December 2025

Product Release

Customer Success

Welcome!

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

— Panel Management

1. A Reset Password option is now available on the Panel login page.

— Decipher (Forsta Surveys)

1. AI Transcriptions for Media Testimonials
2. New Task Manager Page
3. Simplified Permissions Report
4. SmartHub Integration Improvements
5. Compat Retirement – Extended through February 24th 2026

— Forsta Visualizations

1. AI Summary – Exclusion List for Topics
2. Translations for Scatter and Bubble Chart Labels
3. StoryTeller UI Refresh – AutoGenerate Slides

— Forsta Plus

1. CAPI Supervisor:
    a. Public APIs
    b. Device Management - Bulk Device Deactivation
    c. Device Management – Last Sync User
    d. Device Management – Show Additional Device Information
    e. Respondent Management – Column Sorting
2. CATI: New properties for interviewer accounts
3. Survey Designer: Respondent Data Exports
4. Survey Designer: New survey invitation scheduling options (LIMITED AVAILABLITY)
5. Studio: Email delivery reports (LIMITED AVAILABLITY)
6. Workflow Builder

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

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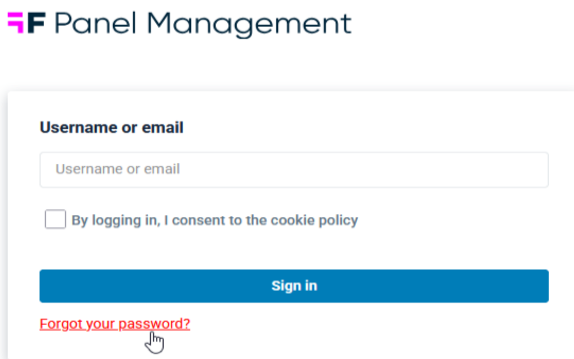
Panel Management

1. **Panel users can now reset their password from the login page**



Decipher (Forsta Surveys)

1. **AI Transcriptions for Media Testimonials**

   Version 2 of the Media Testimonial Element allows for automatic AI transcriptions.

   Once the AI transcription feature is enabled, responses to the Media Testimonial Element are automatically sent for translation every 30 minutes.

   Learn more: Media Testimonials

   To enable the transcription feature, contact your Forsta representative.

2. **New Task Manager Page**

   When testing a survey, it is important to review the settings and attributes for each survey question. These include row / column randomization, making questions optional or mandatory, setting a minimum or maximum number of required answers, etc.

   If you want to make a change to any of these settings for a question, you can use the "Tasks" feature in the survey testing toolbar **or from newly added Tasks list**.

   See About QA Codes to view a complete list of question attributes and settings.

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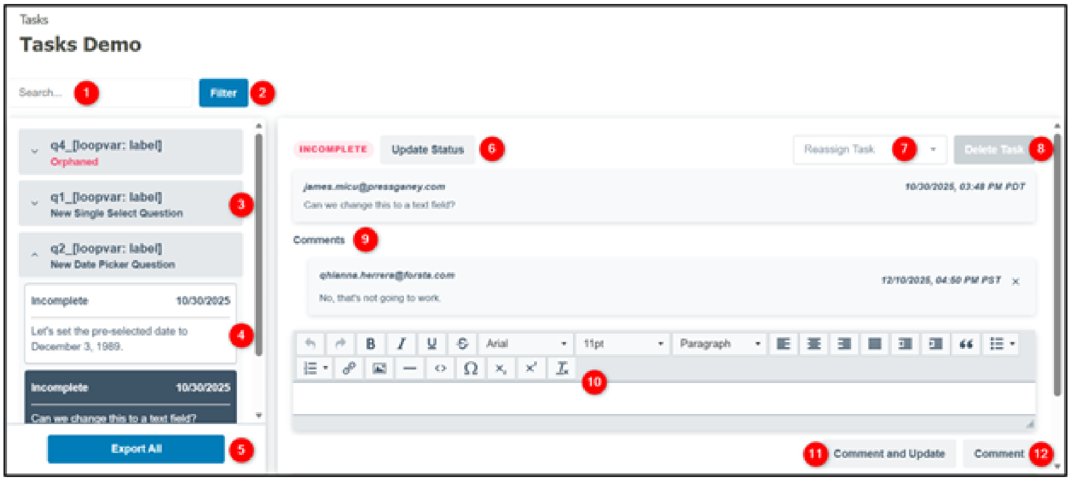

3. The **Permissions Report** has been simplified to show a list of all groups, and a list of all users.
   Learn More: [Viewing the Permission Report]

4. **SmartHub Integration** now supports case-insensitive duplicate extra variables (evar) labels when Decipher surveys are synced to SmartHub.

5. **COMPAT RETIREMENT:**

EXTENSION: On FEBURARY 24th 2026, surveys marked as "DEPRECATED" will no longer be supported and surveys with a compat levels of 108-142 will be transitioned to "RETIRED". ***These projects will not load in the portal at-all after this date! This includes historical reports and data downloads on projects that are closed.*** To prevent a survey from being retired, upgrade your survey's compat level. To learn more, see Survey Compat Levels.

Forsta Visualizations

1. **AI Summary – Exclusion List for Topics**

   The AI Summary object now includes an exclusion list, allowing you to define specific topics the AI should not include in the generated topic output. Any term on the list, including synonyms, close variations, broader categories, and subtopics, will be removed from the final results. This gives you clearer control over topic relevance and helps ensure summaries remain focused and accurate.

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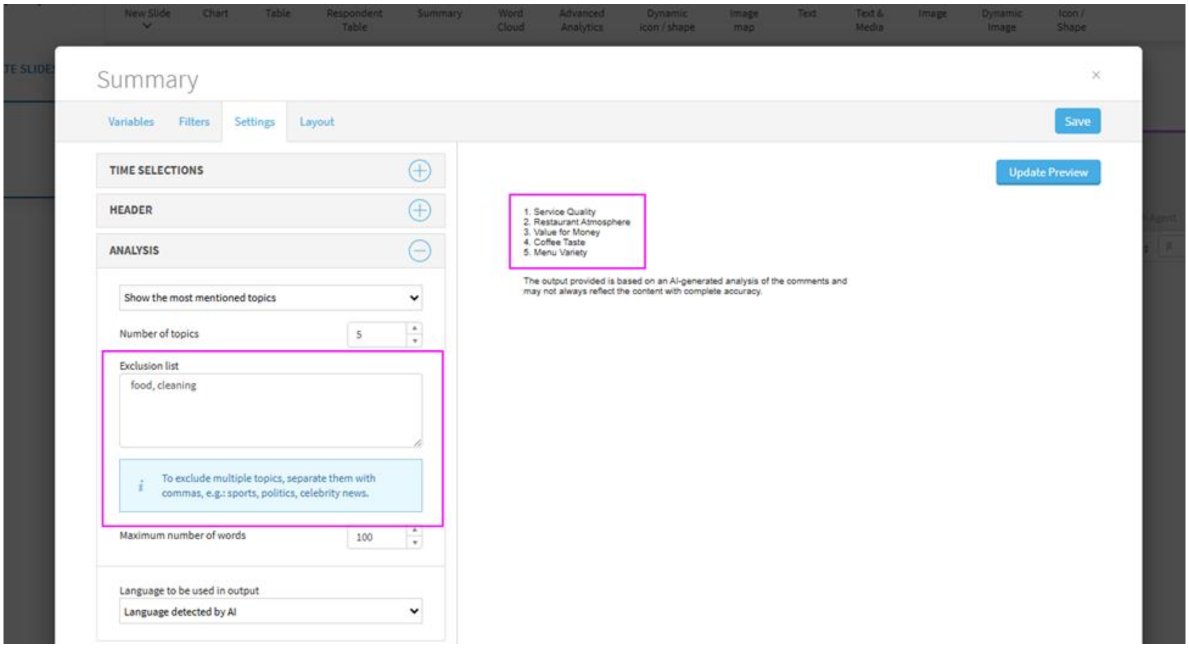

2. Translations for Scatter and Bubble Chart Labels

Scatter and Bubble chart labels are now fully integrated into the translation workflow. Both the main label text and the optional short text can be translated within your project languages or via the metadata file. This update ensures consistent multilingual support across these chart types, aligned with the rest of your StoryTeller content.

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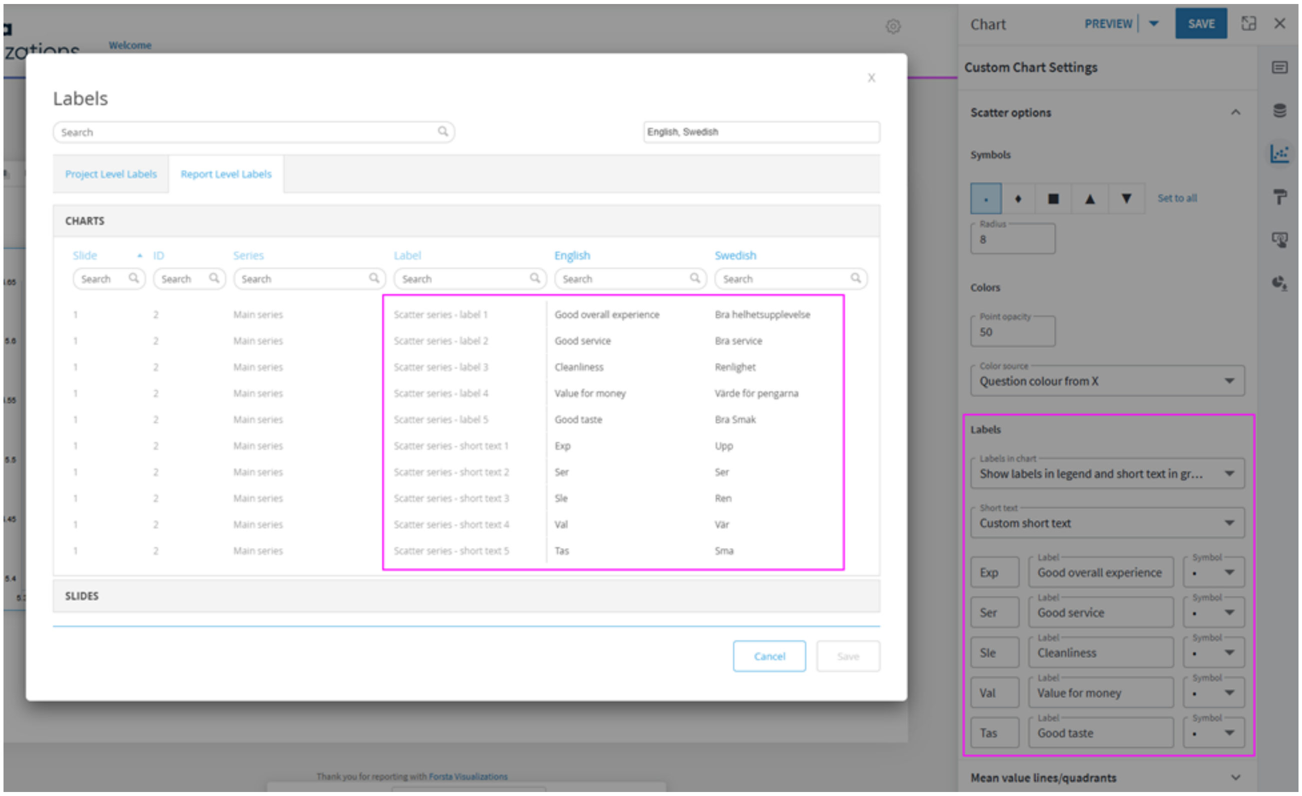

3. StoryTeller UI Refresh – AutoGenerate Slides

The refreshed StoryTeller interface now extends to the AutoGenerate Slides workflow. The updated UI provides a more structured and intuitive setup experience, including improved question and filter selection, visible filter chips for better clarity, and an enhanced Template Set selection panel. These changes make slide creation faster, clearer, and more user-friendly.

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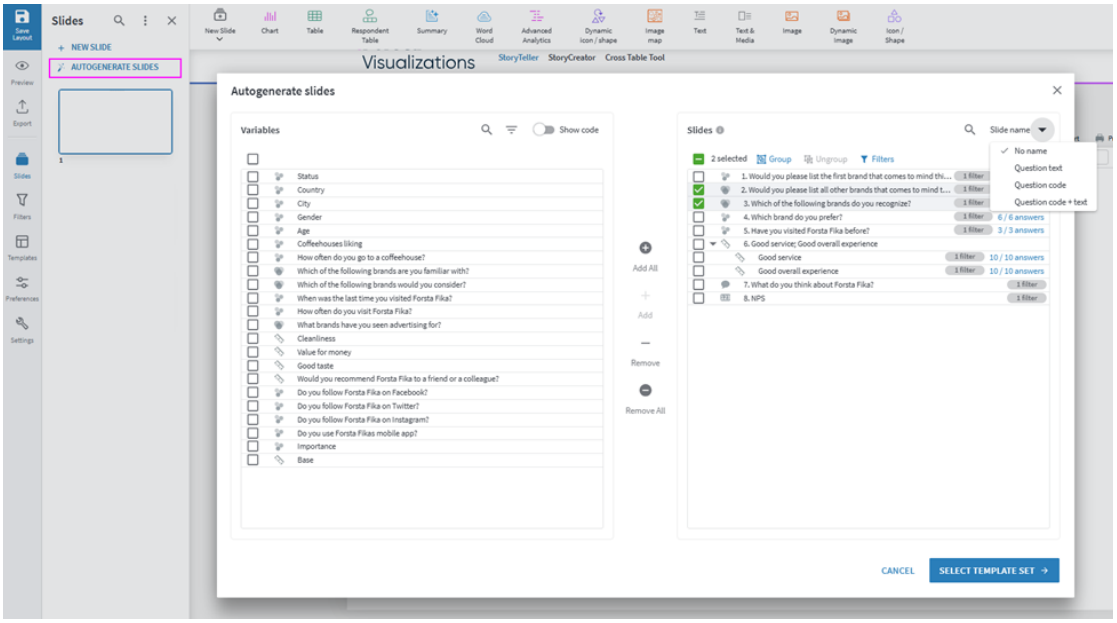

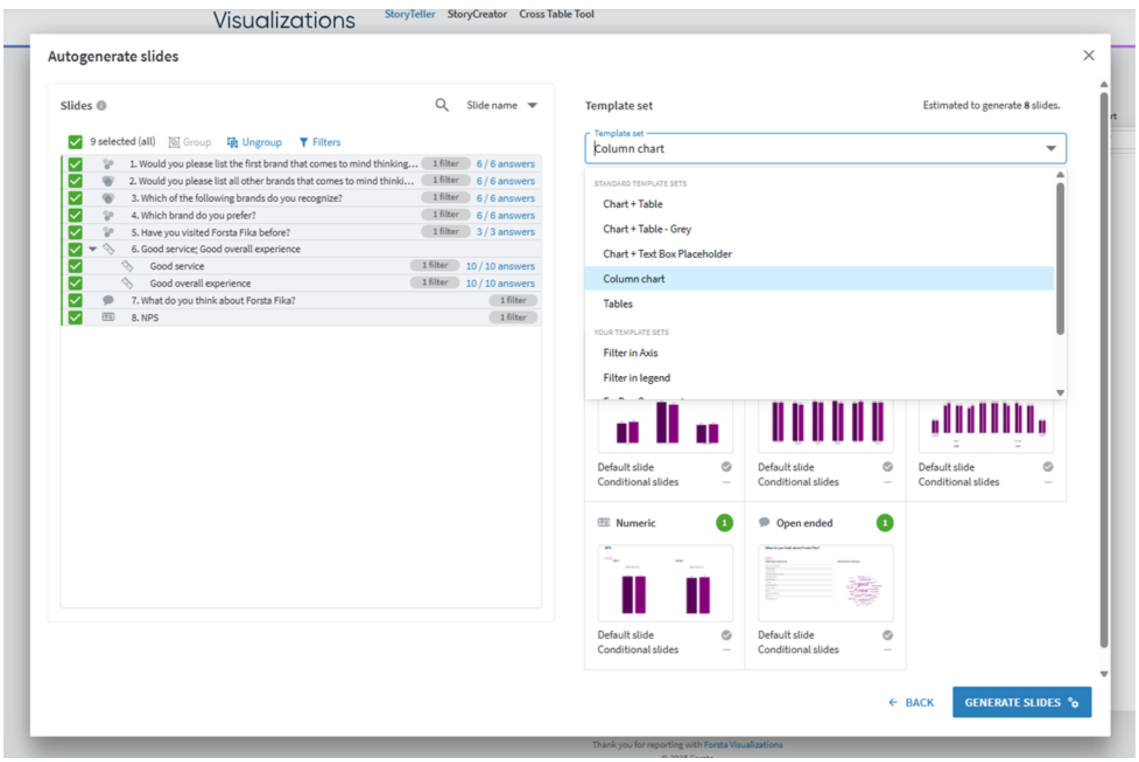

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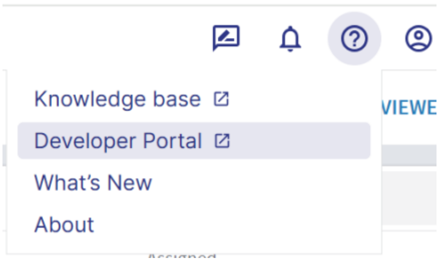
Forsta Plus

1. **CAPI Supervisor:**
   a. **Public APIs**

Public APIs are now available for common CAPI Supervisor actions.
To access the documentation, when in CAPI Supervisor, select Help > Developer Portal



APIs available:

- Get assigned interviewers for a survey
- Assign interviewers to a survey
- Unassign interviewers from a survey
- Assign respondents to an interviewer
- Unassign respondents from an interviewer

These APIs replace existing legacy SOAP APIs.

Note: The new CAPI APIs are treated the same as our other public APIs. Please refer to this article for additional information on public APIs.
https://forstadigitalfeedback.zendesk.com/hc/en-us/articles/8882422245787--Getting-started-with-Public-APIs

b. **Device Management - Bulk Device Deactivation**

It is now possible to bulk delete many devices at once! For example, it is common to use one activation code for a specific field team or region. Once that work is completed, it is helpful to be able to deactivate all those devices. This is now possible by filtering by Activation Code and then select "Apply to all > Deactivate"

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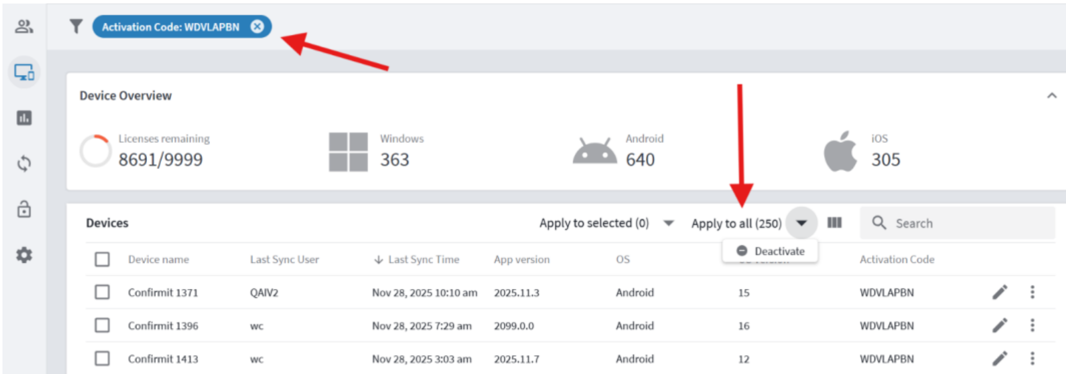
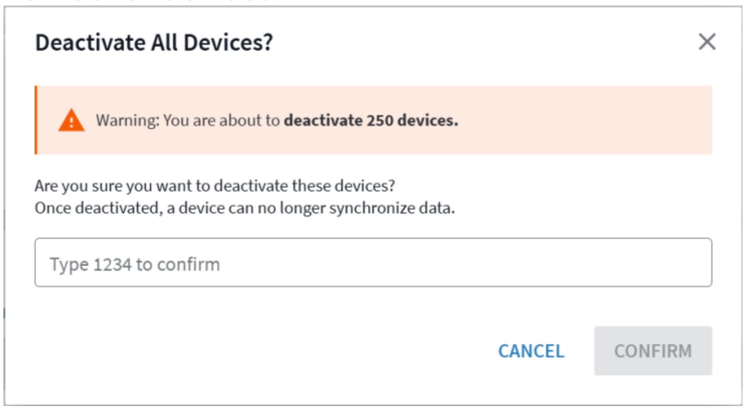


Deactivation now requires a confirmation step "Type 1234 to confirm" for any number of devices:



c. Device Management – Last Sync User

Devices list now indicates which interviewer was last logged in during the last synchronization. This is helpful for being able to see what interviewer is using a device and when the user last synchronized. Sorting by Last Sync User is not supported but use the filter panel to easily filter for a specific username.

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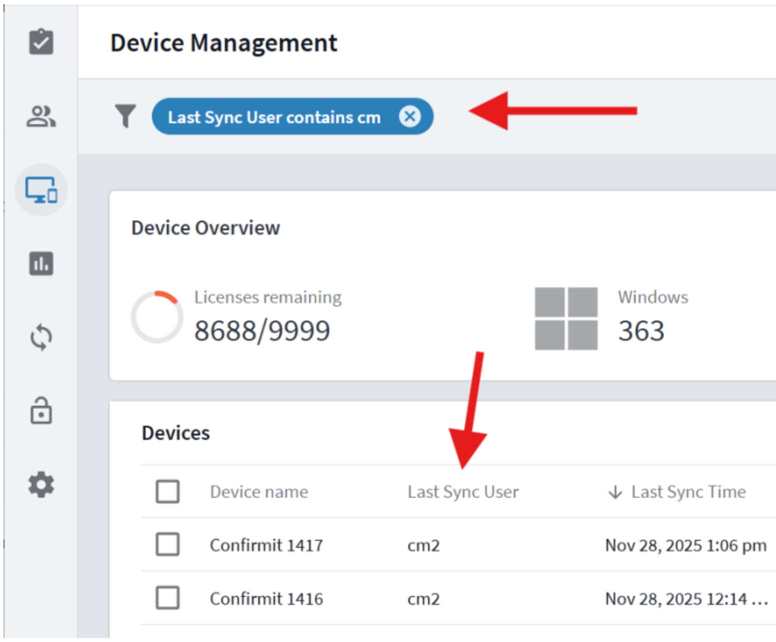
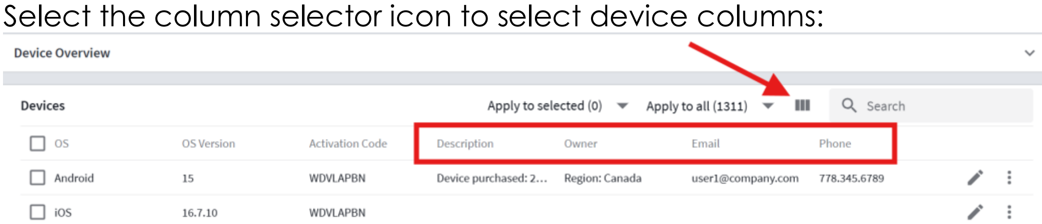


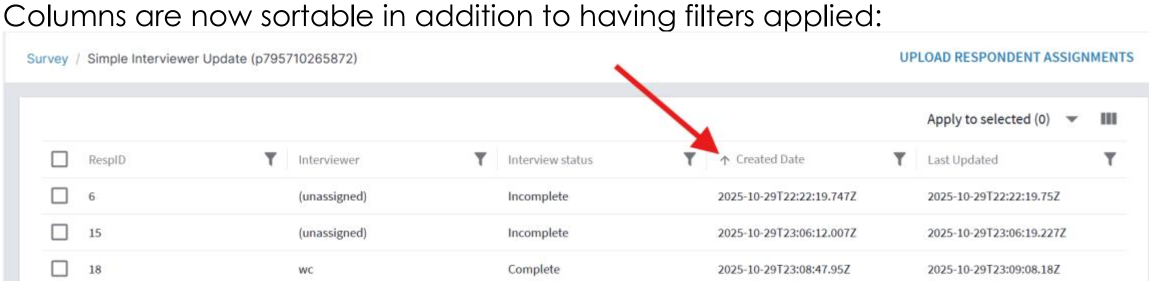
d. Device Management – Show Additional Device Information

The Devices list can now show additional device information directly in the list without needing to select Edit.
Select the column selector icon to select device columns:



e. Respondent Management – Column Sorting

Columns are now sortable in addition to having filters applied:



Note: Some system columns do not support sorting (Interviewer and Interviewer status) however filtering is supported.

2. CATI: New properties for Interviewer Accounts

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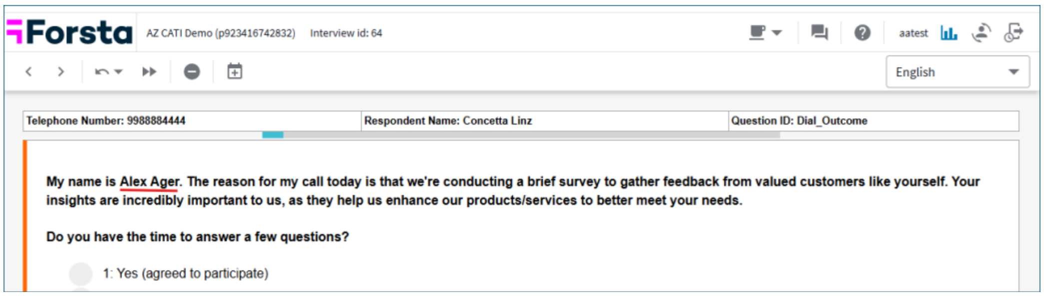
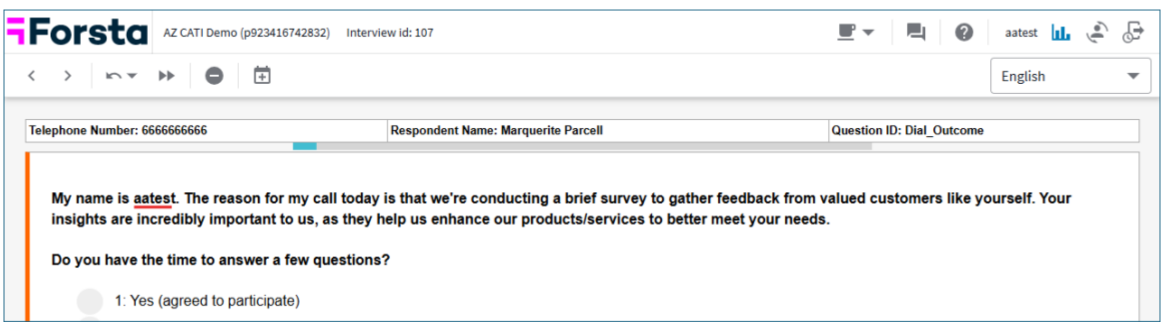
In the latest CATI update we have introduced new properties that can be added to interviewer accounts.

1. **Display Name**
2. **Custom Interviewer Attributes**

The new **Display Name** field allows you to specify a name for the interviewing agent that can be dynamically inserted into survey introduction text, enabling personalised intros by showing the interviewer's name on the survey screen.
This value can be applied to CATI survey intro texts by inserting the new **GetCatiInterviewerDisplayName()** function…



Note: Previously it was only possible to use the **GetCatiInterviewerName()** function but the limitation with this is that it only displays the username, usernames are often not defined in a suitable format to be presented in the survey intro…



Note: It is recommended for users to ensure that all active interviewer accounts have this property set, if the survey intro pipes the function but the interviewer has no value for the display name set then the pipe will simply return a blank space.

Users may retrospectively modify the properties of existing interviewer accounts to insert Display Name values. This could also be managed as a bulk process through the **CATI REST API**.

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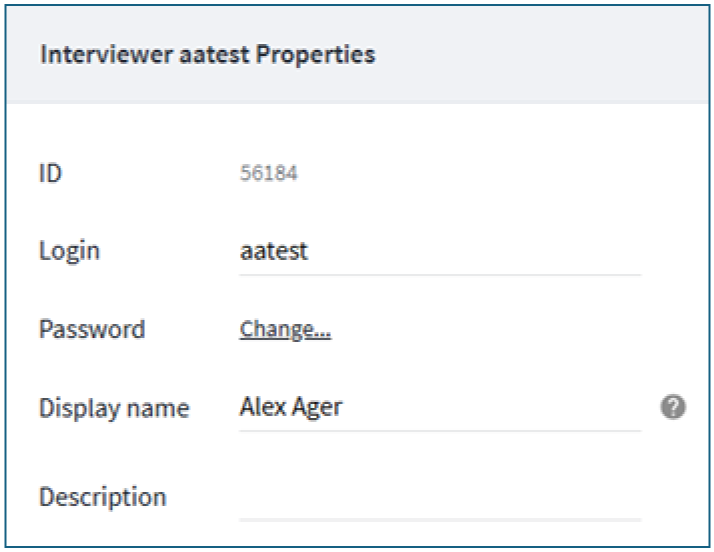

The new **Custom Interviewer Attributes** feature allows companies to define up to five optional interviewer attributes to store additional custom information about each interviewer. These attributes are fully configurable and may be used to capture details such as team assignment, supervisor name, region, language, shift, or any other operational data relevant to your call-center workflow.

Note: Interviewer attributes must initially be created by Forsta, if required, clients should contact the Forsta Technical Support team stating the labels they would like for each attribute (max of 5).

Interviewer attribute values can then be entered on the **Attributes tab** when creating or modifying an interviewer's properties. Using these fields is optional, and each organisation can choose how (or whether) to incorporate them into their working processes.

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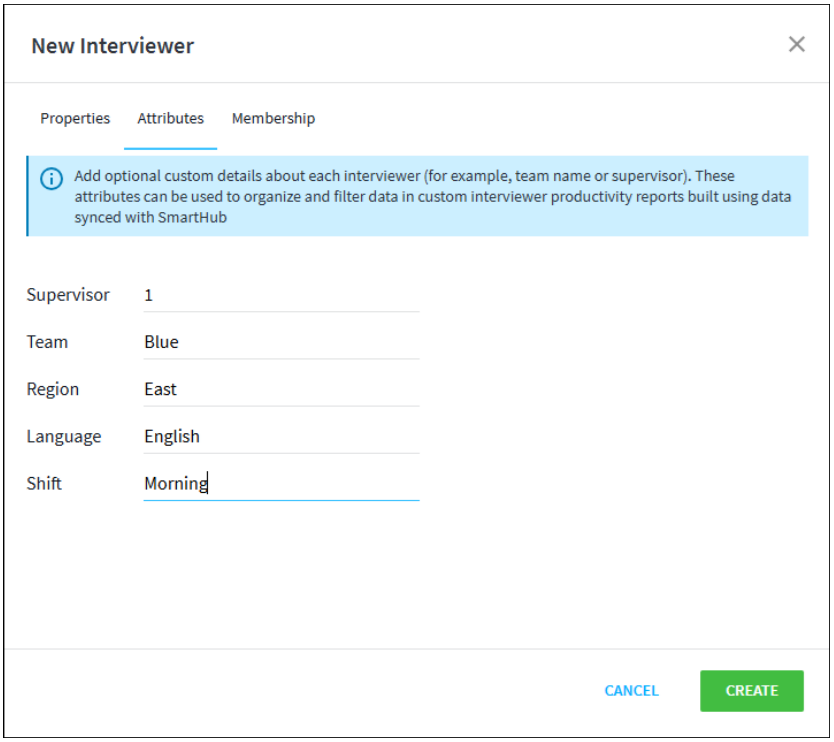
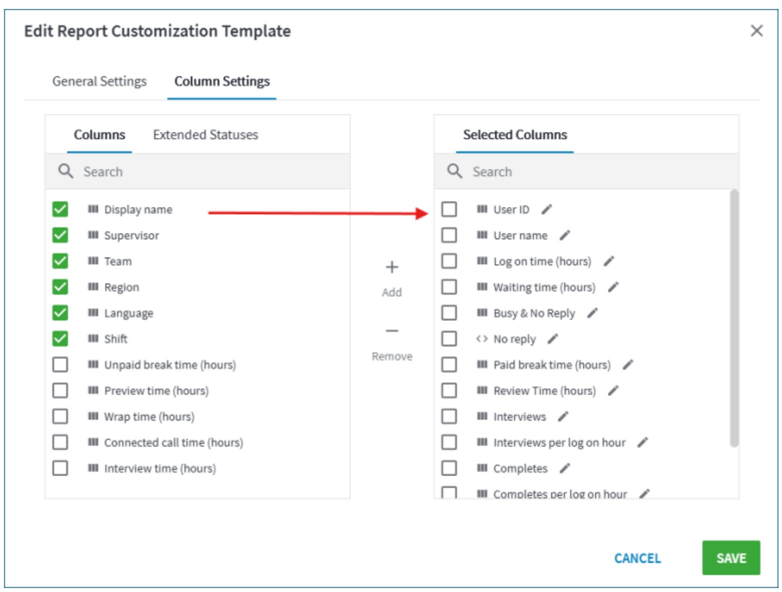


Users can add the new **Display Name** or **Custom Interviewer Attributes** to their **Interviewer Productivity Reports** by choosing to add the respective columns to their **report template**…



3. Survey Designer: Respondent (Sample Contact) Data Exports

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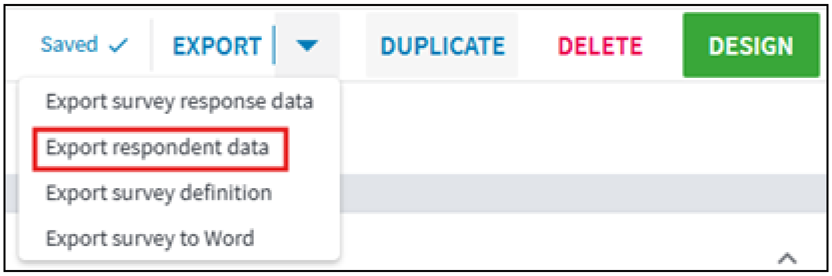
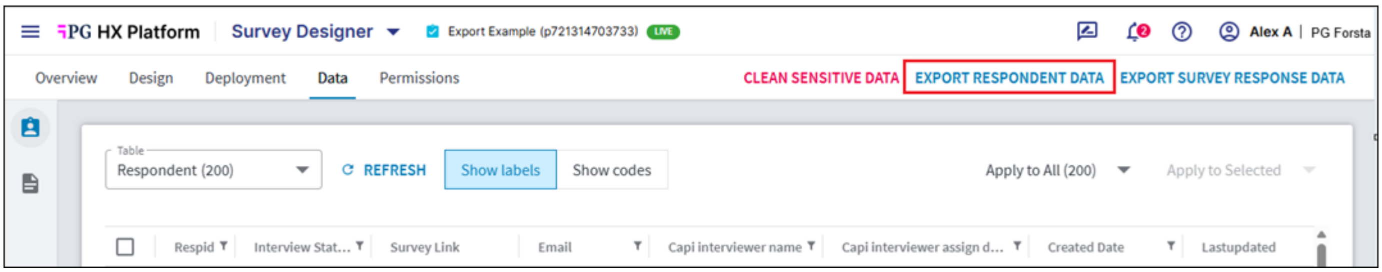
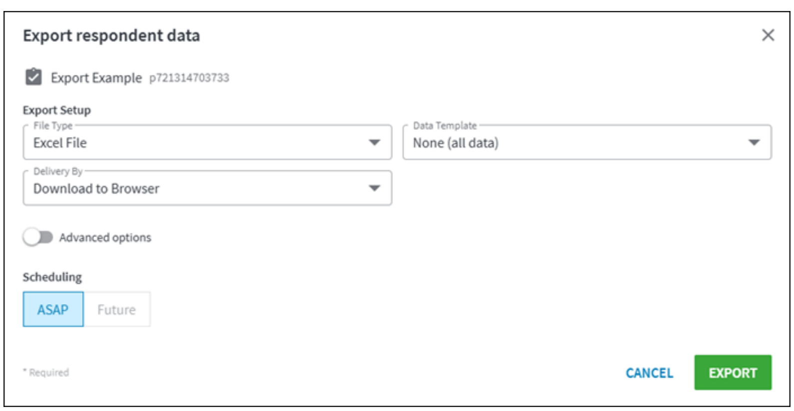
Users can now export data from the respondent database using Survey Designer. There is a new option for ‘Export respondent data’ in both the Export menu and the toolbar of the Data tab…





- The export dialog allows the choice of Excel or Delimited file formats and users can optionally apply a data template to specify fields to be included and the field order.
- Files can be delivered through browser download, email or FTP (depending on company settings)
    - Email or FTP exports can be scheduled for one time execution or recurrence
- Advanced options allow for
    - Files to be delivered uncompressed
    - Filename formatting adjustments
    - Encoding selection (delimited format only)



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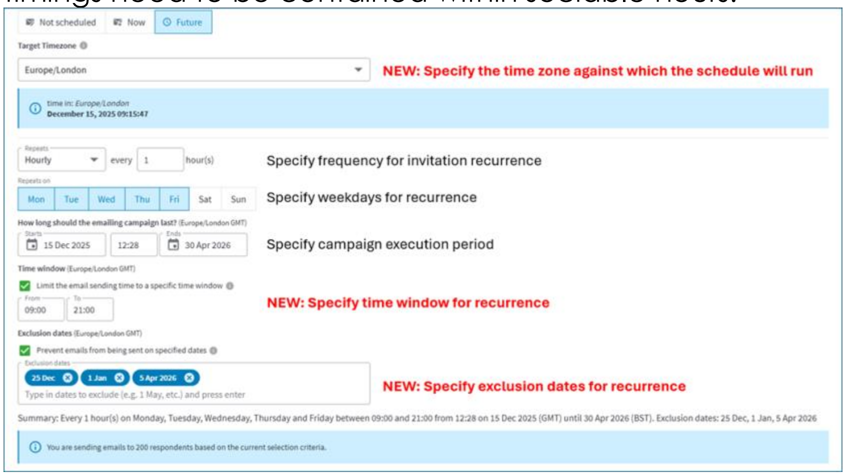
4. Survey Designer: New survey invitation scheduling options (LIMITED AVAILABLITY)

Please contact Forsta Support to enable this feature

The new timing restrictions for recurring invites allow for greater control over when recipients will be targeted. This is especially useful when sending SMS invitations and timings need to be contained within sociable hours.



Target time zone

Choose the time zone that defines all scheduling and delivery times (by default this will be based on your local time zone).

Time window

- Optionally restrict deliveries to specific hours of the day (e.g., 09:00–21:00).
- This helps avoid sending messages outside typical business hours.

Exclusion dates

Add any dates to skip, such as holidays or maintenance days, when no invitations should be sent.

You can specify exclusion dates **with or without a year**:

- **Without a year**: Use this format for dates that recur annually (e.g., 25 Dec for Christmas Day).
- **With a year**: Use this when the exclusion applies only once in a specific year (e.g., 27 Nov 2026 for Thanksgiving).

This flexibility ensures both recurring and one-time exclusions are handled appropriately in long-running or multi-year campaigns.

Learn More: [Scheduling Survey Invitations]

5. Studio: Email delivery reports (LIMITED AVAILABLITY)

The Email Delivery Report can be created in Studio to provide richer insights into how survey invitation emails are sent, delivered, and engaged with. The report utilizes data

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stored in SmartHub that is captured directly from the emailing system (e.g. Amazon SES or SendGrid).

In the LA release the set up of the report is achieved by following the set-up steps described in the user documentation. Users may use the standard report template provided or create their own Studio report.

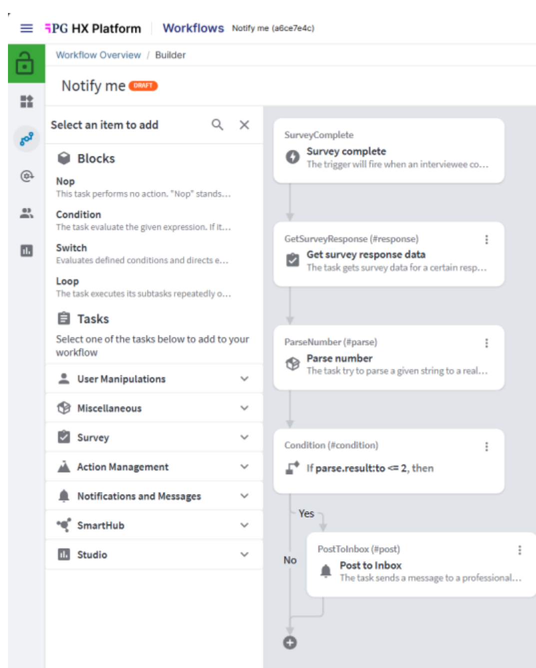
The data includes key data points such as delivery rates, open rates, and bounce rates.

Learn More: [Email Delivery Report Overview]
Learn More: [Setting up an Email Delivery Report]

6. Workflow Builder

Workflow Builder is now in General Availability!
Workflows is a no code solution for automating business processes in Forsta Plus. Workflow Builder is a visual designer for Workflows. Without writing code, users can automate various tasks in Forsta Plus and set up their own business rules:

- Reduce manual effort by triggering tasks based on events.
- Deliver instant notifications, follow-ups, or escalations.
- Move record level information between surveys, SmartHub, and third-parties via webhooks (**External connections coming in Q1 2026 when licensing has been finalized**).
- Standardize workflows, reduce errors, and increase consistency.



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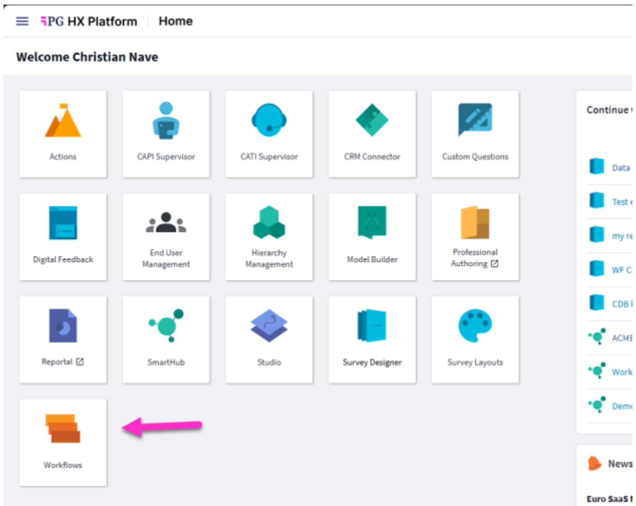
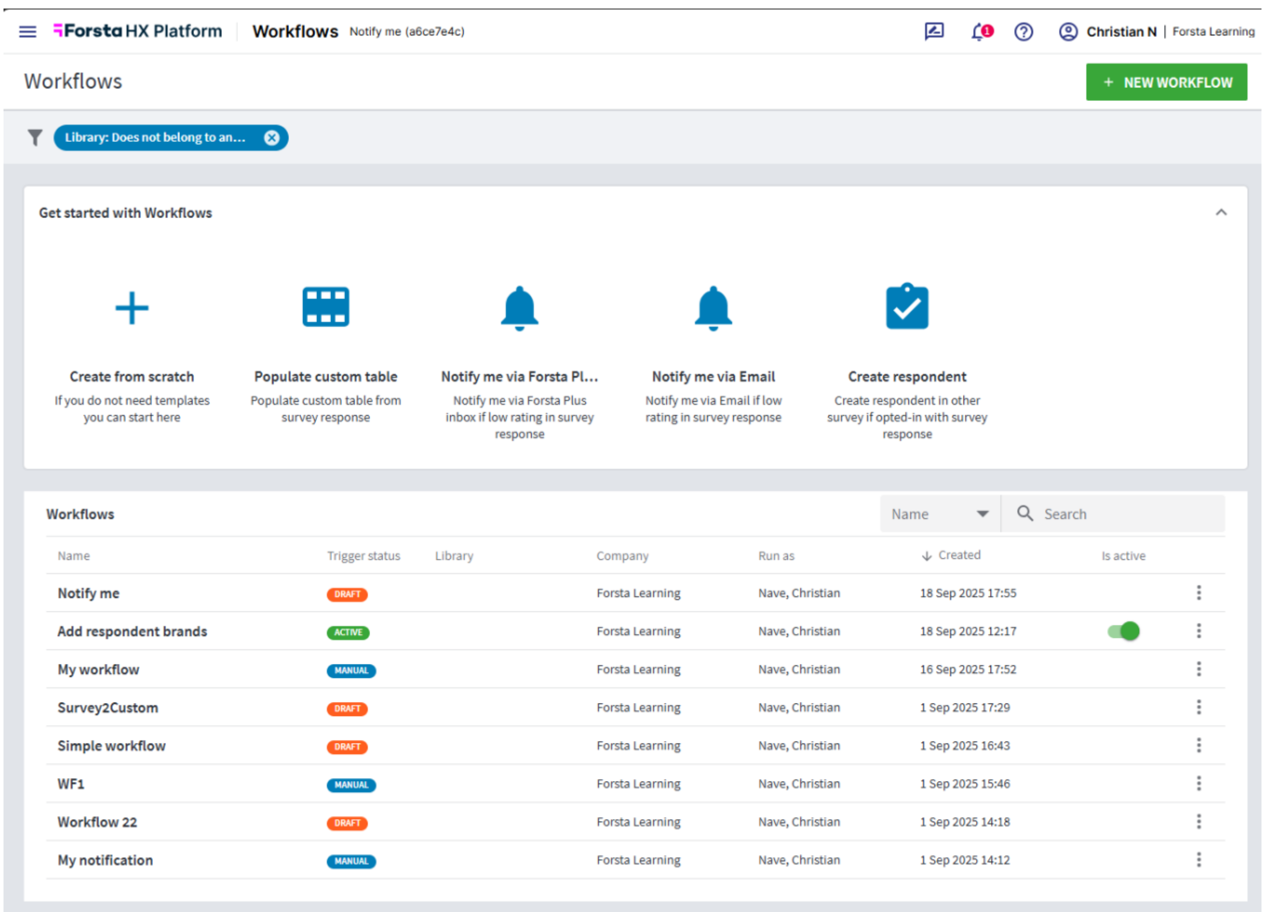
Accessing Workflow Builder:

On the Forsta Plus Home page you can access the Workflows app.





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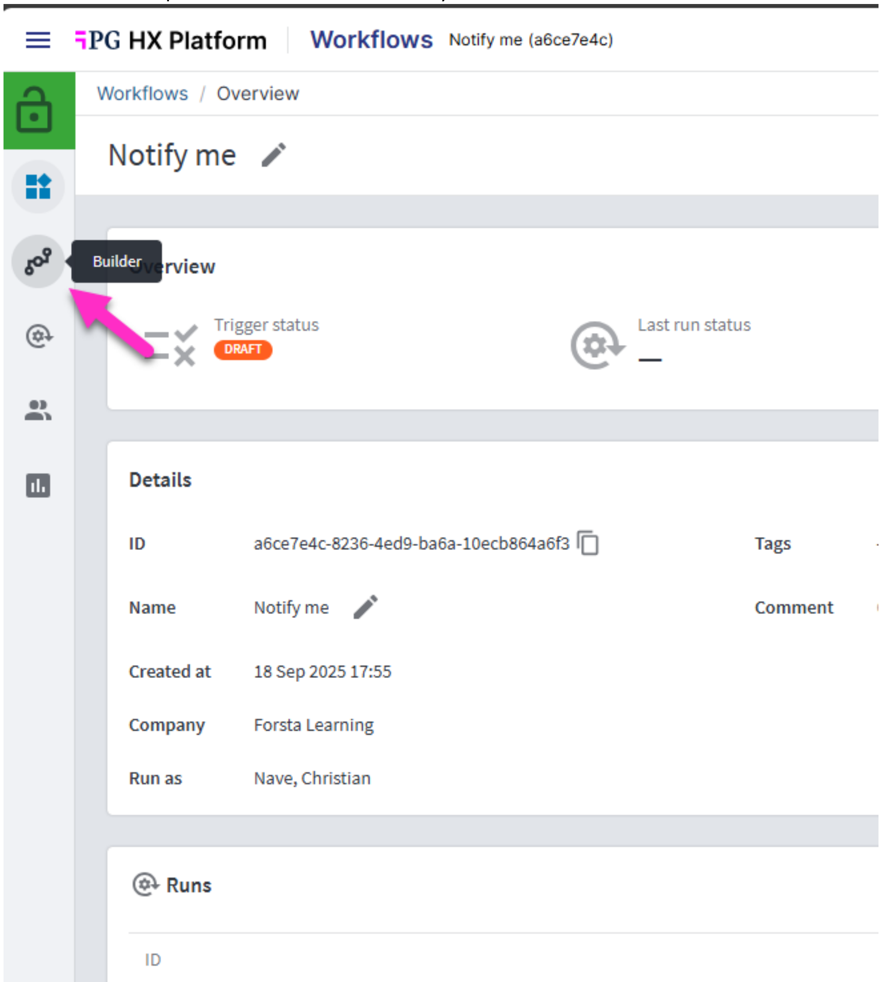
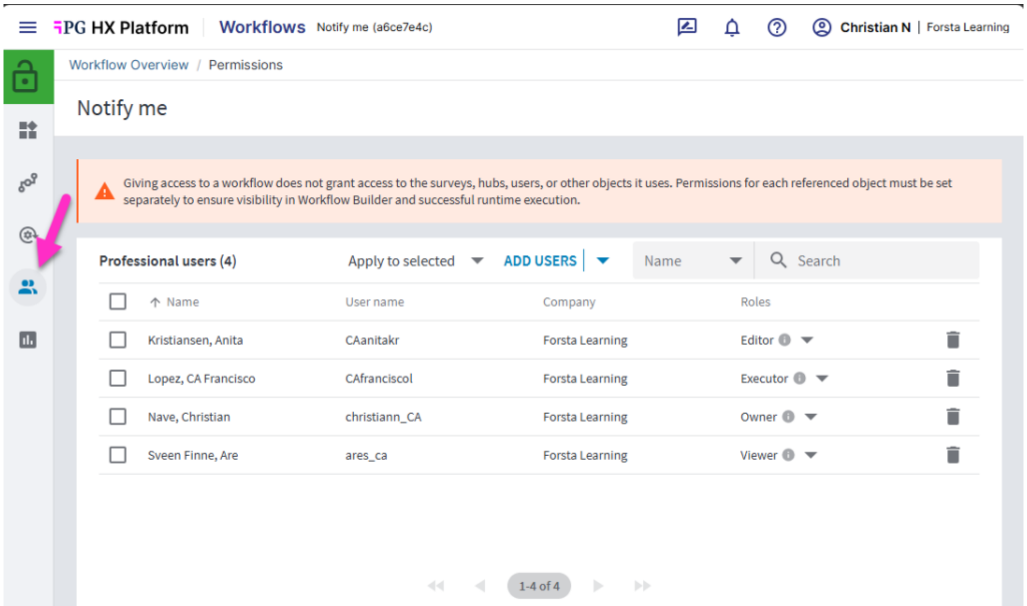
Create or open a workflow, and you will see the Builder on the sidebar menu:



Permissions

Since our internal release we have now added permissions to workflows, so they can be shared easily between users. Different roles restrict what the users are able to do with the workflow.



Helpful videos to get you started:
[My first workflow]

[Create Workflow from a recipe]

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