Creating a new Attitude to Risk Questionnaire

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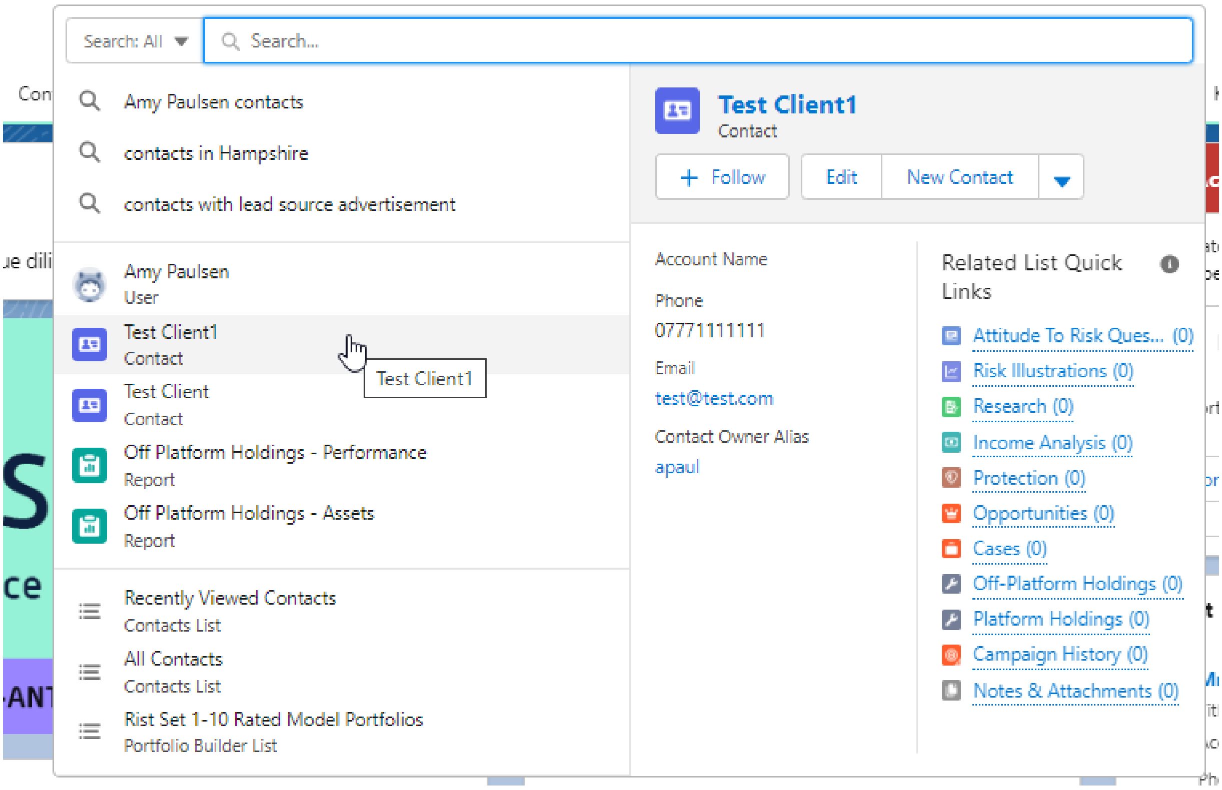
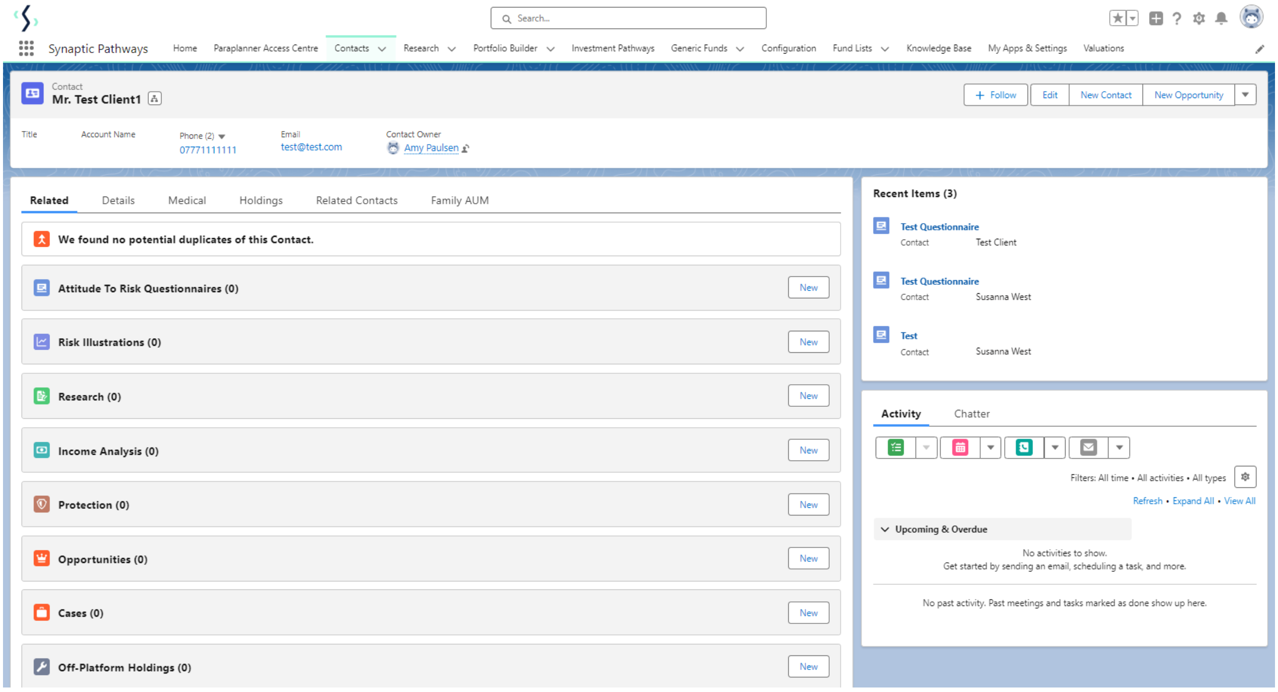
You can create an attitude to risk questionnaire in two ways, either by completing the questions on behalf of your client, or sending them the questionnaire by email to complete themselves.

To create an attitude to risk questionnaire, create a new contact or find an existing contact record.

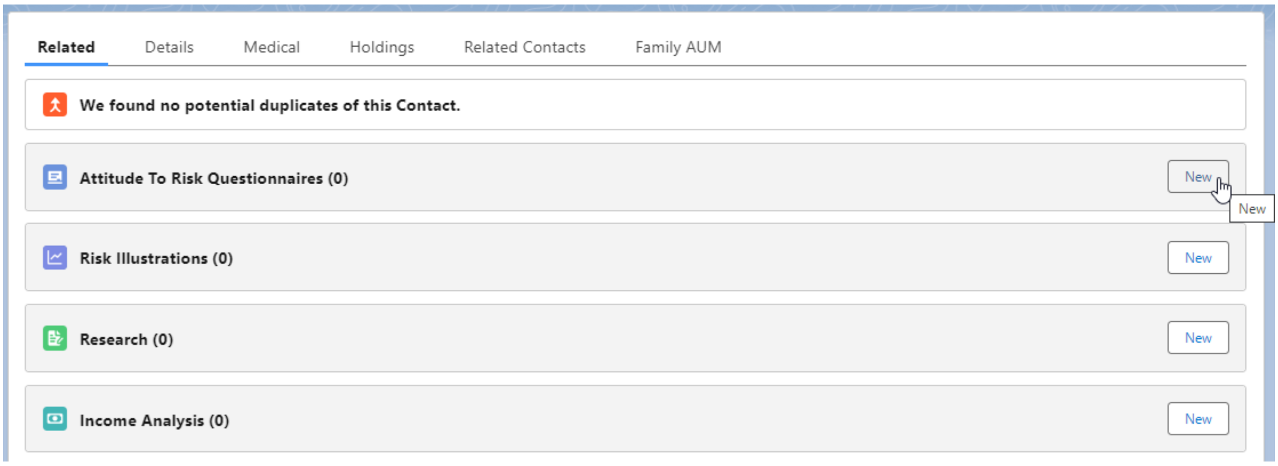
In this example, I will search for a contact called ‘Test Client 1’:



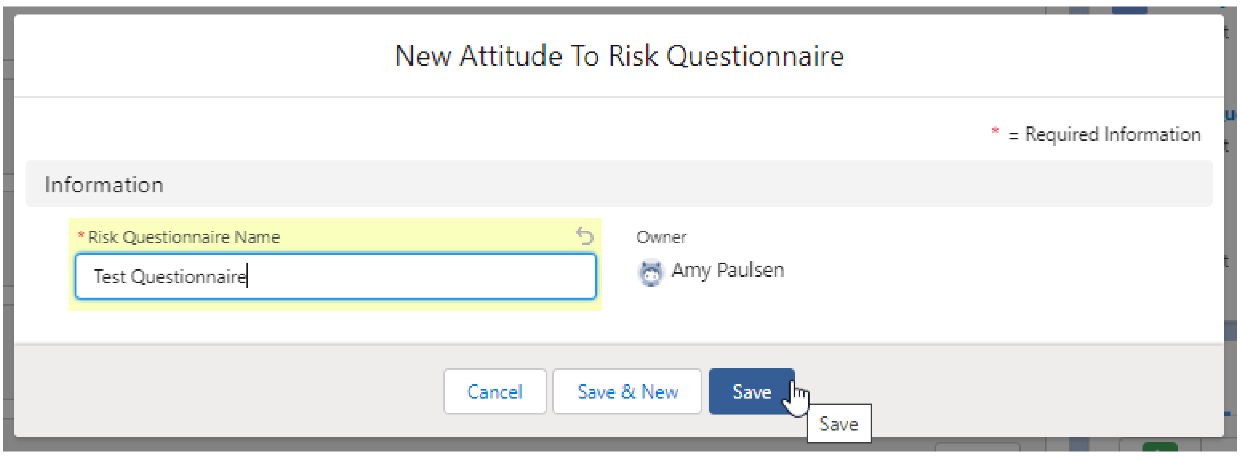
This will load up their contact record:



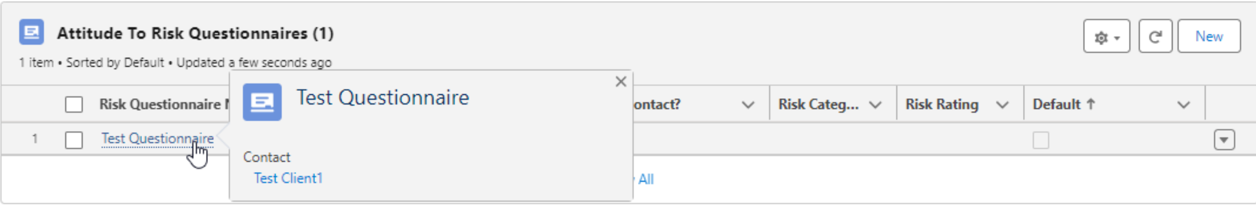
To create an attitude to risk questionnaire, click ‘New’ next to ‘Attitude To Risk Questionnaire’



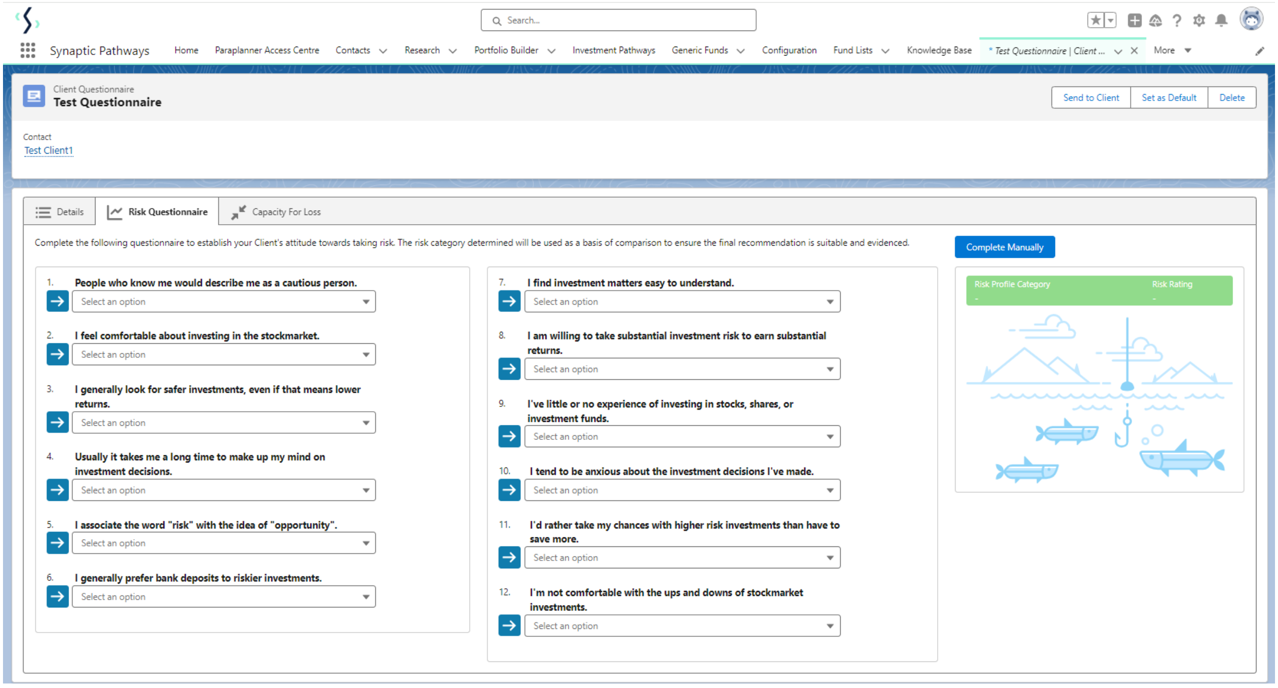
Enter the questionnaire name and click ‘Save’:



This will take you back to the contact record. To complete the questionnaire or send to a client to complete, click on the name of the questionnaire:



Once within the questionnaire, you get a choice of sending the questionnaire to your client to complete, or complete the questions on behalf of your client.



The following articles cover how to complete the questionnaire manually and sending the questionnaire to a client:

Creating an Attitude to Risk Questionnaire on behalf of your client

Sending an Attitude to Risk Questionnaire to your client to complete