

Release Notes: Checklist Genius by Kandisa

Release Version History

Version Number	Version Name	Release Date
1.1	CLG	26-Jul-2024
1.2	CLG 1.2	13-Aug-2024
1.3	CLG (1.3)	14-Aug-2024
1.4	CLG (v1.4)	09-Sep-2024
1.4.1	CLG (v1.4.1)	11-Sep-2024
1.4.2	CLG (v1.4.2)	19-Sep-2024
1.5	CLG (v1.5)	06-Dec-2024
1.5.1	CLG (v1.5)	17-Dec-2024
1.5.2	CLG (v1.5.2)	19-Dec-2024
1.6	CLG (v1.6)	26-Dec-2024
1.6.1	CLG (v1.6.1)	27-Dec-2024
1.6.3	CLG (v1.6.3)	14-Jan-2025
1.7	CLG (v1.7)	03-Apr-2025
1.7.1	CLG (v1.7.1)	15-Apr-2025
1.7.2	CLG (v1.7.2)	25-Apr-2025
1.8.2	CLG (v1.8.2)	04-Dec-2025
1.9	CLG (v1.9)	09-Apr-2026

1.10.1	CLG (v1.10.1)	21-Jun-2026
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Release Version Details

Version 1.1

Date of Release: 26-Jul-2024

Overview

This inaugural release of "Checklist Genius by Kandisa" introduces users to a powerful tool designed to streamline task management and enhance productivity. Version 1.1 focuses on usability and performance, providing a robust foundation for future enhancements. With its intuitive design, Checklist Genius simplifies the creation, management, and reporting of task lists, making it an essential asset for businesses looking to optimize their workflow processes.

Key Features

- **Template Creation:** Streamline your task management by creating reusable checklist templates, ensuring consistency and saving time across repetitive tasks and projects.
- **Checklist Creation:**
 - **With Templates:** Effortlessly generate checklists using predefined templates, allowing you to quickly set up tasks without starting from scratch.
 - **Without Templates:** Customize your checklist creation by adding tasks individually, tailored specifically to unique project requirements.
- **Dynamic Item Addition:** Enhance flexibility by adding new items to existing checklists at any stage, allowing you to adapt to changes and incorporate additional tasks as needed.
- **Progress Tracking:** Use intuitive visual progress rings to monitor the completion status of each checklist, providing a clear overview of task progress at a glance.
- **Due Date Management:** Assign due dates to tasks and track their progress, ensuring timely completion and helping prioritize workload efficiently.
- **My Checklist Page:** Access a personalized view where users can see and manage all their checklists in one place, facilitating better organization and task handling.
- **Assignment Flexibility:** Assign checklists to individual users or queues, enabling effective distribution of tasks based on workload and expertise.

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- **Permission Sets:** Two distinct permission sets are provided:
 - **Admin/Manager Level Access:** Full access to all features and settings, allowing management and oversight of all checklists and user activities.
 - **Standard User Level Access:** Limited access focused on personal checklist management and task completion.
 - **Reporting and Dashboards:** Provided comprehensive reports and interactive dashboards to gain insights into task performance and completion metrics, aiding in decision-making and strategic planning.
 - **Automation:** Leverage the power of automation with global Apex function to automate checklist creation from Flows and Apex, reducing manual effort and increasing operational efficiency.

Version 1.2

Date of Release: 13-Aug-2024

Overview

This version solves the issue of installation of the app due to different limits of dynamic dashboards on different salesforce orgs.

Key Features/Changes:

- **Dashboards:** 'View Dashboard As' setting of all the Dashboards in the package is changed from 'The dashboard viewer' to 'Me' to avoid the error in installation of the app due to the limits on dynamic dashboards for SF orgs.

Version 1.3

Date of Release: 14-Aug-2024

Overview

This version fixes a bug that occurs when loading the MyChecklist page having Checklists from objects which do not have certain common fields such as Name which is not present in the Case object for example.

Bug fixes:

1. **Apex & Custom metadata:** The apex class responsible for fetching checklist data for the MyChecklist page is updated to handle all objects with the help of a Custom Metadata Type component.

Version 1.4

Date of Release: 09-Sep-2024

Overview

This version introduces Mobile user interface, and features such as Delete Checklists and Filters on the main (record level) interface. It also adds enhancements to the dialogue boxes.

Key Features/Changes:

- **Mobile UI:** Take your checklists wherever you go. Introducing Mobile user interface with this release to help you work with your checklists on the go. You can use it on a smartphone or a tablet pc.
- **Filters based on Owner, Due Dates & Status:** Find exactly what you need, when you need it! Filter by owner, due dates or status of the checklists in a snap!
- **Delete Checklists:** Keep only what's important to you and your workspace clutter-free. Now the checklists can be deleted if you are the creator or have the right permissions.

Enhancements:

- **Back buttons for dialogue boxes:** We have added 'Back' buttons to dialogue boxes that appear when you create checklists. They make it easier to change from 'with checklist' to 'without checklist' and vice versa.

Version 1.4.1

Date of Release: 11-Sep-2024

Overview

This patch version fixes a bug concerning delete checklist option.

Bug fixes:

1. **Delete icon:** For non-admin users, the delete checklist icon would hide on adding a new item to the checklist, until the page is refreshed. The issue has been resolved.

Version 1.4.2

Date of Release: 19-Sep-2024

Overview

This patch addresses a minor CSS (styles) rendering issue observed in the mobile user interface.

Bug fixes:

1. **Mobile UI CSS re-rendering:** When navigating between the main record component and the create checklist pages, certain styles, including the progress ring, were not rendering correctly. This patch ensures consistent rendering of these styles across those mobile screens.

Version 1.5

Date of Release: 06-Dec-2024

Overview

This version introduces a feature - Mass addition of Checklist Items to open checklists via the Checklist Template. Also a few fixes are included regarding CSS and object icons in Mychecklist page.

Key Features/Changes:

- **Mass Addition of Checklist Items:** Now you can add Items to open checklists which are created using a Checklist Template. It enables you to add a missing item or expand your checklists based on your new requirements. It can be achieved by editing the Checklist Template using which the checklists were created.

Bug fixes:

- **CSS classes:** Improved CSS naming conventions to avoid any possible overrides.
- **Object Icon in MyChecklist page:** In the grouping level of MyChecklist page, Order and Work Order icons were not fetched and shown in the earlier versions. It is now fixed.

Version 1.5.1

Date of Release: 17-Dec-2024

Overview

This version handles HTML text formatting in Description fields and changes the way Show more and Show less work in description fields.

Key Features/Changes:

- **HTML text formatting handled:** These tags help in presenting text in better and more engaging ways. On the main record level component of Checklist Genius, lengthy descriptions are handled in a neater way with buttons for Show more and Show less.

Also, it's handled in a way that it doesn't break the text when formatting HTML tags are used.

Version 1.5.2

Date of Release: 19-Dec-2024

Overview

A minor bug fix regarding the width of the description area and Show more/less button.

Bug fix:

- **Width of Show more/less:** Some text formatting tags such as
 tend to break the UI. In this case the width of the description area and the Show more/less button below it. It has been fixed to handle these scenarios.

Version 1.6

Date of Release: 26-Dec-2024

Overview

Now the Checklist app can be used with Task object seamlessly. This version implements Custom Metadata Type to establish a relationship between Checklist and Task.

Key Features/Changes:

- **Task Object relationship with Checklist:** Some objects such as Task cannot have a custom Lookup relationship with Checklist (or any other object). This limitation is overcome by implementing a Custom Metadata Type to establish a relationship between Checklist and Task. Hence, now you can add and work with Checklist App in Task record pages.

Version 1.6.1

Date of Release: 27-Dec-2024

Overview

A minor bug regarding permissions is fixed.

Bug Fix:

- **Permission set updated:** Permission sets which are packaged with the app are updated to provide access to certain fields required to handle Task object relationship feature.

Version 1.6.3

Date of Release: 14-Jan-2025

Overview

A minor bug regarding access is fixed.

Bug Fix:

- **Apex query permission updated:** Some profiles(such as the predefined Eval user profile) with limited access were not able to access Checklist Genius app functionalities even with the provided permission sets. A related apex code is updated to make it work for such limited profiles too.

Version 1.7

Date of Release: 03-Apr-2025

Overview

Major features added, along with minor fixes and improvements in user experience.

Key Features/Changes:

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- **Sequential completion of checklist items:** We can now impose on Checklist Items of a Checklist to be completed in the order they appear. This helps in use cases where an item depends on the previous item or if there are any prerequisites.
 - **Item Activity details:** Now you are able to see who updated a Checklist Item & when, right below each item. Also, this feature can either be enabled or disabled in the main component as & when we need.
 - **Edit & Delete Checklist Items:** Checklist Items can now be edited or deleted even after a Checklist is created, based on certain permissions.

Enhancements:

- **Scrolling of Template Items in Checklist Templates page:** Too many Items in a Checklist Template? That would cause your Template editor page to be unnecessarily too long, not anymore. Now you can easily scroll through items within the Items section, without needing to scroll the entire page.
- **Not Applicable icon position shift:** To indicate that an item is marked Not Applicable, now the checkbox of the item is replaced by Not Applicable item, so that you grasp the status of your checklists in a quick glance.

Version 1.7.1

Date of Release: 15-Apr-2025

Overview

Minor bug fix on Global apex method provided to automate checklist creations.

Bug fix:

- **Global apex method updated:** The global invocable apex method used to automate checklist creation has been enhanced to support Task-like objects (in the earlier versions), which can't have relationship fields due to Salesforce limitations. The method now correctly populates custom fields to link checklists with these objects—fixing a mismatch that previously occurred only during automation (not via UI).

Version 1.7.2

Date of Release: 25-Apr-2025

Overview

A new feature has been introduced that allows editing of the Checklist title, description, and due date directly from the main UI with certain permissions.

Key features/changes:

- **Checklist Edit:** Users can now easily update the title, description, and due date of a checklist after it has been created, provided they are either an admin user or the owner of the checklist. This enhancement helps keep checklist information relevant and accurate as plans evolve.

Version 1.8.2

Date of Release: 04-Dec-2025

Overview

Introducing powerful new capabilities that significantly elevate flexibility, control, and productivity for both Admins and Users. This release includes the brand-new Setup Page, Reminder Email Notifications, and CSV Import for Checklist Items, along with important improvements and bug resolutions that enhance the overall experience across the app.

Key features/changes:

- **Setup page:** Introducing a Checklist Genius Setup page to empower Admins and Managers with greater control. From this panel, you can now conveniently manage:
 - Checklist edit permission
 - Checklist Item edit/delete permissions
 - Reminder Notification settings

You also get quick access to User Guide, FAQs, and Contact Support. This streamlined setup experience ensures smoother administration.

- **Reminder Email Notification:** Users can now set automated Reminder Emails for checklists based on Due Date—whether approaching or past due, using the Notify toggle.
 - Admins can enable/disable this feature in the Setup tab
 - Supports custom email templates

This ensures teams never miss critical deadlines again.

- **Import Checklist Items:** Users can now import checklist items from a CSV file into:
 - Any new or existing Checklist Template
 - A Checklist during creation

This drastically reduces repetitive typing and helps maintain consistency across processes. (Not available in Mobile phone/Tablet as of version 1.8.1).

Enhancements:

- **Checklist Edit Icon on hover:** The Edit Checklist icon now appears only on hover and is aligned to the right of the Checklist Title. Cleaner UI, less visual clutter.
- **My Checklist Navigation:** Refreshing My Checklist page no longer resets the filter to “Today’s Checklists.” You remain on the same filter, enabling uninterrupted workflow.
- **Item Activity with user avatar/photo:** The Item Activity section now displays the user’s avatar/photo instead of their name. Avatar is clickable and redirects to the user record. Initials are shown if no photo exists.

This provides quicker visual context and enhances usability.

Bug fixes:

- **Template Item Re-ordering issue :** Rare scenarios where Item Order values are duplicated or missing would cause wrong ordering of Template Items and are now handled gracefully.
Now in such cases the Order is automatically reassigned based on the visual UI position, ensuring accuracy.

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- **Description - Show More/Less improved:** Now behaves correctly even when browser zoom is changed. Resolved issue where the last few characters were sometimes hidden.
 - **Accordion collapse issue:** Previously, interacting with one checklist could unintentionally expand others on the same parent record. This is now fixed—each checklist accordion remains independent, giving a stable, predictable viewing experience.

Version 1.9

Date of Release: 09-Apr-2026

Overview

This version introduces new capabilities to improve flexibility and usability in checklist management. The release includes enhancements to due date handling, template management features such as Advanced Search and Clone functionality, and user interface refinements for a more consistent and modern experience. Additionally, certain features have been enabled by default to streamline usage for new installations.

Key features/changes:

- **Due Date Optional:** A new option Due Date Mode is provided in Checklist Genius Setup. Users can now create and manage checklists without specifying a due date, allowing greater flexibility for workflows where deadlines are not necessary.

A new report has also been added to the package to help administrators track and monitor checklists that do not have due dates. Instructions for using this report are included in the User Guide.

- **Template Clone:** Users can now clone existing Checklist Templates to create new templates with the same structure and items, and update them before saving as needed. This feature reduces manual effort and ensures consistency when creating similar templates for different processes or teams.

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- **Template Advanced Search:** A new Advanced Search capability has been introduced on the Checklist creation page. This feature enables users to quickly locate templates based on recent usage & specific text, improving efficiency when working with a large number of templates.

Enhancements:

- **Item Activity Enabled by Default:** The Item Activity feature is now enabled by default for new installations. This allows users to immediately view information about who updated a checklist item and when, improving transparency and traceability without requiring additional configuration.
- **Checklist-Level User Avatar:** User avatars are now displayed at the Checklist level as well, providing quick visual identification of the user associated with the checklist. If a user photo is not available, initials will be displayed automatically. On click it will redirect to the user profile page.
- **Main UI Styling Improvement:** The main user interface now uses the SLDS background container that adjusts rounded corners automatically based on the active Salesforce theme, ensuring a more consistent and modern visual appearance across environments.

Version 1.10.1

Date of Release: 21-Jun-2026

Overview This version focuses on significant visual upgrades, usability improvements, and providing a more modern Salesforce experience. The release introduces full SLDS 2 Dark Mode compatibility, a redesign of the Setup page, and powerful new filtering capabilities on the main UI. Additionally, it brings visual indicators for locked checklists and rolls in recent Apex Action enhancements for due date flexibility while auto creating checklists.

Key features/changes:

- **Dark Mode Compatibility (SLDS 2):** The Checklist Genius UI is now fully compatible with SLDS 2, introducing seamless support for Dark Mode. The interface will automatically

adjust backgrounds, fonts, buttons, borders, and other elements to behave properly based on the color mode selected at the user level in Salesforce.

- **Setup Page Redesign:** The Setup page UI has undergone a complete rearrangement and redesign. The new layout is structured for intuitive understanding, making administrative tasks, configurations, and navigation much smoother.
- **Main UI Filter:** The filter combobox in the Main UI has been significantly enhanced with state retention. Cookies are now used to store the user's "My Checklists" filter preferences between sessions so users don't have to reapply them. Additionally, users can now select multiple filters at once, and the filters have been logically split into two distinct categories for easier navigation.

Enhancements:

- **Checklist Lock Indicator:** A new lock icon has been added to the UI to clearly indicate when a Checklist is locked. This provides a quick visual cue signifying that more items cannot be added to that specific checklist.
- **Apex Action Update:** The Invocable Method has been updated to create Checklists without requiring a Due Date, providing backend parity with the front-end Due Date Optional feature.