Forsta

August 2025

Product Release

Customer Success

a PG Forsta company

Welcome!

In the month of August, we added new features for you to check out for the following products:

— Panel Management

1. Download unused coupons for Coupon Redemptions.

— Forsta Visualizations

1. Updated User Interface for smaller panels with reports in StoryTeller
2. Updates to the Summary Object
3. AI Computes – now available across all project types
4. Chart tooltip – Respondent count
5. Simplified download for imported files
6. Project Administration – Color template update
7. Research Agent – COMING SOON

– Forsta Plus

1. Studio: Subpages & Breadcrumb Navigation
2. Survey Designer: Quota Administration
3. Survey Designer: Ability to restore soft-deleted surveys
4. Email or SMS send confirmation

Keep reading to learn about these improvements!

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

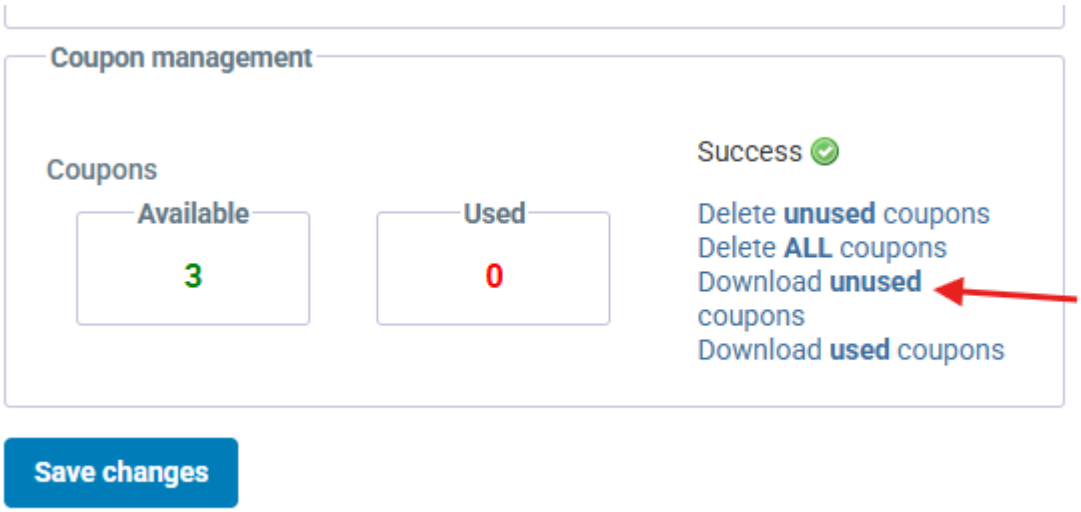
https://pgforstaproductupdates.zendesk.com/hc/en-us/p/ProductUpdates

©2024 Forsta. All Rights Reserved. a PG Forsta company.

Panel Management

1. Unused coupons can now be downloaded from Redemption Manager.

Learn more about Redemption options here: Coupons



Forsta Visualizations

StoryTeller

1. **Updates to the User Interface**

   As part of our ongoing UI improvements in StoryTeller, we've introduced a refreshed visual design for smaller panels within reports. To use the new UI, enable "Use new StoryTeller setup layout" under Project settings > Beta settings in your project.

   NOTE! There are no new or removed features, but the position and/or how they look may have changed.

   Key enhancements include:

   - Element Tags – individual tags for each object
   - Header and Footer – add structured branding and navigation elements
   - Slide Management – working with slides, including importing, resizing and reordering.

©2024 Forsta. All Rights Reserved. a PG Forsta company.

- Report Layout Settings – panel over layout, device filtering, slide navigation and export formats

2. Summary Object

We've introduced the ability to analyze multiple open-ended questions simultaneously, generating a single, consolidated output. The setup process remains unchanged; however, you can now select multiple questions instead of just one when setting up your summary object. Additionally, we've enhanced the context provided to the AI by including the question text along with the open-ended responses. This ensures the AI has a clearer understanding of the content it's summarizing, resulting in more accurate and relevant insights.

3. AI Computes

We're excited to announce the AI Computes functionality is now available across all project types! Prompts can now be executed for up to 50,000 respondents per activation with smarter caching logic to make sure your data is consistent. For projects exceeding 50,000, simply activate the data in your project multiple times. This ensures all respondents with open-ended answers are included in the analysis. There is still a project level feature toggle to use AI Computes, however this will be removed in the upcoming months.

> **NOTE!** Using AI Computes in larger projects may result in longer processing times. You can monitor progress in the Activation Log, which provides a detailed breakdown of the time taken for each step in the activation process.

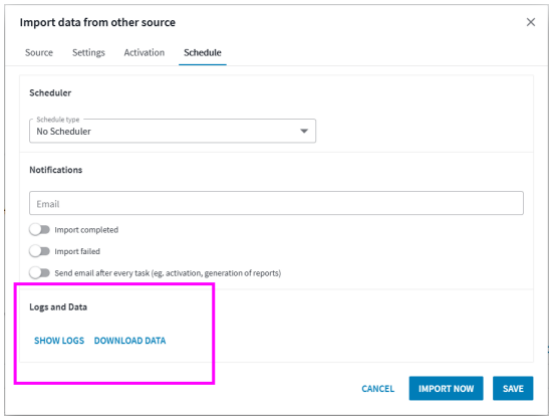
4. Chart tooltip – Respondent count

With this update, you can now display either weighted or unweighted respondent counts in chart tooltips, providing greater clarity and flexibility when interpreting chart data.

5. Simplified download for imported files

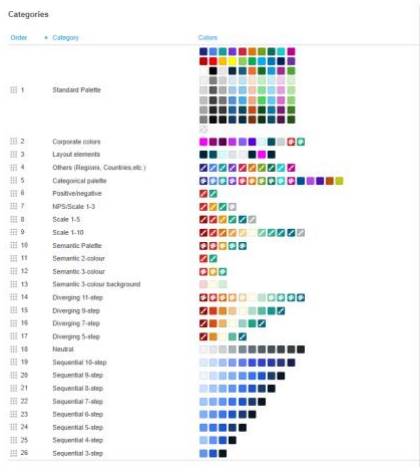
Previously, the ability to download imported files was limited to scheduled tasks within the legacy UI. We've now extended this functionality to the standard user interface. As shown in the image below, the download option is now available directly within the task view, alongside the logs. This enhancement simplifies access to imported files and improves overall usability.

©2024 Forsta. All Rights Reserved. a PG Forsta company.



Project administration

1. **Color template update**
   Our Standard color template has been refreshed and modernized to align with current design best practices. This updated template has replaced the previous version and is available for selection during the project creation phase. If you wish to customize the template and reuse it across other projects, simply export the modified color template from the project where changes were made. This allows you to apply your tailored design consistently across all relevant projects. For users who prefer to retain the legacy version of the Standard color template, we recommend exporting it from an existing project where it is currently in use. Save it as a custom template to ensure continued access across your organization's projects.



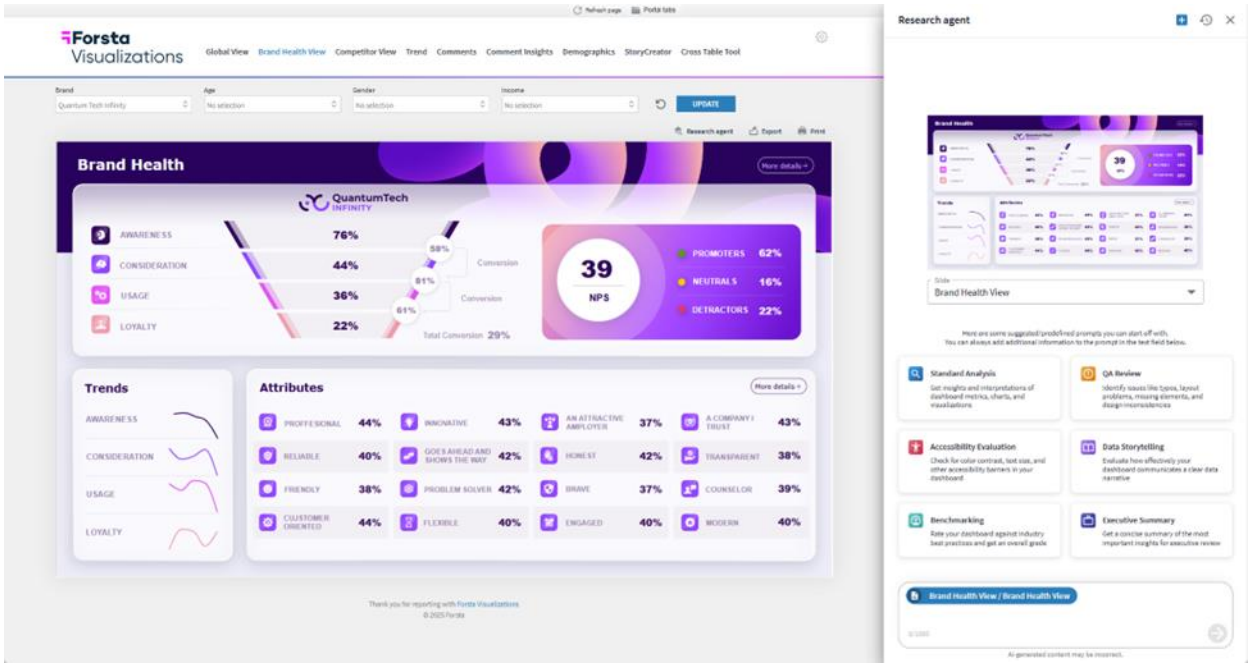
©2024 Forsta. All Rights Reserved. a PG Forsta company.

Research Agent – COMING SOON!

Meet the newest member of AI in Forsta Visualizations! Your intelligent assistant, designed to work right alongside you in your Dashboard. Think of it as your analytical sidekick, ready to:

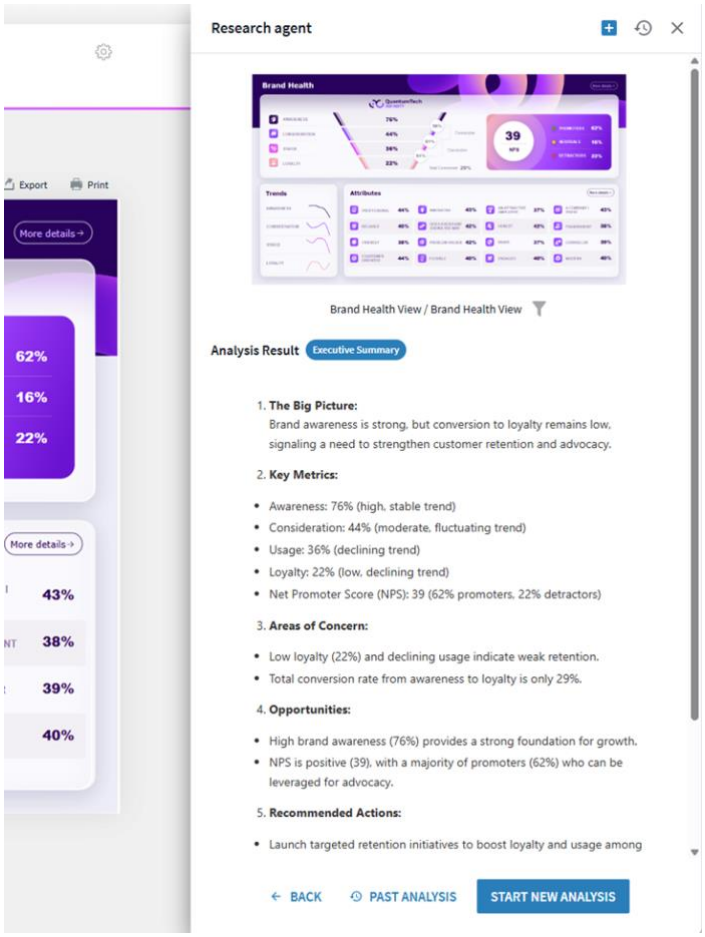
- Enhance slide layouts
- Generate executive summaries
- Provide design recommendations

All directly within a new right-hand side panel, always just one click away.



To help you dive in, we've prepared six sample prompts. Use them as they are, adapt them for inspiration, or create your own from scratch. Your results will appear instantly in the Research Agent panel.

©2024 Forsta. All Rights Reserved. a PG Forsta company.



How does it work?

The Research Agent uses visual analysis to suggest improvements, surface insights, or create a high-level overview of your slide.
Important: It does not connect to your raw or meta data. Everything it produces is based only on the content you've created in your report, keeping your data secure and private.

How do I access it?

Right now, the Research Agent is available for Admins on the Dashboards and DashboardsNA servers only. We'll be rolling it out to shared installs in the next 1–2 months.

©2024 Forsta. All Rights Reserved. a PG Forsta company.

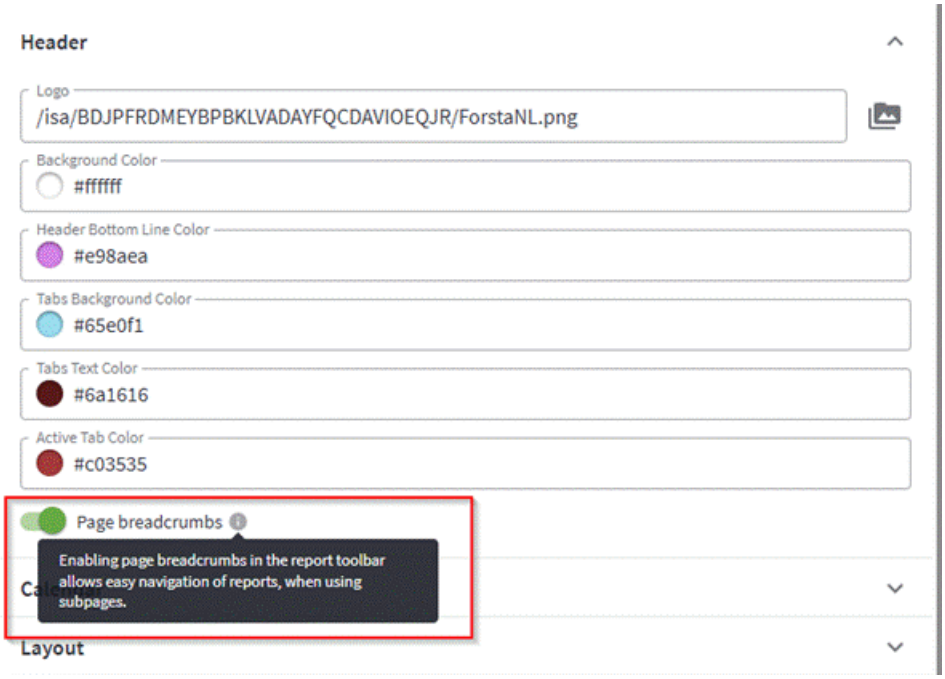
Forsta Plus

Studio

1. Subpages & Breadcrumb Navigation

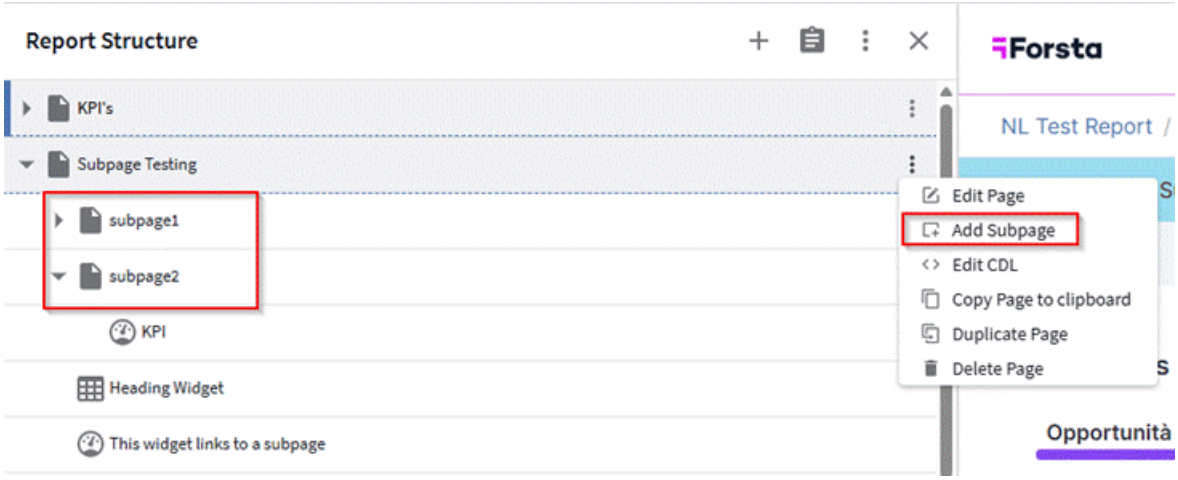
Studio now supports **subpages** and a brand-new **page breadcrumb navigation**, allowing for intuitive multi-level report structures never before possible.

Page Breadcrumbs available in Header settings:

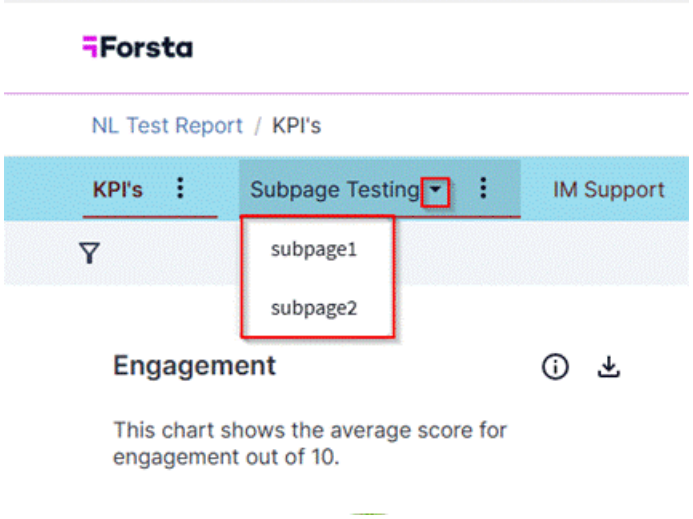


Subpages can be added via drag/dop or 3 dot menu in Report Structure panel. New tree indentation clearly shows subpages.

©2024 Forsta. All Rights Reserved. a PG Forsta company.



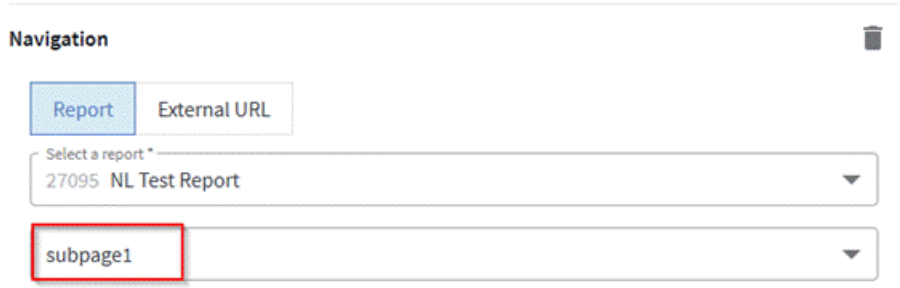
New UX for showing and navigating to subpages via the page tab bar



Page tab bar updates to show only subpages at same level, when in a subpage. Navigation back up is completed via the Page Breadcrumb

Navigate to subpages using "Navigate To" as usual

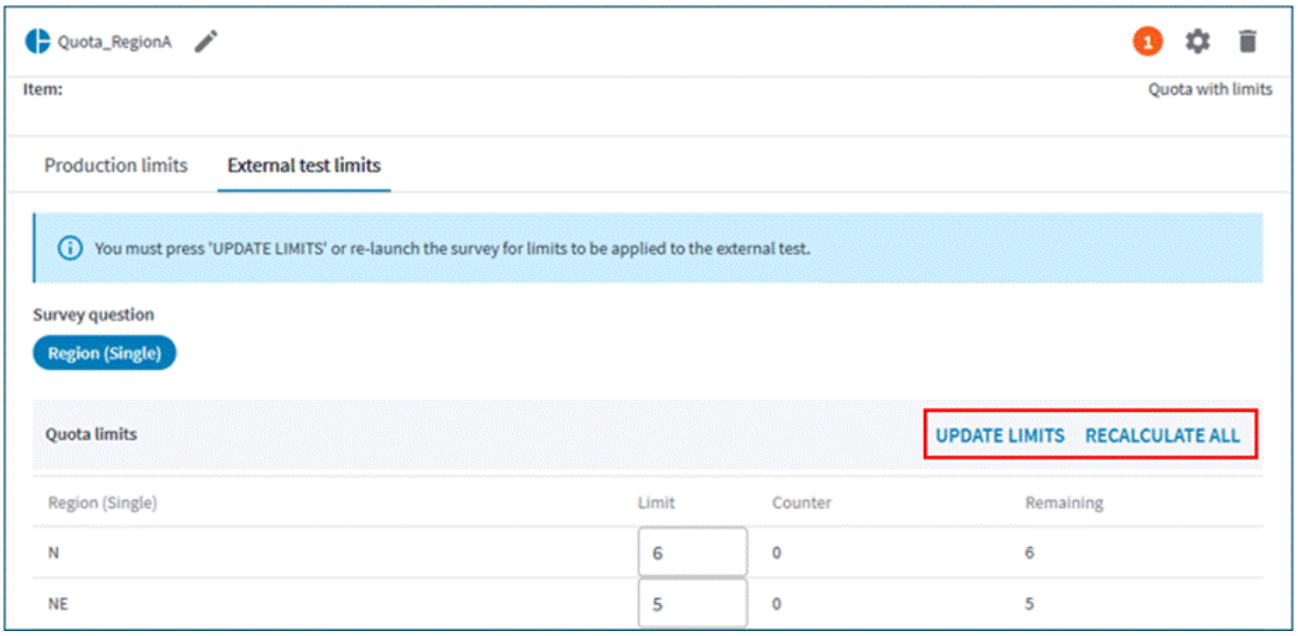
©2024 Forsta. All Rights Reserved. a PG Forsta company.



Survey Designer

2. Quota Administration

There are now new buttons in the quotas UI for **'UPDATE LIMITS'** and **'RECALCULATE ALL'** operations.



The **'UPDATELIMITS'** button is useful when users wish to update the production limits without re-launching the survey (a full re-launch may be undesirable if there are changes in the survey that are not ready to be launched to production).

The **'RECALCULATE ALL'** button is useful in situations where users need to request for the system to check through all the responses for the survey, to recalculate the quota counts. For example, after deleting some poor quality completed interviews, to decrement the achieved counts accordingly.

©2024 Forsta. All Rights Reserved. a PG Forsta company.

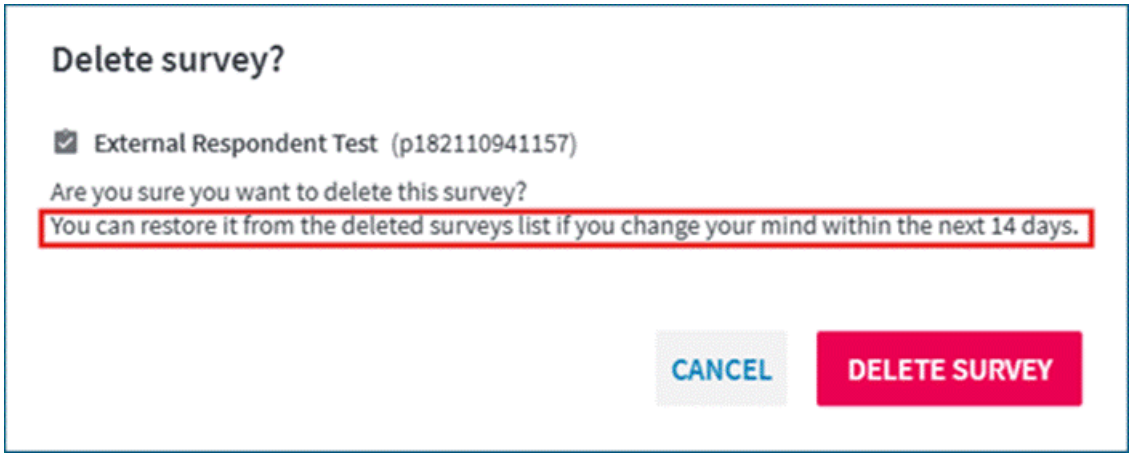
NOTE! These options can also be used on test limits although you will need to generate the external test link (which generates the accommodating database) first.

3. Ability to restore soft-deleted surveys

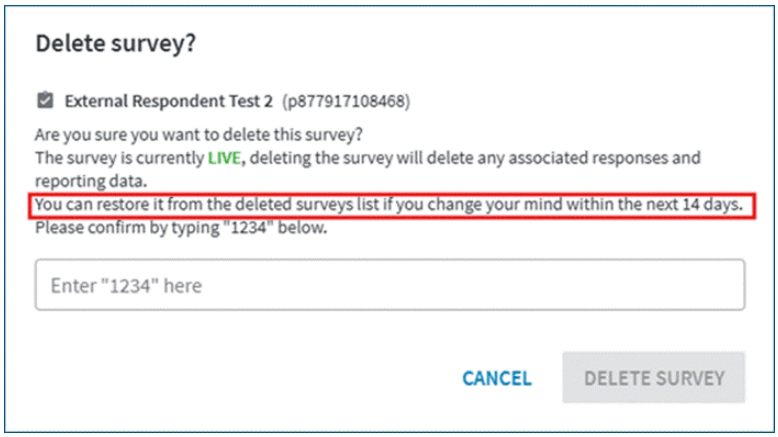
When you delete a survey, it is initially marked as "soft-deleted," meaning it will no longer appear in the surveys list. The survey will only be permanently deleted after the retention period set for the environment has elapsed (the default retention period is 2 weeks).

During this retention period, users can review the list of Deleted Surveys and restore any surveys if necessary. **This is especially useful if a survey was deleted by mistake.**

When a user attempts to delete a **Draft** survey, they will see a confirmation message informing them that they have N days to restore the survey before it is permanently deleted.

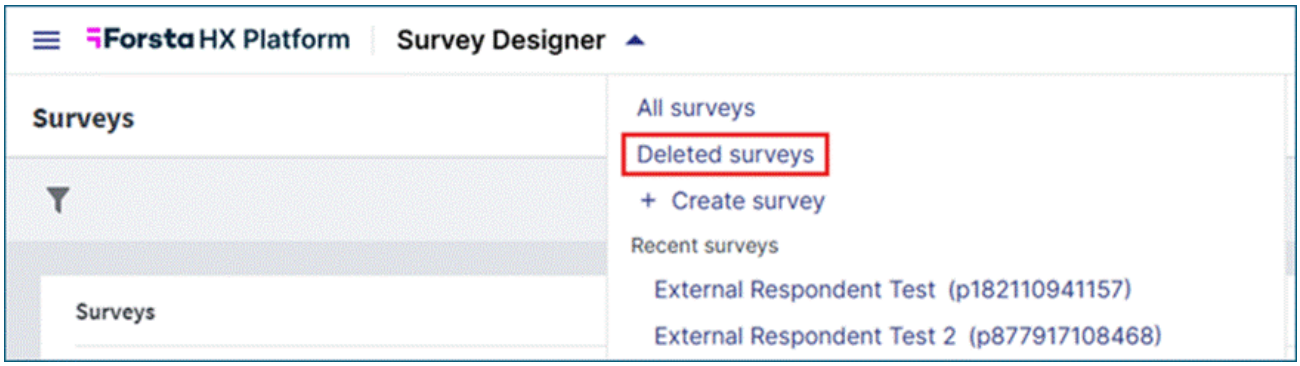


NOTE! When a user attempts to delete a **Live** survey (a survey that has been launched) there is an added layer of protection for accidental deletion as the user must confirm their action by typing 1234 first…

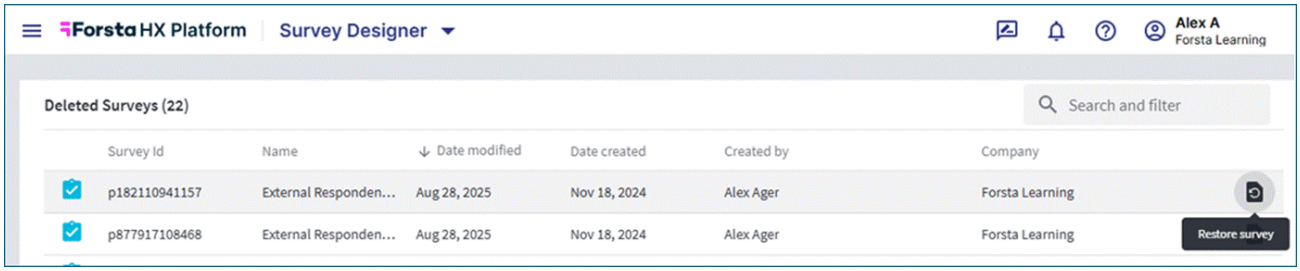


©2024 Forsta. All Rights Reserved. a PG Forsta company.

Users can now open a list of soft-deleted surveys by selecting the **'Deleted surveys'** option from the surveys drop down menu…



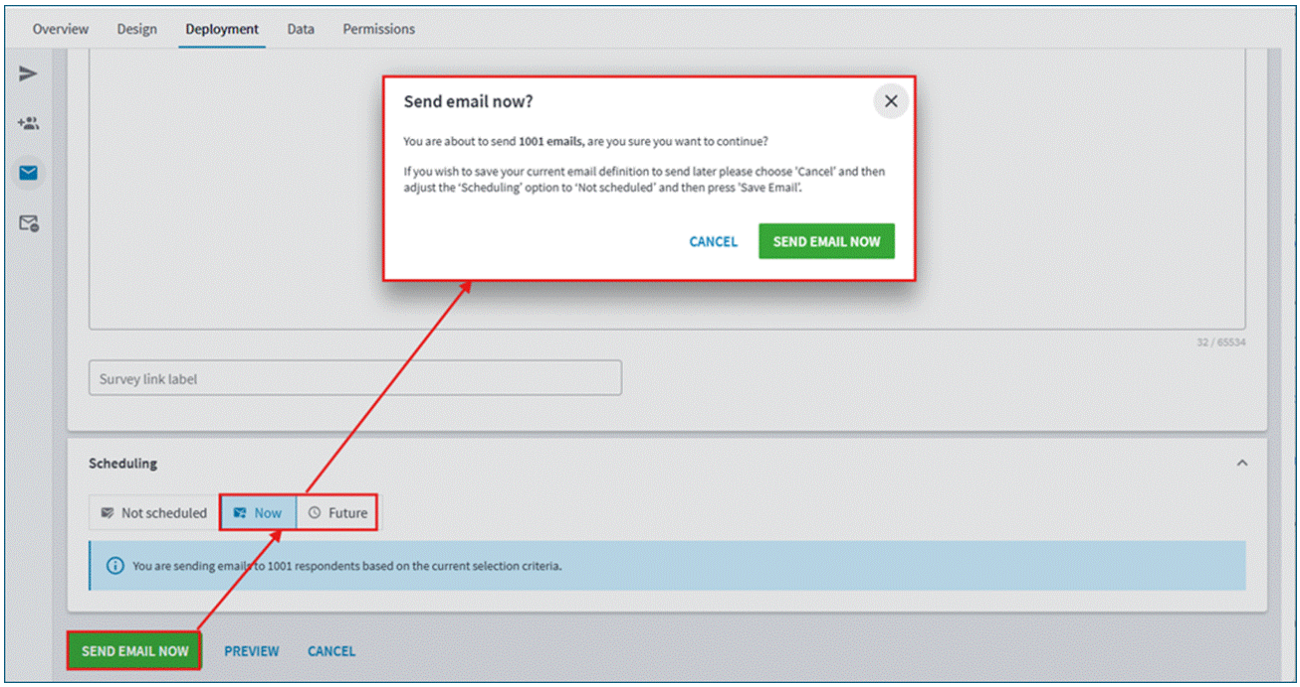
The user will see a searchable list of soft-deleted surveys. The **Restore** button allows them to recover a selected survey to its original state.



4. Email or SMS send confirmation

To help avoid situations where Email or SMS could be sent by mistake we have added a confirmation overlay which will now appear when the user presses the send button (with either the 'Now' or 'Future' modes pre-selected). The confirmation message reminds the user how many emails are set to be sent according to the specified selection criteria and gives the opportunity to cancel.

©2024 Forsta. All Rights Reserved. a PG Forsta company.

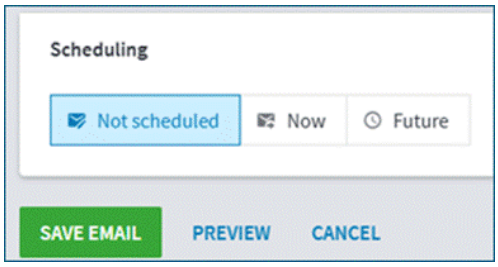


We have also made an improvement to how the schedule mode for email and SMS invitations behaves.

Previously, the mode defaulted to **'Now'** when creating a new invitation or reopening one that has already been sent.

The updated behaviour is that:

- New invitations, or those that have already been sent, will now default to **'Not scheduled'**.
- Invitations that already have a valid future schedule (either one-time or recurring) will continue to default to **'Future'**.



This change makes it easier to find and use the **Save** button to store changes when

©2024 Forsta. All Rights Reserved. a PG Forsta company.

messages aren't yet ready to send. It also reduces the risk of accidentally sending incomplete messages using the **Now** option.

©2024 Forsta. All Rights Reserved. a PG Forsta company.