

External Platform QualBoard Login Free Integration

Last Modified on 04/09/2026 12:08 pm EDT

Overview

This setup is used to guide setting up an external platform (i.e. a survey provider) with QualBoard. In it your participants will navigate from Survey -> QualBoard -> Survey. It is ideal for projects where a user does not need to come back to QualBoard multiple times and will have a single interaction with the platform (i.e. AI Moderation or Crowd Survey).

QualBoard Setup

1. Go to the users tab of the Project and click Profile Fields
 - o Create the following profile fields. Casing of the External ID must match exactly. These are required for the redirect to and from the survey
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Type	Profile Field	External ID
Text	Redirect Url	RedirectUrl
Text	UUID	Uuid

- o You can also pass additional optional fields into QualBoard to set up question logic or filter results. To do so, add the Group Tag or Profile Field inside of QualBoard, then follow Forsta Survey setup instructions below
2. Navigate back to Events and create an Event inside of QualBoard.
3. Navigate to the Project Settings and enable the Login-Free experience for your project
4. Inside of your event, load your discussion guide.

External Platform Setup

1. Program your survey as usual, then at the point you want to redirect to QualBoard, create a new page with a Redirect Element
2. For the "Redirect Element", paste in the login-free link from QualBoard's project settings
3. Configure a way to pass a respondent ID via Query String as Uuid
4. (Optional) For any survey data you may want to pass into QualBoard for reporting or to pipe into the AI Moderation:
 1. For Group Tags, you'll want to pass in groupTags= and then the variables you want to set separated by a comma via query string
 2. For Profile Fields, you'll want to pass in the profile field's "External ID" from QualBoard = and then the Label from the question response you want to push over via query string.
5. (Optional) If you don't want a user to have to enter a display name, pass in a value for "displayName" into the query string as well
6. An example setup from Forsta Surveys would look like this
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Finalizing the Setup

Navigate back into your QualBoard Event's Edit area then:

1. Create an External Survey Link Question type where you want to redirect back to Forsta Surveys. Fill out the question Title and Participant Instructions.

2. Under External Survey Link, type in ### and then select redirectURL (user-profile--redirectURL)
 1. If you wish to pass any additional Group Tags or Profile Fields back to Decipher, you can append them by selecting them in the question options
3. Click the toggle for "Complete Question on Redirect"
4. Your setup should at minimum look like this
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5. Click Save

Testing

Now test your survey flow beginning in your survey. You should progress through the survey, land in QualBoard, complete the activity, and navigate back into your survey.

Additionally, you will want to navigate to the users tab and make sure they have any group tags or profile fields that you expect.

If everything looks good, then you're ready to launch your study!

If you have any questions or need assistance, please email support@qualboard.com.
