Forsta

November

Product Release

Customer Success

December 2, 2024

Welcome!

In the month of November, we've added more enhancements to **Panel Management** and **Forsta Plus.**

Forsta Plus:

— Updated global navigation
— New functionality for **CATI** Supervisors
— A new **Studio: Canvas** Tile Microchart
— **Studio**: "Clean" Theme available to all!

Panel Management:

— Automated Campaigns based on Panelist Activity

Keep reading to learn about these improvements!

You can also now review previous months' product updates at any time via the knowledge base!

https://pgforstaproductupdates.zendesk.com/hc/en-us/p/ProductUpdates

Forsta Plus

1. **Updated Global Navigation**
   We've reduced the amount of vertical space used in the updated global navigation, eliminating the need for a scrollbar to see all menu items. Over the coming months, more new modules will be added, and this will ensure there is enough space to cater for them. Here's the updated nav, sorted alphabetically.
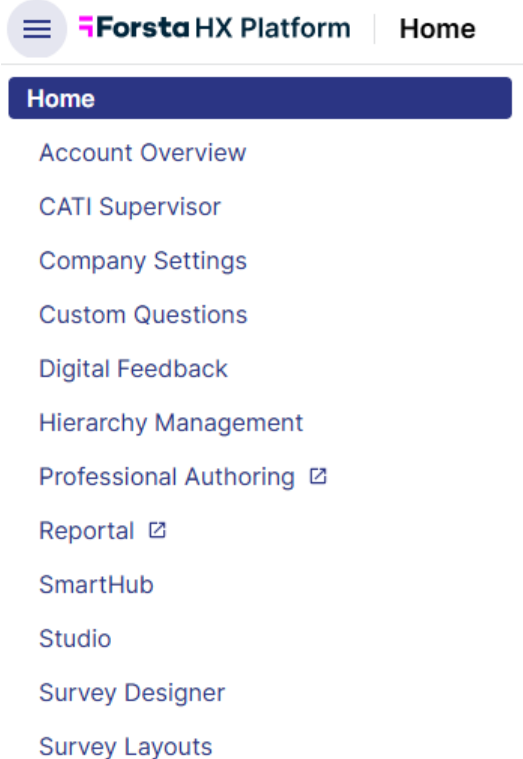

CATI Supervisor

1. **'Calls available now' filter setting in Call Management**
   This new setting will filter the scheduled calls list to only display the call records which are available to dial currently. This means that any call records that are disabled, set for a time in the future or a shift which is not currently active will be hidden from the list. Turning the setting off again will return the full display of all calls in the scheduled list.

   — This setting should make it easier to understand how many scheduled calls in the list are currently available to be worked on, keeping in mind that any calls which are explicitly assigned to interviewers or interviewer groups will only be delivered when the applicable agents are logged in.
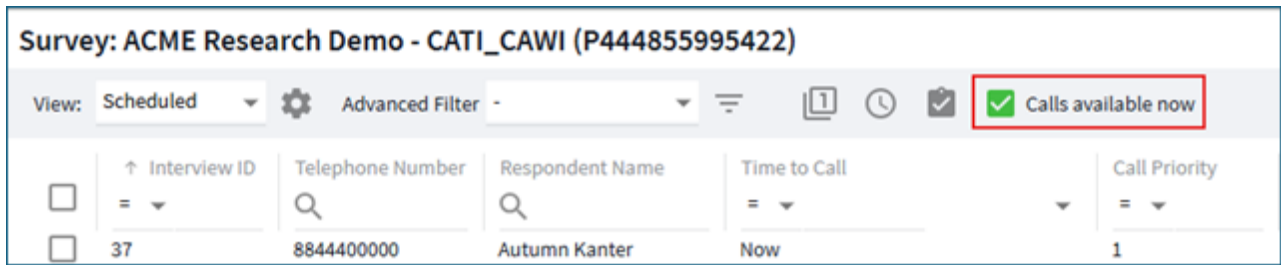
2. Automatically filtered Survey Productivity report list

The survey drop-down list at the top of the Survey Productivity report is now automatically filtered to only include surveys which have data to report on for the chosen date range. This helps to reduce the size of the list and makes it easier to find surveys that have been actively worked on.
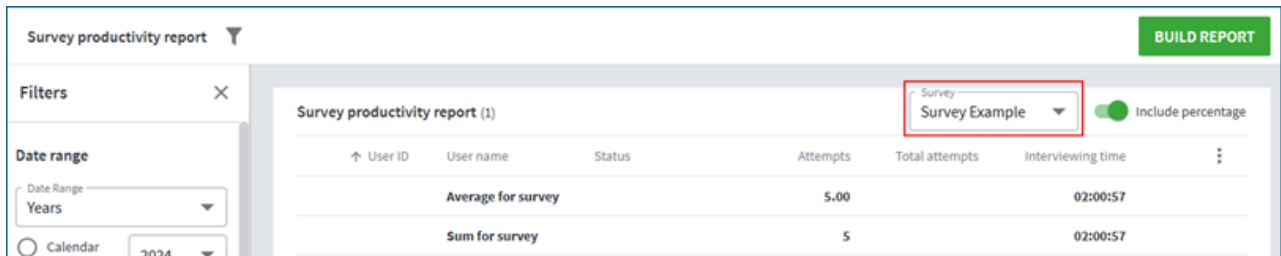
3. Filter quotas using the new 'Criteria (Labels)' column

The 'Criteria (Labels)' column that was added in a previous update now provides filter support. Given the increased usefulness, this column is now presented to users by default, instead of the 'Criteria (Codes)' column.
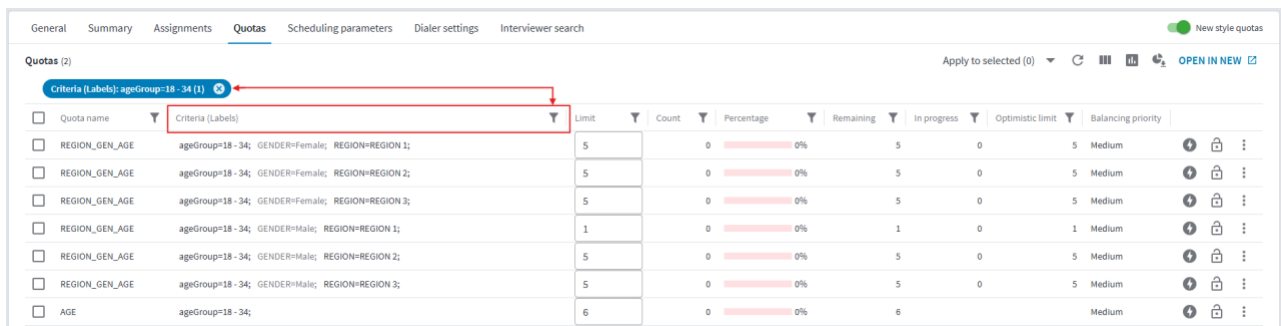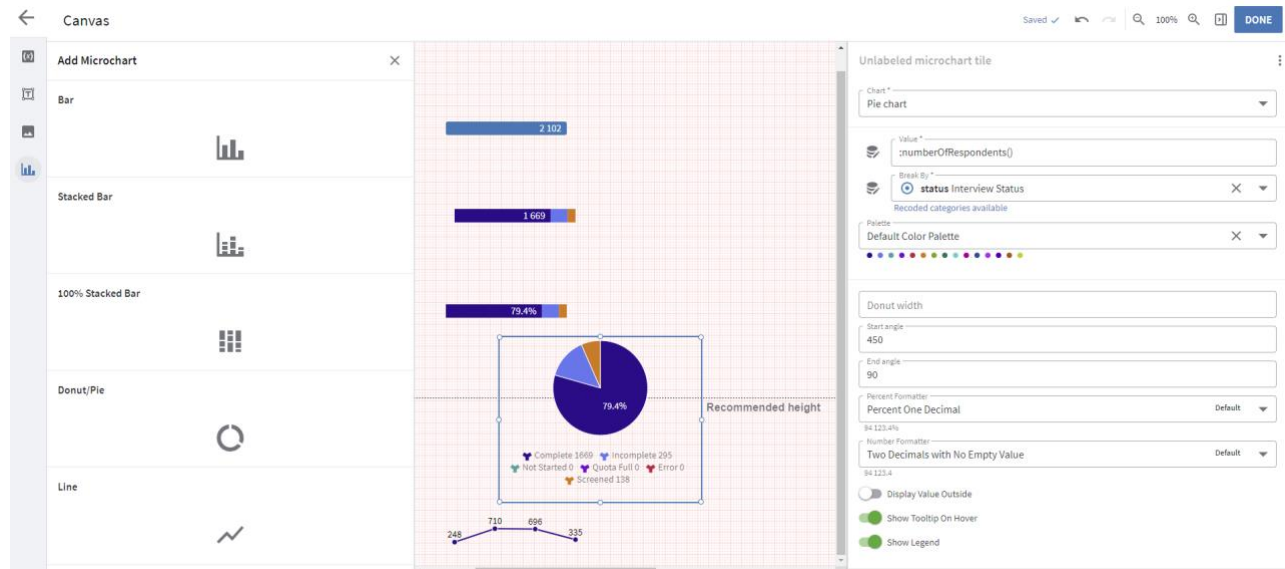

Value: The filter option allows users to contain the quota view down to look at the targets or progression for a specific subset of the quota cells. This is especially convenient when working with large and complex quota definitions.

Studio: Canvas

1. Tile Microchart available to all users!

Until now, the visual editor for Canvas contained 3 Tile options: Value, Text and Image Tile. For most users, these are enough, and CDL provides even more. However, users now have access, right from the UI, to a new Tile: Tile Microchart. Studio users will be familiar with this Tile from elsewhere in the Product. You can now easily drag, drop, configure and resize Microcharts in Canvas, adding even more functionality to the Studio design tool.

KnowledgeBase:https://forstastudio.zendesk.com/hc/enus/articles/242341752 13851--Designing-the-Canvas

2. Clean" theme is now available to all!

Our earlier "Modern" theme improved report design primarily through enhanced color palettes and widget borders. The "Clean" theme takes this several steps further. We have expanded theming capabilities, now exposing **over 100 properties**, enabling theme control over a wide range of design elements such as:

— Chart visuals (e.g., line type, bar width, pie vs. donut)

— Fonts, shading, and gradients

— Padding, table borders, and alignment

— Color palettes

Additionally, the "Clean" theme introduces a **new "Widget Variant" feature**, allowing you to choose between three options at the widget level: "Default," "Subtle," and "Emphasized." This provides greater flexibility to highlight key data

points or de-emphasize less critical information.
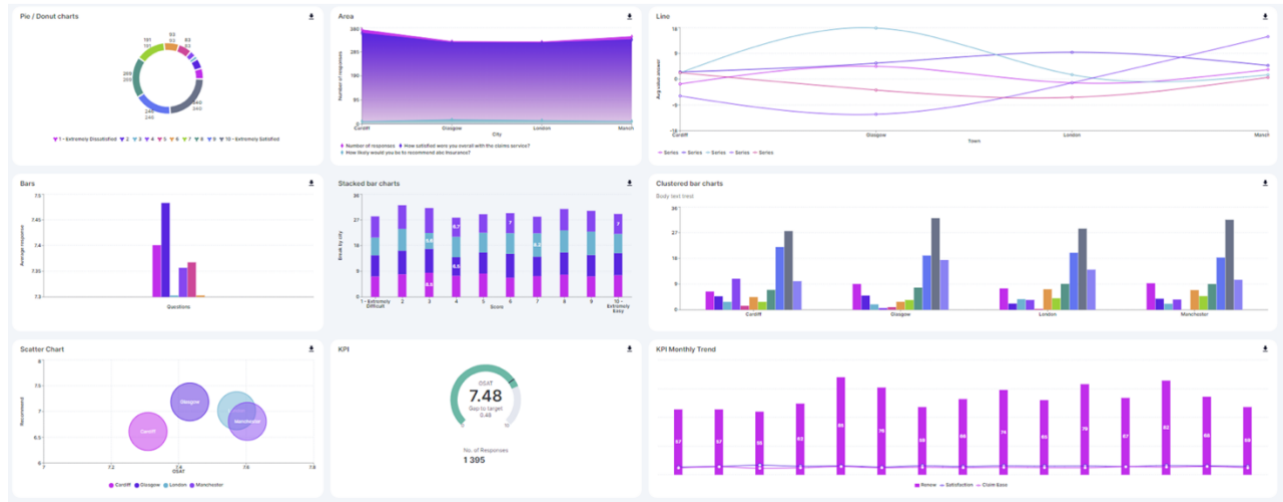
Panel Management

1. Automated campaigns based on panelist activity.
Automated campaigns are now available to be scheduled based on a panelist's activity.

For more information, please click on the "Context Help" icon within Campaign Wizard.