# Setup - Attitude to Risk Questionnaire

Last Modified on 15/07/2021 12:22 pm BST

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.



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		
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<ul> <li>Sites and Dom</li> </ul>	alns	
Custom UR	Ls	
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Didn't find what you' Try using Global Sea	re looking t	for?

Vhat is a Site?	
esforce sites enables you to create public websites and applications th ganization through pages that match the look and feel of your company'	at 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 s brand. Use sittes 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 integra que Salesforce domain and URL, or you can register your own branded	tion issues. And because sites are built on native Visualiforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your domain or subdomain to redirect to your site.
eate multiple sites that appeal to different audiences and satisfy your co	mpany'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 sites URLs
	MyCompany force.com/customers
	Sample Domain Name MyCompany.force.com/developers
	MyCompany force.com
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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 Domain Name MyCompany force.com MyCompany force com/developers MyCompany force com/developers
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>AnnotheriFA</u> .force.com Check Apaiability

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)

Capita 🛅 Origo 🛅 Product Manageme 🚞 Moody	mbedded page at synapticsoftware3.my.salesforce.com says	Regulation	Cther favorite
Q SI	Once you register, you will not be able to modify your Salesforce site domain name. Are you sure?		*• 🖪 ? 🌣 🖡 🐻
nager 🗸	OK Cancel		
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What is a Site?			
Because sites are hosted on Salesforce servers, there are no data unique Salesforce domain and URL, or you can register your own I Create multiple sites that appeal to different audiences and satisfy	integration issues. And because sites are built on native Visualforce pages, data valid branded domain or subdomain to redirect to your site. your company's various business needs. For example, a software company could cre	lation on collected information is performed automatically. You can all ate one sile for new developers, another for customers, and a third fo	ow users to access your site through your ar marketing.
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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	e or a variation of your company's name, such as
A You cannot modify your Salesforce site domain name after the	he registration process.		
http:// AnnotherIFA .force.com Check	Availability		
Success: The Salesforce site domain name "annotherifa" is I have read and accepted the Salesforce <u>Sites Terms of Us</u>	s available.		

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:

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What is a Site?					
Salesforce sites enables you to create pub organization through pages that match the	lic websites and applications tha look and feel of your company's	are directly integrated with your Salesforce.com organization- brand. Use sites to create public community sites to gather cus	-without requiring users to log in with a tomer feedback, branded login and regi	isername and password. Y dration pages for your port	ou can publicly expose any information stored in your als, Web forms for capturing leads, and so on.
Because sites are hosted on Salesforce se unique Salesforce domain and URL, or yor	ervers, there are no data integrati u can register your own branded	on issues. And because sites are built on native Visualforce pa- domain or subdomain to redirect to your site.	ges, data validation on collected informa	tion is performed automatio	ally. You can allow users to access your sile through your
Create multiple sites that appeal to different	nt audiences and satisfy your con	npany's various business needs. For example, a software comp	any could create one site for new devel	opers, another for custome	rs, and a third for marketing.
		Your Force.com Domain	Your Sites		
		✓ MyCompany.force.com	MyCompany.force.com/customers	5	
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			1		
			Create Your Force.com Sites		
Salesforce Sites Terms and Conditions					
Setunds					
settings					
These settings affect all Salesforce	sites.				
These settings affect all Salesforce Allow using standard external profiles	sites. for self-registration and user cre	ation 1			
These settings affect all Salesforce     Allow using standard external profiles	sites. for self-registration and user cre	ation 3 Save Cancel			
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Sites				
Site Edit				Help for this Page 😌 🇴
New Site		Save Cancel		
Site Label Site Name Site Type Site Description		1		
Site Contact Default Record Owner Default Web Address	Ann Other Ann Other http://annother/fa.force.com			6
Active Active Site Home Page Inactive Site Home Page	InMaintenance	S Preview!		
Site Template Site Robots txt Site Favorite Icon Analytics Tracking Code	SiteTemplate			
URL Rewriter Class Enable Feeds Clickjack Protection Level	Allow framing by the s	Stame origin only (Recommended)	VI	
Require Secure Connections (HTTP5) Lightning Features for Guest Users Upprade all requests to HTTP5				

## 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			
		4	
Site Contact	Ann Other	9	
Default Record Owner	Ann Other	<b>S</b>	
Default Web Address	http://annotherifa.force.com	n/ questionnaire	
Active			
Active Site Home Page	Questionnaire	<u>9</u>	
Inactive Site Home Page	InMaintenance	🕙 (Preview)	
Site Template	SiteTemplate	S. 1	
Site Robots.txt		92	
Site Favorite Icon		93	
Analytics Tracking Code		i	
URL Rewriter Class		S. 1	
Enable Feeds			
Clickjack Protection Level	Allow framing by the s	ame origin only (Recommended)	~
Require Secure Connections (HTTPS)	✓ i		
Lightning Features for Guest Users	✓ <u>i</u>		

Visualforce Pa	ge ~ Salesforce	- Enterprise Edition	n - Work - Mie	crosoft Edge		-	L X
https://	synapticsoft	tware3.my.sale	sforce.con	n/_ui/com	imon/data/Lo	okupPage	?lkfm=t
	up						
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Vou can use TE a	E a wildcard next	Go!	o improve your	search result			
You call use - a	is a wildcard next	to other characters in	o improve you	search resum	5.		
Clear Search	Deculto						
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Label	Name	Namespace Prefix	Api Version	Description	Created By Alias	Created Date	Last Modified
Questionnaire	Questionnaire	synaptics1	48.0		AOthe	27/01/2021, 14:27	AOthe
			Copyright © 200	0-2021 salestore	e com, inc. All rights r	eserved.	

'Save' once completed.

Guest Access to the Support API					
Referrer URL Protection					
Protection					
Enable Browser Cross Site Scripting	V i				
Enable Content Sniffing Protection	V 1				
Upgrade all requests to HTTPS	V 1				
Lightning Features for Guest Users	V 1				
Require Secure Connections (HTTPS)	V 1				
Clickjack Protection Level	Allow framing by the s	same origin only (Recommended)			
Enable Feeds					
URL Rewriter Class					
Analytics Tracking Code		1			
Site Favorite Icon		93			
Site Robots.txt		9			
Site Template	SiteTemplate	<b>%</b> i			
Inactive Site Home Page	InMaintenance	(Preview)			
Active Site Home Page	Questionnaire	<b>G</b>			
Active					
Default Web Address	http://annotherifa.force.com	m/ questionnaire			
Default Record Owner	Ann Other				
Site Contact	Ann Other				

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 Acces	a Settinga
Site Lab	Pl Questionnaire (	
Site Descriptio	n Ŭ	
Activ	e 🔯	
Active Site Home Pag	e synapticsf.Questionnaire [Preview]	
Inactive Site Home Pag	InMaintenance [Preview]	
šite Tempia	B SiteTemplate (Preview)	

### Then select 'View Users'

#### Profile Questionnaire Profile

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	
b.	Name	Questionnaire Profile	<u></u>	
User Lic	cense	Guest User License	View Users	
Descri	Iption			
Create	ed By	Mike Oliver, 22/09/2020, 08:37		

#### Click on the username link:

#### Questionnaire Profile

On this page you can create, view, and manage users. In addition, download SalesforeA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: <u>IOS | Android</u>

			A   B   C   I	DEFG	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	<u>guest</u>	guestionnaire@atroguestionnaireuat.force.com			1	Questionnaire Profile	4
		0	A   B   C   I	DEFG	H I J K L	M N O P Q R	S   T   U   V   W   X   Y   Z   Other

Help for this Page 🔞

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

Permission Set Assignments [0]   Permissio	In Set Assignments: Activation Required [0]   Permission Set Group Assignments [0]   Permission Set Li
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	1
emporary Verification Code (Expires in 1 to 24 Hours)	(Generate)
Created By	Ann Other, 27/01/2021, 15:19
	Edit Sharing
Permission Set Assignments	EditAggionments
No records to display	Edit Assignments
Permission Set Assignments: Activat	ion Required Edit Assignments

Select 'Synaptic Pathways Questionnaire User' 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 Enabled Permission Sets CRM User Salesforce CMS Integration Admin Salesforce Consol User Standard Einstein Activity Capture Synaptic Configuration Synaptic Pathways Admin Synaptic Pathways User Trust Card Manager	
Save	

Enabled Permission Sets
ove
Ad m

'Save' once done:

Enabled Permission Sets	Available Permission Sets
tic Pathways Questionnaire User	User sforce CMS Integration Admin sforce Console User dard Einstein Activity Capture ptic Configuration ptic Pathways Admin ptic Pathways User Card Manager
8	Caru manager