



Messaging Service – Install Guide

Checkbox Survey Messaging Service Install Guide	
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1 Introduction

This guide will walk you through how to set up the new Checkbox Messaging service with and tie your Checkbox 6.0 or higher installation to it.

This guide assumes that you have followed the Email setup instructions located in the Install, or Upgrade guides. If you have not followed these instructions, please locate the appropriate guide for your situation and follow those instructions.

If you have questions or feedback about the installation process, please contact our support department:

➤ <http://www.checkbox.com/support/login>

If you are using the Checkbox® 6 Trial, please contact your salesperson directly.

2 Before you Begin

Before you set begin to set up the Checkbox Messaging service, please make sure that you have a supported version installed. The messaging service will only work with Checkbox 6.0 or higher. If you have an earlier version of Checkbox you will need to either upgrade or patch your installation for it to work properly.

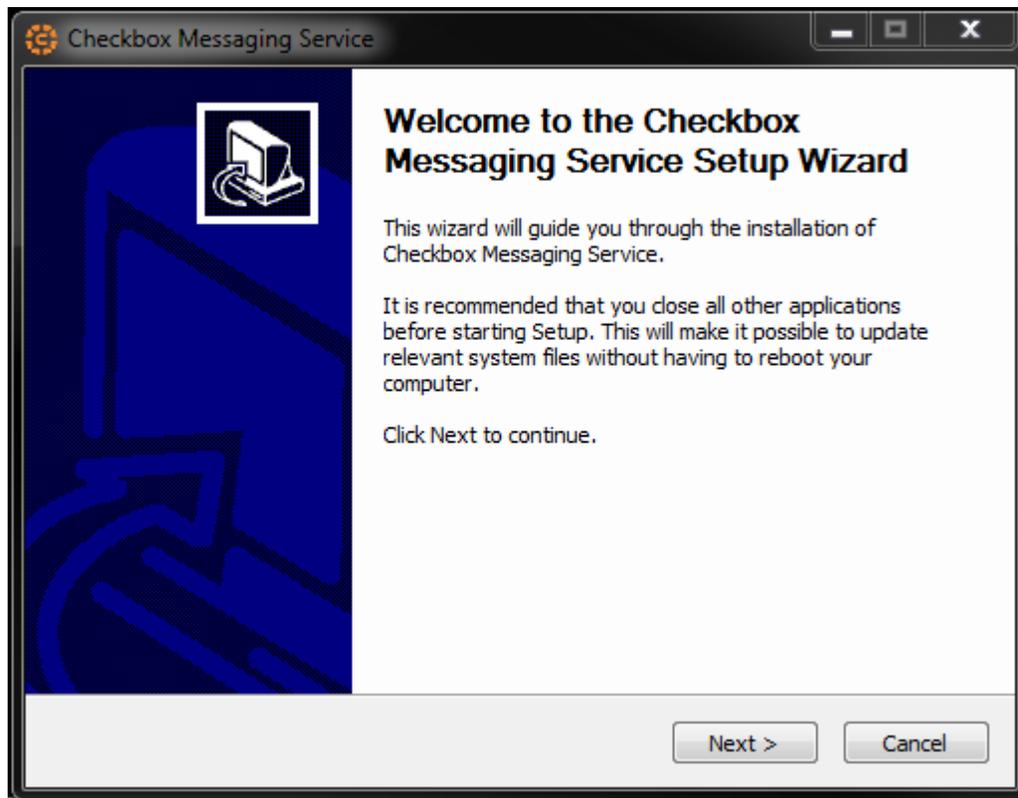
The Checkbox Messaging Service does not have to be installed on the same server as the Web Application, or the Database, however the Messaging Service does need to be on a server with access to the database.

3 Instructions

3.1 Start the Installer

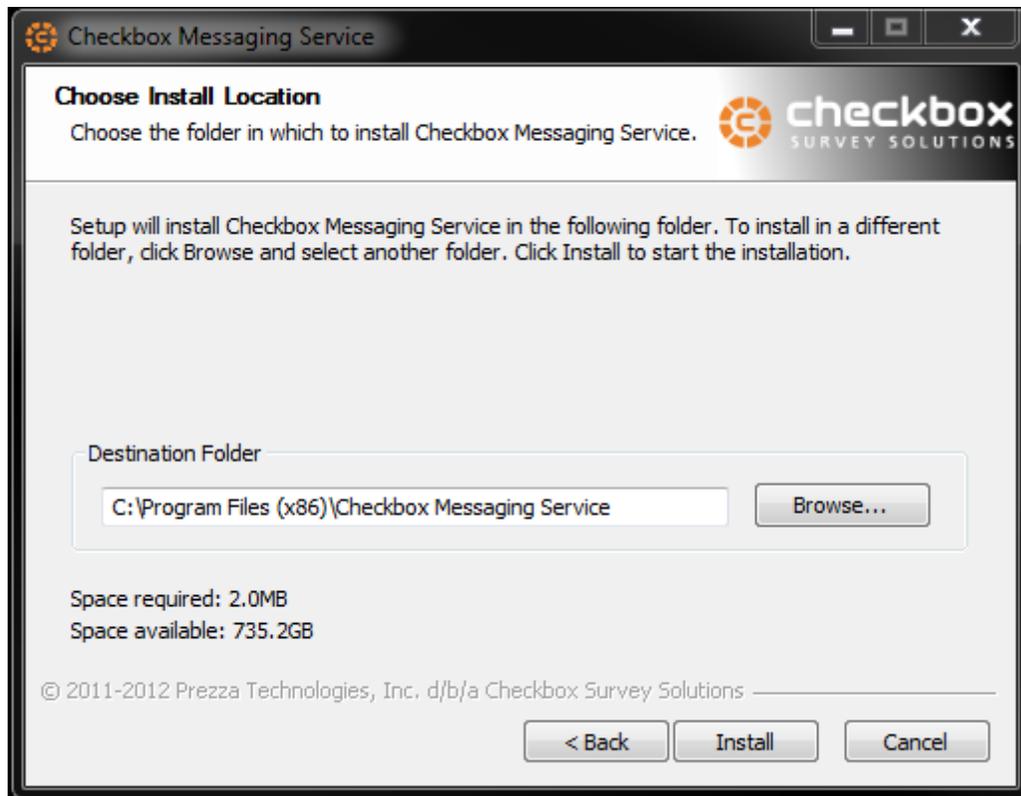
Please contact customer support via a support ticket for access to the Checkbox Messaging Service installer.

The installer requires Administrative access to install the service.



3.2 Choose the Install Path

The default path is “C:\ProgramFiles (x86)\CheckboxMessagingService”



3.3 Choose how you would like to send your emails.

With the new messaging service, Checkbox now supports sending emails via SMTP or via Amazon Web Services Simple Email Service. Using either of these two features you will be able to schedule your invitations.

3.3.1 SMTP

If you choose SMTP, you will need your SMTP credentials.

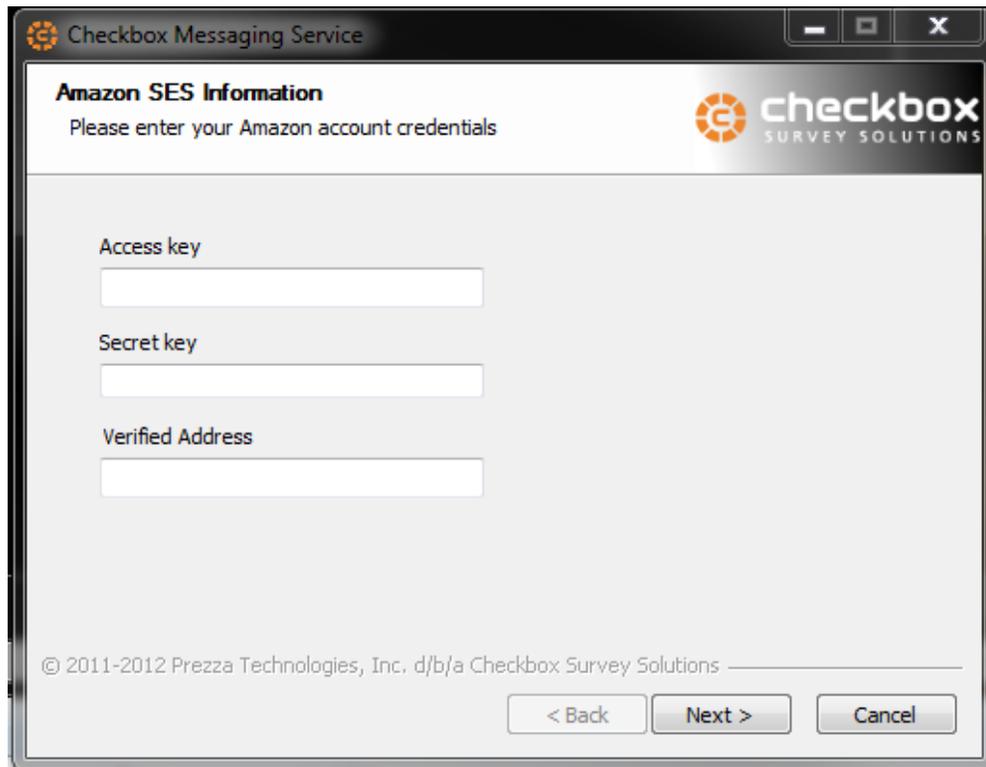
The screenshot shows a window titled "Checkbox Messaging Service" with a sub-header "SMTP Information" and the instruction "Please enter your SMTP account credentials". The window contains the following fields and options:

- Server: A text input field.
- Server Port: A text input field.
- User Name: A text input field.
- Password: A text input field.
- Enable SMTP SSL: A checkbox, currently unchecked.
- Enable SMTP Authentication: A checkbox, currently checked.

At the bottom of the window, there is a copyright notice: "© 2011-2012 Prezza Technologies, Inc. d/b/a Checkbox Survey Solutions" and three buttons: "< Back", "Next >" (highlighted), and "Cancel".

3.3.2 Simple Email Service

If you choose to use Amazon SES, you will need your AWS Access Key and your Amazon Secret Access Key, as well as a verified email address for your SES Account. Checkbox will attempt to send all emails from the email used in the From Address field in Checkbox, however if the email address used is not verified, it will instead send from the verified address entered here.



Checkbox Messaging Service

Amazon SES Information
Please enter your Amazon account credentials

checkbox
SURVEY SOLUTIONS

Access key

Secret key

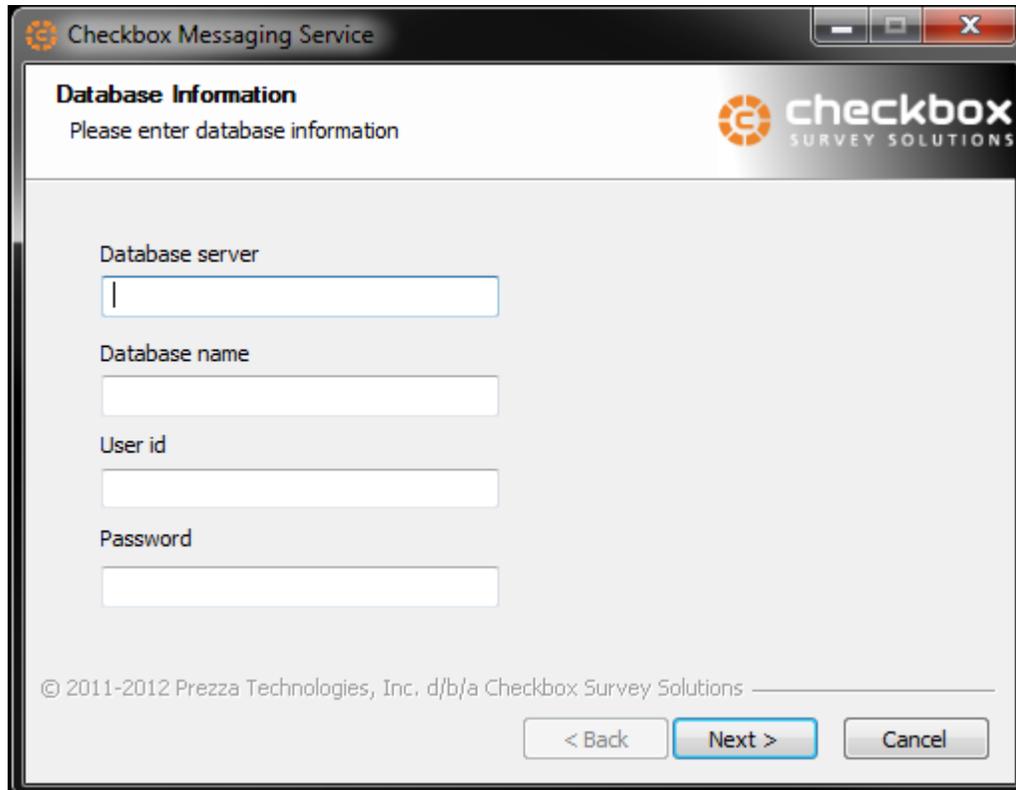
Verified Address

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< Back Next > Cancel

3.4 Database Connection Information

When Checkbox tries to send emails, using the messaging service, they are stored in the database that you created and setup in the application. (Under the Settings- > Email page) During this step, you will enter in the database connection information so that the messaging service knows where to pull this information from.



The screenshot shows a window titled "Checkbox Messaging Service" with a "Database Information" section. The text "Please enter database information" is displayed. The "checkbox SURVEY SOLUTIONS" logo is in the top right. There are four input fields: "Database server", "Database name", "User id", and "Password". At the bottom, there is a copyright notice: "© 2011-2012 Prezza Technologies, Inc. d/b/a Checkbox Survey Solutions" and three buttons: "< Back", "Next >", and "Cancel".

If you encounter any issues setting up the messaging service, or sending your invitations using the messaging service. Please contact customer support.