Integration

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Strategic Partnership
Series of Documentation
From Panoramix™ Financial

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Introduction

Panoramix™ for Financial Advisors is a portfolio management tool with light customer relationship management (CRM) and robust billing, and performance reporting components. Panoramix also offers a Client Portal included in its base cost. This manual covers the Panoramix integration with Wealthbox, a web-and-mobile CRM designed for financial advisors with an intuitive interface design, advanced features, and integrations. Panoramix integrates with Wealthbox as a strategic partner to provide the advanced CRM functionality not native to the platform. We let the CRM experts do what they do best, thereby offering a superior advisor experience at the lowest possible cost.

NOTE: Once the connection is established between a Panoramix Client and a Wealthbox client, the data entered in one does ***not*** automatically flow to the other. For example, an address change in Wealthbox will not reflect in Panoramix until the advisor completes a data synchronization, either via the utility, as described herein, or via the Contact Dashboard icons and menu selections.

Pictorial Guide to Panoramix-to-Wealthbox integration

The following is a step-by-step guide to connecting Wealthbox to Panoramix.

Begin by obtaining your Wealthbox access token from Wealthbox.com[1], entering it into Panoramix and verifying that it works as expected. Use the **Settings** tab, followed by **Third Party Data**, **Wealthbox** tabs.

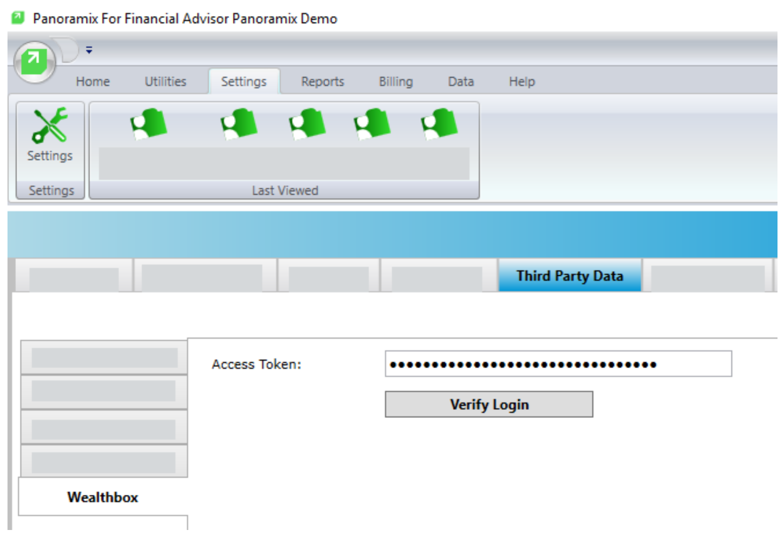

Figure 1:Set your Wealthbox token and validate it.

From the Panoramix **Utilities** menu tab, select The Wealthbox Import utility as shown in figures 2 through 4. If this is your very first use of the utility, click the **analyze contacts** button to start the process. This will populate four sub-tabs on the import screen, labeled A – D in figure 3. If you've used the utility before it is not necessary to complete the analyze step before taking certain other actions, which are covered below.

[1] From Wealthbox Help file: "In order to **obtain** a new access **token** or to manage your existing **tokens**, please visit the *API access token settings* page. From there, simply click *'Create Access Token'* and give the token a name. That token should then be passed as an HTTP Header, with the name ACCESS_TOKEN, in all requests to the API." The latter is what Panoramix does with the token once you've pasted it into the field shown and verified it.

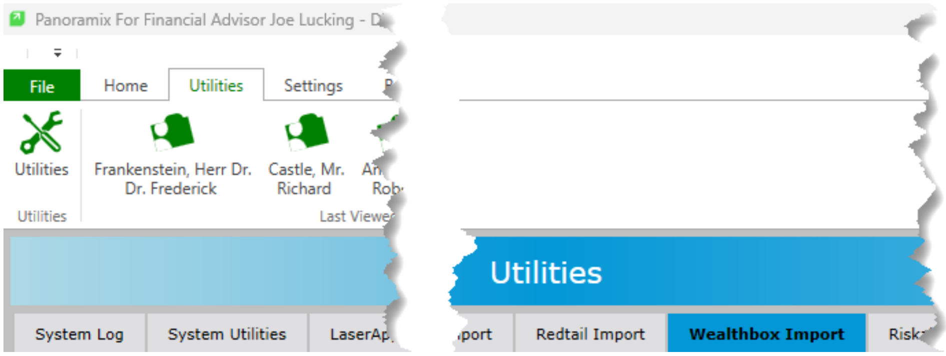

Figure 2: Panoramix Utilities Menu, Ribbon, and Wealthbox Import tab

Active and inactive buttons when you first access the Wealthbox Import utility tab.

On a first launch of the utility, only the **analyze contacts** button is active. This is a critical first step in linking mass numbers of Panoramix and Wealthbox contact records together. Upon subsequent use of the utility, the **update Panoramix contacts** and **update Wealthbox contacts** button are also active for mass updates without needing to complete the time-consuming analysis step.

- The **update Panoramix contacts** button looks from Panoramix to Wealthbox for matched contacts and pulls the information from Wealthbox to Panoramix and updates Panoramix.
- Conversely, the **update Wealthbox contacts** button looks at those matched contacts and pushes information from Panoramix into Wealthbox, updating the record there,

It is important not to select the wrong action. If you update Wealthbox when you meant to update Panoramix, there's not a single thing we can do about it. Not. A. Thing.

Figure 3: Active and Inactive Buttons at Initial Access of the Wealthbox Import utility once contacts are linked

The **export to Excel button** becomes active once the grids contain data from the analyze contacts process. To export data to Excel, activate the tab containing the data you desire exported and click the button.

The Four Results Tabs

Each of the four results tabs becomes populated following the **analyze c**ontacts action. Each tab contains different results and offers different courses of action.

A—Properly connected

This tab lists Panoramix clients already connected to Wealthbox. There are five actions you may take with any checked or set of checked contacts. As mentioned previously, two of those actions involve either updating Panoramix from Wealthbox (the most common) and updating Wealthbox from

Panoramix (far less common). The next two buttons act similarly, affecting only the Notes field. The most common direction is to **add notes to Panoramix** from Wealthbox. The **clear link** button terminates the connection for the selected contact or set of contacts selected

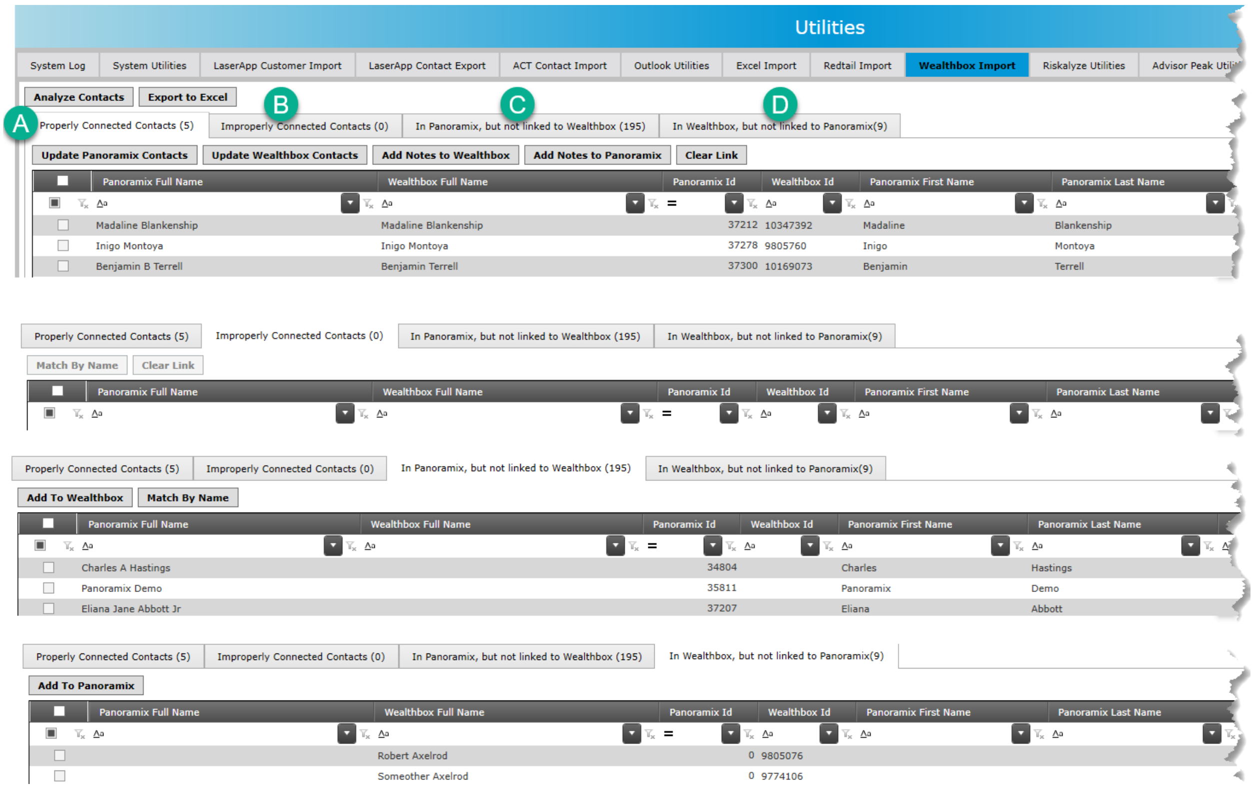

Figure 4: The Panoramix Wealthbox Import Utility Screen, with each tab highlighted vertically as moving from left to right.

B—Improperly connected

This tab lists Panoramix clients linked to a non-existent Wealthbox ID. You may either attempt to re-match them by name or terminate (clear) the connection using the buttons shown.

C—In Panoramix but not Wealthbox

This tab displays contacts in Panoramix with no Wealthbox connection presently. All Panoramix contacts show up in this grid the first time you run the analysis. From here, the proper thing to attempt is to match existing records by name. Panoramix uses the first and last names, spaces removed and adjusted for case on both the Panoramix and Wealthbox sides, to create matches. See figure 5 for the ensuing interface, which allows you to make connections. Non-matches may be uploaded to Wealthbox. Taking this action copies the Panoramix data to Wealthbox, creating a new client there using the Panoramix demographic data.

D—In Wealthbox but not in Panoramix

The opposite of C, above. You may add these contacts to Panoramix using the Wealthbox data.

Matching by Name in the Utility

See figure 5.

Once matched you have the option to Link and update Panoramix from the Wealthbox data (common), link and update Wealthbox from the Panoramix data (rare), or create the link only and not do and data transfer (faster for the initial linking and you can always go get (or push) the data the data later.

If you select one of the link and update options, you may also select what it is that you wish to pull (or push) with this update action. The options are as follows.

Demographics—client name, date of birth, etc. as available.

Addresses—one or more addresses may be exchanged/updated.

Phones—one or more client phone numbers may be exchanged/updated.

Emails—between zero and three email addresses for the client may be exchanged/updated.

Notes—a synchronization process for all notes on a client. Notes from Wealthbox into Panoramix also include such things as the contact's status as a smoker (Y/N) and other tags in Wealthbox that have no Panoramix equivalent.

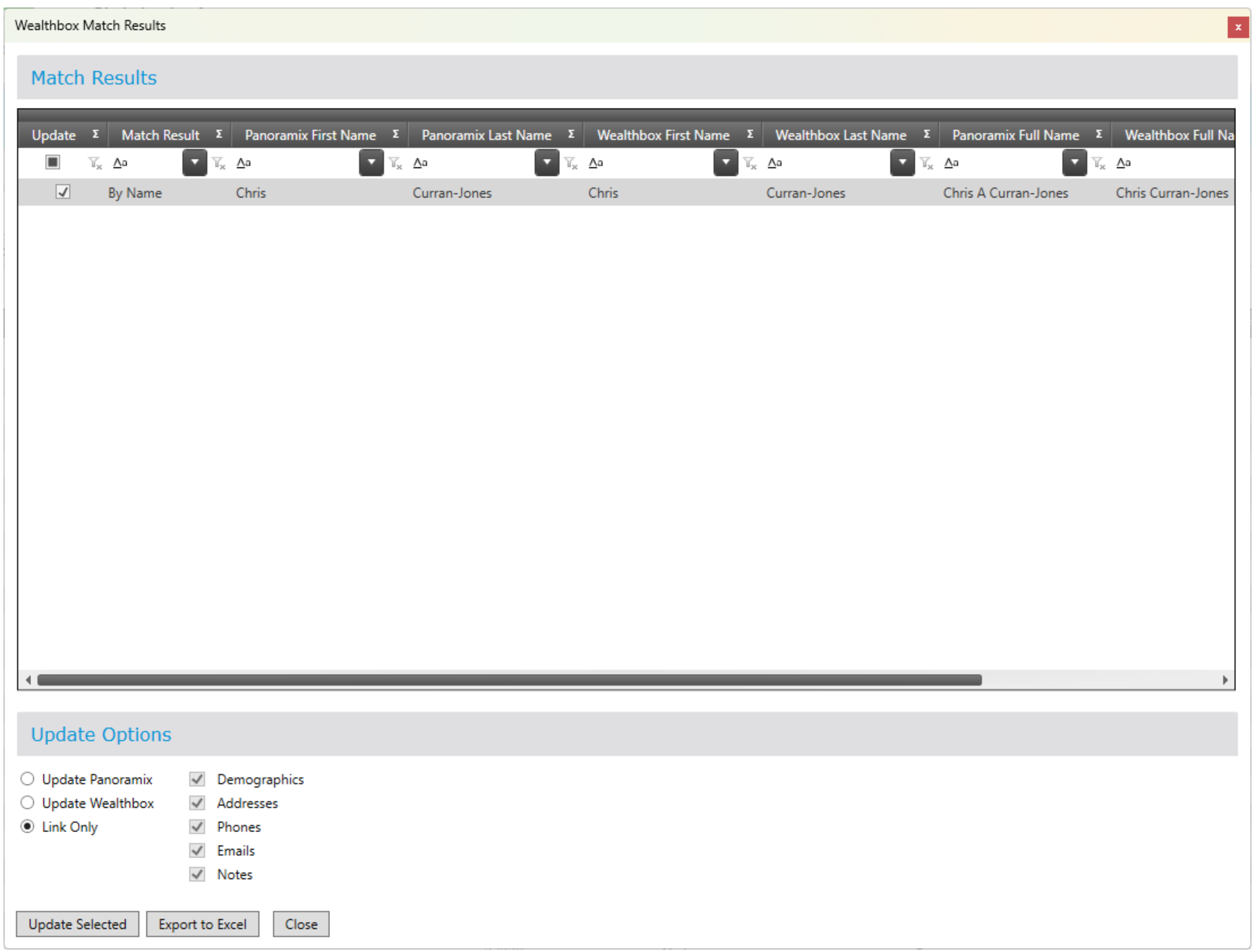

Figure 5: Match results interface with update options for the found matches by name

Matched Contacts in the Dashboard

Once matched, the Contact Dashboard shows the link by displaying the Wealthbox logo in the contact information tile. (This contact is also linked to AdvicePay and has Household Billing established.)

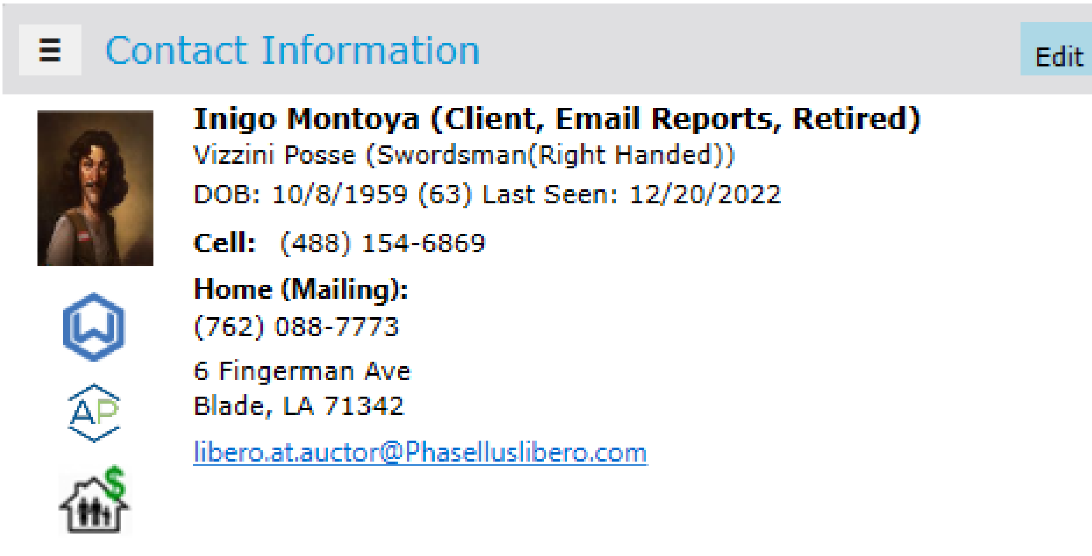

Figure 6: Wealthbox logo indicates linked contact

Contact information may be imported and exported between Panoramix and Wealthbox using the **Import** and **Export** menu options in the Contact Dashboard hamburger menu. Remember that Import means to pull information from Wealthbox and load it into Panoramix and export means to push information from Panoramix to Wealthbox. Importing is more common than exporting. If you export and overwrite more current Wealthbox data with stale Panoramix date there is nothing we can do to recover from that.

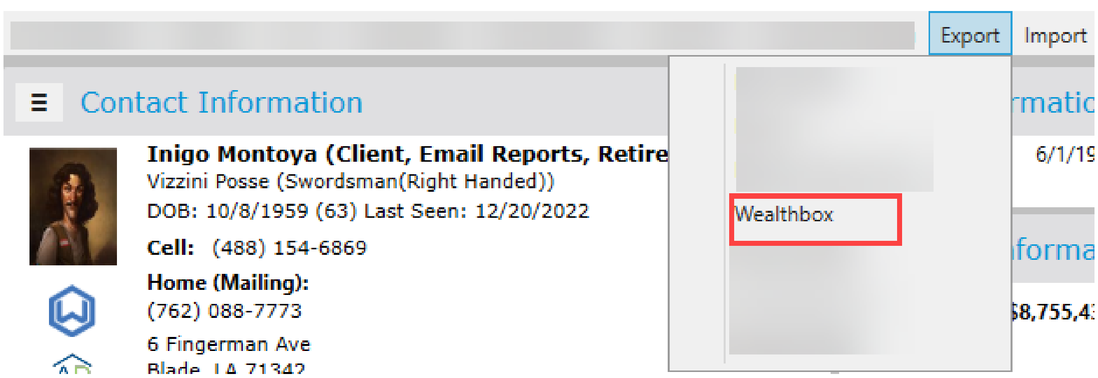

Figure 7: Export from Panoramix to Wealthbox

Figure 8: Import from Wealthbox to Panoramix

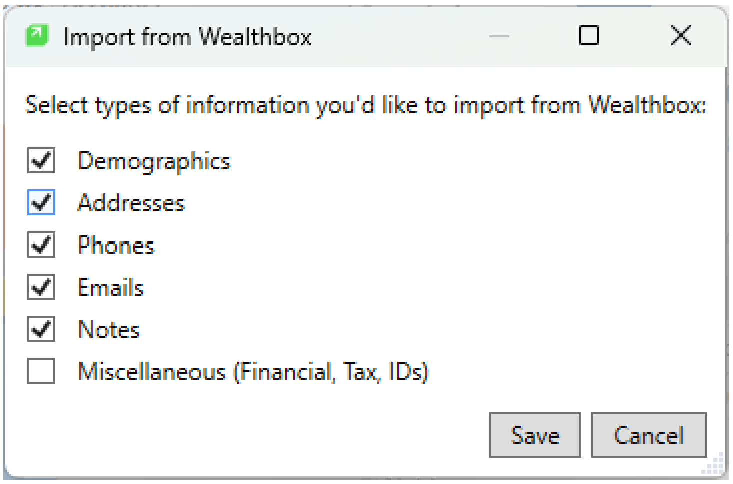

Figure 9:Import data options dialogue box

Matching New Contacts in the Dashboard

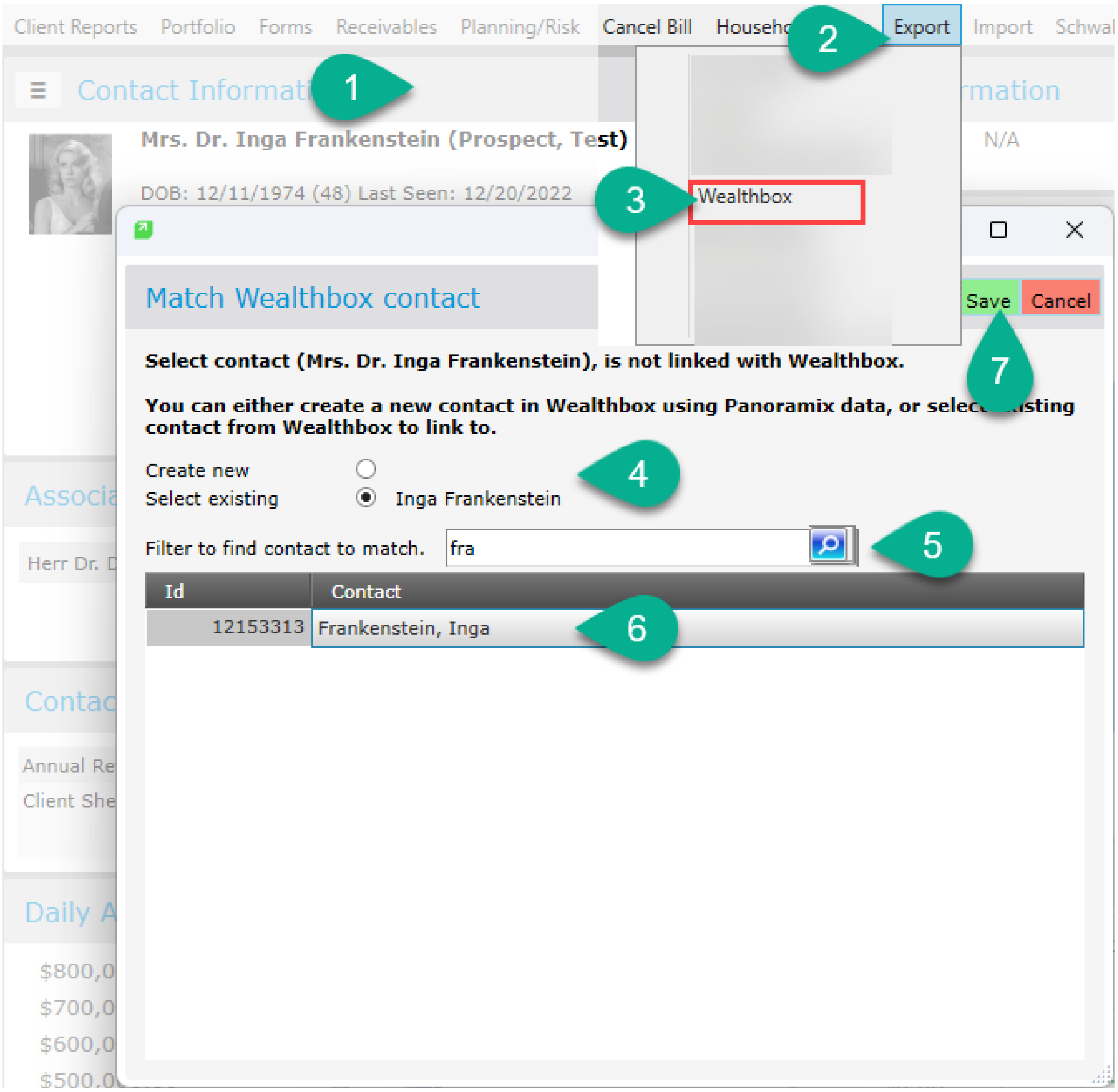

Figure 10: Composite image of steps needed to add an individual contact to Wealthbox.

1. Access the Contact Dashboard for the contact you wish to tie to Wealthbox
2. Select either the **Export** or **Import** menu items
    a. The export selection, shown in figure 10, allows you to choose if you wish to create a new Wealthbox record or use an existing one—this sample uses an existing one
    b. The import option is nearly identical, but it assumes that the record already exists in Wealthbox—which it must if you're going to import it to Panoramix
3. Select **Wealthbox** from the menu options
4. For Export, select either *create new* or *select existing*—this option does not exist for **Import**
    a. Create new will use the information in Panoramix to create a new Wealthbox record and then link them
    b. Select exiting allows you to search for an existing record and then link it
5. Start typing some search parameters for Wealthbox to look for and click the **Search** icon

6. Locate and highlight your matching record from Wealthbox
7. **Save** to create the link

Final Note

Some actions described in this document require Yes/No or Continue confirmation selections. Others display progress bars or other interactive elements not captured herein.

Appendix A

Document Change Control

Date	Version	Requester	Author(s)	Approver(s)	Notes
06/05/2019	1.00	Wealthbox	Joe Lucking	Chris Hastings	Initial publication
12/19/2019	1.01	An advisor	Joe Lucking	Chris Hastings	Added footnote related to obtaining a Wealthbox token.
01/16/2020	1.02	Sean Brzozowski	Joe Lucking	Chris Hastings	Matching individual contacts from the Contact Dashboard.
08/12/2021	1.03	One alert reader	Joe Lucking	Chris Hastings	Typo corrections
12/22/2022	1.04	Advisors	Joe Lucking	Chris Hastings	UI-change-related updates

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Conventions Used in this Document

Text in ***bold italics*** represents an important point.

Text in **Bold** with capital letters represent the tab levels in the Panoramix interface.

Text in SMALL CAPITAL LETTERS (SMALL CAPS) represent ribbon selections in the Panoramix interface.

Text in **bold** with lower case lettering indicates a button somewhere other than on the ribbon in the Panoramix interface (regardless of how that text appears on the button, which is with an upper case first character).

Non-figure-caption text in *italics* represent selections within the Panoramix interface.

The text is written in the Calibri TrueType™ font for ease of readability on electronic media. Should the advisor require another font or font size selection for Americans with Disability Acts reasonable accommodations reasons, please contact Panoramix Financial Support at support@panoramixfinancial.com.

Likewise, contact Panoramix Financial Support at the email address above with suggested corrections, additions or deletions.

The term client is reserved for referring to the individual(s) who engage with the financial advisor, while the word advisor[2] refers to the consumer/licensee of the Panoramix software (regardless of their status as an actual advisor in your firm).

All data displayed in this manual originates from the Panoramix test system. You will likely see the humor of developers and testers represented in certain image clips.

[2] Panoramix uses the spelling advisor, with an o, as opposed to adviser, with an e, for two reasons. First, even though the *English Oxford Dictionary*, *AP Style Guide*, and several other sources prefer the older form of adviser for all usage, advisor is the de facto standard in North America for referring to the job title of an individual who earns a living by working in an advisory capacity in academics or financial services (note, too, that the adjective form of the word is always spelled with an o). Second, it's more pretentious and calls attention to your special role (to those who are aware that adviser appears roughly three times as often in print than advisor).