



# Integration

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Strategic Partnership  
Series of Documentation  
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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.

## Authorized Use Statement

Usage of this manual is limited by the terms and conditions of the standard Panoramix Software License Agreement dated March 2, 2017, which covers “any related documentation” (section 4). Only active licensees of Panoramix may possess and use this document, unless explicitly released for another use by an officer of Sapphire Software Services, Inc.

## Legal Disclaimer

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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](mailto: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<sup>1</sup> 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.

## Pictorial Guide to Panoramix-to-Wealthbox integration

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

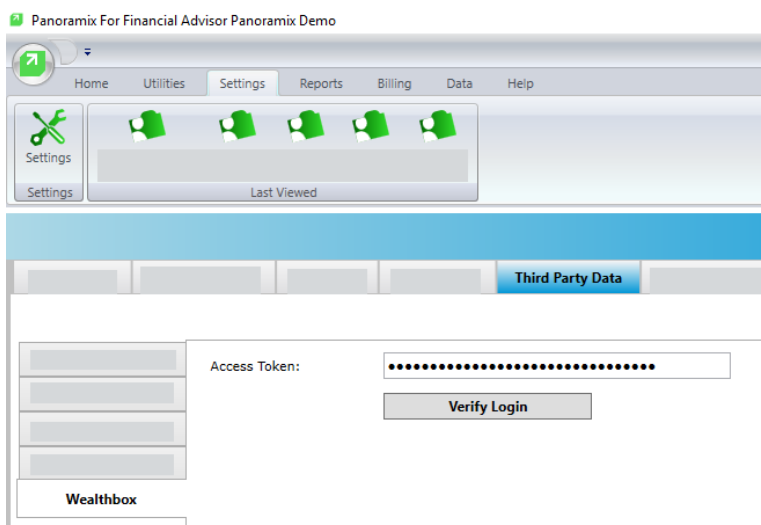
Begin by obtaining your Wealthbox access token from Wealthbox.com, entering it into Panoramix and verifying that it works as expected. Use the **Settings** tab, followed by **Third Party Data**, **Wealthbox** tabs.

*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 and 3. Click the **analyze contacts** button to start the process. This will populate four grids on the import screen, labeled A – D in figure 2.

### A—Properly connected

This grid lists Panoramix clients already connected to Wealthbox. Note that there are five actions you may take with any checked or set of checked contacts. The buttons explain those actions, from synchronizing from Panoramix to Wealthbox or Wealthbox to Panoramix for all data or notes only. The clear link button terminates the connection for the selected contact or set.



<sup>1</sup> 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).

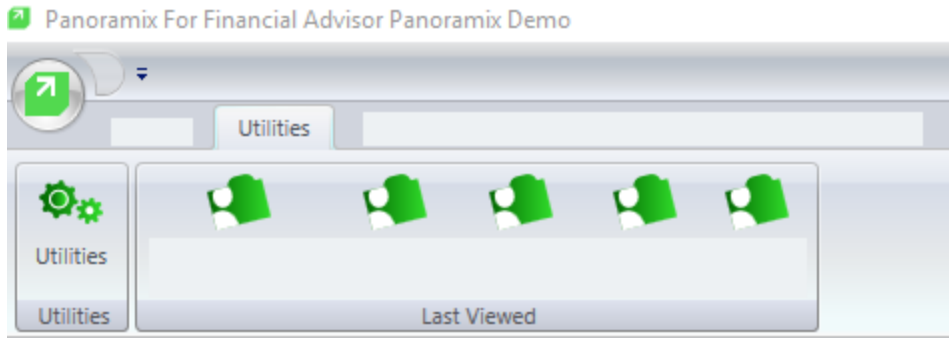


Figure 2: Panoramix Utilities Menu and Ribbon

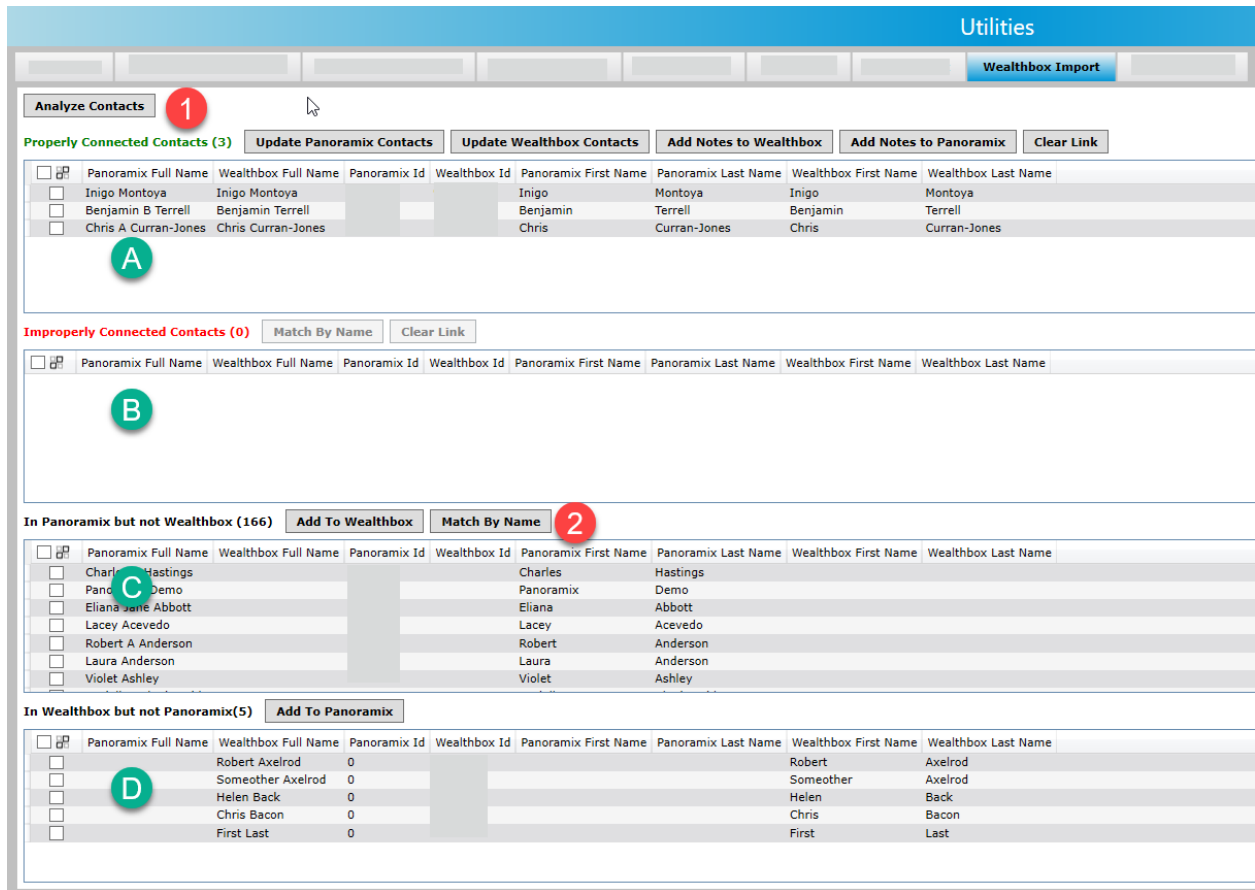


Figure 3: The Panoramix Wealthbox Import Utility Screen

**B—Improperly connected**

This grid lists Panoramix clients linked to a non-existent Wealthbox ID. You may either attempt to re-match them or terminate the connection using the buttons shown.

**C—In Panoramix but not Wealthbox**

This grid 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 4 for the ensuing interface, which allows you to make connections. Non-matches may be uploaded to Wealthbox.

#### D—In Wealthbox but not in Panoramix

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

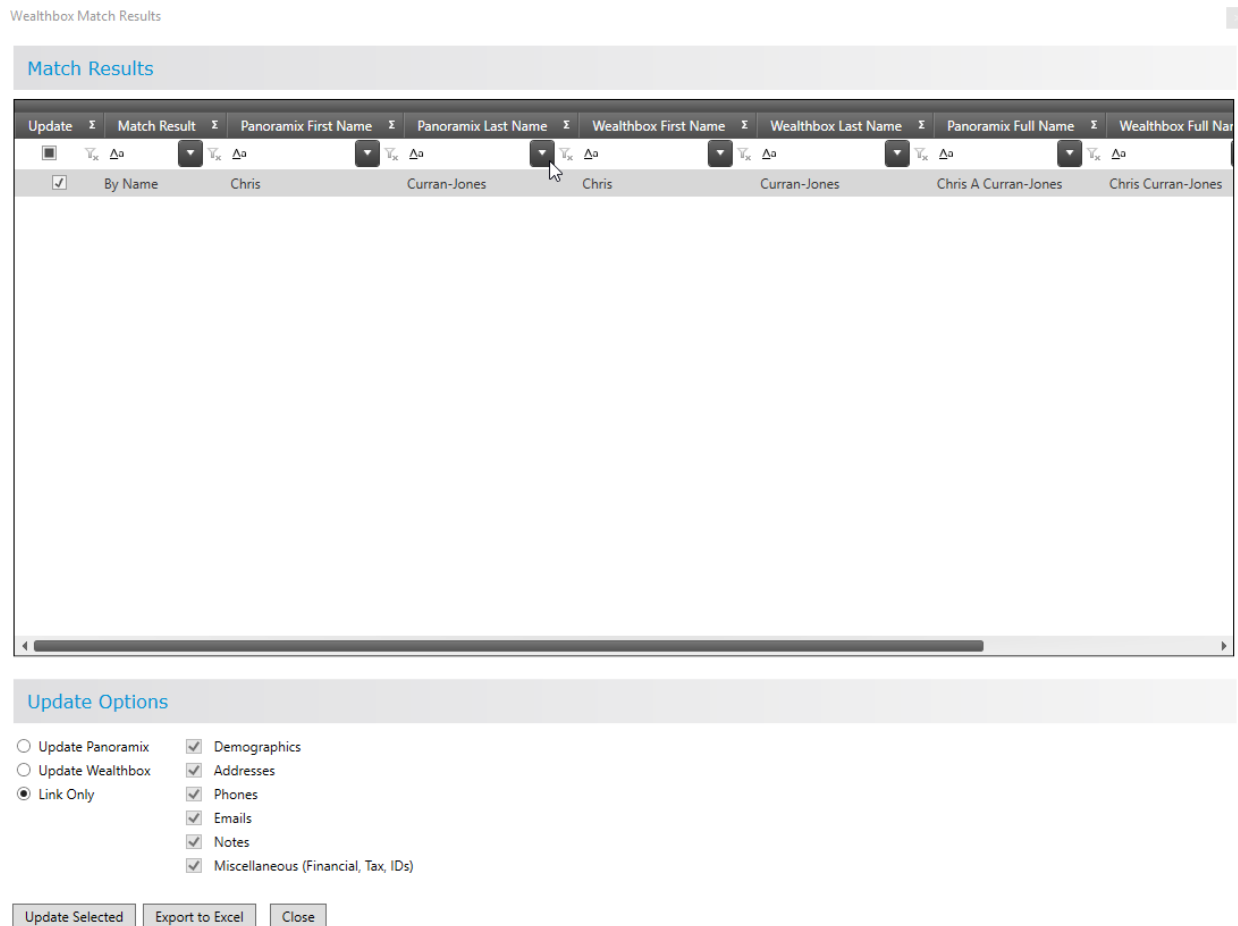


Figure 4: Match results interface with update options for the found matches by name

## Matched Contacts in the Dashboard

Once matched, the Contact Dashboard shows the link by displaying the Wealthbox logo in the contact information tile.

**Contact Information** Edit

**Inigo Montoya (Client, Retired, Email Reports)**  
 Vizzini's Posse (Swordsman (Right Handed))  
 DOB: 1/1/1941 (78)  
 Cell: (488) 154-688

**Home:**  
 (762) 088-773  
 6117 Natoque Ave  
 Apt. #713  
 Lynchburg, ID 67628  
[libero.at.auctor@Phaselluslibero.com](mailto:libero.at.auctor@Phaselluslibero.com)

*Note: A blue Wealthbox logo icon is present below the contact details.*

Figure 5: 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.

**Contact Information** Edit

**Inigo Montoya (Client, Retired, Email Reports)**  
 Vizzini's Posse (Swordsman (Right Handed))  
 DOB: 1/1/1941 (78)  
 Cell: (488) 154-688

**Home:**  
 (762) 088-773  
 6117 Natoque Ave

*Note: The 'Export' button is highlighted in the top right, and a dropdown menu is open showing 'Wealthbox' as an option.*

Figure 6: Export from Panoramix to Wealthbox

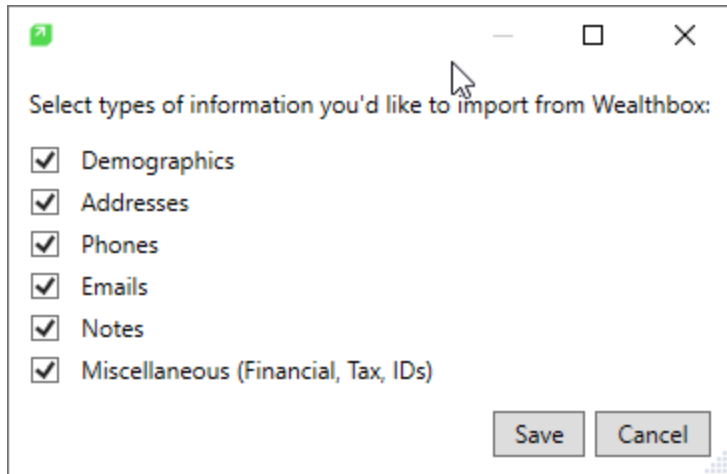
**Contact Information** Edit

**Inigo Montoya (Client, Retired, Email Reports)**  
 Vizzini's Posse (Swordsman (Right Handed))  
 DOB: 1/1/1941 (78)  
 Cell: (488) 154-688

**Home:**  
 (762) 088-773  
 6117 Natoque Ave

*Note: The 'Import' button is highlighted in the top right, and a dropdown menu is open showing 'Wealthbox' as an option.*

Figure 7: Import from Wealthbox to Panoramix



*Figure 8: Import data options dialog box*

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



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*Appendix A*

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**Document Change Control**

Date	Version	Requester	Author(s)	Approver(s)	Notes
06/05/2019	1.0	Wealthbox	Joe Lucking	Chris Hastings	Initial publication