

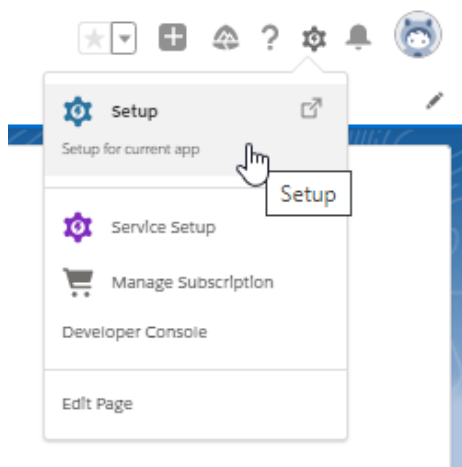
Setup - Attitude to Risk Questionnaire

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

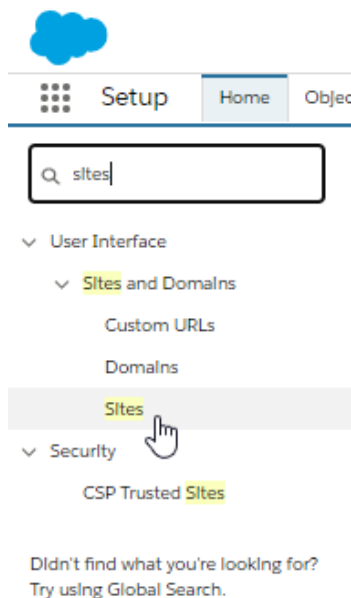
To send Attitude to Risk Questionnaires (ATRQ) direct to your clients to complete, you must set up a unique URL for your system. The URL will be sent in an email to the client and will show in their browser, so you should choose a name that the client would recognise and trust, such as your company name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

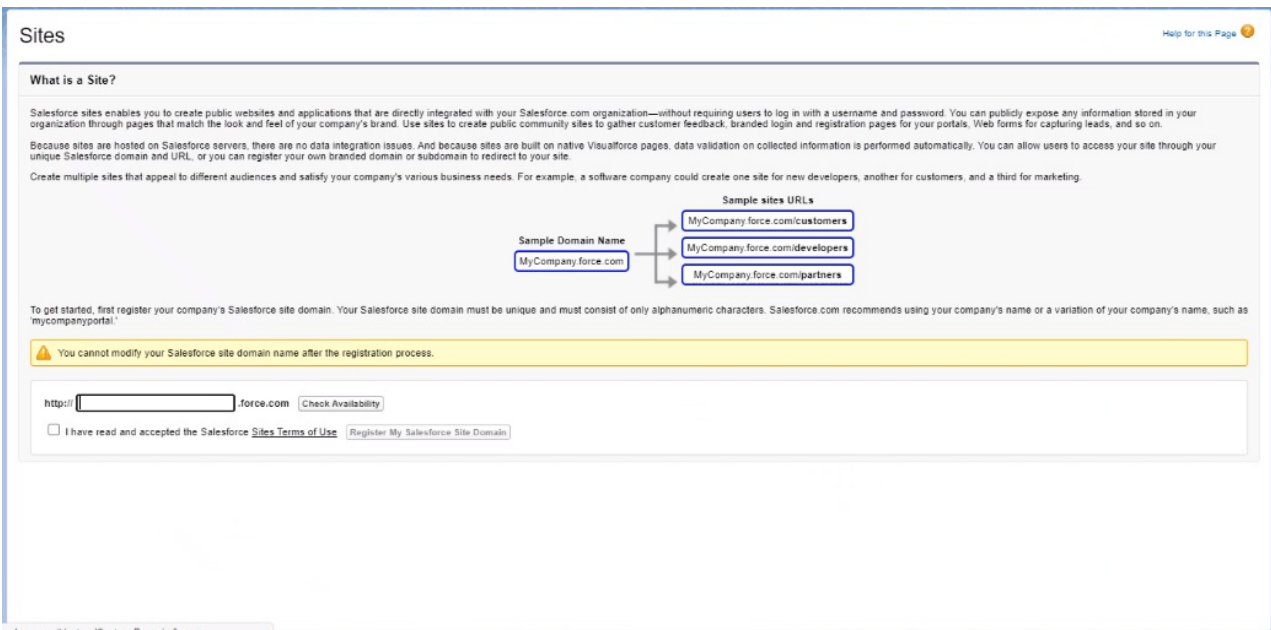
This is only setup once, therefore if you opt to move from a trial to a full licence, your URL will remain the same.

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



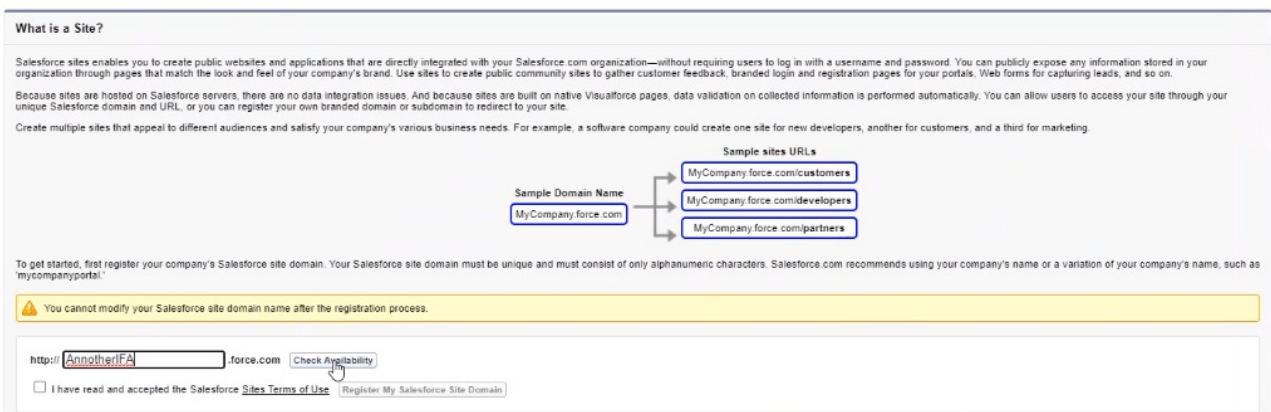
In the Setup panel on the left, enter 'Sites' in the search box and click on 'Sites':





Add your company name to the field below and click 'Check Availability'.

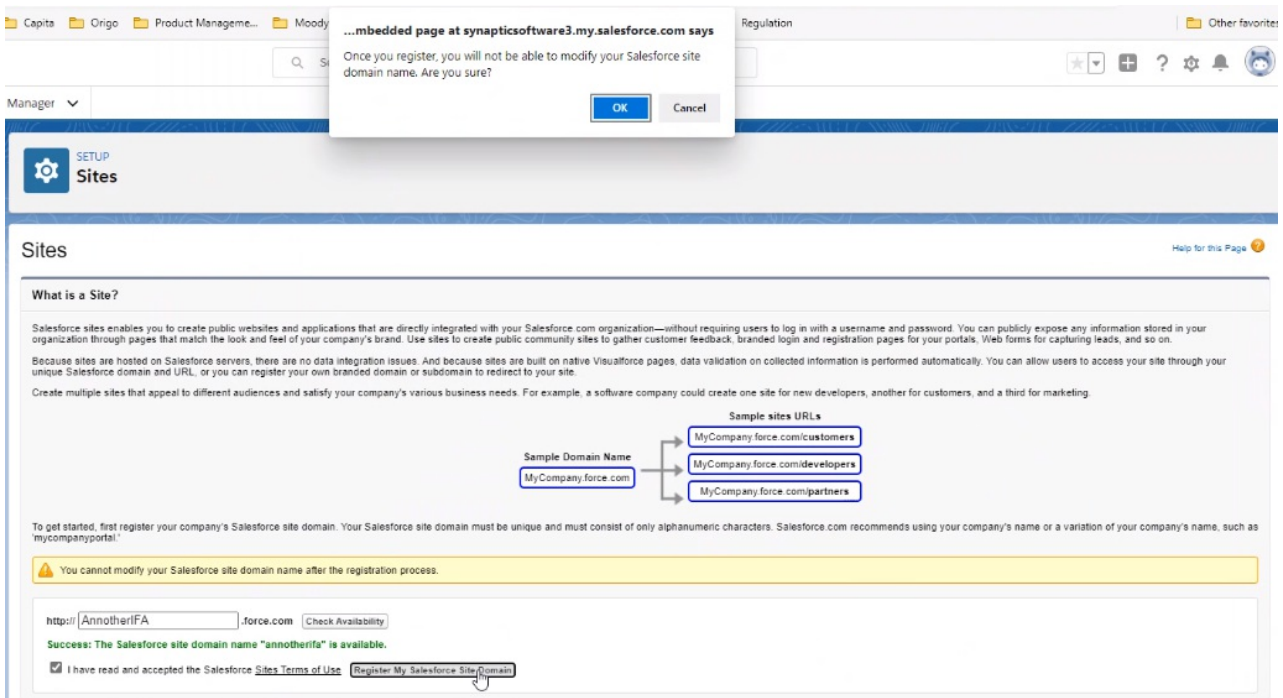
The URL must be unique and cannot be modified once it has been registered.



You will receive a success message if the URL is available

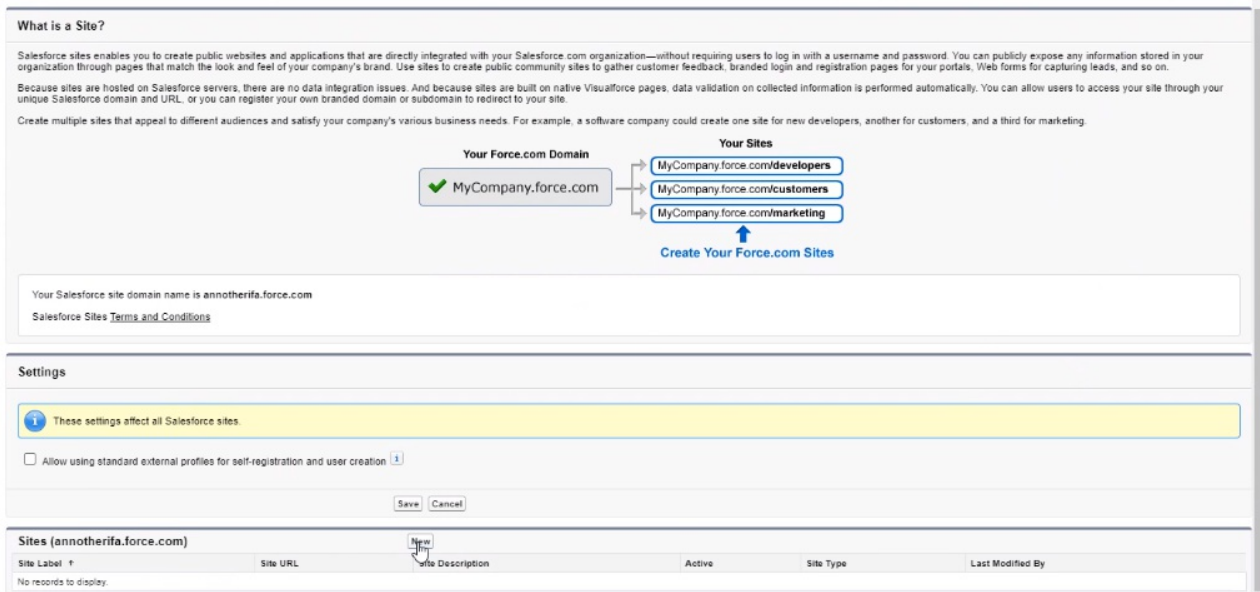
Read and accept Salesforce 'Sites Terms of Use' and click 'Register My Salesforce Site Domain'.

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



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:



Site Edit

New Site [Save] [Cancel]

Site Label [] [i]

Site Name [] [i]

Site Type [] [i]

Site Description []

Site Contact [Ann Other] [i]

Default Record Owner [Ann Other] [i]

Default Web Address [http://anotherifa.force.com/] [i]

Active [i]

Active Site Home Page [] [i]

Inactive Site Home Page [InMaintenance] [i] [Preview]

Site Template [SiteTemplate] [i]

Site Robots.txt [] [i]

Site Favorite Icon [] [i]

Analytics Tracking Code [] [i]

URL Rewriter Class [] [i]

Enable Feeds

Clickjack Protection Level [Allow framing by the same origin only (Recommended)] [i]

Require Secure Connections (HTTPS) [i]

Lightning Features for Guest Users [i]

Upgrade all requests to HTTPS [i]

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

Site Edit

New Site [Save] [Cancel]

Site Label [Questionnaire] [i]

Site Name [Questionnaire] [i]

Site Type [] [i]

Site Description []

Site Contact [Ann Other] [i]

Default Record Owner [Ann Other] [i]

Default Web Address [http://anotherifa.force.com/questionnaire] [i]

Active [i]

Active Site Home Page [Questionnaire] [i]

Inactive Site Home Page [InMaintenance] [i] [Preview]

Site Template [SiteTemplate] [i]

Site Robots.txt [] [i]

Site Favorite Icon [] [i]

Analytics Tracking Code [] [i]

URL Rewriter Class [] [i]

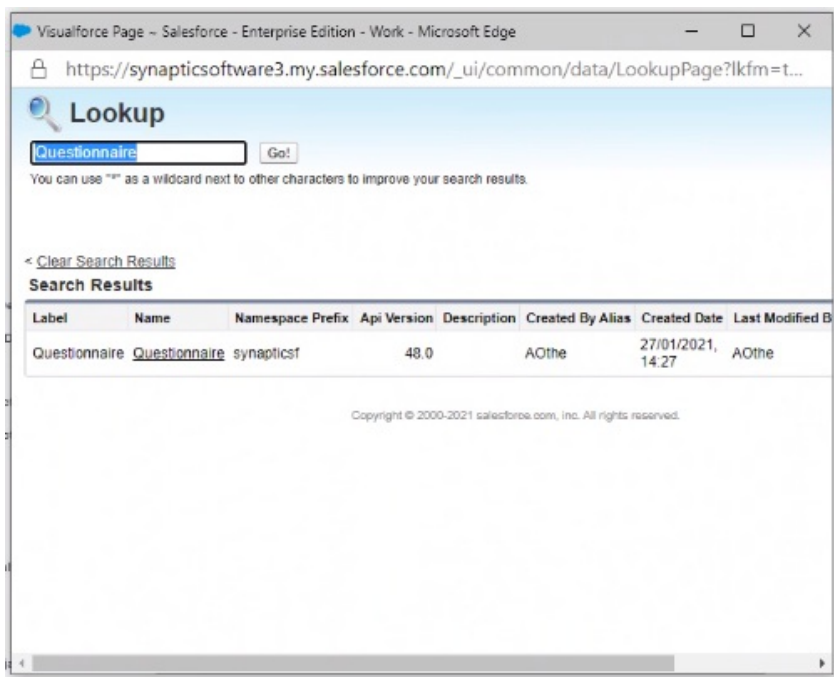
Enable Feeds

Clickjack Protection Level [Allow framing by the same origin only (Recommended)] [i]

Require Secure Connections (HTTPS) [i]

Lightning Features for Guest Users [i]

Upgrade all requests to HTTPS [i]



'Save' once completed.

The screenshot shows the configuration page for a Salesforce site. The page is titled 'Site Description' and contains various settings for the site. The settings are as follows:

- Site Contact:
- Default Record Owner:
- Default Web Address:
- Active:
- Active Site Home Page:
- Inactive Site Home Page:
- Site Template:
- Site Robots.txt:
- Site Favorite Icon:
- Analytics Tracking Code:
- URL Rewriter Class:
- Enable Feeds:
- Clickjack Protection Level:
- Require Secure Connections (HTTPS):
- Lightning Features for Guest Users:
- Upgrade all requests to HTTPS:
- Enable Content Sniffing Protection:
- Enable Browser Cross Site Scripting Protection:
- Referrer URL Protection:
- Guest Access to the Support API:

At the bottom of the page, there are 'Save' and 'Cancel' buttons.

We will now need to setup the permission set for the user. When a site is created, a user 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 | | |
| Site Description | | | |
| Active | <input checked="" type="checkbox"/> | | |
| Active Site Home Page | synopticsf.Questionnaire (Preview) | | |
| Inactive Site Home Page | InMaintenance (Preview) | | |
| Site Template | 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 availa

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(13\)](#) | [Enabled External Data Source A](#)

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

Click on the username link:

Questionnaire Profile

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

| Action | Full Name + | Alias | Username | Last Login | Role | Active | Profile | Manager |
|----------------------|--|-------|--|------------|------|-------------------------------------|-----------------------|---------|
| Edit | Site Guest User, Questionnaire | quest | questionnaire@atrqquestionnaireuat.force.com | | | <input checked="" type="checkbox"/> | Questionnaire Profile | |

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

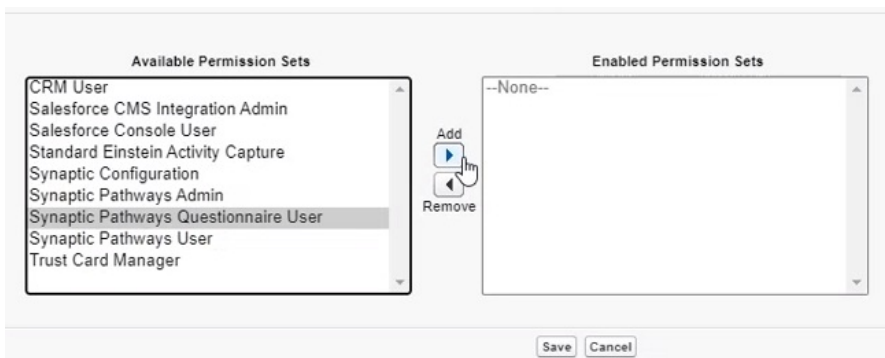
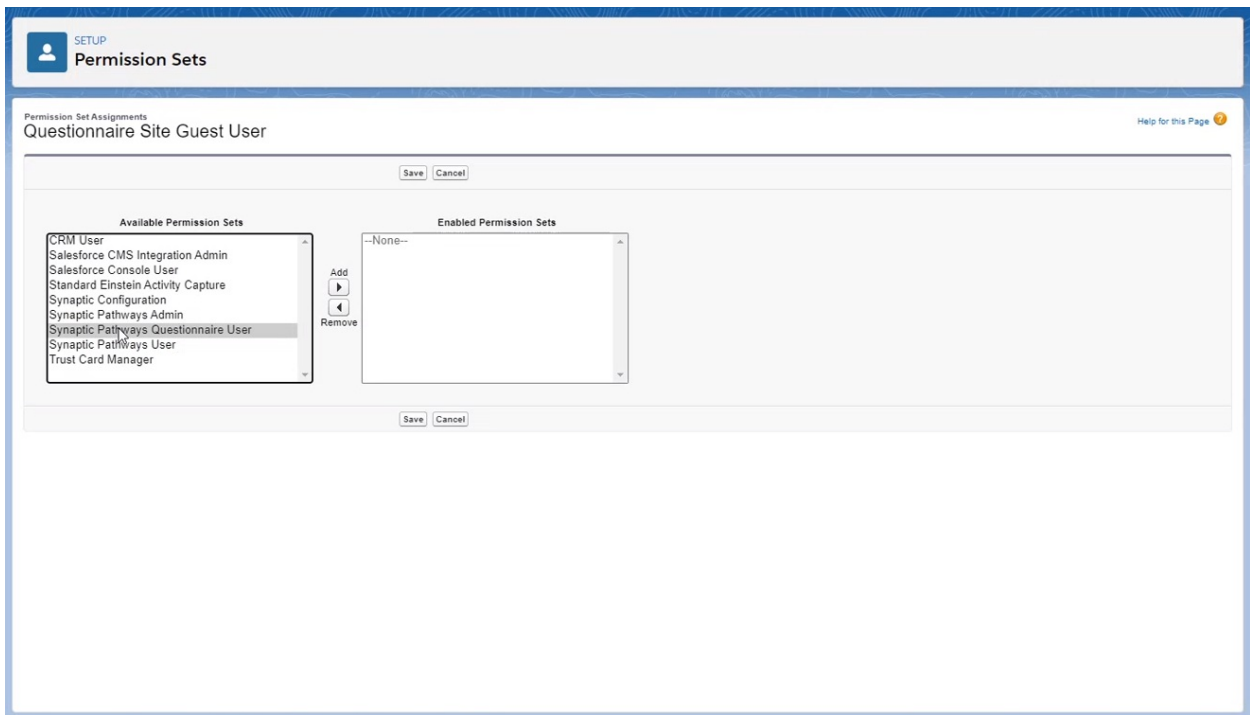
User Questionnaire Site Guest User

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set Lic](#)

| User Detail | | Edit | Sharing |
|--|--|----------------------|-------------------------|
| Name | Questionnaire Site Guest User | | |
| Alias | quest | | |
| Email | pathwizystrial@gmail.com | | |
| Username | questionnaire@anotherifa.force.com | | |
| Nickname | Questionnaire i | | |
| Division | | | |
| Time Zone | (GMT+00:00) Greenwich Mean Time (GMT) | | |
| Locale | English (United Kingdom) | | |
| Language | English | | |
| Federation ID | | | |
| App Registration: One-Time Password Authenticator | i | | |
| App Registration: Salesforce Authenticator | i | | |
| Security Key (U2F) | i | | |
| Lightning Login | i | | |
| Temporary Verification Code (Expires in 1 to 24 Hours) | (Generate) i | | |
| Created By | Ann Other , 27/01/2021, 15:19 | | |

| Permission Set Assignments | | Edit Assignments |
|---|--|----------------------------------|
| No records to display | | Edit Assignments |
| Permission Set Assignments: Activation Required | | Edit Assignments |
| No records to display | | |

Select 'Synaptic Pathways Questionnaire User' and use the arrow to move it over to the 'Enabled Permission Sets' box:



'Save' once done:

