FLX
NETWORKS

Release Notes 25.06.1
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DOCUMENT VERSION CONTROL

Version	Comments	Author	Date
0.1	Draft Version	Kunaljit Nath	06/12/2025
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 25.6.1 includes key improvements to the FLX Wealth Manager platform, addressing access control, user experience consistency, and critical security vulnerabilities. These updates improve data protection, strengthen relationship workflows between Wealth Managers and Asset Managers, and ensure consistent platform experience for all user roles.

IMPACTED USERS

Impacted Persona(s)	Impacted Section	Functionality
Security	File Access (Uploads)	PDFs and document URLs now gated behind authentication
All AM Employees	Access Control	Auto-favorite WM company upon approval
WME Non-Admin Users	Company Profile	Can now view the "Added to Favorites" popup

RELEASE SCOPE DETAILS

The scope of the release includes the following items:

Platform Category	Feature	Description / Details
Security	PDFs are Publicly Inaccessible	Files hosted in FLX application are now securely gated behind user authentication. Direct access via URL is no longer possible for unauthenticated users, preventing files from being publicly indexed (e.g., by Google) and ensuring all documents remain behind the login wall.
Access Control / Favorites	Auto-Favorite WM Company for All AM Employees	When an AM company is approved by a WM via Access Control, all AM employees (including Admins) automatically favorite the WM company. This ensures immediate visibility in the WM's "Added to Favorites" list and improves cross-company engagement. This logic excludes new AM employees added after approval.
Favorites Modal	WME can View "Added to Favorites" pop-up	This bug fix enables non-admin Wealth Manager Employees to successfully access and open the "Added to Favorites" (followers) popup when viewing their company profile.

What's Next

The following changes are planned for future releases:

Platform Area	Feature	Description
Partner Folders	Folder Permission Alignment	Updated logic for folder creation/removal permissions for both WM and AM companies under the new Edit/View model.
Notifications	Pillar Activity Alerts	In-app alerts for when users are added to Pillars, and for updates or file/document changes.
Emails	Pillar Update Notifications	A templated email is sent when a Pillar update is published with email enabled.

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