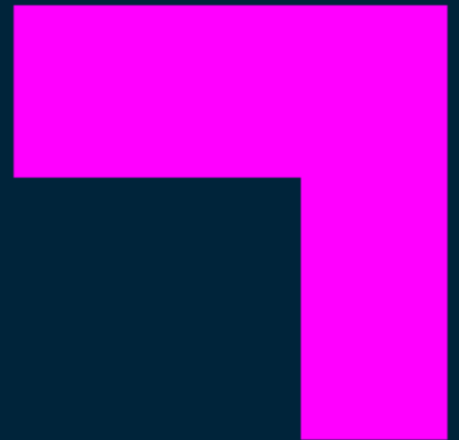




July 2026

Product Release

Customer Success

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

— Panel Management

1. Sending SMS message for Newsletters is now available.
2. You can now copy a campaign without inheriting the scheduled sample settings from the original campaign.
3. You can now send test invitations to multiple recipients for review.
4. The Campaign Invitation Links page now includes opt-out links.

— Forsta Plus

1. Survey Designer: AI Assisted Translation (LA)
2. Studio:
 - Icon Infographic view in datagrid cells
 - Favorite Filters saved for End Users

— Forsta Visualizations

1. Expanded capabilities with Metadata Agent
2. Improvements to Custom Rules
3. Qualtrics V3 integration
4. Legacy Admin interface

Keep reading to learn about these improvements!

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

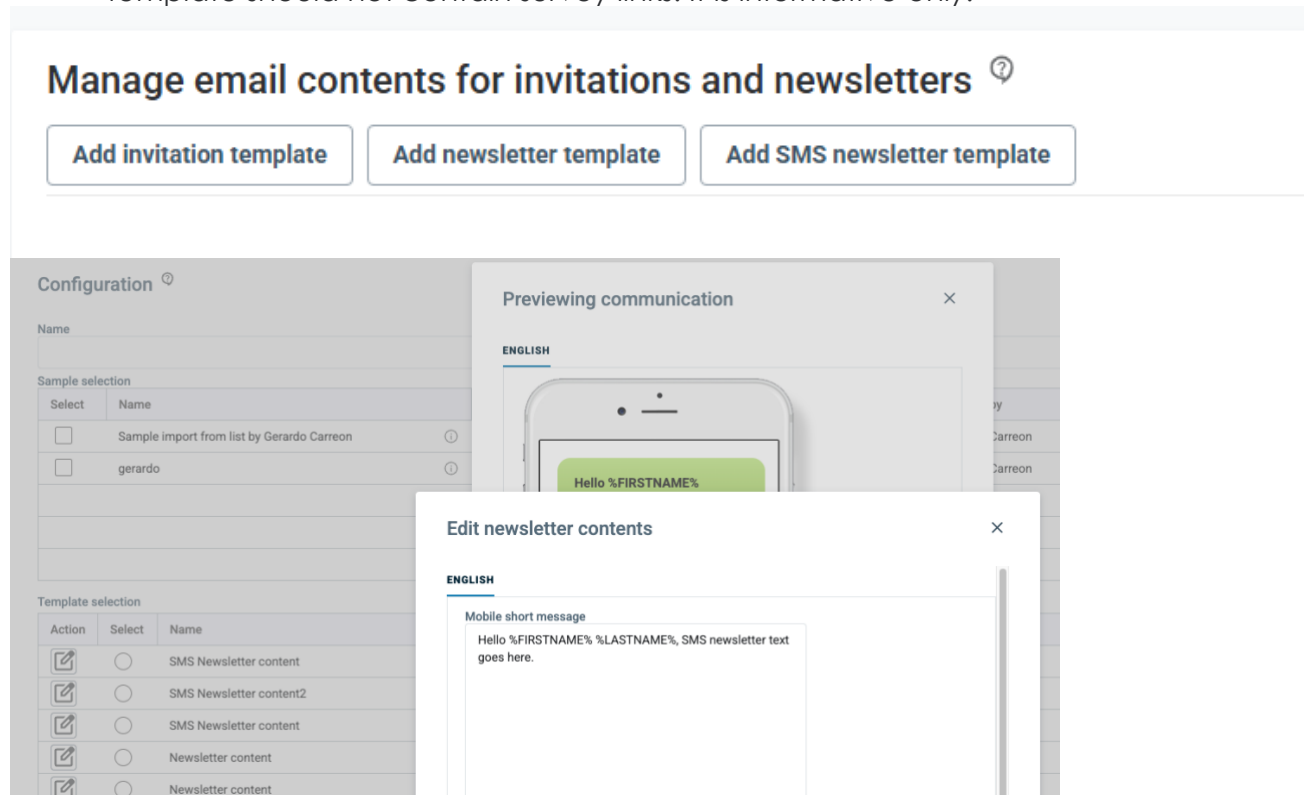
<https://pgforstaproductupdates.zendesk.com/hc/en-us/p/ProductUpdates>

Panel Management

1. Sending SMS messages for Newsletters is now available.

Within Email Content Manager, a template for SMS Newsletters is available. Note that this option will only show if SMS is configured for your panel.

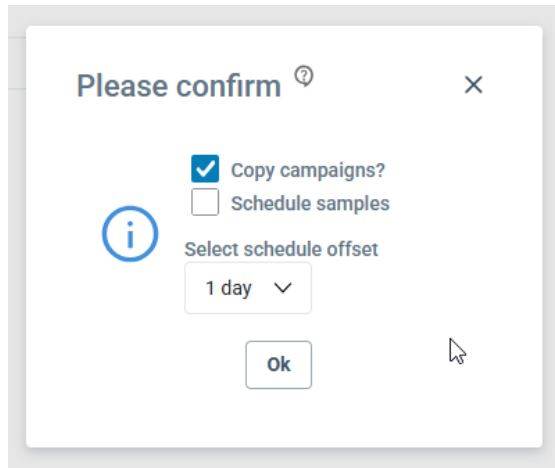
This content template allows you to send mass SMS messages to your panelists without requiring a campaign or associated project. The newsletter content template should not contain survey links. It is informative only.



Learn more about setting up SMS [here](#)

2. You can now copy a campaign without inheriting the scheduled sample settings from the original campaign.

Previously, copying a campaign would automatically schedule samples in that campaign. Now when you copy the campaign, you are able to confirm if samples should be scheduled.

A modal dialog box titled "Please confirm" with a close button (X) in the top right corner. On the left is a blue circular icon with a white lowercase 'i'. To the right of the icon are two checkboxes: "Copy campaigns?" which is checked with a blue square, and "Schedule samples" which is unchecked. Below these is a label "Select schedule offset" followed by a dropdown menu showing "1 day" with a downward arrow. At the bottom center is an "Ok" button.

Please confirm

☒ Copy campaigns?

☐ Schedule samples

Select schedule offset

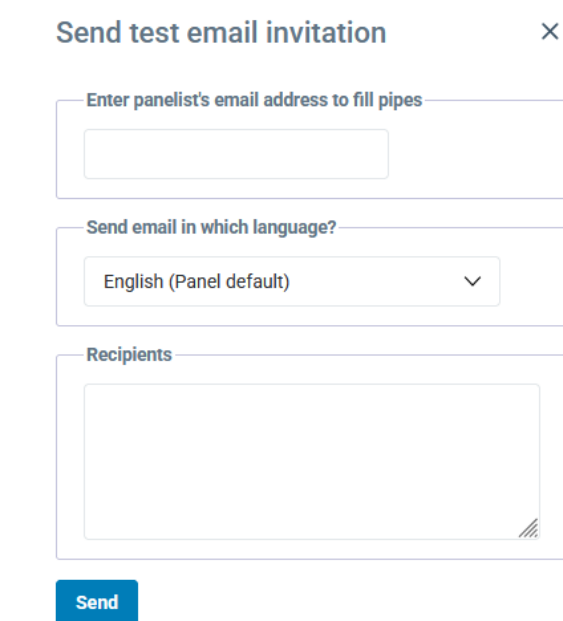
1 day

Ok

If you would like to use the Copy Campaign feature, please reach out to surveysupport@forsta.com to have this enabled.

3. You can now send test invitations to multiple recipients for review.

When creating [survey invitations](#) within your project campaign, you can now send test invitations to multiple recipients on the "Finalize" step, prior to finishing the invitation set up.

A form titled "Send test email invitation" with a close button (X) in the top right corner. It contains three sections: "Enter panelist's email address to fill pipes" with a text input field; "Send email in which language?" with a dropdown menu showing "English (Panel default)"; and "Recipients" with a large text area. At the bottom left is a blue "Send" button.

Send test email invitation

Enter panelist's email address to fill pipes

Send email in which language?

English (Panel default)

Recipients

Send

4. The Campaign Invitation Links page now includes opt-out links.

Within the Campaign Manager Tools, using View Links, you are now able to view the optout link and optout reminder link that when clicked, opens in a new tab and will take the user to the optout link.

Campaign invitation links ⓘ

Download CSV

☒ Non responders ☐ Responded not completed ☐ Completed

Find

Name	Identifier	Email	Phone number	Status	Completion time	Invitation type	Invitation link
6sekkkmcghudfvl	gerardoooo.carreonte@forsta.com	+100000000	INVITED		Email	https://staging.panel.dev.focusvision.com:443/receiver.pro?seskey=h0Z0q0k	
ql4fzy1v2vxpxuu	panelist+003ch2@panelmgmt.com	+528447210796	INVITED		Email	https://staging.panel.dev.focusvision.com:443/receiver.pro?seskey=h0RVK0M	View optout link View reminder optout link

Forsta Plus

Survey Designer

1. AI-Assisted Translation for Survey Designer (Limited Availability)

This new capability helps users accelerate the survey translation process by automatically pre-populating exported translation spreadsheets with AI-generated translations. The feature is designed to significantly reduce the amount of manual translation work required while maintaining the existing translation workflow.

How it works

When exporting translation files from the Manage Translations dialog, users can enable the new "Prefill with AI Translation" option. The exported Excel files will be populated with AI-generated translations for the selected target language(s), allowing translators to focus on reviewing and refining the content rather than translating from scratch.

Manage translations ×

Managing question translations is as easy as 1-2-3!

- 1** DOWNLOAD A ZIP FOLDER CONTAINING AN EXCEL® FILE FOR EACH LANGUAGE

Translate from: English

Translate to: French

☐ Prefill language (English)
☒ Prefill with AI Translation
☐ Include only un-translated text fields
☐ Ignore "Exclude from translator" question property

[DOWNLOAD SELECTED](#)
[DOWNLOAD ALL](#)
- 2** ADD TRANSLATIONS TO EACH SPREADSHEET...

 Do not attempt to unprotect the protected sections. You must use the original worksheet.
- 3** UPLOAD EACH SPREADSHEET RIGHT BACK HERE

Upload one Excel® file at a time. Content in uploaded files, including blanks, will override existing survey texts.

For detailed instructions, please refer to the [Survey Designer translation documentation](#)

Studio

1. Using Infographic view within datagrid cells

This CDL-only capability allows dashboard designers to:

- Specify an icon view (based on the current capabilities of the headline infographic tile)
- Settings like conditional formatting color, number of icons, etc are available
- Apply this view to a datagrid cell

These feature enhancements are **available now** to all users (via CDL configuration only).

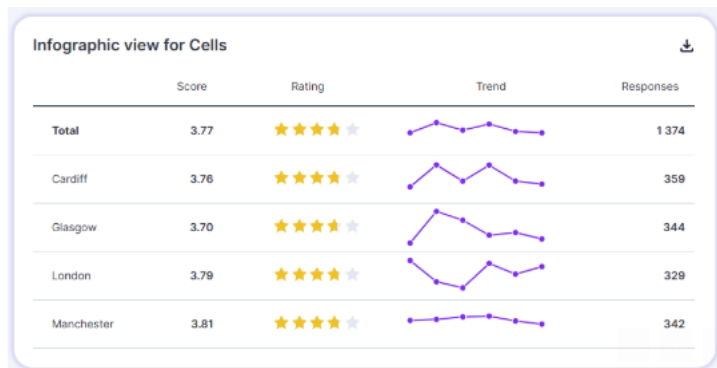
Note: This is only currently supported in standard datagrid cells only, so use within custom cell calculations will be prioritized based on demand.

A quick overview of using an infographic view in a datagrid is shown here (2 min)



[IconCellView.mp4](#)

Screenshot of a simple datagrid with star rating icons:



2. Favorite Filters for End Users

Users with saved Favorite Filter Groups will no longer lose them when:

- Using a different browser
- Switching devices
- Clearing browser cache or local data

Favorite Filter Groups are now linked to the user's account and stored securely on the server. This means they will always be available whenever the user logs in.

The next time a user logs in, Studio will automatically check whether they already have Favorite Filter Groups stored on the server.

- If server-side groups already exist, no action is required.
- If no server-side groups are found, Studio will look for any locally saved groups.
- Any locally saved groups will be automatically migrated to the server and removed from local browser storage.

No user action is required.

What are Favorite Filters?

Favorite Filters allow users to save commonly used report filter settings as a named group and quickly reapply them whenever needed.

This is particularly useful for reports that are run regularly using the same filter combinations.

Need a refresher?

For a recap of how Favorite Filters work, see the original release information here:

<https://forstastudio.zendesk.com/hc/en-us/articles/20255365941659-Saving-Filters>

Availability

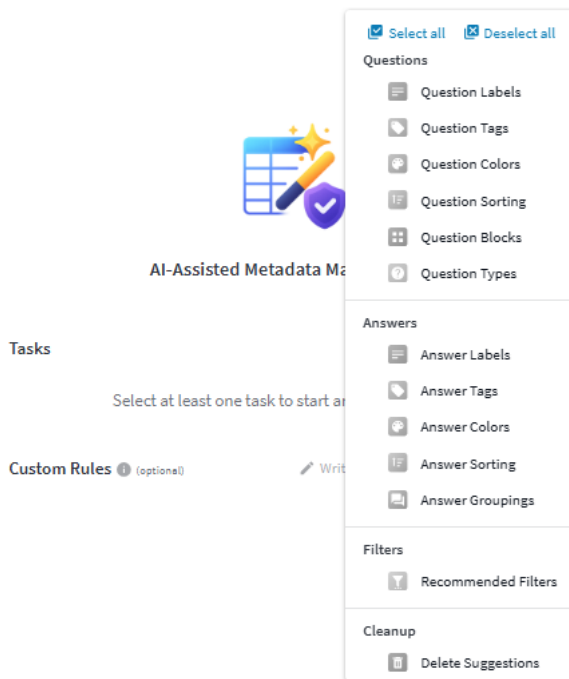
Available now for all users

No updates or configuration changes required

Forsta Visualizations

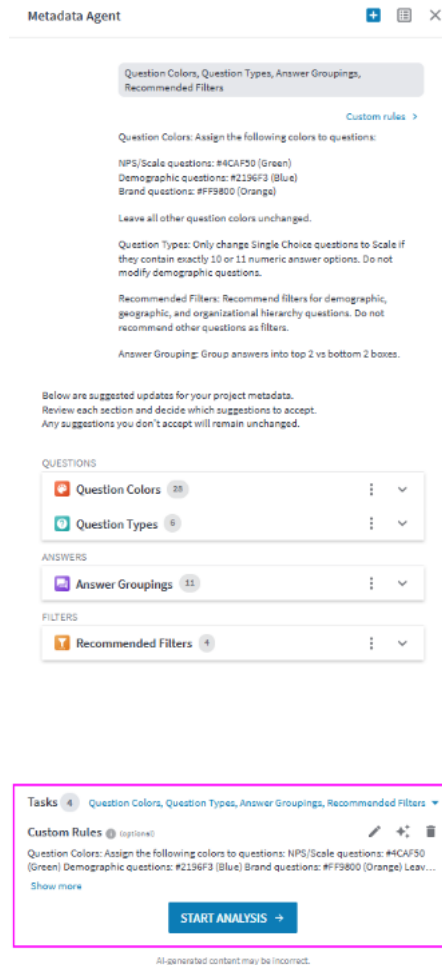
1. Metadata Agent – Expanded Capabilities

The Metadata Agent now supports additional metadata tasks, including colors, tags, sorting, blocks, groupings, and cleanup suggestions. The updated workflow also introduces improved task selection and a more efficient iterative analysis experience.



2. Custom Rules improvements

Custom Rules now replace the default Metadata Agent rules for all selected tasks, giving you greater control over AI-generated suggestions. You can also refine multiple analyses within the same session before saving all approved changes in one operation.



3. Qualtrics V3 Integration

Introducing the new Qualtrics V3 integration with support for importing surveys containing looped data. Additional import options provide greater control over surveys, filters, questions, embedded data, and time period selection.

4. Legacy Admin Interface

The "Switch to old interface" option has been removed from the Admin pages. This change applies only to the Admin interface and does not affect the StoryTeller interface.

Full details are available in the [Forsta Visualizations release notes](#).