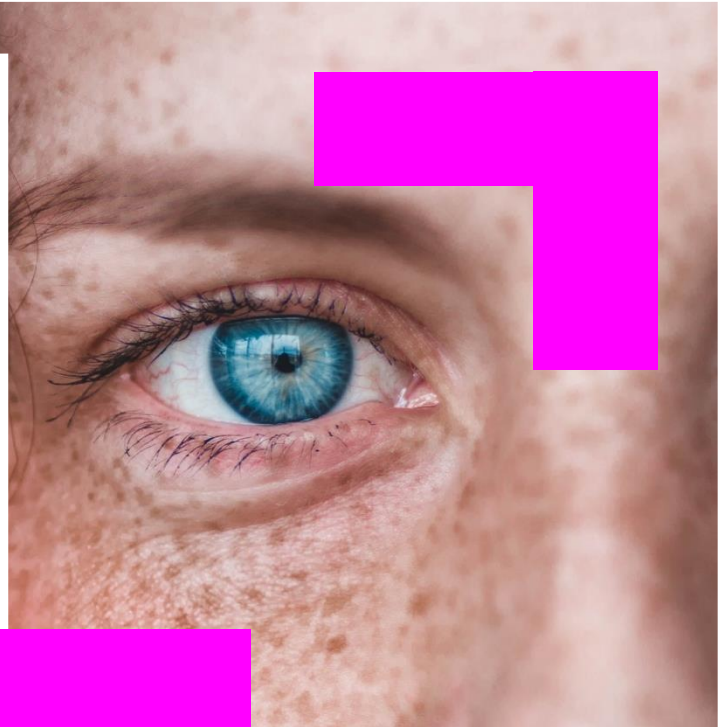




Getting Started with Forsta Panel Management



About Forsta

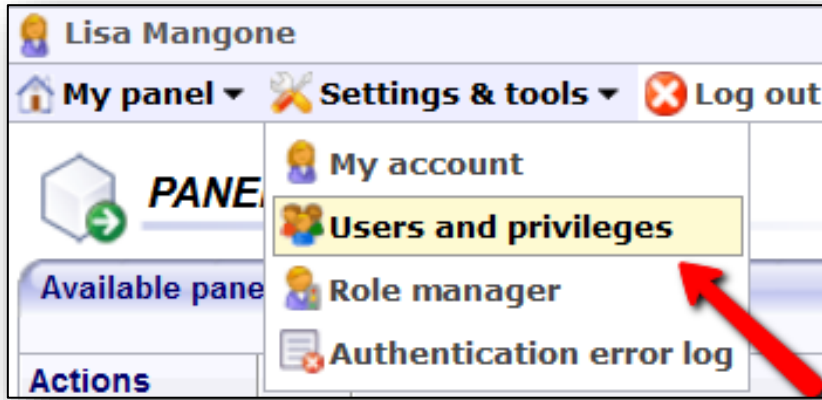
Forsta is the new frontier of Customer Experience and Market Research Technology. Formed in 2021 via the merger of industry leaders Confirmit and FocusVision, our global company powers the richest and most comprehensive set of research and insights solutions, spanning CX, enterprise feedback management, VoC, VoE, Qual, Quant, Data Visualization and more. Forsta's extensive set of market-leading tools, including the award-winning Dapresy data visualization and reporting suite, combined with the expert guidance of our seasoned data and insights professionals, empower decision-makers to drive business impact based on truly deeper customer understandings. Founded in the Nordics, Forsta means "to understand" in Swedish. Visit www.Forsta.com for more information.

Contents

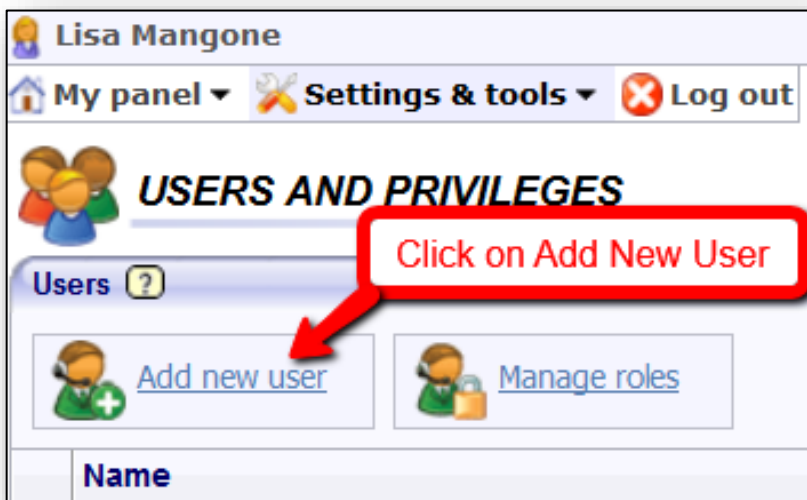
Adding a New User.....	3
Creating a New Panel.....	5
Adding DataPoints.....	6
Adding Panelists.....	9
Creating a New Project	12
Running a Query for Sample	14
Creating a New Campaign.....	16
Creating Cross Tabs	20
Accessing a Community Portal	22
Summary	24

Adding a New User

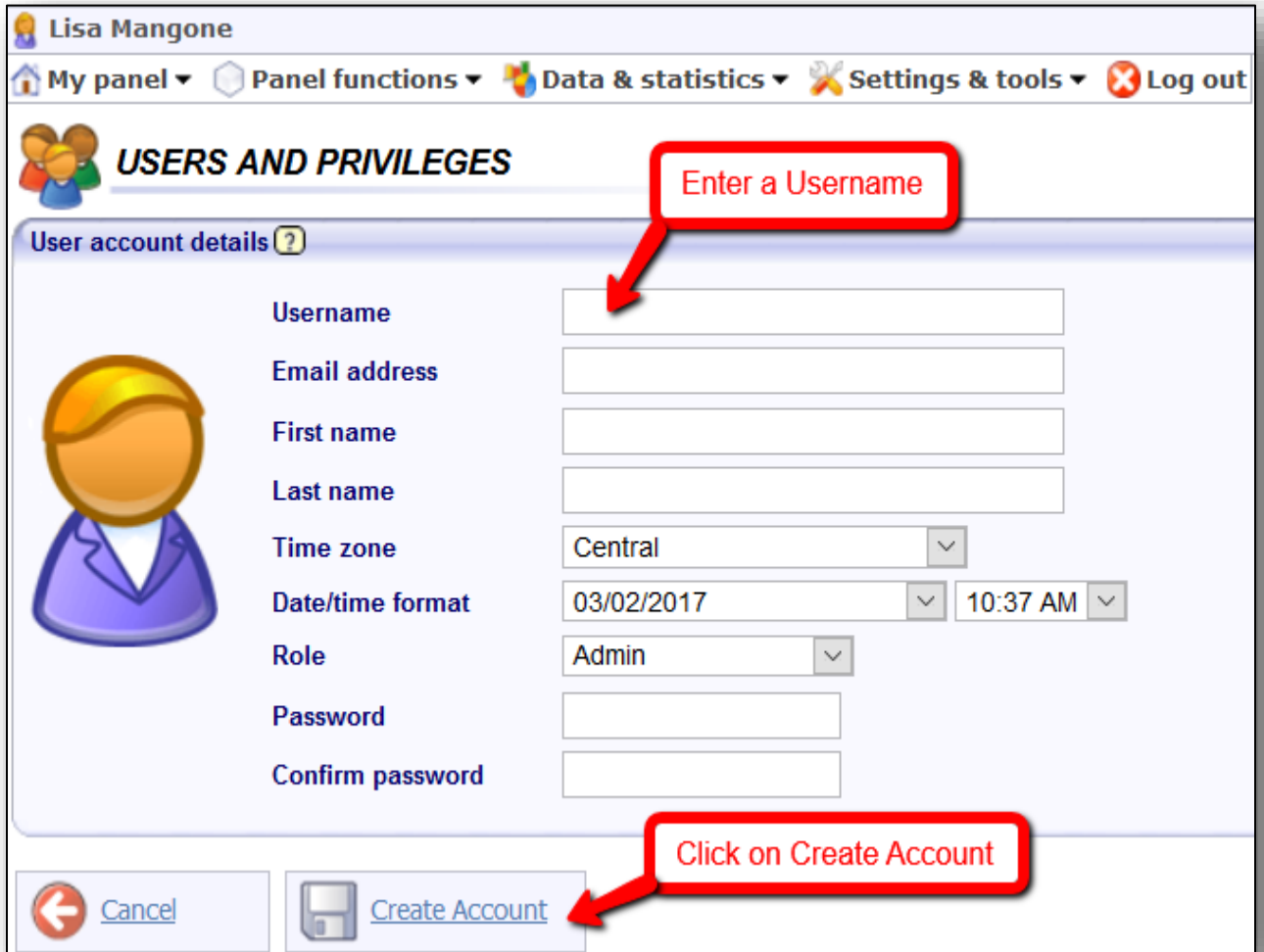
1. Click on Settings & Tools from the menu bar then click on Users and Privileges



2. Click on Add New User.



3. Enter a username and all other details about the user then click on Create Account.






Lisa Mangone

My panel ▾ Panel functions ▾ Data & statistics ▾ Settings & tools ▾ Log out

USERS AND PRIVILEGES

User account details ?

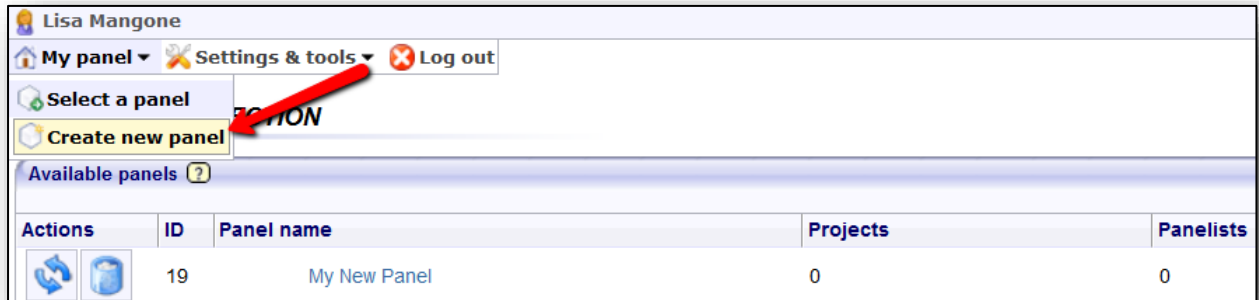
	Username	<input type="text"/>
	Email address	<input type="text"/>
	First name	<input type="text"/>
	Last name	<input type="text"/>
	Time zone	Central ▾
	Date/time format	03/02/2017 ▾ 10:37 AM ▾
	Role	Admin ▾
	Password	<input type="password"/>
	Confirm password	<input type="password"/>

 [Cancel](#)  [Create Account](#)

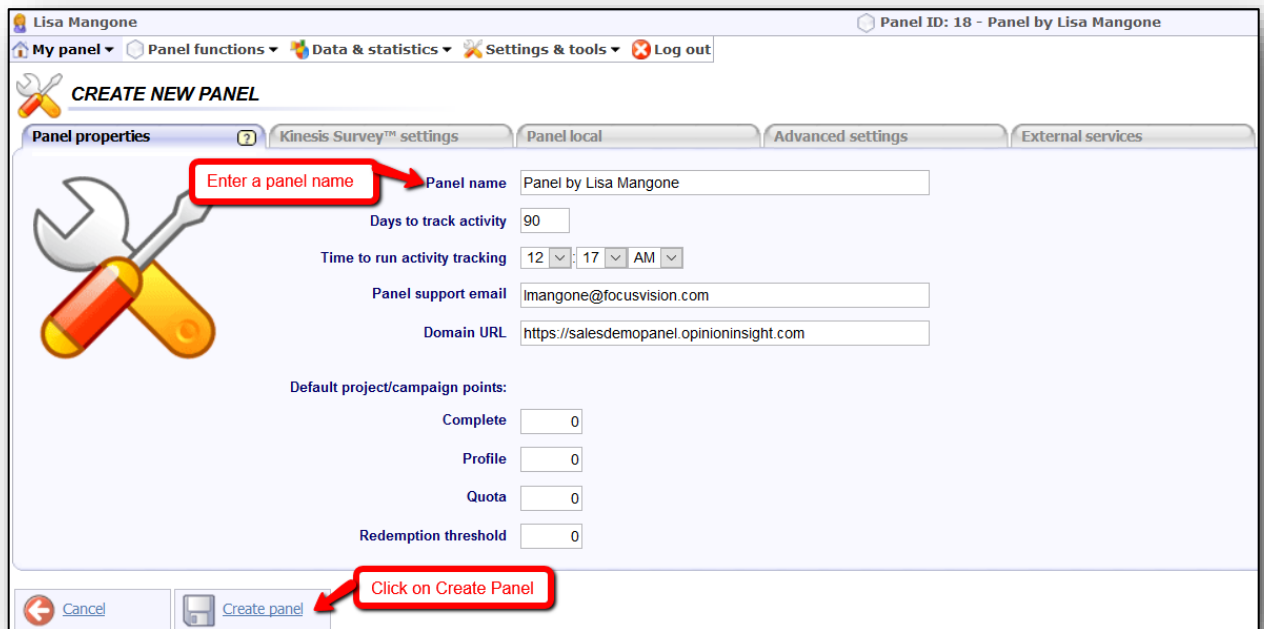
[Back to Top](#)

Creating a New Panel

1. Click on My Panel then click on Create New Panel



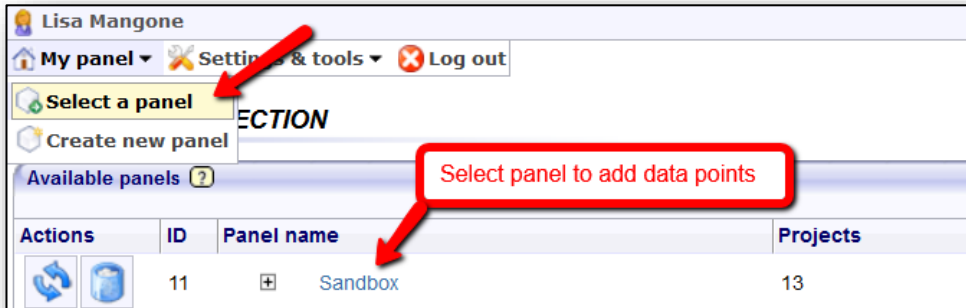
2. Enter a Panel Name and all other details about the panel then click on Create panel.



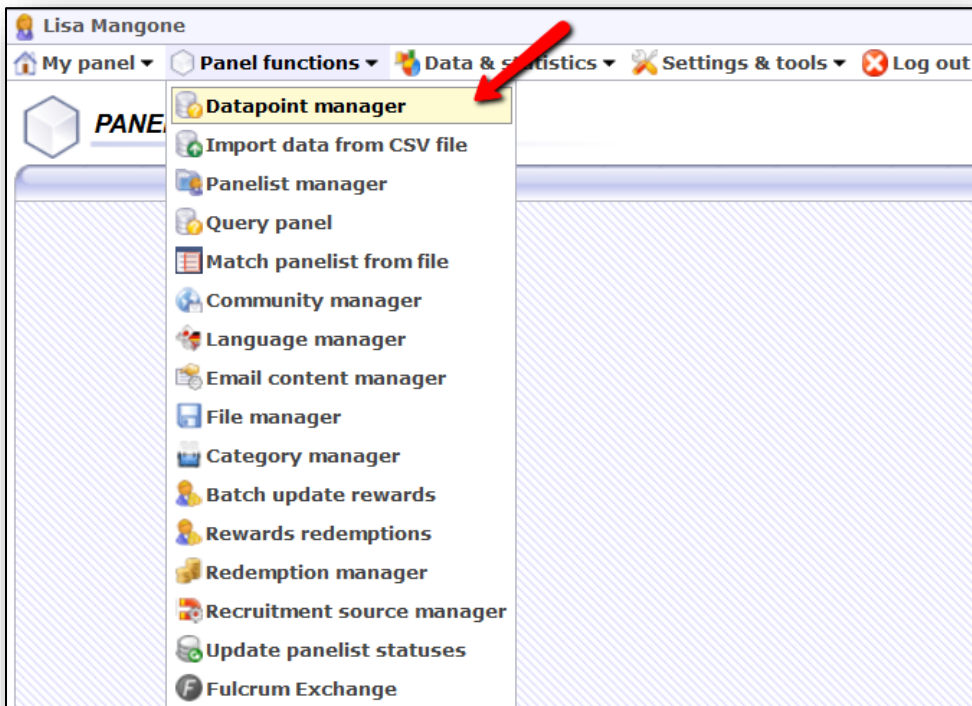
[Back to Top](#)

Adding DataPoints

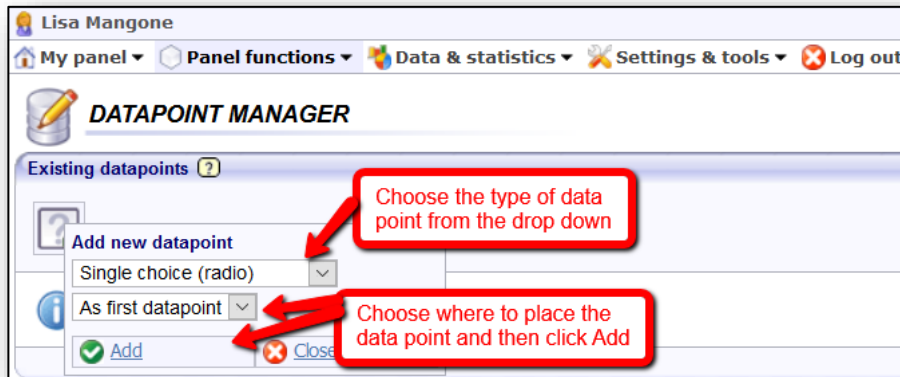
1. Click on My Panel, click on Select a panel then select the panel to add datapoints to.



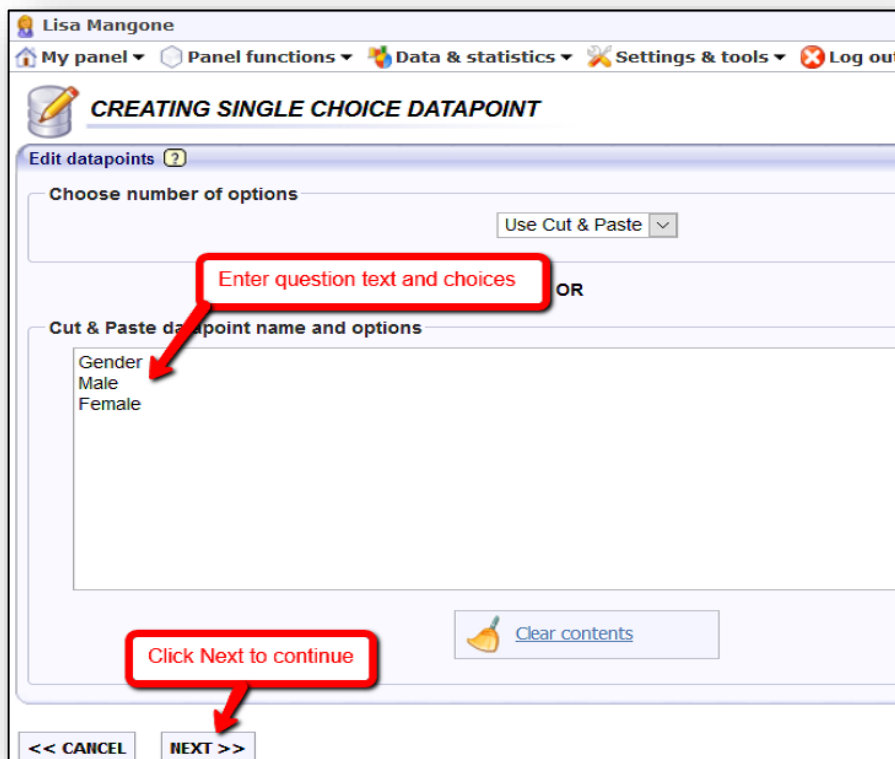
2. Click on Panel functions then click on Datapoint Manager.



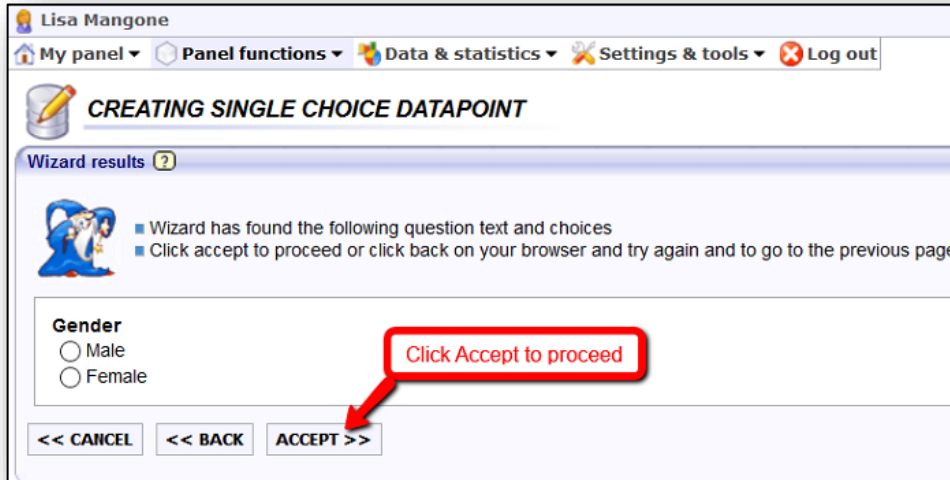
- To add a new datapoint, click on the Question Mark, choose the type of Datapoint, where to place it, then click Add. You can add: Single or Multiple Choice, Numeric, Open-Ends or Date.



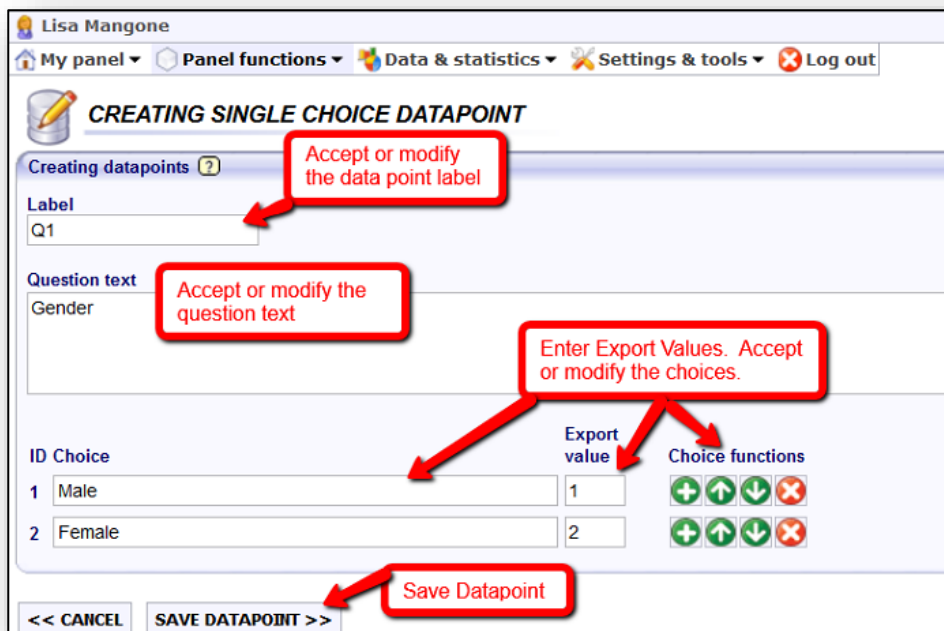
- Enter the datapoint information per the type chosen then click Next.



- Click Accept to proceed if the datapoint information looks correct.

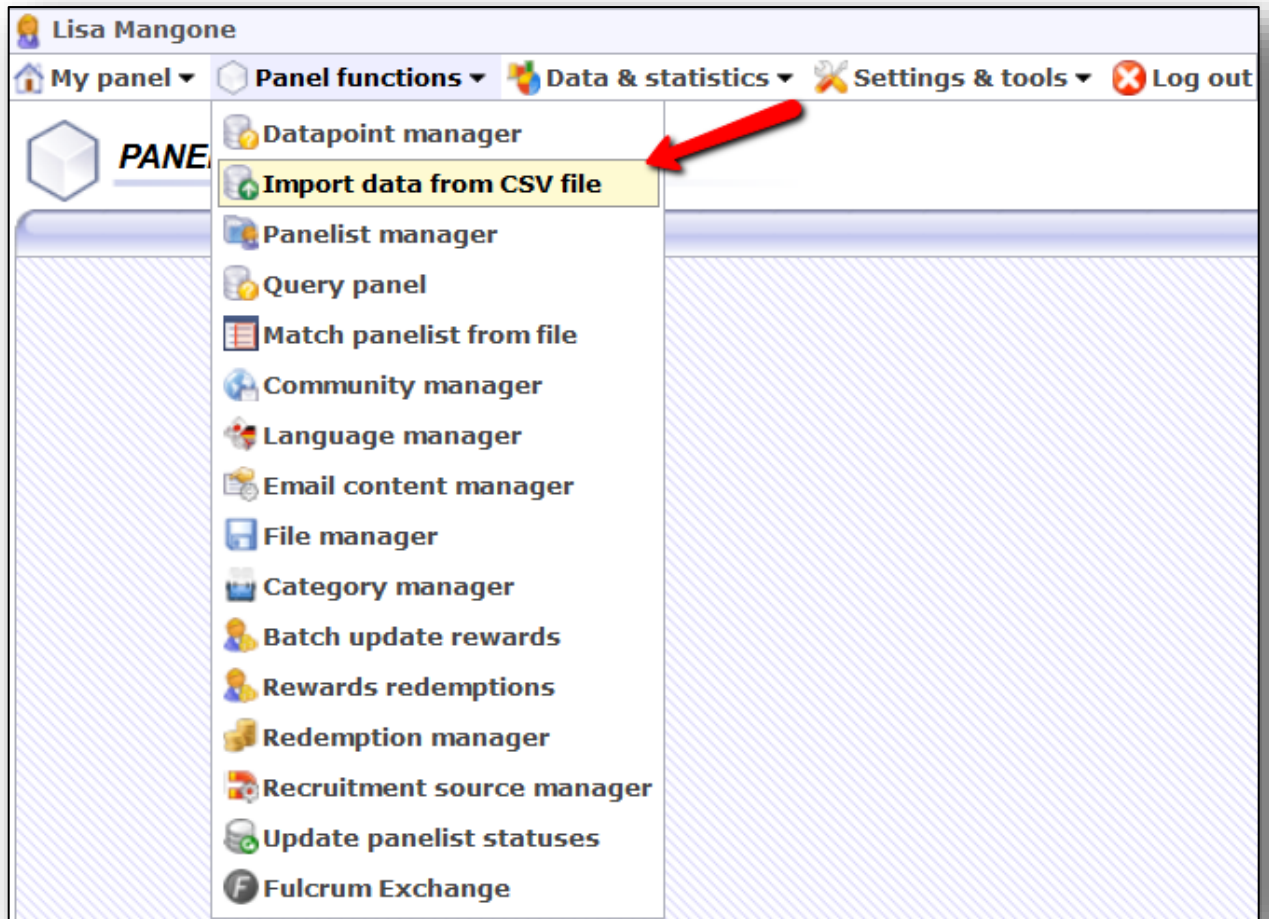


- Make any necessary changes to the datapoint label, question text, or choices, then click save datapoint.

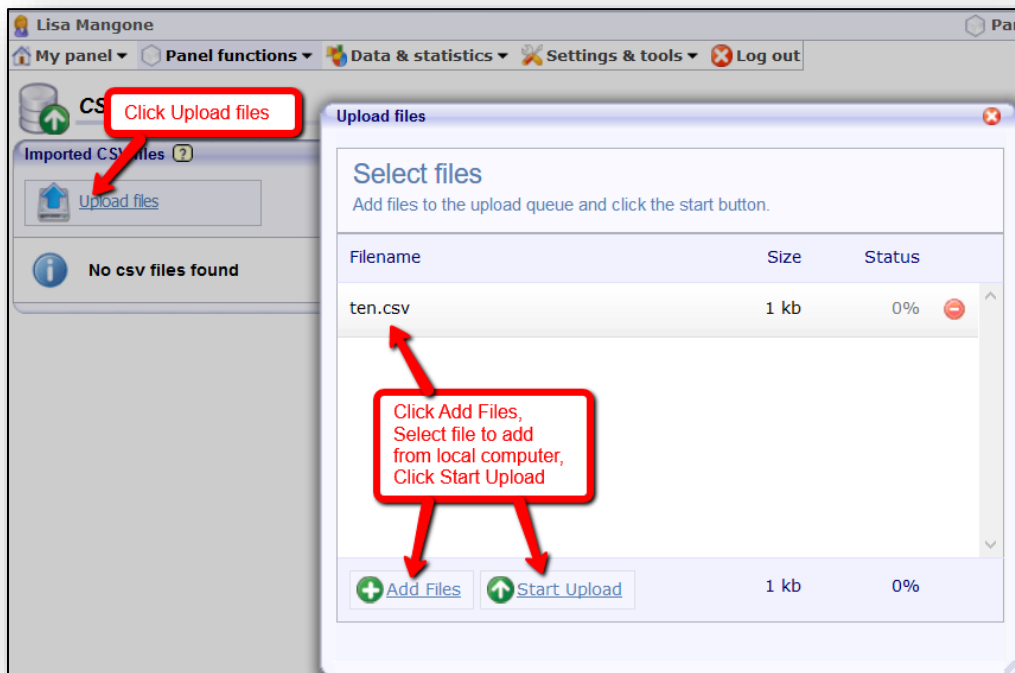


Adding Panelists

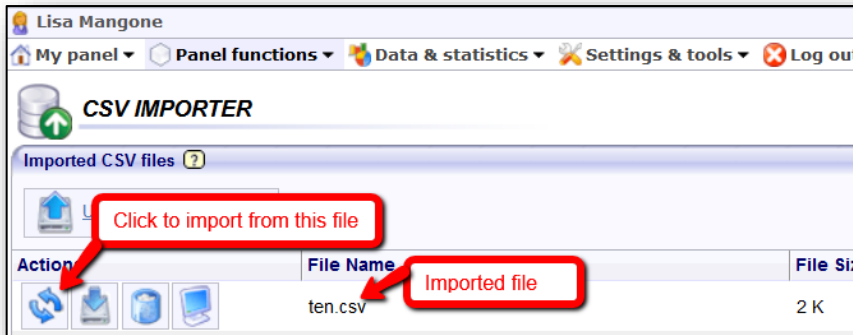
1. Create or use an existing CSV file with the panelist information to import. Ensure that the file imported has an email address and all other appropriate column headers that match each datapoint.
2. Click on Panel Functions then click on Import Data from CSV File.



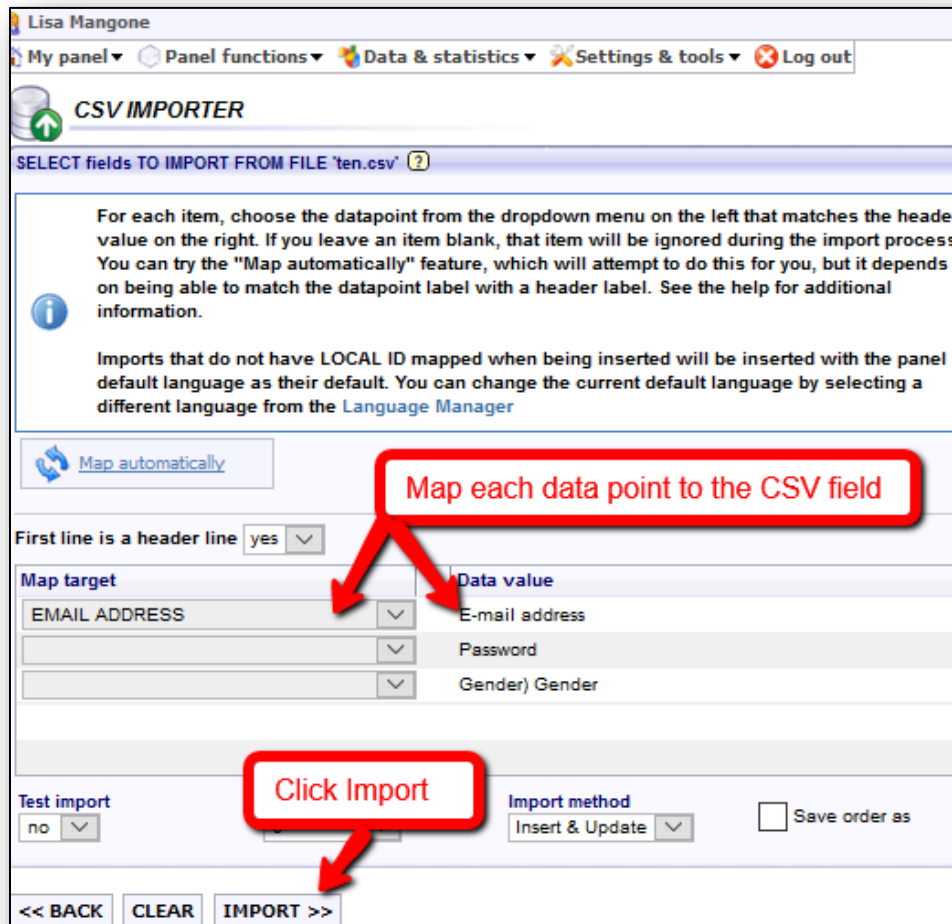
3. Click on Upload files. Once the popup appears, click Add Files, select the CSV file to add from your local computer then click Start Upload.



4. Once imported, click on Import from this file.



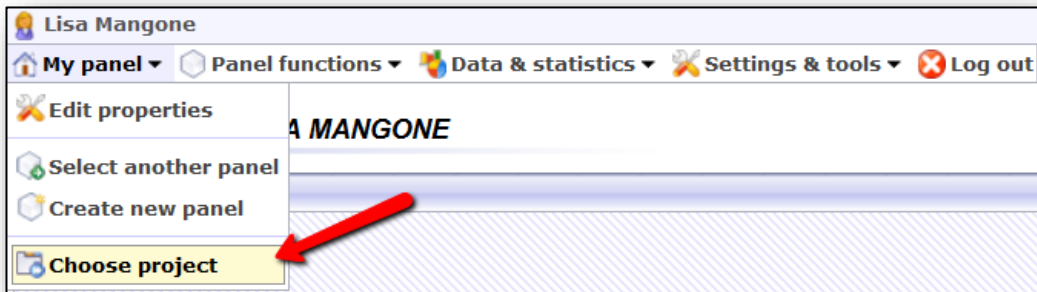
5. Map the data points to the appropriate CSV fields then click on Import.



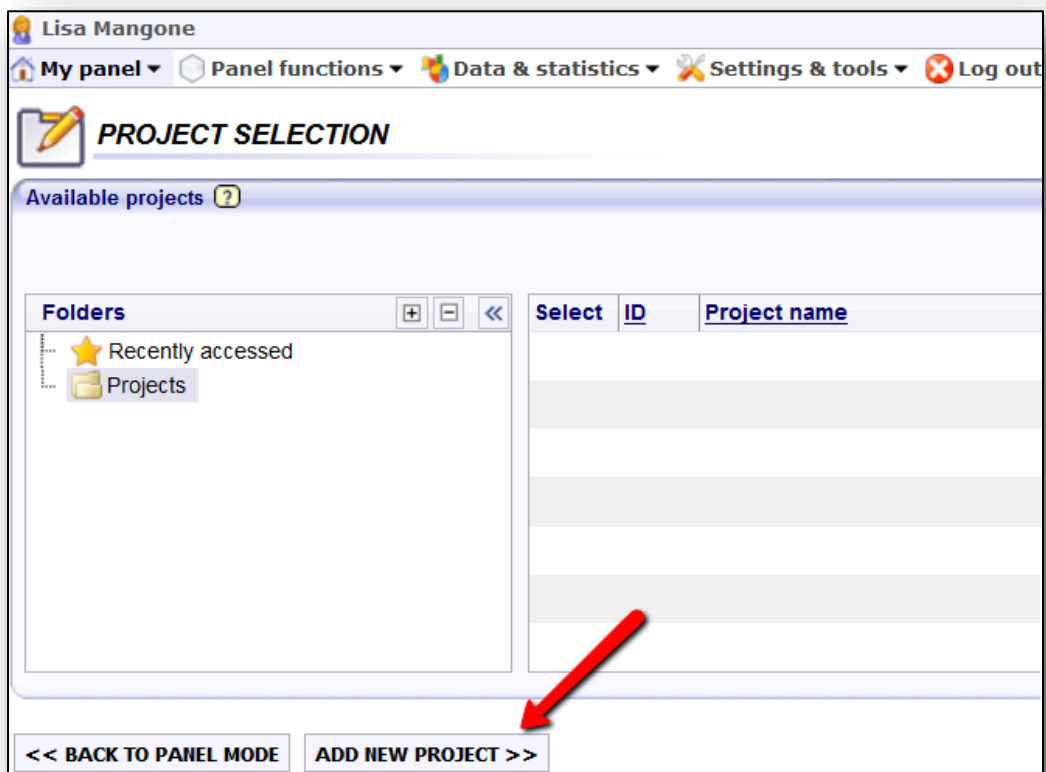
[Back to Top](#)

Creating a New Project

1. Click on My Panel then click on Choose Project.



2. Click on Add New Project.



3. Enter a project name and all other details about the project then click on Create Project.

ADD NEW PROJECT

General settings | Other settings | Survey settings | Category assignment

Name: Lisa's new project

Description: [Empty text area]

Link to survey: No active surveys exist, or they are already assigned to other panels. at <https://salesdemosurvey.opinioninsight.com>

Link to Decipher survey: none

Default reward points: Complete: 0, Profile: 0, Quota: 0

Default maximum participation: 1

Estimated incidence: %

Project manager: Lisa Mangone

Assistant project manager: [Empty dropdown]

Target close date: 03/09/2017 11:07 AM

Buttons: Cancel, Create Project

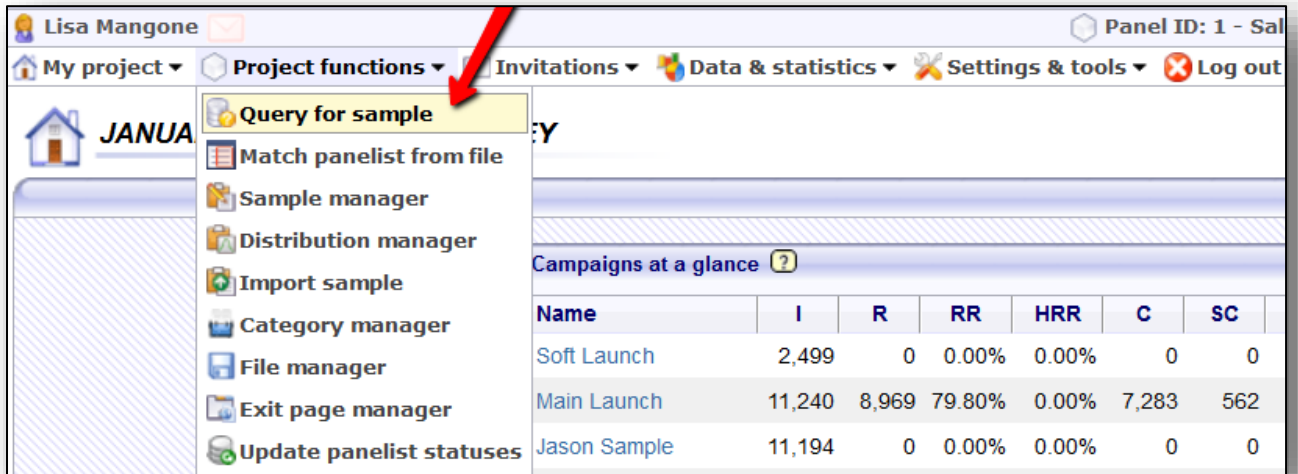
Annotations:

- Enter a project name (points to Name field)
- Links for surveys. Enter Default reward points. (points to Complete, Profile, and Quota fields)
- Click Create Project (points to Create Project button)

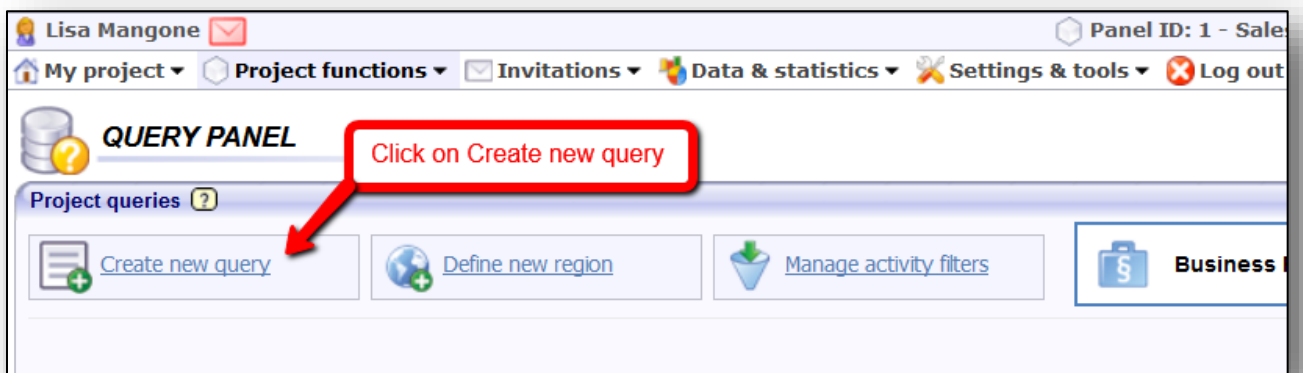
[Back to Top](#)

Running a Query for Sample

1. Click on Project Functions then click on Query for Sample.



2. Click on Create New Query



- Build a query by dragging in data points from the left into the query building area in the middle, then choose options from the right. Click preview to see how many panelists were chosen.

Enter a name for the query, click Save Query to re-use then click Save as Sample to save out the queried sample file.

The screenshot shows the 'querybuilder' interface with the following components and annotations:

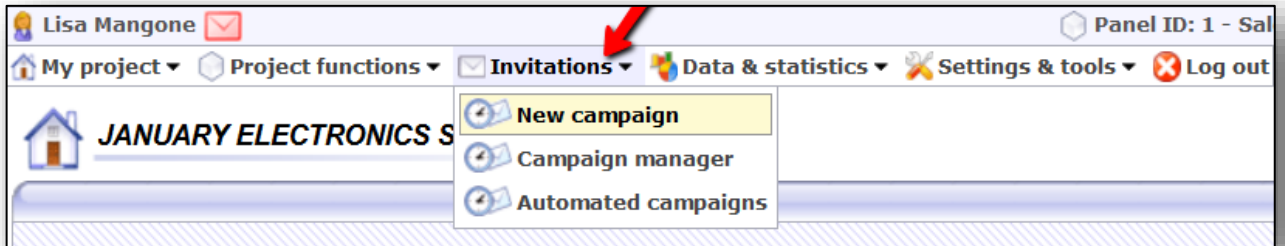
- Left Sidebar (Datapoints):** A list of data points including 'Gender', 'DOB', 'Age', 'First', 'Middle', 'Last', 'Address', 'UnitNumber', 'City', and 'State'. A red callout box labeled 'Choose data points to run query' points to this list.
- Query Building Area:** Contains two clauses: 'Gender is Female' and 'Age Range is 18 - 50'. A red callout box labeled 'Build the query' points to this area.
- Query Title:** 'Females Age 18-50'. A red callout box labeled 'Name the query' points to this title.
- Buttons:** 'Preview', 'Save query', and 'Save as Sample'. Red callout boxes labeled 'Click preview to view results', 'Save the query', and 'Save as sample' point to these buttons respectively.
- Clause Editor:** Shows 'AgeRange Age Range is' with radio button options: 'Under 18', '18 - 50' (selected), and '51+'. A red callout box labeled 'Select options' points to these options.
- Query Results:** A table showing the results of the query:

	Percent	Panelists
Included	22.7%	5,918
Excluded	77.3%	20,146
Total	100%	26,064

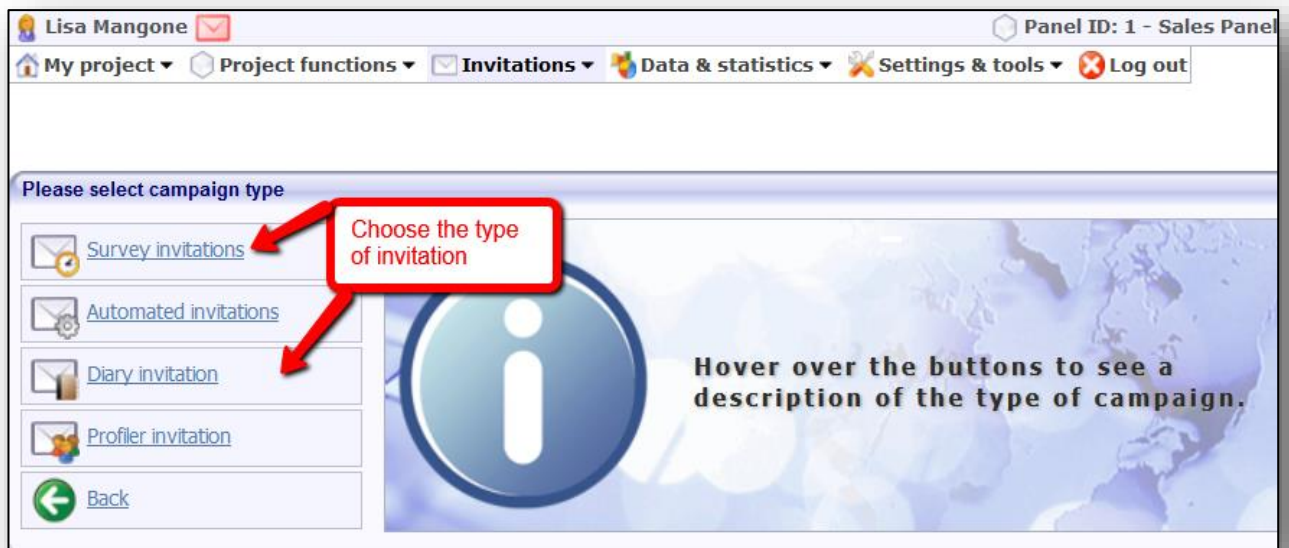
[Back to Top](#)

Creating a New Campaign

1. Click on Invitations then click on New Campaign.



2. Click on the type of invitation to send out. For this guide, we'll use Survey Invitations.



- Enter an Internal campaign name and all other campaign properties then click Next.

Invitation Campaign Properties

Internal campaign name

Internal campaign description

Maximum participation

Enter a campaign name

Enter properties

Click Next to continue

CANCEL NEXT >>

- Enter a Survey name then click Next.

Survey name

The following survey name and description will be always used when referencing this invitation (Community available survey)

English Spanish (Spain)

Survey name

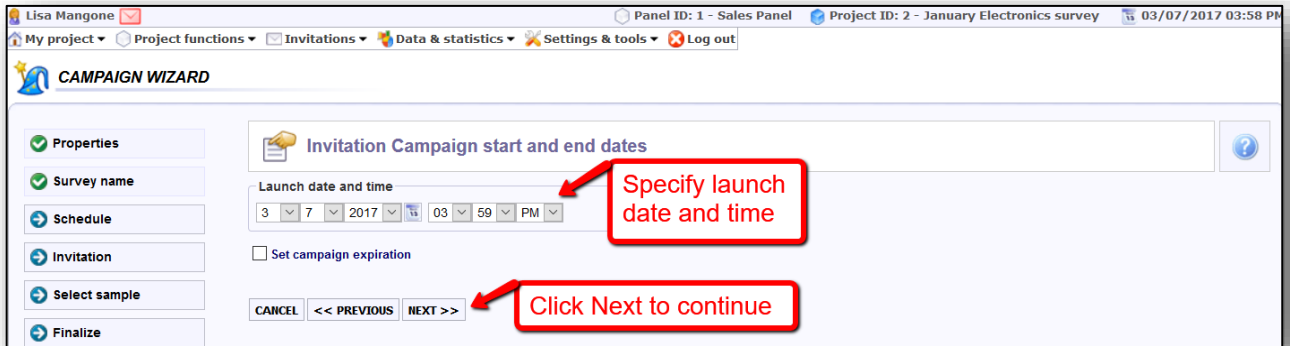
Survey description

Enter a survey name

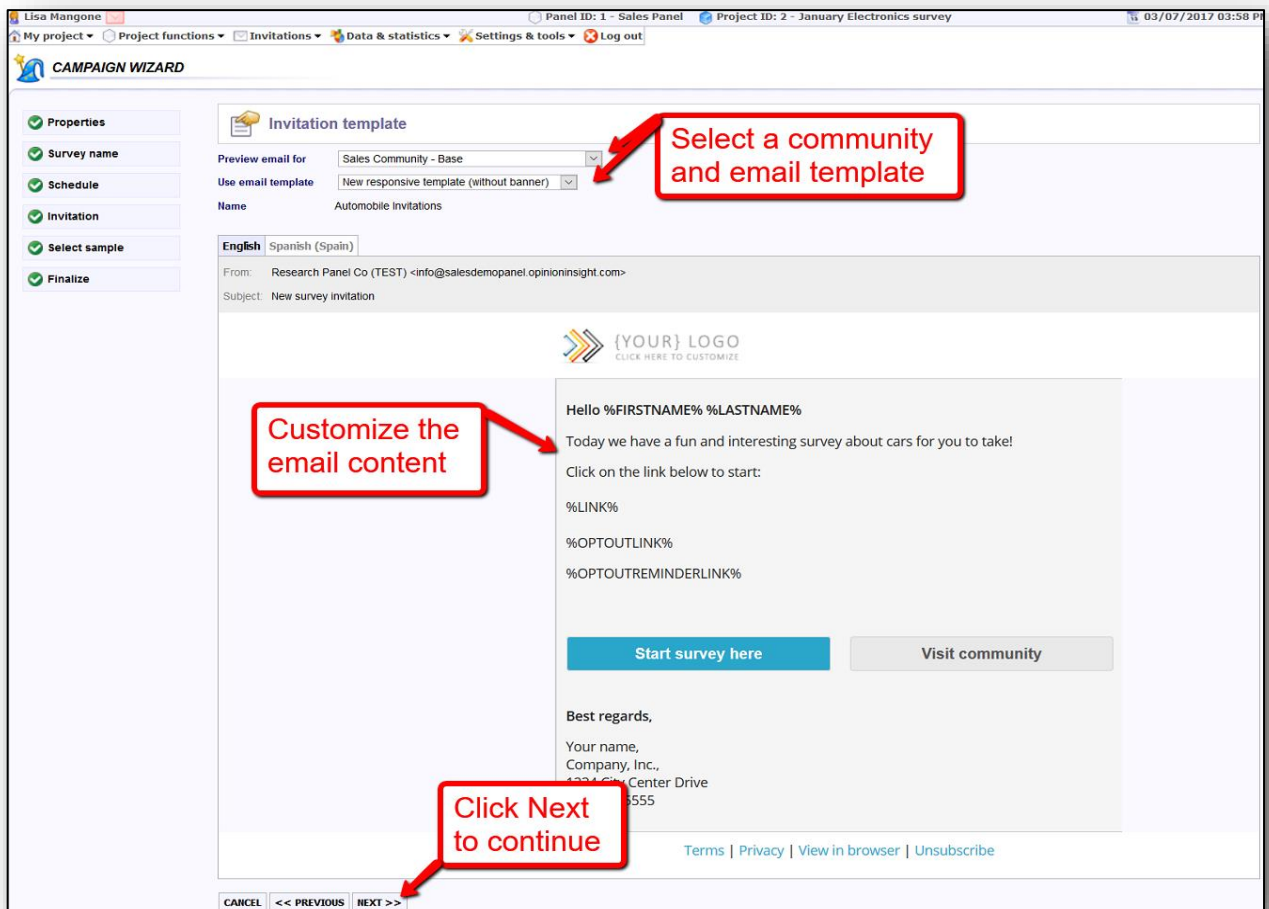
Click Next to continue

CANCEL << PREVIOUS NEXT >>

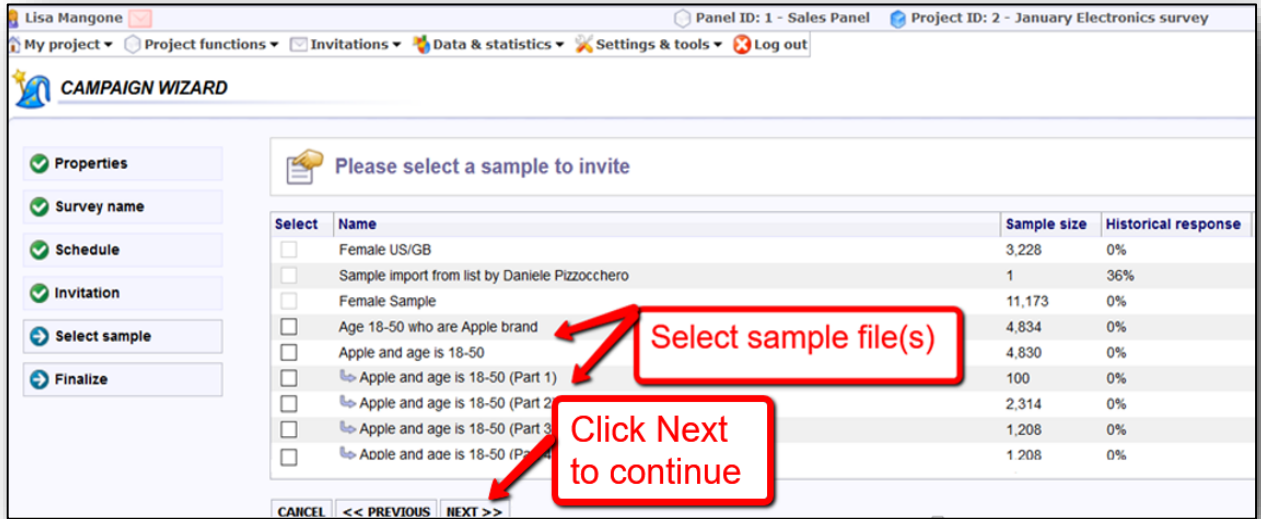
- Specify the Launch date and time of the invitation campaign then click Next.



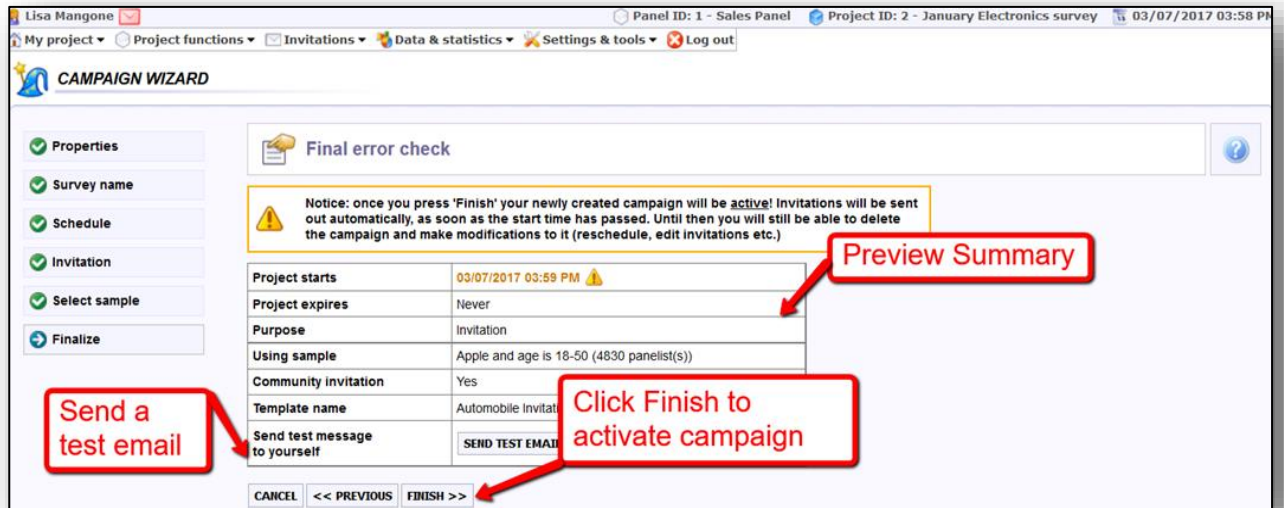
- Customize the Email Template then click Next.



7. Select the Sample File to use to send out the invitation then click Next.



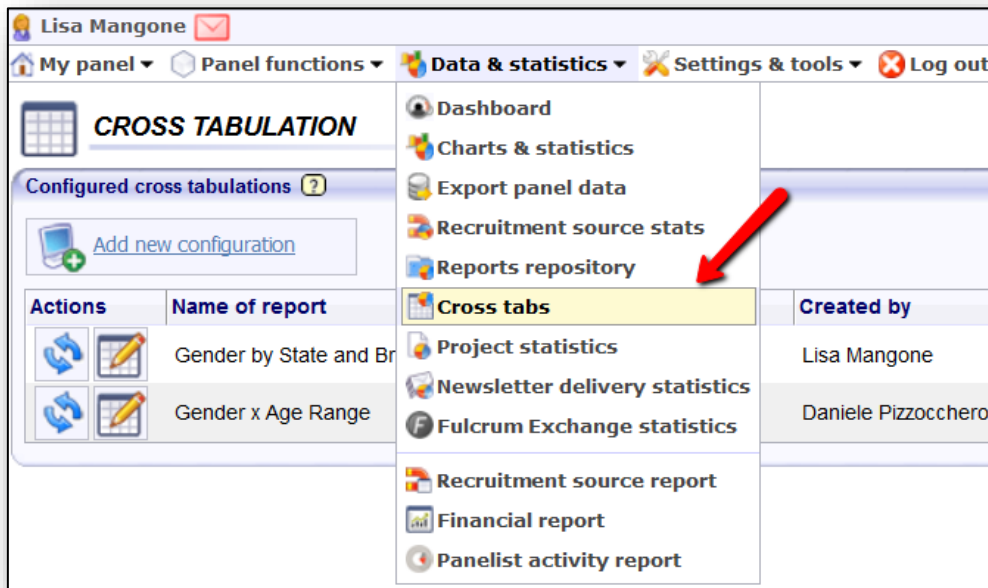
8. Preview the Summary, send yourself a Test Email then click Finish to finalize the campaign.



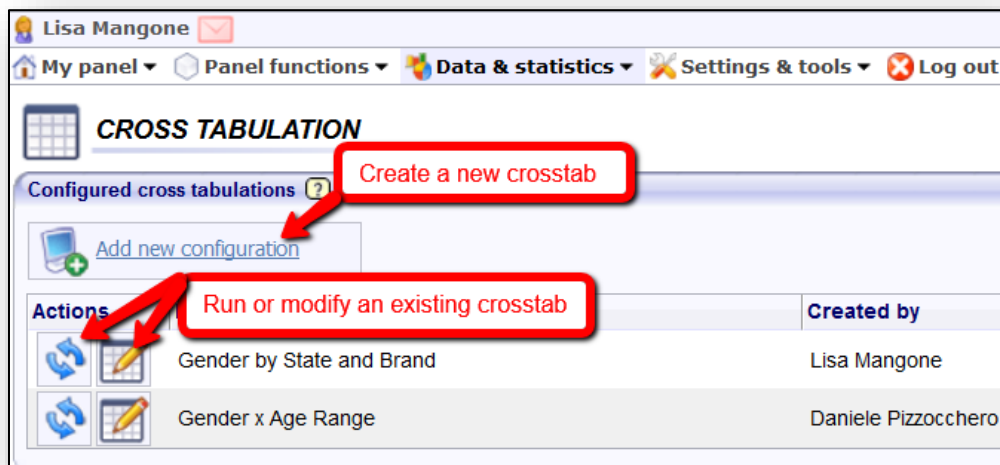
[Back to Top](#)

Creating Cross Tabs

1. Click on Data & Statistics then click on Cross Tabs.



2. Here you can create a New Cross Tab or modify an existing Cross Tab.



- When adding a new configuration, select your Banner and Target question(s), name the Cross ab then click on Save & Generate Report

CROSS TABULATION

Report name **Enter a Report name**

Select questions

Banner question(s)

- Qpanel (checkbox) Subpanel classification
- Gender (radio) Gender
- State (radio) US State
- Qelectronics (checkbox) Electronics currently owned
- Qbrand (radio) Apple or Android?
- Qapple (checkbox) Apple
- AgeRange (radio) Age Range
- Country (radio) Country
- AgeF (radio) Age

Target question(s)

- Qpanel (checkbox) Subpanel classification
- Gender (radio) Gender
- State (radio) US State
- Qelectronics (checkbox) Electronics currently owned
- Qbrand (radio) Apple or Android?
- Qapple (checkbox) Apple
- AgeRange (radio) Age Range
- Country (radio) Country
- AgeF (radio) Age

Additional options

Include

- Cell counts
- Row percentages
- Column percentages
- Indices

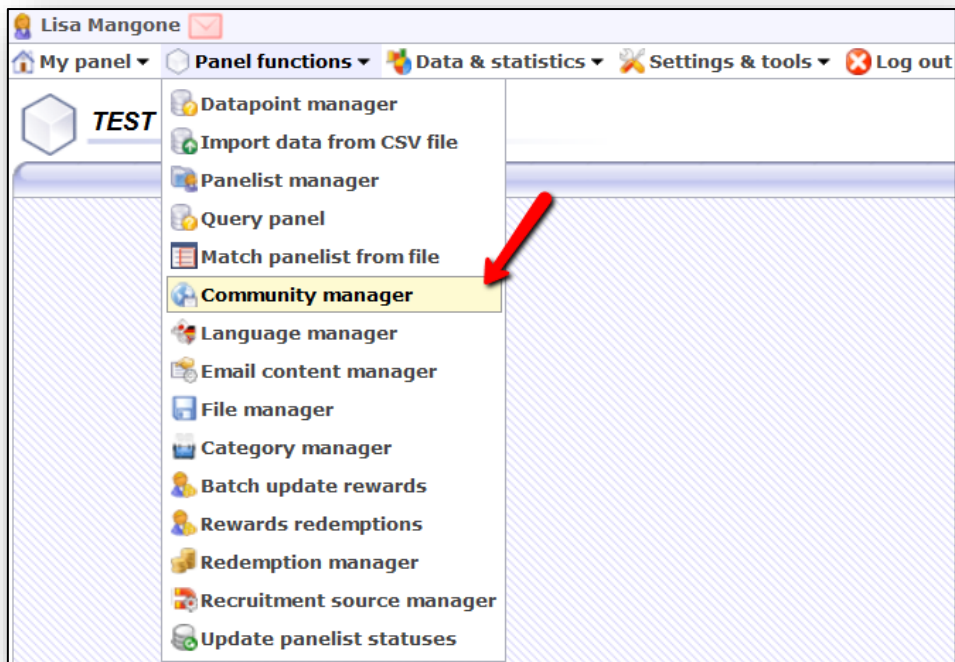
Data filtering using panel queries

Save and Generate the Report

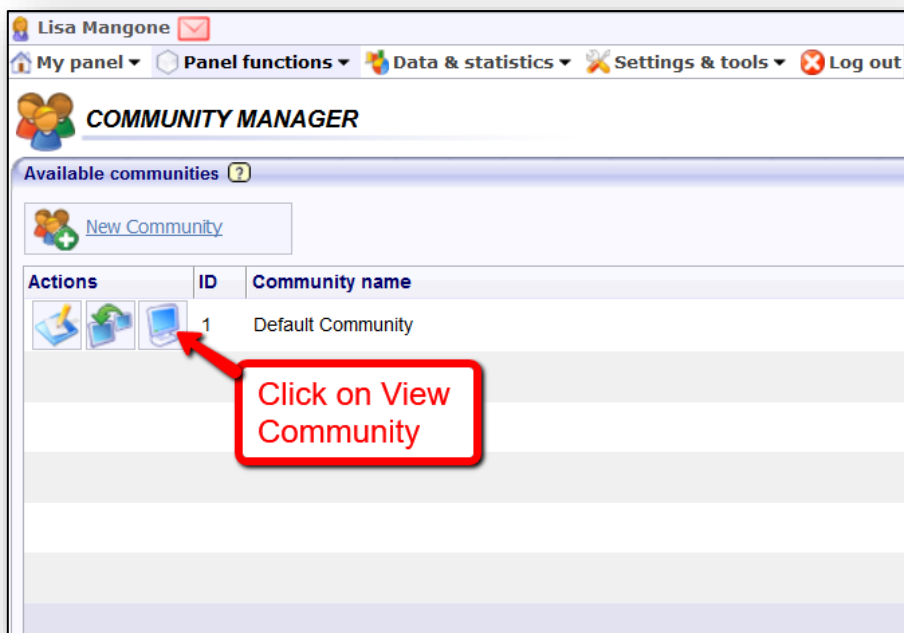
<< CANCEL CHANGES SAVE CHANGES **SAVE & GENERATE REPORT >>**

Accessing a Community Portal

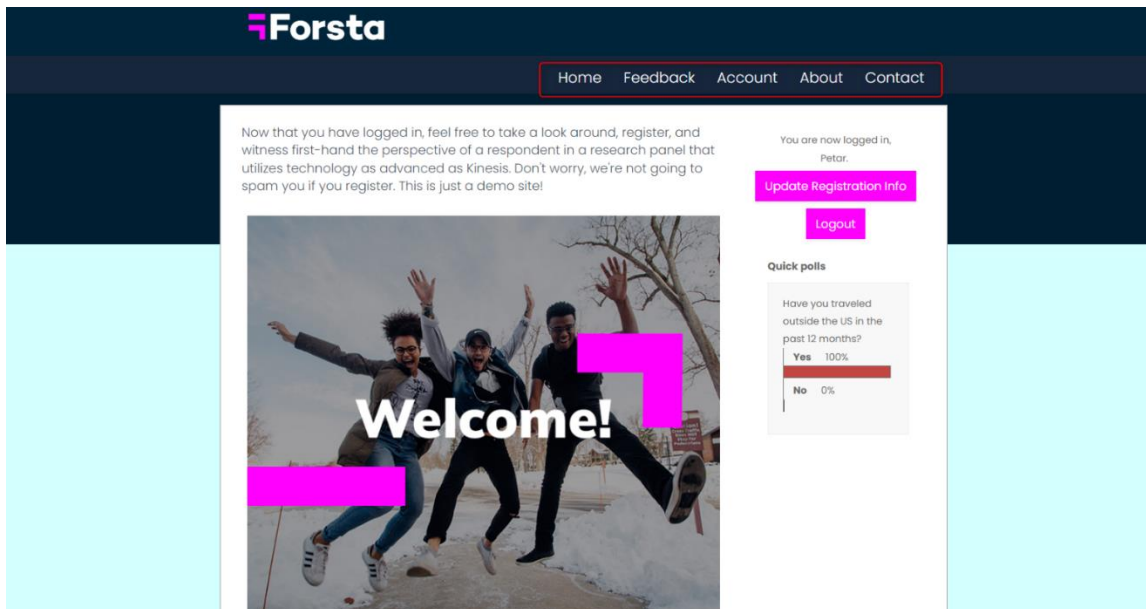
1. Click on Panel Functions then click on Community Manager.



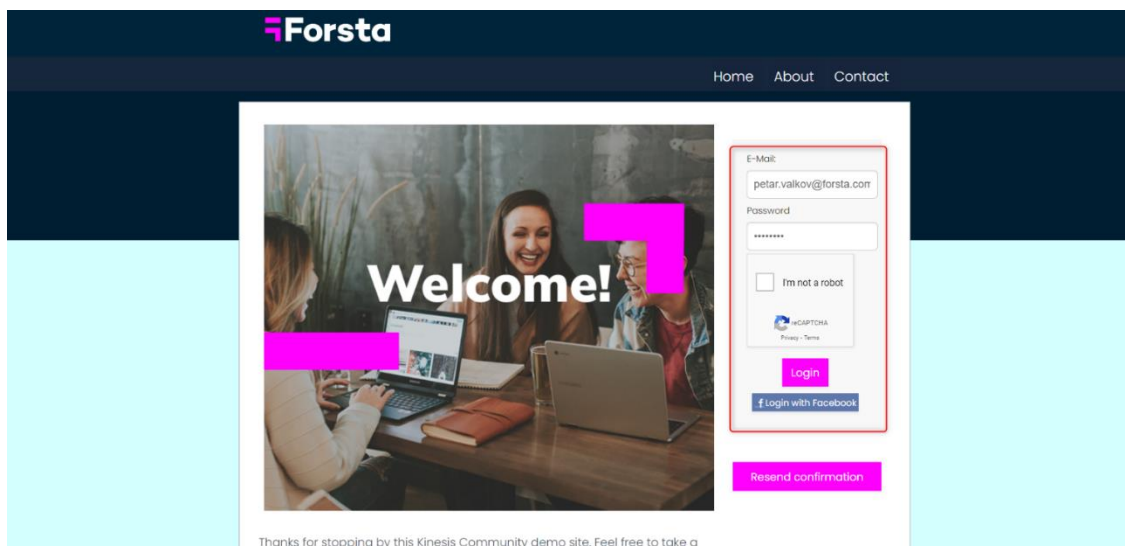
2. Click on View Community



3. Login into the community with your panelist credentials.



4. Once logged in, access information like available surveys, reward redemptions, discussion forums, your account profile, and quick polls with a customized branded community portal.



[Back to Top](#)

Summary

For further assistance during your trial, there are two ways you can seek help:

1. Review the [Knowledge Base](#), which offers training videos and a searchable database.
2. E-mail the [Forsta Global Tech Sales](#) team if you need more one-on-one assistance.

We are committed to ensuring the Forsta Surveys tool meets your needs as you're going through this evaluation period.