Robert E., Frankenstein, Herr Dr. Frederick, Castle, Mr. Richard E., and Coolidge, Calvin. A main panel on the right displays "Displaying data for Panoramix Demo (Sales)".

The main content area has a sub-navigation bar with tabs: Data Settings, Static Data, User Settings, **Third Party Data** (selected), Report Settings, and Portal Settings.

Under the "Third Party Data" tab, there's a list of services on the left: Copytalk, dbCams Interface, Dropbox, FAN Mail, LaserApp Anywhere, Redtail, and Riskalyze. The "Riskalyze" service is selected.

The Riskalyze configuration form includes:

- User Name: cjhastings@sapphiress.com
- Password: [masked]
- ☒ Send Account Number
- ☒ Retrieve Riskalyze Scores Only (highlighted in yellow)
- Authenticate with Riskalyze button
- Fix Browser Setting button

Save those changes.

If you are updating a Riskalyze score for an individual client, make sure that you check that checkbox there as well.

The screenshot shows the Riskalyze Interface. At the top, it says "Riskalyze Interface". Below that, there's a header with the Riskalyze logo, a green "Authorized" status, and fields for User Name (cjhastings@sapphiress.com) and Password ([masked]). An "Authenticate with Riskalyze" button is present.

The main content area displays:

- Robert E. Anderson Current Risk Number®: 96
- Riskalyze Id: 551133860
- Buttons: Link To Existing Riskalyze Client, Unlink Client
- Form options: ☐ Household, ☐ Replace existing portfolio, ☒ Retrieve Riskalyze Scores Only (highlighted in yellow)
- Buttons: Update Client/Portfolio, Send As New Client, Launch Riskalyze

Once all that is set, then you need to log into Riskalyze and look for a portfolio called "Panoramix Portfolio." Panoramix uses the "Panoramix Portfolio" by default. The only way this gets created in Riskalyze is if you created it in a previous update for the client between Panoramix and Riskalyze. If you don't want Panoramix to use that portfolio, delete it in Riskalyze. This causes Panoramix to use the scores from the "Current Portfolio" in from Riskalyze, which is typically the current portfolio from your custodian.