Checkbox®

Messaging Service – Update Guide (Version 6.3+)

Checkbox Survey Messaging Service Update Guide	
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1 Introduction

THIS DOCUMENT OUTLINES STEPS ON HOW TO UPDATE THE MESSAGING SERVICE, AND APPLICATION FROM PRE-EXISTING VERSIONS TO THE 6.3 UPDATE - ONLY USE THIS GUIDE IF YOU WERE USING THE MESSAGING SERVICE BEFORE CHECKBOX 6.3

This guide will walk you through how to update your existing Checkbox Messaging service itself as well as the database tables required for its operation.

This guide assumes that you have followed the original messaging service installation guide, and have a pre-existing messaging service installation from before patch 6.3. If you do not have an earlier version of the messaging service running please dis-regard this document and utilize the Messaging Service documentation guide to install the service outright.

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. This version of the messaging service will only work with Checkbox 6.3 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 and access to the application itself via http or https.

3 Instructions
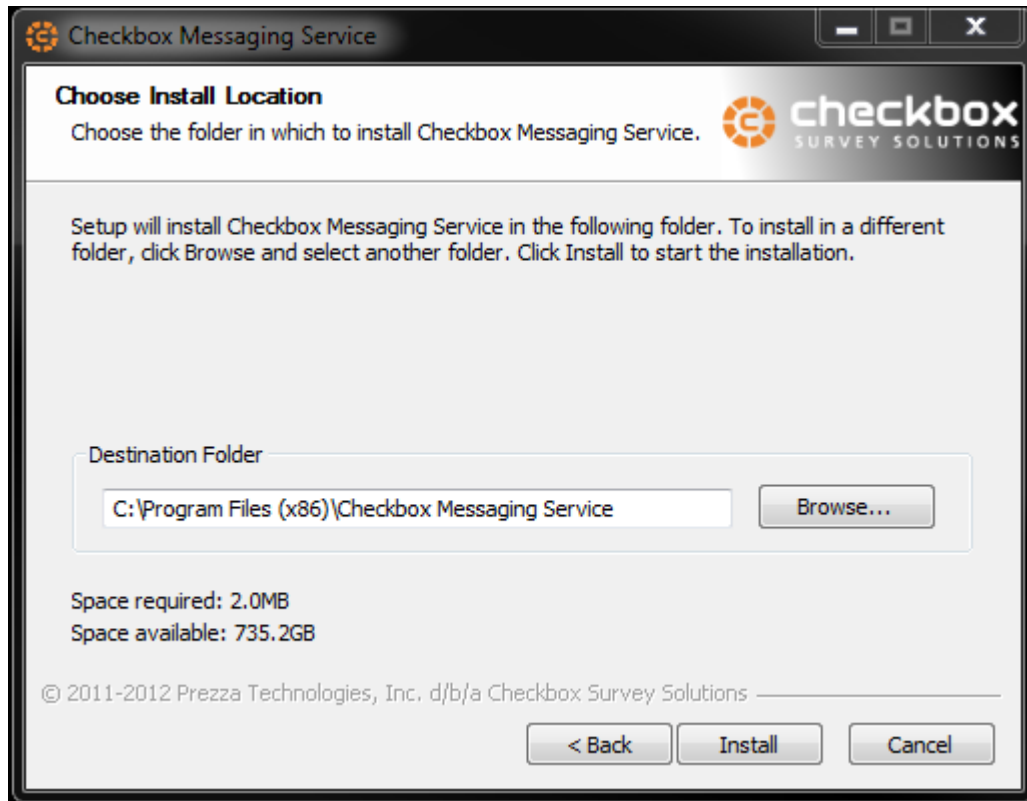
3.1   Start the Installer

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

The installer requires Administrative access to install the service.
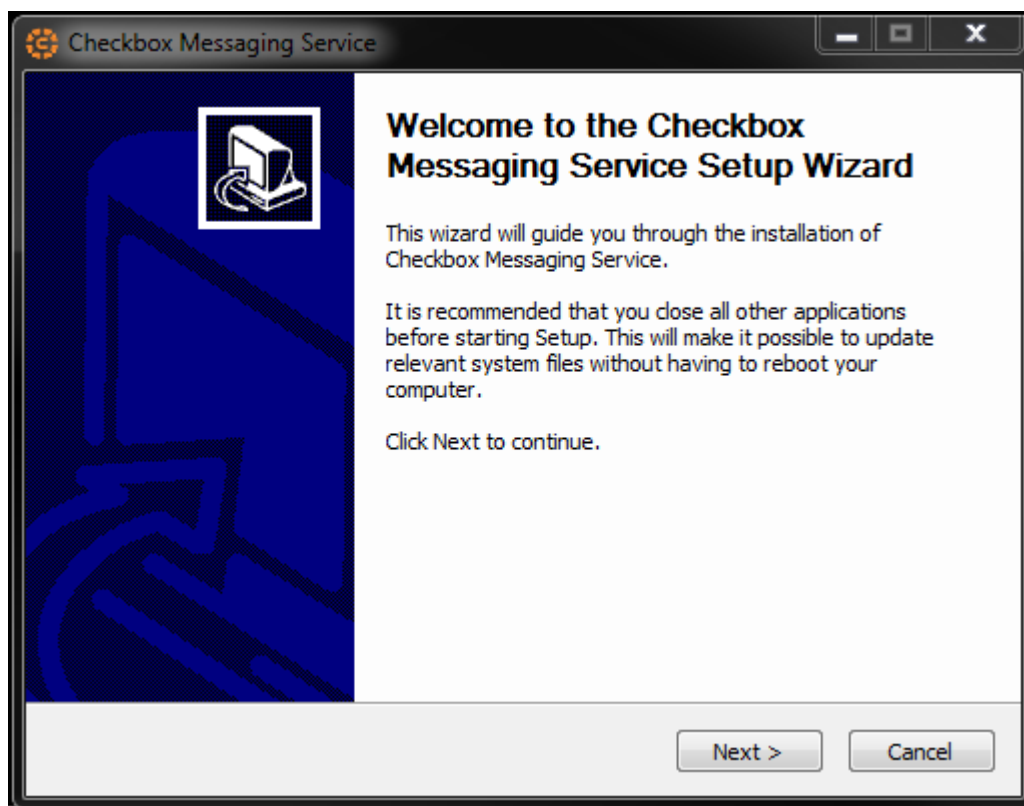
3.2   Choose the Install Path

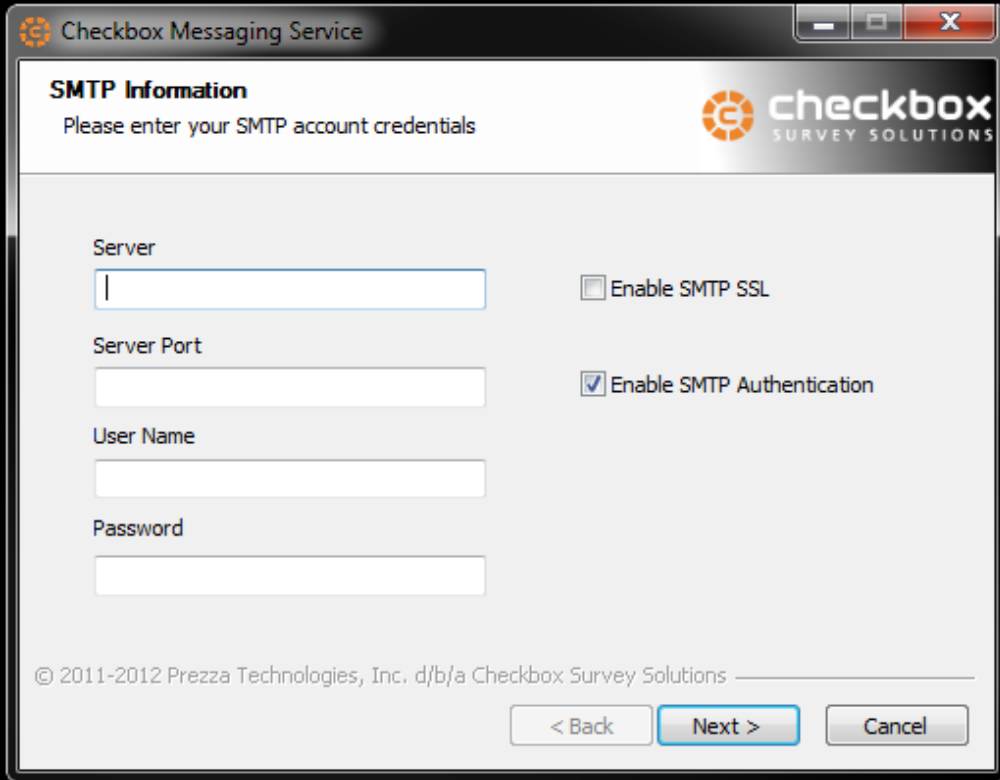The default path is "C:\ProgramFiles (x86)\CheckboxMessaging Service"

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
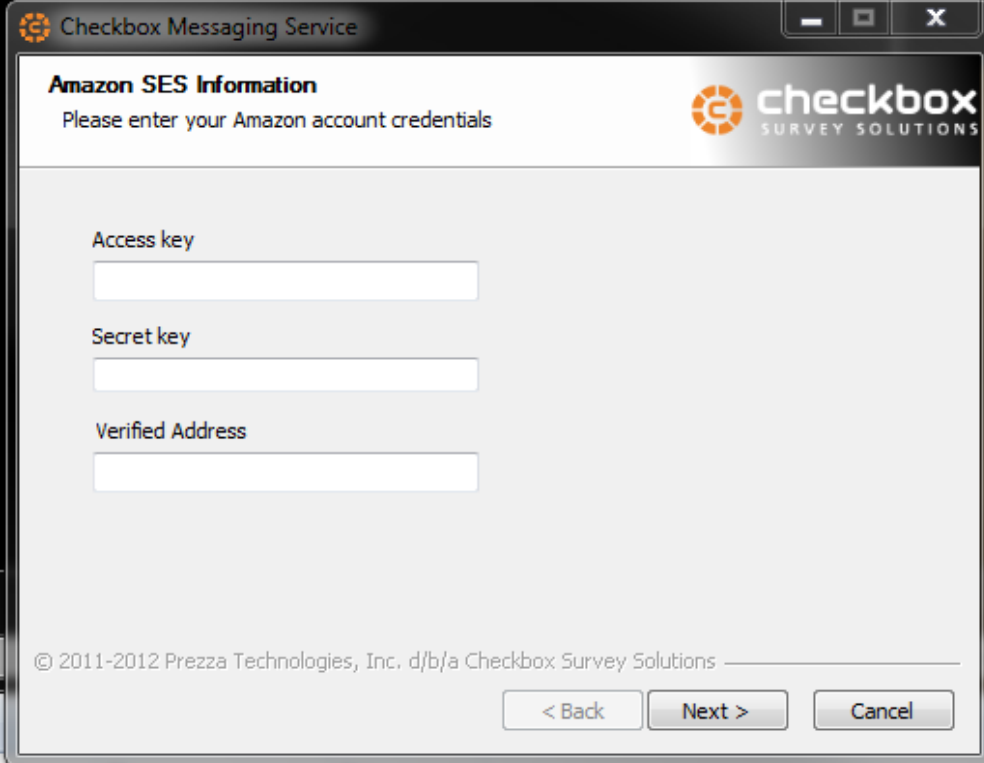
If choose to use SMTP, you will need your SMTP credentials.
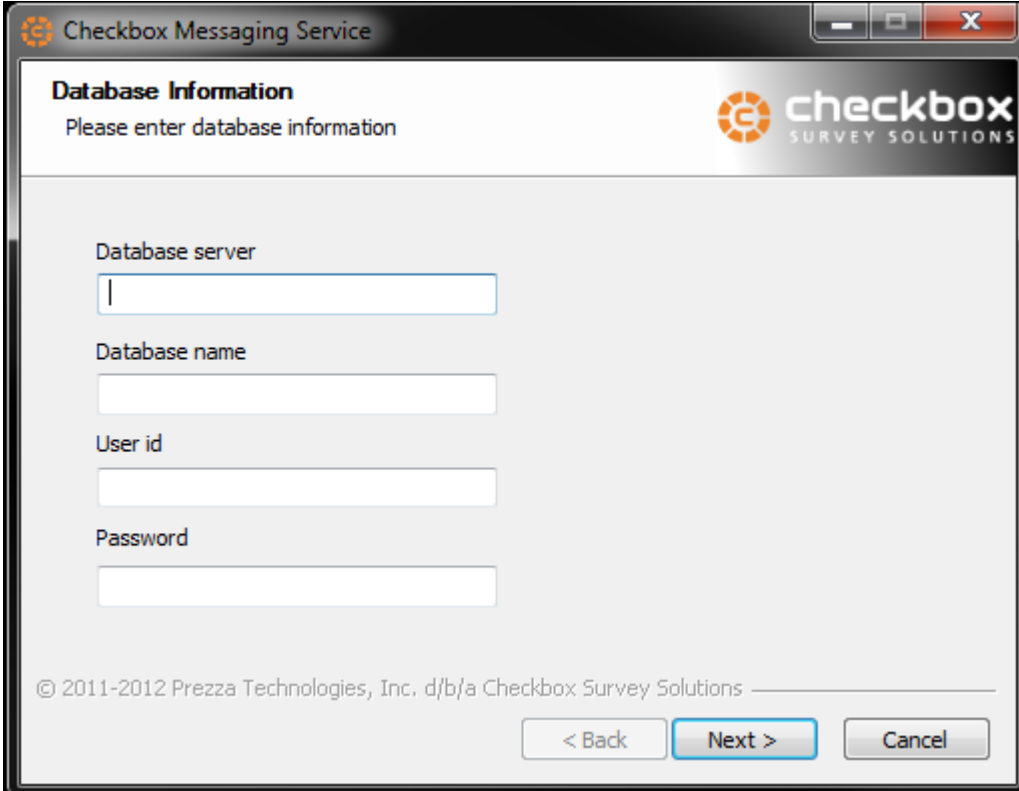
3.3.2   Simple Email Service

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.

3.4   Database Connection Information

When Checkbox tries to sends 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.

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

3.5   Run database patch scripts.

Once the messaging service has been updated you will have to also update the database that it and the application use to process invitations. You will want to connect to the database that you have used in the instructions above and run the script EmailDB_Upgrade.sql. This script is located in:
[Checkbox_Root]\Install\InstallScripts\SqlServer\ .
Once this script has been run you can start the service and process new invitations.