



# Release Notes 25.04.

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## DOCUMENT VERSION CONTROL

Version	Comments	Author	Date
0.1	Draft Version	Kunaljit Nath	05/21/2025
0.2	Draft Version	Rob Britt	

## RACI MATRIX

R - Responsible, A - Accountable, C - Consulted, I - Informed

	Tarun Goud	Rob Britt	Brian Moran
Review	A	A	I
Approve	C	A	A

## INTRODUCTION

Release 25.03. introduces a major redesign of the WM 2.0 and represents a significant transformation of the FLX Wealth Manager experience. This release includes the foundational rollout of the new WM profile design, enhanced content structuring, advanced permission handling, and the introduction of the Pillars framework. The changes aim to modernize the interface, streamline navigation, and provide tools that increase personalization, configurability, and cross-company collaboration.

## IMPACTED USERS

Impacted Persona(s)	Impacted Section	Functionality
WM / WME Admins	Admin Panel	New permission system, employee visibility
WMs, WME, Visitors	Company Profile	New layout, about section, favorites, and pillars
All Users	Navigation (Header)	Waffle menu, home button replacement
WM	Pillars	Content updates, pinning, overview enhancements

## RELEASE SCOPE DETAILS

The scope of the release includes the following items:

Platform Category	Feature	Description / Details
Navigation	Waffle Menu Redesign	A new top-right waffle menu has been implemented, replacing the legacy side navigation. The menu is categorized into sections like "Exchanges," "My Apps," "Personal," and " <b>Recent Favorites</b> ." Each section is dynamically displayed based on user role and permissions.
Navigation	Home Button in Header	The Launchpad button in the header has been removed and replaced with a "Home" button. This provides quicker access to the new default home landing experience and aligns with global navigation design.
Admin Panel	Updated WM Permissions System	This foundational story introduces the new two-level permission model (Edit, View), replacing legacy granular permissions. It sets the stage for all feature-specific permission checks in the new WM ecosystem.
Admin Panel	Lookup for Global Pillar Tags	Under Admin > Lookup > Tags, a new management screen is available for defining and editing Global Pillar Tags. These tags are used during the pillar creation process for classification and filtering.

Company Profile	Company Details - About Section	A dedicated "About" section now appears on the company profile, with support for a headline and rich text description. The section dynamically expands if longer content is added, and gracefully collapses if left empty.
Company Profile	Edit Company Profile Page	The Edit Company Profile modal has been redesigned to include editable fields for name, address, contact info, website, and social media. Phone number formatting, email validation.
Admin Panel	WME Permission Changes	All Wealth Manager Employee permissions have been realigned to match the updated Edit/View model. Redundant sections (like Platform Updates and Announcements) were removed, and My Company access is now organized in an accordion view for the said permissions.
Company Profile	Video Embedding in About	The About section supports video embedding from YouTube /Spotlightr/Vimeo. When enabled, Admins can add a video URL or upload a file. The video appears above the description, with proper controls and a thumbnail preview.
Favorites	Add to Favorites	Users outside the company can now favorite a Wealth Manager profile. The favorite icon has been updated to a bookmark. Favorited companies appear in the user's "All Favorites" view under the waffle menu.
Favorites	Favorites - All Favorites Page	A dedicated "All Favorites" popup lets users view and manage companies they've favorited. Companies can be pinned (max 3), reordered, and removed. Pinned companies appear at the top of the waffle menu.
Favorites	Favorites - Visitor & Non-WME Users	Visitors and external users can favorite WM companies and access them later from their waffle menu. Full functionality is now available across all personas (excluding WM internal employees who are default followers).
Company Profile	Favorites - Company Profile Integration	The favorite count now appears on the company profile. WM/WME users see a follower count (Added to Favorites), which when clicked, opens a searchable popup of favoriting users.
Pillars	Pillars Section on Company Profile	A new section allows WMs to define up to 12 business Pillars. These are shown in a card-style layout and include support for notification counters, role-based access, and a "Manage Pillars" configuration view.
Pillars	Adding a New Pillar	Admins can create new pillars with a Global Tag, icon, display name, overview headline, and description. Live character counters, icon selection modals, and dropdown management are included.
Pillars	Pillar Overview Page	Clicking a Pillar card opens its overview page, which displays its headline, description, update feed, and a list of Pillar Contacts. Support for pinning events to the carousel and adding documents is included.

Pillars	Update Component Cards	Each update inside a Pillar is rendered using a modular component card. Cards display the title, description, effective date, links, document count, and a "Read More" CTA. Pinned updates appear with a different background and order.
Pillars	Manage Pillars Interface	A centralized management screen allows Admins to review and update existing Pillars. The page supports editing tag/icon, adding new updates, and a banner alert for saved-but-unpublished changes.
Pillars	Create New Pillar Update	A full-page form enables Admins to add updates with title, description, platform/product tags, links, documents, publish scheduling, email notification toggle, and company profile carousel settings.
Pillars	Read More Page for Updates	Each update now links to a dedicated read-more page showing full content, document previews, source links, and navigation to previous/next updates. This page improves content visibility and historical browsing.

## What's Next

The following changes are planned for future releases:

Platform Area	Feature	Description
Admin section	Access Control	WM/ Admins can add or remove Asset Managers from their company's approved list. Once approved, a Partner Folder is auto created for shared collaboration.
Pillars	Share Pillar Access	A new access management popup allows Admins to assign specific permission levels (View Only, View & Download, Full Access) to employees per Pillar. Users can also be marked as Pillar Contacts.
Pillars	Pillar Carousel	Updates marked as "Feature in Profile Carousel" are now displayed in a carousel on the company profile. The carousel supports up to 5 pinned updates, each with image, title, and description.
Reporting	Partner Folder	Once a company is approved via Access Control, a Partner Folder is created under Reporting. Default subfolders are added, and shared file access is governed by folder-level permissions.
Platform Notifications	Pillar Notifications	Users now receive in-app notifications when they are added to a Pillar, when new updates are posted, or when content (documents or text) within an update is modified.
Emails	Update Email Notifications	When "Send email at publish" is enabled, users with access to the Pillar receive a short templated

		email notifying them of the new content.
Favorites	WME Non-Admins - Favorites Popup Fix	A fix enabling non-admin Wealth Manager Employees to successfully open and view the “Added to Favorites” modal when viewing company profiles.

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