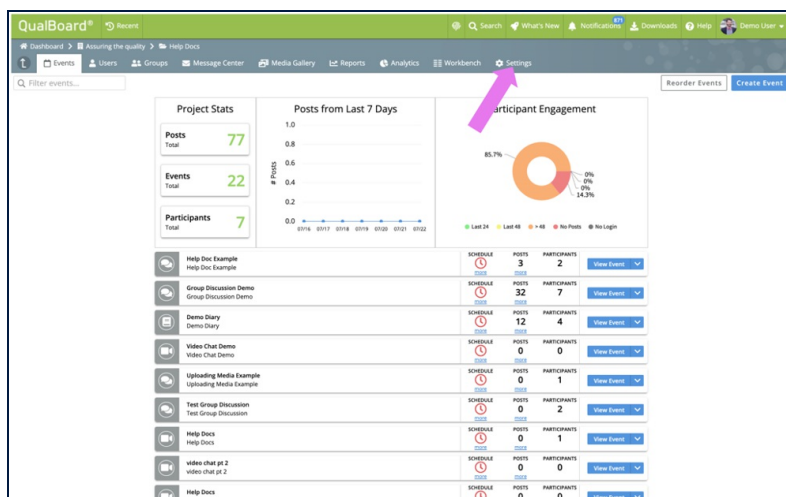


Creating an Agreement

Last Modified on 11/12/2020 1:45 pm EST

1 of 9

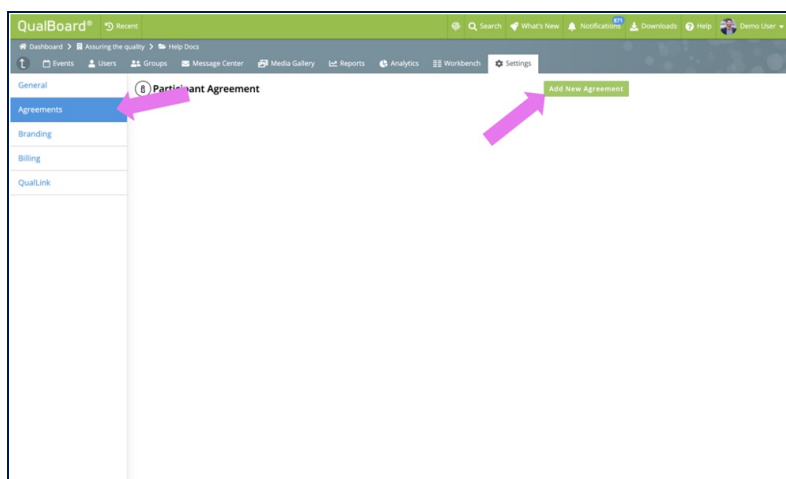
To create an agreement, first go to the Settings tab in your project.



You're well on your way! Click **Next** for the next step.

2 of 9

Go to the Agreements tab and click the "Add New Agreement" button.



3 of 9

Add a Name and a Body to your agreement. The name will be visible to the participant

QualBoard® Recent

Dashboard > Assuring the quality > Help Docs

Events Users Groups Message Center Media Gallery Reports Analytics Workbench Settings

General

Agreements

Branding

Billing

QualLink

Participant Agreement

Name
Test Agreement

Body
Type something

Opt-In Text
I understand and agree to these terms and conditions.

☒ Required

Cancel Save

4 of 9

You have the ability to modify the Opt-in Text and you can select whether the agreement will be required or not.

QualBoard® Recent

Dashboard > Assuring the quality > Help Docs

Events Users Groups Message Center Media Gallery Reports Analytics Workbench Settings

General

Agreements

Branding

Billing

QualLink

Participant Agreement

Name
Test Agreement

Body
This is an example sentence. |

Opt-In Text
I understand and agree to these terms and conditions.

☒ Required

Cancel Save

Once finished, click "Save"

5 of 9

Participant Agreement

Name
Test Agreement

Body
This is an example sentence.

Opt-In Text
I understand and agree to these terms and conditions.

☒ Required

Cancel Save

6 of 9

Once the agreement has been made, you can edit it or delete it. If you want to add a new agreement, click the “Add New Agreement” button.

Participant Agreement

Name
Test Agreement

Body
This is an example sentence.

Opt-In Text
I understand and agree to these terms and conditions.

Add New Agreement

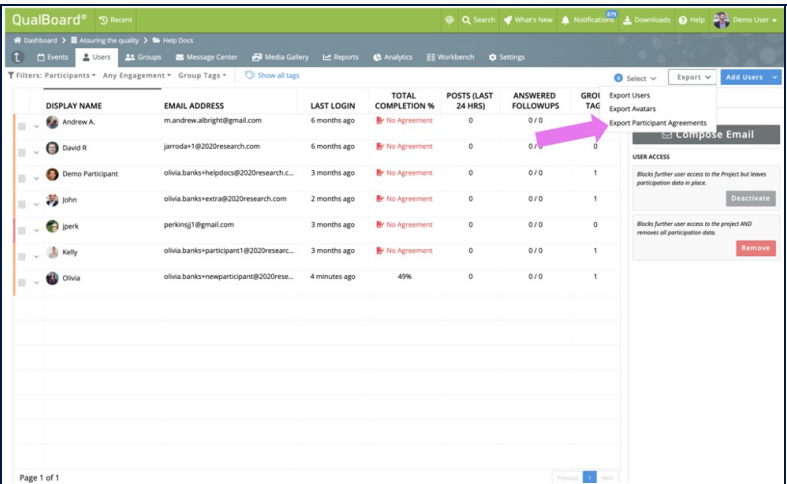
7 of 9

You can track the status of the participant's agreements on the User's tab. If they've completed the agreement it will display the percent completed of the events they're participating in. If they have not completed the agreement it will display “No Agreement”.

DISPLAY NAME	EMAIL ADDRESS	LAST LOGIN	TOTAL COMPLETION %	POSTS (LAST 24 HRS)	ANSWERED FOLLOWUPS	GROUP TAGS
Andrew A.	m.andrew.albright@gmail.com	6 months ago	No Agreement	0	0/0	0
David R	jarroda11@2020research.com	6 months ago	No Agreement	0	0/0	0
Demo Participant	olivia.banks+helpdesk@2020research.com	3 months ago	No Agreement	0	0/0	1
John	olivia.banks+extra@2020research.com	2 months ago	No Agreement	0	0/0	1
perk	perkings1@gmail.com	3 months ago	No Agreement	0	0/0	0
Kelly	olivia.banks+participant1@2020research.com	3 months ago	No Agreement	0	0/0	1
Olivia	olivia.banks+newparticipant@2020research.com	13 seconds ago	49%	0	0/0	1

8 of 9

To export who has consented to the agreement and when they did, click the “Export” button and then click “Export Participant Agreements”.



The export of the participant agreement shows if the user has agreed and shows the date they completed each agreement.

Display Name	Has Agreed	Agreed On
Andrew A.		
David R		
Demo Participant		
John		
jperk		
Kelly		
Olivia	x	7/23/20