Setup - Attitude to Risk Questionnaire

Last Modified on 02/02/2024 9:36 am GMT

To send Attitude to Risk Questionnaires (ATRQ) direct to your clients to complete, you must set up a unique URL for your system. The URL will be sent in an email to the client and will show in their browser, so you should choose a name that the client would recognise and trust, such as your company name or your name.

This is only setup once, therefore if you opt to move from a trial to a full licence, your URL will remain the same.

Navigate to Setup by clicking on the cog at the top right of the screen and select and Setup.

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- 1	Setup C	
	Setup	
	Hanage Subscription	
	Developer Console	
	Edit Page	

In the Setup panel on the left, enter 'Sites' in the search box and click on 'Sites':

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Setup	Home	Objec			
Q sites					
✓ User Interface					
 Sites and Domains 					
Custom URLs					
Domains					
Sites 0.					
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Dldn't find what you're looking for? Try using Global Search.

hat is a Site?	
lesforce sites enables you to create public websites and applications that are directly anization through pages that match the look and feel of your company's brand. Use	y integrated with your Salesforce com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.
cause sites are hosted on Salesforce servers, there are no data integration issues. A que Salesforce domain and URL, or you can register your own branded domain or si	And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your subdomain to redirect to your site.
eate multiple sites that appeal to different audiences and satisfy your company's vario	ious business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.
	Sample sites URLs
	MyCompany force.com/customers
	Sample Domain Name MyCompany.force.com/developers
	MyCompany force.com
	le domain must be unique and must consist of only alphanumeric characters. Salesforce.com recommends using your company's name or a variation of your company's name, sur
get started, first register your company's Salesforce site domain. Your Salesforce site companyportal."	e domain must be unique and must consist of only alphanumeric characters. Salesforce.com recommends using your company's name or a variation of your company's name, su
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Add your company name to the field below and click 'Check Availability'.

The URL must be unique and cannot be modified once it has been registered.

What is a Site?
Salesforce siles enables you to create public websites and applications that are directly integrated with your Salesforce com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals. Web forms for capturing leads, and so on.
Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.
Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.
Sample IDomain Name MyCompany force com MyCom
To get started, first register your company's Salesforce site domain. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce.com recommends using your company's name or a variation of your company's name, such as 'mycompanyportal.'
A You cannot modify your Salesforce site domain name after the registration process.
http:// <u>Annother/IFA</u>

You will receive a success message if the URL is available

Read and accept Salesforce 'Sites Terms of Use' and click 'Register My Salesforce Site Domain'.

Then 'OK' the message (as stated above, this cannot be modified once registered)

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Q SI	Once you register, you will not be able to modify your Salesforce site domain name. Are you sure?	★▼ 🖽 ? భ 🐥 🧑
nager 🗸	OK Cancel	1. ZZZZZZANI STE NAMAS DUGZZ – DIASZZITE ZZZZZZANI STE NAMAS DUGZ
SETUP Sites		
Sites		Heip for this Page 🍕
What is a Site?		
unique Salesforce domain and URL, or you can register your own I		ation on collected information is performed automatically. You can allow users to access your site through your ate one site for new developers, another for customers, and a third for marketing.
		Sample sites URLs npany force com/customers
	MyCompany.force.com	npany force com/developers
To get started, first register your company's Salesforce site domain 'mycompanyportal.'	Your Salesforce site domain must be unique and must consist of only alphanumeric	characters. Salesforce.com recommends using your company's name or a variation of your company's name, such as
A You cannot modify your Salesforce site domain name after th	e registration process.	
http://AnnotherlFA .force.com Check	Availability	
Success: The Salesforce site domain name "annotherifa" is	available.	
I have read and accepted the Salesforce Sites Terms of Us	C Register My Salesforce Site Comain	

This URL will appear when the client is filling in the ATRQ.

Now the domain name has been created, you will need to setup the site. Click 'New' under the 'Sites (YourCompany)' area:

What is a Site?							
					password. You can publicly expose any information stored in your for your portals, Web forms for capturing leads, and so on.		
Because sites are hosted on Salesforce unique Salesforce domain and URL, or y	servers, there are no data integration ou can register your own branded do	issues. And because sites are built on native Visualformain or subdomain to redirect to your site.	rce pages, data validation on c	ollected information is perform	ed automatically. You can allow users to access your sile through your		
Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.							
		Your Force.com Domain	Your Sit				
		✓ MyCompany.force.com	MyCompany.force.co				
			MyCompany.force.co	m/marketing			
			1				
			Create Your Ford	e.com Sites			
Your Salesforce site domain name is Salesforce Sites <u>Terms and Condition</u>							
Settings							
These settings affect all Salesfor	ce sites.						
Allow using standard external profil	es for self-registration and user creat	ion 1					
		Save Cancel					
Sites (annotherifa.force.com)		New					
Site Label 1	Site URL	afte Description	Active	Site Type	Last Modified By		
No records to display.							

Sites				
Site Edit				Help for this Page 😡 🏠
New Site		Save		
Site Label Site Name Site Type		l		
Site Description				
Site Contact	Ann Other			3
Default Record Owner	Ann Other			
Default Web Address Active	http://annotherifa.force.com	1/i		
Active Site Home Page		93		
Inactive Site Home Page	InMaintenance	S (Preview)		
Site Template	SiteTemplate	<u></u>		
Site Robots.txt		9		
Site Favorite Icon		9		
Analytics Tracking Code		(i)		
URL Rewriter Class		N		
Enable Feeds				
Clickjack Protection Level	Allow framing by the s	ame origin only (Recommended)	v i	
Require Secure Connections (HTTPS)	1			
Lightning Features for Guest Users	V i			
Upgrade all requests to HTTPS	V 1			•

Set the following:

- 1. Site Label Questionnaire
- 2. Site Name Questionnaire
- 3. Default Web Address Questionnaire
- 4. Tick 'Active'
- 5. Active Site Home Page Type 'Questionnaire' and click the lookup magnifying glass to select the correct 'name' for the page.

Site	Edit
------	------

New Site		Save Cancel	
Site Label	Questionnaire	1	
Site Name	Questionnaire		
Site Type			
Site Description			
	_		
Site Contact	Ann Other	4	
Default Record Owner	Ann Other	C	
Default Web Address	http://annotherifa.force.com	m/ questionnaire	
Active	2 1		
Active Site Home Page	Questionnaire	<u>@</u>	
Inactive Site Home Page	InMaintenance	C IPreview]	
Site Template	SiteTemplate	4	
Site Robots.txt		93	
Site Favorite Icon		93	
Analytics Tracking Code		i	
URL Rewriter Class		S	
Enable Feeds			
Clickjack Protection Level	Allow framing by the s	ame origin only (Recommended)	~
Require Secure Connections (HTTPS)			
Lightning Features for Guest Users	V i		

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You can use - a	as a wilocard next	to other characters t	o improve your	search result	8.		
Clear Search							
Label	Name	Namespace Prefix	Ani Version	Description	Created By Alian	Created Date	Last Modifier
				Description		27/01/2021,	
Questionnaire	Questionnaire	synapticsf	48.0		AOthe	14:27	AOthe
			Copyright © 200	0-2021 salesfore	ee.com, inc. All rights r	eserved.	
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			Copyright © 200	0-2021 saleston	se, com, inc. All rights r	eserved.	
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			Capyright © 200	0-2021 salesfor	se com, inc. All rights i	eserved.	
			Capyright © 200	0-2021 saleston	se com, inc. All rights r	eserved.	

'Save' once completed.

Site Contact	Ann Other	Q i		
Default Record Owner	Ann Other			
Default Web Address	http://annotherifa.force.com/ questionnaire			
Active	V 1			
Active Site Home Page	Questionnaire	S		
Inactive Site Home Page	InMaintenance	(Preview)		
Site Template	SiteTemplate	🕙 👔		
Site Robots.txt				
Site Favorite Icon				
Analytics Tracking Code				
URL Rewriter Class				
Enable Feeds				
Clickjack Protection Level	Allow framing by the s	ame origin only (Recomm	iended)	¥ 1
Require Secure Connections (HTTPS)	V 1			
Lightning Features for Guest Users	1			
Upgrade all requests to HTTPS	V 1			
Enable Content Sniffing Protection				
Enable Browser Cross Site Scripting	V i			
Protection				
Referrer URL Protection	1			

We will now need to setup the permission set for the user. When a site is created, a user is account is also created.

Go to 'Public Access Settings'

Site Details Questionnaire

« Back to List: Sites

Site Detail		Edit Public Access Settings
Site Label	Questionnaire	4)
Site Description		Ũ
Active		
Active Site Home Page	synapticsf.Questionnaire [Preview]	
Inactive Site Home Page	InMaintenance [Preview]	
Site Template	SiteTemplate [Preview]	

Then select 'View Users'

Profile Questionnaire Profile

User

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's per If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available Login IP Ranges [0] | Enabled Agex Class Access [0] | Enabled Visualforce Page Access [1] | Enabled External Data Source A

Profile Detail			Edit View Users
	Name	Questionnaire Profile	
	User License	Guest User License	View Users
	Description		
	Created By	Mike Oliver, 22/09/2020, 08:37	

Click on the username link:

Questionnaire Profile								Help for this Page 🕜
On this page you can create, view, and manage users.								
In addition, download SalesforceA to view and edit user details, r	eset passwo	rds, and perform other administrative tasks from your mobile devices: $\underline{\text{iOS}} \mid \underline{\text{Android}}$						
			A B C D	E F G	6 H	I J K	L M N O P Q R S T	「 U V W X Y Z Other
Action Full Name *	Allae	Username	Last Login	Role		Active	Profile	Manager
Edit Site Guest User, Questionnaire	guest	guestionnaire@atroquestionnaireuat.force.com				1	Questionnaire Profile	4
		40	ABCD	EFG	3 Н		L M N 0 P Q R S 1	「 U V W X Y Z Other All

Select 'Edit Assignments' under the Permission Set Assignments area towards the bottom of the screen:

User Detail	Edit Sharing
Name	Questionnaire Site Guest User
Alias	guest
Email	pathwaystrial@gmail.com
Username	questionnaire@annotherifa.force.com
Nickname	Questionnaire
Division	
Time Zone	(GMT+00:00) Greenwich Mean Time (GMT)
Locale	English (United Kingdom)
Language	English
Federation ID	
App Registration: One-Time Password Authenticator	1
App Registration: Salesforce Authenticator	1
Security Key (U2F)	1
Lightning Login	i
mporary Verification Code (Expires in 1 to 24 Hours)	(Generate)
Created By	Ann Other, 27/01/2021, 15:19
	Edit
ermission Set Assignments	EditAssignments
No records to display	Edit Assignments
ermission Set Assignments: Activat	ion Required [Edit Assignments]
No records to display	

Scroll through the Available Permission Sets area to find 'Synaptic Pathways External Questionnaire User'. Select and use the arrow to move it over to the 'Enabled Permission Sets' box:

Permission Sets		
Permission Set Assignments Questionnaire Site Guest User		Help for this Page 🥹
	Save Cancel	
Available Permission Sets Synaptic Assets Under Management Admin Synaptic Attitude To Risk Questionnaire User Synaptic CIP Admin Synaptic CIP User Synaptic CiP User Synaptic Common Synaptic Company Information Admin Synaptic Company Information User		
	Save Cancel	

'Save' once done.

Ensure two licences are listed under the Managed Packages area:

SETUP Users				
No records to display			\approx $($ \sim	
Permission Set License Assignments	Edit Assignments			Permission Set License Assignments Help (?)
No records to display				
Public Group Membership	New Group			Public Group Membership Help (?)
No records to display				(
Queue Membership	New Queue			Queue Membership Help
No records to display				
🗣 User Skills	New Skill New Skill User			
No records to display				
Installed Mobile Apps				
No records to display				
Managed Packages	Assign Licenses			Managed Packages Help ?
Action Package Name	Disabled button: Assign Licenses	Status	Expiration Date	
Salesforce Connected Apps		Free	Does not Expire	
Synaptic Pathways		Active	Does not Expire	
∼ Back To Top	Always show me 🔻 more	e records per related li	st	

Contact our support team for further support if the licences aren't listed:

Phone: 0808 164 5463 Email: support@synaptic.co.uk

Opening Hours: 9:00am-5:30pm, Monday to Friday.