# 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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ique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site. eate multiple sites that appeal to different audiences and salesfy 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 comit MyCompany force force Site domain Mame or a variation of your company's name or a variati	ilesforce sites enables you to create public websites and applications that are directly ganization through pages that match the look and feel of your company's brand. Use s	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 Kedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.
Sample Domain Name MyCompany force com MyCompany force com/extinents MyCompany force com/e	cause sites are hosted on Salesforce servers, there are no data integration issues. Ar que Salesforce domain and URL, or you can register your own branded domain or su	nd 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 bdomain to redirect to your site.
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I have read and accepted the Salesforce <u>Siles Terms of Use</u> Register My Salesforce <u>Sile Domain</u>	ycompanyportal	
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	ycompanyportal *	8.
	ycompanyportal: You cannot modify your Salesforce site domain name after the registration proces http://	8.

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 sites 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 in your organization hough pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, toranded 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 Jomain Name MyCompany force com MyCompany force com/generation MyCompany force com/generation MyCompany force com/generation MyCompany force com/generation
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.'
실 You cannot modify your Salesforce site domain name after the registration process.
http:// <u>AnnotheriFA</u> .force.com Check Argainability

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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What is a Site?			
unique Salesforce domain and URL, or you can register your own	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		
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🔺 You cannot modify your Salesforce site domain name after th	he registration process.		
http:// AnnotherIFA .force.com Check			
Success: The Salesforce site domain name "annotherifa" in			
I have read and accepted the Salesforce Sites Terms of Us	c Register My Salesforce Site Domain		

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?					
		at are directly integrated with your Salesforce com organizations is brand. Use sites to create public community sites to gather			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 server unique Salesforce domain and URL, or you car	s, there are no data integra n register your own brander	tion issues. And because sites are built on native Visualforce d domain or subdomain to redirect to your site.	pages, data validation on	collected information is perform	ed automatically. You can allow users to access your site through your
Create multiple sites that appeal to different au	idiences and satisfy your co	mpany's various business needs. For example, a software co	impany could create one s	ite for new developers, another	for customers, and a third for marketing.
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		✓ MyCompany.force.com	MyCompany.force.co		
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			Create Your For	ce.com Sites	
Your Salesforce site domain name is annot Salesforce Sites <u>Terms and Conditions</u>					
Settings					
These settings affect all Salesforce site	15.				
Allow using standard external profiles for	self-registration and user cr	reation 1			
		Save Cancel			
Sites (annotherifa.force.com)		Nitw			
Site Label 1	Site URL	arte 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		1		
Site Description				
Site Contact	Ann Other			₽
Default Record Owner	Ann Other	<b>9</b>		43
Default Web Address	http://annotherifa.force.com	ı/		
Active				
Active Site Home Page		93		
Inactive Site Home Page	InMaintenance	C IPreview1		
Site Template	SiteTemplate	<b>%</b> •		
Site Robots.txt		9		
Site Favorite Icon		94		
Analytics Tracking Code		i		
URL Rewriter Class		<b>%</b> i		
Enable Feeds				
Clickjack Protection Level	Allow framing by the s	ame origin only (Recommended)	▼ i	
Require Secure Connections (HTTPS)	1			
Lightning Features for Guest Users	<b>1</b>			
Upgrade all requests to HTTPS	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	Ed	it
Onto		

New Site		Save Cancel	
Site Label	Questionnaire	1	
Site Name	Questionnaire		
Site Type			
Site Description			
Site Contact	Ann Other	<b>S</b>	
Default Record Owner	Ann Other		
Default Web Address	http://annotherifa.force.com	v/ questionnaire	
Active			
Active Site Home Page	Questionnaire	9	
Inactive Site Home Page	InMaintenance	C IPreview]	
Site Template	SiteTemplate	<b>S</b>	
Site Robots.txt		<b>@</b>	
Site Favorite Icon		93	
Analytics Tracking Code		1	
URL Rewriter Class		<b>S</b>	
Enable Feeds			
Clickjack Protection Level	Allow framing by the s	ame origin only (Recommended)	~
Require Secure Connections (HTTPS)	<b>1</b>		
Lightning Features for Guest Users	V i		

	ge ~ Salesforce	- Enterprise Edition	n - Work - Mic	crosoft Edge		-	
A https://	synapticsoft	tware3.my.sale	sforce.con	n/_ui/com	mon/data/Lo	okupPage	?lkfm=t
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Questionnaire	Questionnaire	synapticsf	48.0		AOthe	27/01/2021, 14:27	AOthe
			Copyright © 200	0-2021 salesfore	ce.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		<b>9</b>
Analytics Tracking Code		1
Site Favorite Icon		<b>G</b>
Site Robots.txt		<b>G</b>
Site Template	SiteTemplate	S 1
Inactive Site Home Page	InMaintenance	(Preview)
Active Site Home Page	Questionnaire	<b>C</b>
Active		
Default Web Address	http://annotherifa.force.com	m/ questionnaire
Default Record Owner	Ann Other	🔁 🗉
Site Contact	Ann Other	🔁 i

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 Lab	I Questionnaire	4m)
Site Descriptio	1	<u> </u>
Activ		
Active Site Home Pag	synapticsf.Questionnaire [Preview]	
Inactive Site Home Pag	InMaintenance [Preview]	
Site Templat	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
	Name	Questionnaire Profile	
Use	er License	Guest User License	View Users
D	escription		
c	reated 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>

						.   M   N   O   P   Q   R   S   T	
Action Full Name *	Allae	Username	Last Login	Role	Active	Profile	Manager
Edit Site Guest User, Questionnaire	guest	guestionnaire@atroquestionnaireuat.force.com			1	Questionnaire Profile	
		$\bigcirc$	ABCD	EFG	H  J K L	. M N O P Q R S T	U V W X Y Z O

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 SetAssignments 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
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Ad

'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