

Neilon Project Management Public Site Setup

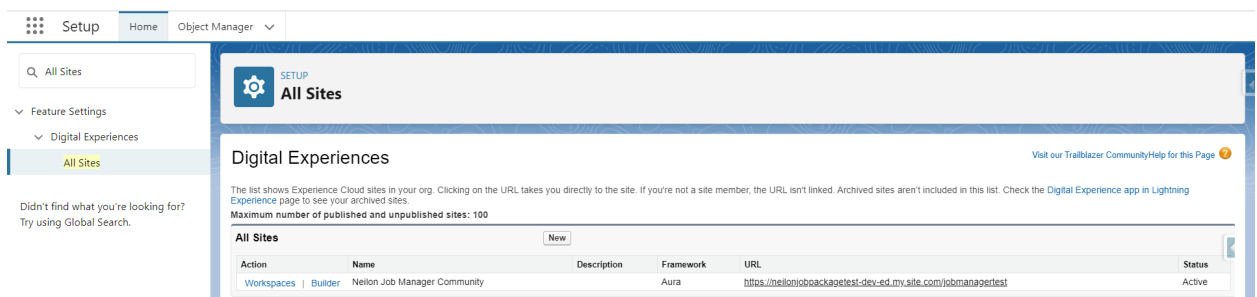
Introduction

This guide is used to create or enable public sites. These sites will be used to send job request quote approval, job request quote decline, and job invoice feedback emails.

Public Site Setup

Please follow the below steps to create a public Salesforce site (if not available)

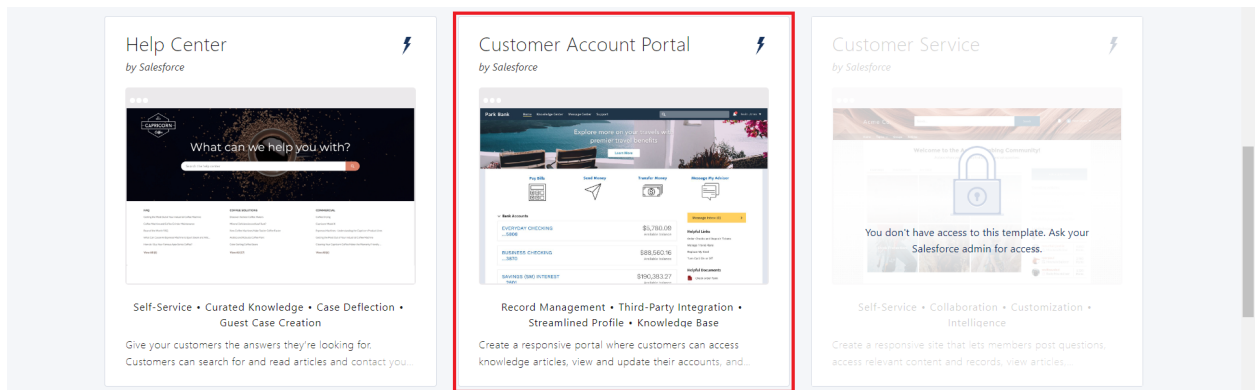
1. Go to **Setup**
2. Search and go to **All Sites**



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'All Sites' entered. The main content area is titled 'All Sites' and shows a table of digital experiences. The table has columns for Action, Name, Description, Framework, URL, and Status. One site is listed: 'Neilon Job Manager Community' with framework 'Aura' and URL 'https://neilonjobackagetest-dev-ed.my.site.com/jobmanagertest'. A 'New' button is visible above the table.

Action	Name	Description	Framework	URL	Status
Workspaces Builder	Neilon Job Manager Community		Aura	https://neilonjobackagetest-dev-ed.my.site.com/jobmanagertest	Active

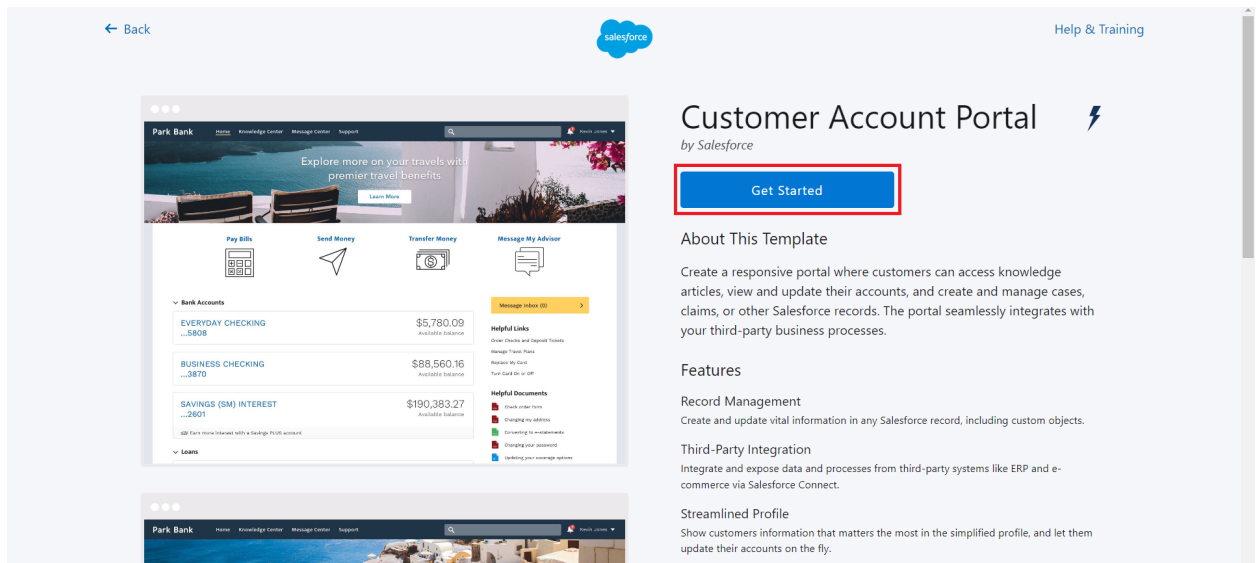
3. Click on the **New** button
4. Select **Customer Account Portal** as a Template



The screenshot shows three template cards. The 'Customer Account Portal' card is highlighted with a red border. Each card shows a preview of the site and a list of features.

- Help Center**
 - Self-Service • Curated Knowledge • Case Deflection • Guest Case Creation
 - Give your customers the answers they're looking for. Customers can search for and read articles and contact you...
- Customer Account Portal**
 - Record Management • Third-Party Integration • Streamlined Profile • Knowledge Base
 - Create a responsive portal where customers can access knowledge articles, view and update their accounts, and...
- Customer Service**
 - Self-Service • Collaboration • Customization • Intelligence
 - Create a responsive site that lets members post questions, access relevant content and records, view articles...

5. Click on **Get Started** button



6. Enter **Name**
7. Click on the **Create** button. The Site will be created
8. Go to **Setup**
9. Search and go to **Sites**
10. Open site detail which was created in the above steps
11. Click the **Public Access Settings** button
12. Click **Assigned Users**
13. Open Site Guest User detail
14. Go to the **Permission Set Assignments** section
15. Click **Edit Assignments**
16. Assign **Neilon Job Manager Read Only** permission set
17. Click **Save**