FLX
NETWORKS

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DOCUMENT VERSION CONTROL

Version	Comments	Author	Date
0.1	Draft Version	Kunaljit Nath	05/27/2025
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

This incremental release builds upon the WM 2.0 foundation by enabling Wealth Managers and their Admins to manage Asset Manager (AM) company relationships more effectively through a newly introduced **Access Control** feature.

The Access Control module allows WM Admins to search for Asset Managers, add or remove company-level access, and initiate shared collaboration through **automated Partner Folder creation**. This enhancement strengthens inter-company engagement while maintaining governance through permission-based workflows.

IMPACTED USERS

Impacted Persona(s)	Impacted Section	Functionality
WM / WME Admins	Admin Panel > Access Control	Add, remove, and manage AM companies
AM Users	Partner Folder (via reporting)	Partner folder auto-creation, file access

RELEASE SCOPE DETAILS

The scope of the release includes the following items:

Platform Category	Feature	Description / Details
Admin Panel	**Access Control for AM Management**	A new **Access Control** section has been introduced under the Admin Panel for WM Admins. This screen allows users to search for, add, and remove Asset Manager companies. Once approved, a **Partner Folder** is automatically created under the Reporting tab to enable document sharing and cross-company collaboration.
Reporting	**Partner Folder Automation**	When an AM is approved via Access Control, a folder is created with the AM company name (on WM side) and WM company name (on AM side). Default subfolders are generated based on system templates. Access to these folders is permission-controlled, and notifications are sent when files are uploaded.
Favorites	**Auto-Follow on AM Approval**	Upon approval of an AM company, the WM company is automatically added to the Favorites list of all AM users (including Admins). These users also appear in the WM's "Added to Favorites" view. If the access is revoked, the WM company is removed from AM favorites.

What's Next

The following changes are planned for future releases:

Platform Area	Feature	Description
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.

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