

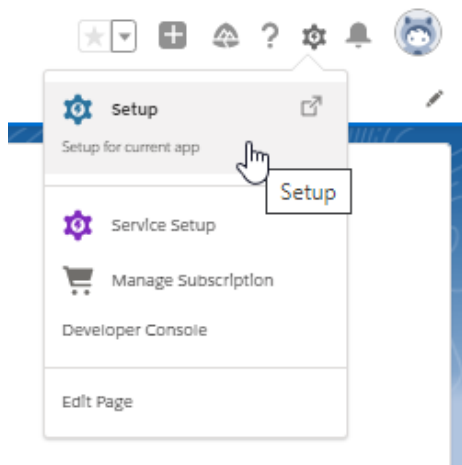
Setup - Attitude to Risk Questionnaire

Last Modified on 12/04/2021 11:47 am BST

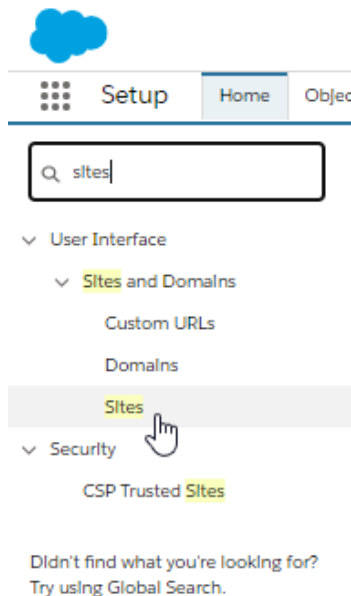
To send Attitude to Risk Questionnaires (ATRQ) direct to your clients to complete, you must set up a unique URL for your system. The URL will be sent in an email to the client and will show in their browser, so you should choose a name that the client would recognise and trust, such as your company name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

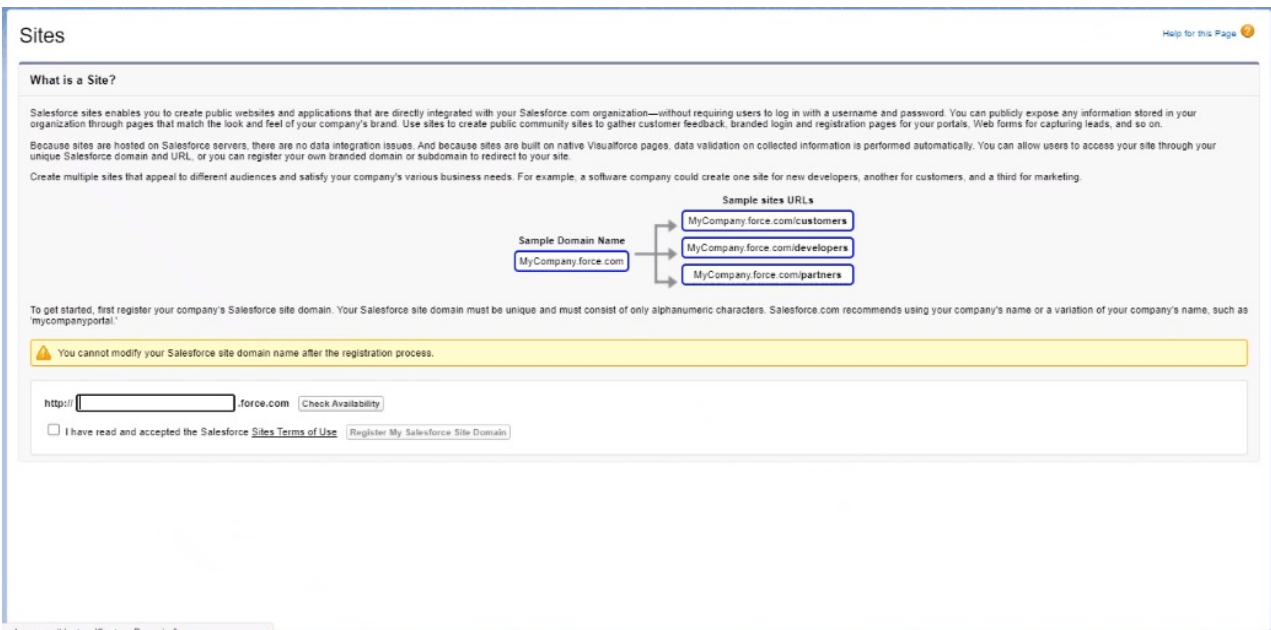
This is only setup once, therefore if you opt to move from a trial to a full licence, your URL will remain the same.

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



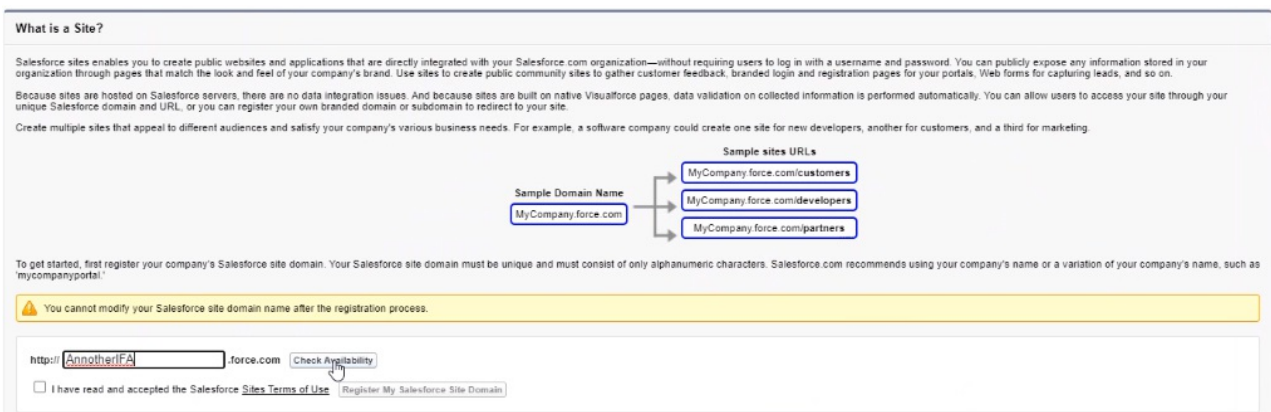
In the Setup panel on the left, enter 'Sites' in the search box and click on 'Sites':





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

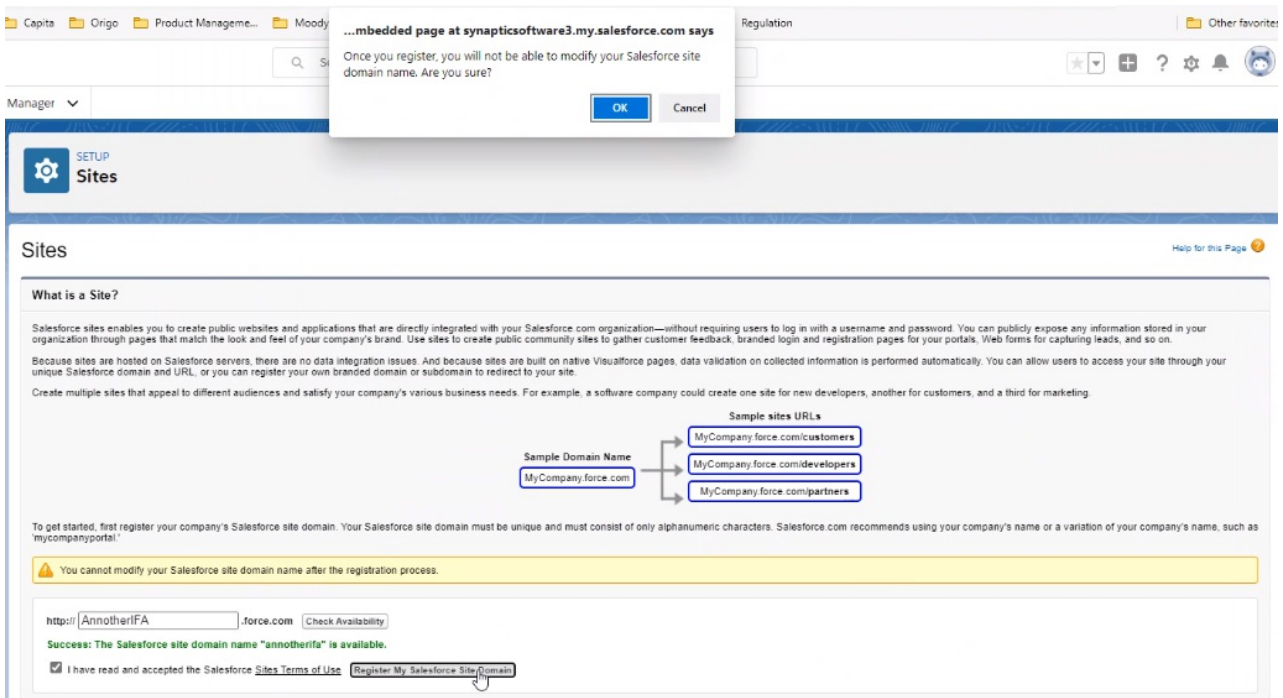
The URL must be unique and cannot be modified once it has been registered.



You will receive a success message if the URL is available

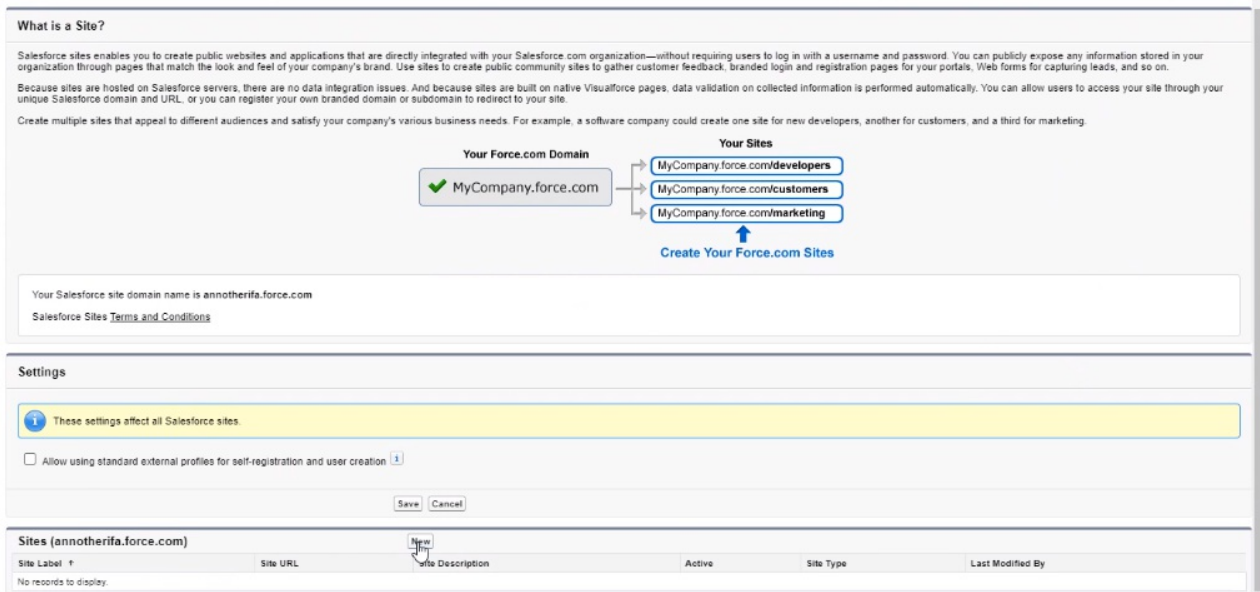
Read and accept Salesforce 'Sites Terms of Use' and click 'Register My Salesforce Site Domain'.

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

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]

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Analytics Tracking Code [] [i]

URL Rewriter Class [] [i]

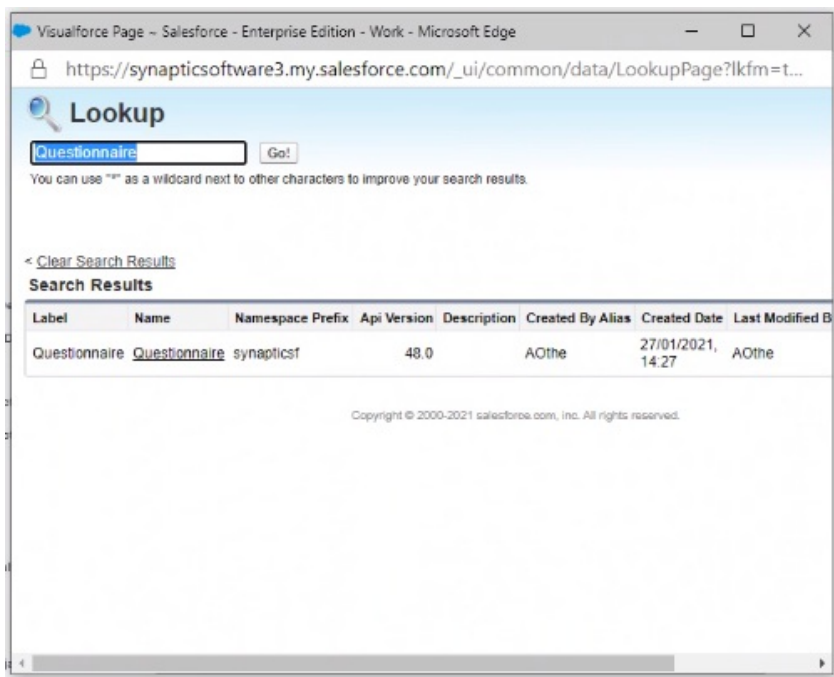
Enable Feeds

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

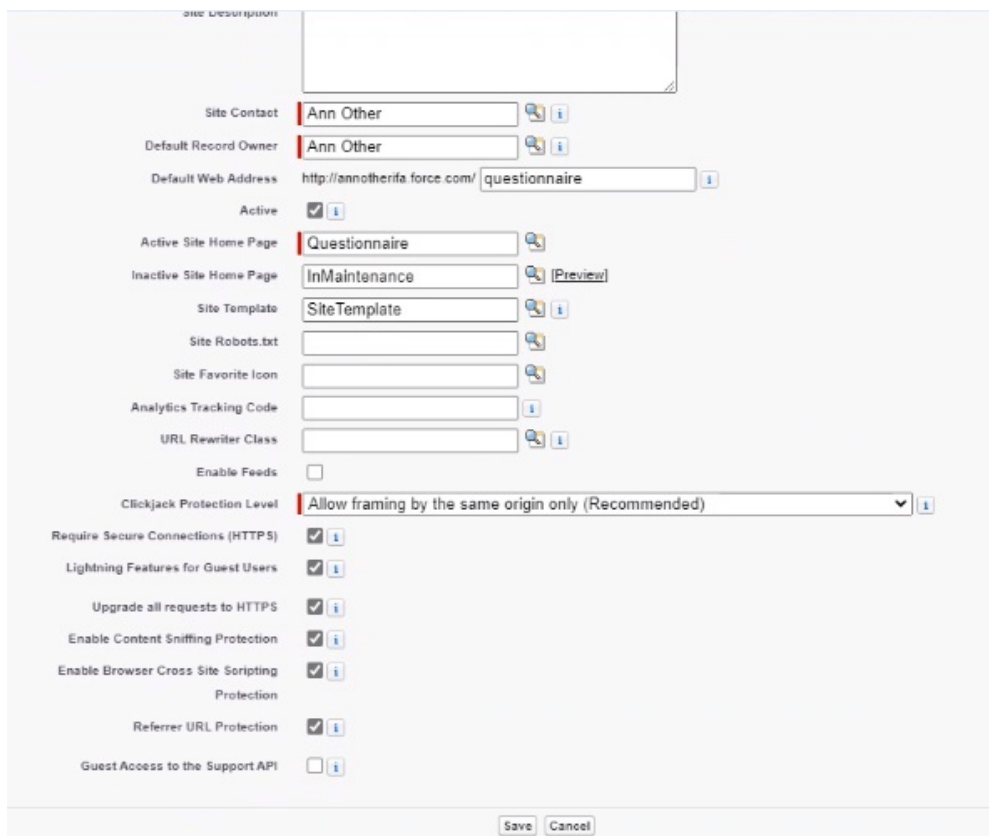
Require Secure Connections (HTTPS) [i]

Lightning Features for Guest Users [i]

Upgrade all requests to HTTPS [i]



'Save' once completed.



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

[Help for this Page](#)

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@atquestionnaireuat.force.com			<input checked="" type="checkbox"/>	Questionnaire Profile	

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

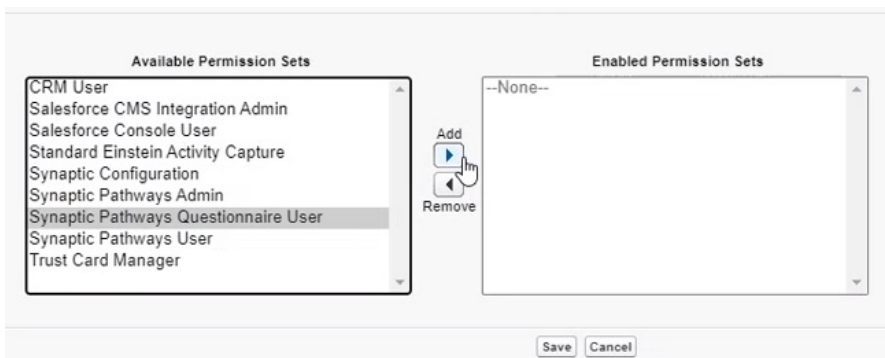
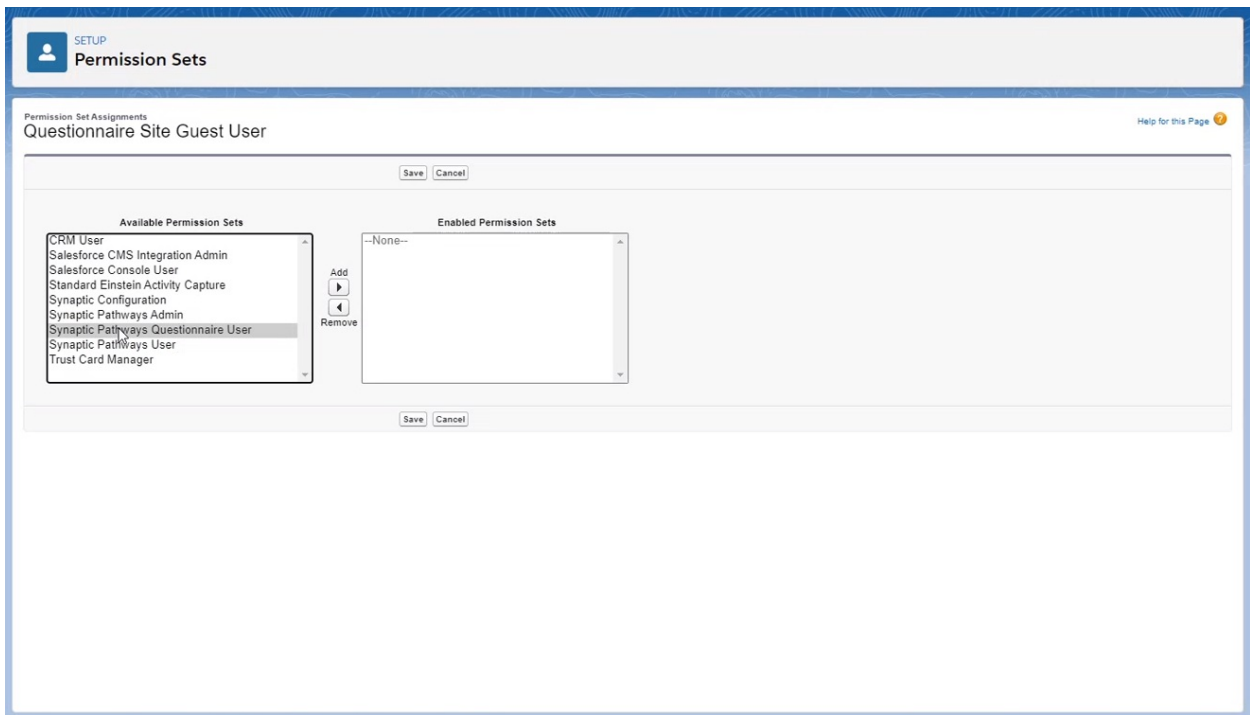
User Questionnaire Site Guest User

[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:

