

# Creating a Trial - New Customers

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This article is for new Salesforce users. If you are an existing Salesforce user, see article - [Creating a Trial - Existing Salesforce Customers](#)

You can create a new trial through our website.

Go to [www.synaptic.co.uk/trial](http://www.synaptic.co.uk/trial)

Enter details you would use if your licence would be converted to a full licence. Your company name will be used to create a unique URL for your trial.

The screenshot shows the Synaptic website's trial sign-up page. The header includes the Synaptic logo, navigation links for Solutions, Insights, About Us, and Get in Touch, and a Login button with a dropdown arrow and a Book a Demo button. The main content is split into two columns. The left column has a teal background and features the heading 'You're only 2 minutes from logging in'. Below this, it states that users can simply enter their details to get Pathways ready in minutes. It further explains that users will receive a fresh, private instance of Pathways on the Salesforce Platform for a 30-day test drive at no cost. A note mentions that pricing for a single module starts at £50pcm, but the trial provides access to all software areas. At the bottom of this section is a small image of a tablet displaying a software interface with a bar chart. The right column is titled 'Your free 30-day trial' and includes a note that the company name field will be used to create a unique URL. Below this are input fields for First name, Last name, Phone, Work Email, and Company Name. An 'Activate your Trial' button is positioned at the bottom of the form.

To login in the future, you can access Synaptic Pathways through this direct link - [Synaptic Pathways | Synaptic Software](#) or through our website - [Synaptic Software](#).

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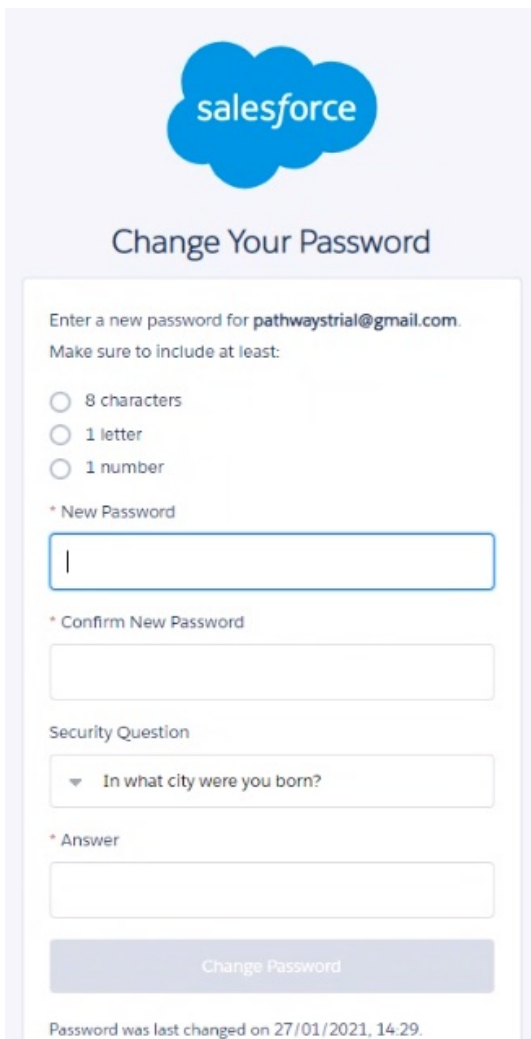
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https://login.salesforce.com

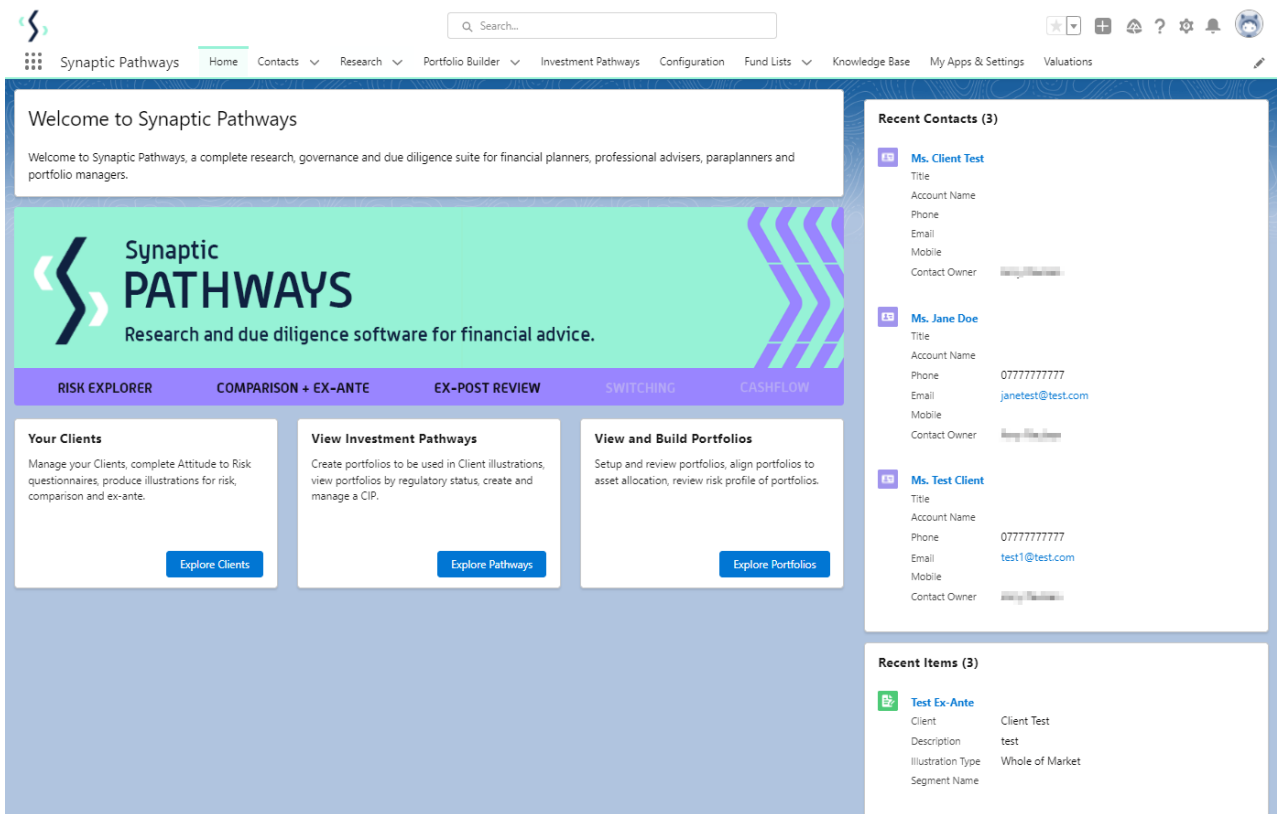
Enter a new password, security question and answer. Click 'Change Password':



The image shows a Salesforce 'Change Your Password' form. At the top is the Salesforce logo. Below it is the title 'Change Your Password'. The form contains the following elements:

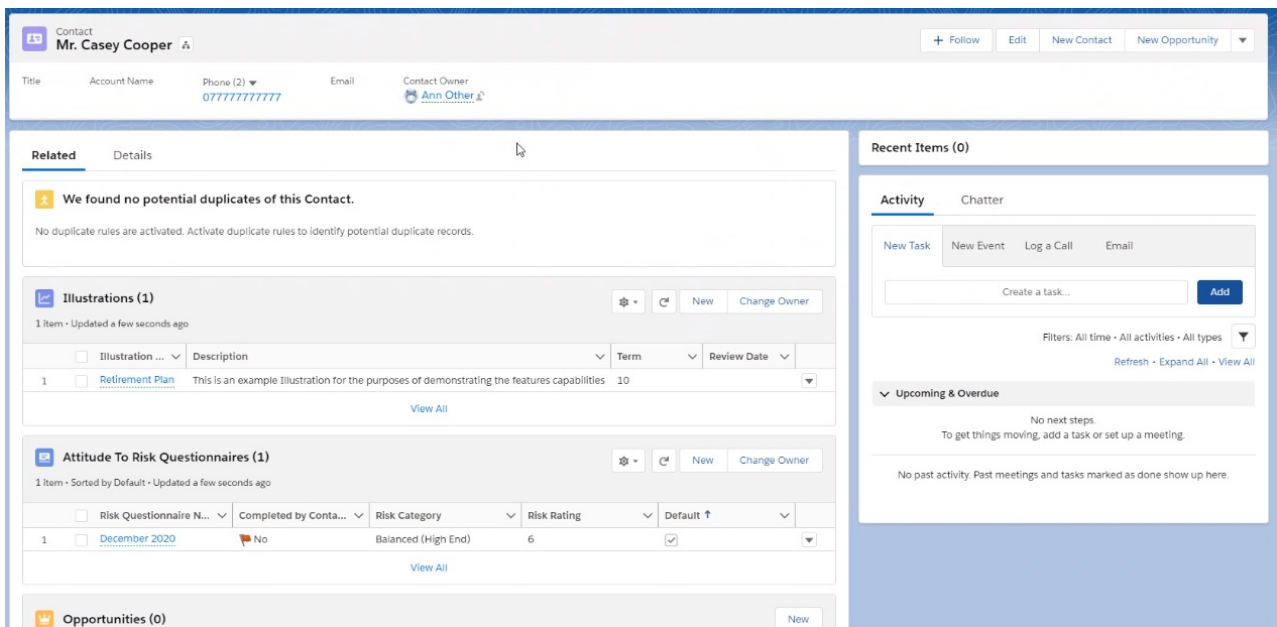
- Text: 'Enter a new password for **pathwaystrial@gmail.com**. Make sure to include at least:'
- Radio buttons for requirements:  8 characters,  1 letter,  1 number.
- Text: '\* New Password' followed by a text input field.
- Text: '\* Confirm New Password' followed by a text input field.
- Text: 'Security Question' followed by a dropdown menu with the selected option 'In what city were you born?'.
- Text: '\* Answer' followed by a text input field.
- Text: 'Change Password' button.
- Text: 'Password was last changed on 27/01/2021, 14:29.'

This will log you into your Synaptic Pathways trial version:



The system will come with some pre-populated data as standard. This will allow you to view test Contacts, Attitude to Risk Questionnaires and Illustrations.

As seen in the contact below, Casey Cooper has been populated with test data.



All Contacts, Attitude to Risk Questionnaires and Illustrations you enter onto your trial version, will be pulled through to your purchased version.

Next step - Set up your Attitude to Risk site

Setup - Attitude to Risk Questionnaire

## **Trial Conditions**

New customers get a 30-day trial which includes a 30-day trial of Salesforce Enterprise Edition.

Trial accounts use Salesforce Enterprise licences as the 'base' licence and you will be able to view Salesforce in-built CRM functionality, such as opportunities and marketing campaigns. When you convert from a trial to a standard Risk Explorer licence, your organisation will be restricted to the Salesforce OEM licence and therefore you no longer have access to Create, Read, Update or Delete the following CRM functionality;

- Leads
- Opportunities
- Cases
- Solutions
- Campaigns

Should you wish to upgrade from our OEM edition to a Salesforce Enterprise Edition, contact us for further information.

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