



ChoiceMail User guide

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1 Front Page



ChoiceMail Small Business

User Guide

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2 Introduction

ChoiceMail Enterprise and ChoiceMail Small Business are email management solutions that requires senders to get your permission before they are able to send emails to you. From now on, we will refer to both of these products simply as ChoiceMail, except in cases where the difference is relevant.

When an unknown person (called a new sender) sends an email to you (the recipient), ChoiceMail prevents the email from reaching you at that time. Instead, ChoiceMail automatically sends an email back to the sender, asking them to register. The sender is directed to a webpage and asked to fill in some information

(name, email address, and the reason for contacting you) and then submit that information. The sender must also type a number displayed in a graphic. Only after the sender has registered do you become aware that a new sender is trying to contact you. This process by itself is sufficient to remove almost all unsolicited or junk email because automated systems cannot respond to the registration request.

Once someone does take the time to register, ChoiceMail sends you an email message notifying you of the registration; you can choose to allow or block the sender from communicating with you.

2.1 Design Goals

ChoiceMail was designed to return control of the inbox to the email recipient (that's you, the customer!).

The criterion is simple: if you receive an email, you wanted it!

2.2 Target Users

Both ChoiceMail Enterprise and ChoiceMail Small Business are intended for enterprises who wish to be able better to manage their email messages and not have to waste time dealing with unwanted email.

2.3 ChoiceMail Enterprise vs. ChoiceMail Small Business

ChoiceMail Enterprise is intended to be installed at an enterprise that is already running its own mail server such as Microsoft Exchange, Lotus Domino, GroupWise or indeed any standard internet mail server. ChoiceMail Small Business is intended for companies who use a remote ISP to retrieve their mail using the standard POP3 protocol.

2.4 Main Features

ChoiceMail Enterprise and ChoiceMail Small Business include the following features:

- Approval-based email management.
- Hierarchical permission management.
- Centralized administration
- Browser-based user access to all ChoiceMail features through any standard browser (desktop or PDA)
- Works with your existing email program
- Supports secure password authentication (SPA) and SSL.

- Allows "approved" listing to be generated from most of today's contact management software such Outlook Express, Eudora, Outlook 98, 2000-2003, Act, Goldmine and so forth.
- Safe previewing of messages without information being sent back to spammers
- Junk box – review automatically deleted mail.
- SmartAway™ Responder -sends automatic responses to people on your whitelist.

2.5 Benefits of Using ChoiceMail

- Increased productivity – no more wasted time rummaging through useless emails.
- Hassle free operation – ChoiceMail puts the "work" back where it belongs, in the hands of the sender.
- Never delete an important email – you are in control and review what you want and when you want it.
- Works with any corporate mail system such as Exchange, Lotus Domino, GroupWise and others.
- ChoiceMail Small Business Server supports centralized POP3-based systems
- Both the Enterprise and Small Business servers have all the features of the single-user solution but without the need to install a desktop client.
- Support for web access for remote browsers and wireless PDAs.

2.6 What Is Junk Mail and Why Does It Happen?

Junk mail, also known as spam, is unsolicited mail sent to you from automated systems hoping to get you interested in some product or service. There are two reasons junk mail is popular. First, some people do respond to it, so there is money to be made. But the number of people who respond is very low compared to the number of email messages sent out. Therefore sending junk mail is only feasible if it's cheap to do. And that's the second reason – it is cheap! Whether you send one email or 1 million emails, the variable cost is essentially zero. There are companies who will sell an email list with millions of addresses in them for as little as \$50. Spammers feed those addresses into an automatic email sender and off they go.

2.7 How Does a Spammer Get Your Email Address?

There are so many ways that spammers can get your email address, it's almost impossible to list them. If your email address is on a webpage, it will be collected by an automated spider. If you have ever subscribed to an email newsletter, your email address may be distributed. Email addresses on free online email systems

are readily available. Spammers also use algorithms to generate large numbers of potentially valid names at a particular domain to try and create valid email addresses. (When there's no cost to sending an email out, it's easy to just try millions of combinations in the hope of getting some real matches.) In an attempt to make their lists more valuable (i.e., with fewer invalid names), spammers will try sending test emails to the domain to see if the messages bounce back or are accepted, and use that information to weed out invalid email addresses.

2.8 Rules vs. Permission Mechanisms

There are a number of tools available that use rules to determine whether an email should be allowed through to your inbox. Rule-based systems examine all incoming email looking for patterns that indicate that the email is junk. For example, if the sequence '\$\$\$' is seen at the beginning of a Subject line, the message is probably spam. But unfortunately, rule-based systems have many drawbacks and it is necessary to spend quite a lot of time managing those rules. These systems have three main problems:

- They allow some junk mail through because there's no rule that fits a particular message.
- They block some messages that should be allowed through because something in a legitimate message matched a rule.
- They require constant upgrading because as soon as a marketer is labeled a spammer, the marketer will find new innovative methods to start again.

ChoiceMail, an enhanced permission-based system with optional challenge/response support, works on a different premise. The presumption is that all emails are junk until proven otherwise or, to put it more bluntly, mail from an unknown sender is assumed to be junk until proven innocent. In particular, the onus is on the sender to start the process of proving his or her innocence.

One concern that is sometimes raised is that a legitimate sender might not want to be bothered going through the registration process. In the ChoiceMail model, our view is one of practicality and simplicity – if the sender doesn't take the time to register, then the message was not sufficiently important and you, the recipient, didn't need to see it anyway.

Another concern often raised (usually by competitors) is that challenge/ response systems screw up mailing list systems because a message sent to a recipient on a mailing list would result in a challenge being sent to all members of the list. However, ChoiceMail is smart enough to recognize mailing lists and does not send a registration request.

2.9 ChoiceMail Features at a Glance

ChoiceMail — Key Features

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Feature	Benefit
Company-based	You do not have to forward your email to a web service – you can continue to use your existing mail systems (ChoiceMail Enterprise) or ISP (ChoiceMail Small Business).
Private	Emails are downloaded directly to your servers and not intercepted or stored by a 3 rd party.
Works with your email application	ChoiceMail does not replace your normal email application – you can continue to use your existing email application.
Sender registration	Anyone sending you email must submit a registration request for your approval.
Preapproval management	You can add permission rules to accept or reject senders – this can be done on an individual user basis as well as centrally by your system administration group.
Safe message preview	You can preview messages before deciding whether you want to allow them into your email application. No information is sent back to a spammer when you do this.
Import existing contacts	ChoiceMail can import email addresses from any email application that supports the standard CSV format so that your existing contacts are preapproved.
SmartAway™ responder	ChoiceMail can reply automatically to people on your whitelist to let them know their message was received.
Junk box	ChoiceMail saves all deleted mail in a junk box for future review, if required.
Automatic approval of outgoing senders	If you send an email to someone for the first time, that email address can be automatically preapproved.
Installation	ChoiceMail is quick, simple, and easy. ChoiceMail works with any mail server and becomes the initial point of entry into your company.
One time charge	No cumbersome monthly payments.
Not a service	Emails are your property and remain as such. Your email continues to live on your own servers.
Vanity page	The registration page can be tailored to

3 Getting Started with ChoiceMail

Your network administrator has already installed ChoiceMail on your corporate LAN and set up an account for you. ChoiceMail will immediately start holding up email from unknown senders while permitting emails from senders on your whitelist directly to your email program.

You don't need to do anything to begin using ChoiceMail. However, you should import your address book so you add all your current contacts to your ChoiceMail whitelist. If you have not already received it, ask your Network Administrator for the ChoiceMail URL and for your ChoiceMail username and password, so you can log in and set your options.

3.1 How ChoiceMail Works

- If the sender's email address is included in your whitelist (i.e., list of preapproved senders) or a permission rule, ChoiceMail passes the email directly through to your email application's inbox.
- If the sender's email address is included in your blacklist (i.e., list of rejected senders), ChoiceMail deletes the email.
- If the sender's email address is not included on any ChoiceMail lists or rules, ChoiceMail sends an automatic request that the sender register, and adds the email to the *Unknown Senders* list. The email message is not sent to your email application. The sender registers by going to a webpage and filling in a form explaining who they are and why they wish to contact you. The submitted form is then received by ChoiceMail for processing.
- If the sender does not register within a specified number of days (specified by setting a preference), the email is moved to the *Junk Box* window. After another interval (also specified in days), the email is automatically deleted from the junk box.
- If the sender does register, ChoiceMail adds the email to the *Senders Waiting for Your Approval* list and sends a special message to you to let you know that a sender is waiting to be approved. You can then connect to ChoiceMail through your browser to approve, reject, reject with a reason, or delete the sender. Alternatively, you can configure ChoiceMail so that if someone fills in the registration form, their email is automatically approved.
- If you send a message to a sender who is not already on your whitelist, ChoiceMail adds this sender to your whitelist automatically. If the sender was on your blacklist, s/he is moved to your whitelist. This behavior is optional and can be turned off in your preferences.
- You can preapprove or reject individual senders and/or domains.
- You can set permission rules for accepting and rejecting senders based on content.

System administrators can create a global white/black lists and rules that would have higher priority. If a message comes through to your email client, but you are not sure why – open the message headers (in Outlook right-click on the message and select options – look at the internet headers section) and find the text "X-ChoiceMail-Accepted Reason:" It will tell you why that message came through to your inbox.

3.2 Important concepts

Sender

A sender is the originator of an email message. You can have multiple email messages associated with a sender.

- Accepting a sender: When you accept or approve a sender, the sender is added to your whitelist. Accepting an unknown sender means that ChoiceMail will permit all future emails coming from that sender's email address to pass through to your email application.
- Rejecting a sender: If you reject a sender, ChoiceMail places that sender on your blacklist, and will not permit any email messages from that sender to pass through. Because of the way ChoiceMail works, it is rarely necessary to explicitly put a sender on your blacklist.
- Deleting a sender: If you delete a sender, it is as if that sender never existed in your system. If that sender subsequently sends you another message, they will get an automatic response asking them to register. It is rarely necessary to explicitly delete a sender – a sender who does not register will be deleted automatically, along with all their emails.

If you do not approve a sender, his/her email messages are held up. However, you can manually allow individual email messages from a particular sender to be passed through to your email application while waiting for the sender to register. You can also read a message in the Unknown Senders view.

Domains

You can optionally allow or block all messages coming from a particular domain, such as your favorite store or a company with whom you do business. Even if you have approve a domain, you can override the permission (or denial) for specific senders within that domain.

Registration Process

You can manually add a sender to your whitelist or your blacklist. For example, if you know you will be receiving emails from john@smith.com, you can manually preapprove this sender so that he will not be asked to register when he sends you a message.

- **Automatic Preapproval:** ChoiceMail automatically adds a new sender to your whitelist when it detects that you are sending a message to someone who is currently unknown to ChoiceMail. If that sender is already on one of your lists (the *Unknown Senders* list or the blacklist), ChoiceMail will automatically move that sender to your whitelist.
- **Importing contacts:** You can preapprove known senders by importing email addresses from your email application's contact list or address book into ChoiceMail.

Permission Rules

You can create rule-based filters to determine the disposition of a new email message based on its content. You'll rarely need to create a permission rule because of ChoiceMail's automatic approval system, but you may find it useful to automatically accepting email messages coming from a list server where the sender is different every time.

With list server messages, it does not make sense to accept each sender manually because there could be thousands of senders. Instead, you can have ChoiceMail look for some identifying information in the header or body of list server messages to determine what to do with them.

4 ChoiceMail Components

The Home Page

Once you log in to ChoiceMail over the web, the home page will be displayed.

The screenshot shows the ChoiceMail Web interface in Microsoft Internet Explorer. The browser address bar displays the URL: `http://192.168.1.10:81/senders.html?sid=b676acb68ea145d185211c1326fd5d37`. The page title is "ChoiceMail Web - Sender list".

The interface features a navigation menu on the left with sections: View, Permission management, Settings, and Tools. The main content area is titled "Sender list" and includes tabs for "Unknown (quarantined)", "Whitelist (approved)", "Blacklist (rejected)", "Approval pending", and "All senders". A "Refresh | Logout" button is located in the top right corner of the main content area.

The "Unknown (quarantined)" tab is selected, showing 359 unknown senders. The list displays the following entries:

Sender	Name	Received
adam@comcast.net	Stephen	Received 12/28/2006 12:02:32 PM
poethyl@day.by	Terence Smallwood	Received 12/28/2006 11:44:48 AM
rifort@shasta.com	Earle Christiansen	Received 12/28/2006 11:44:43 AM
qmanumitted@lokalservice.dk	Jean Jeffries	Received 12/28/2006 11:40:48 AM
juana.hernandez@club-gourmet.com	Jimmie Shook	Received 12/28/2006 11:40:39 AM
nferemotely@fsmail.net	Tammi Cortes	Received 12/28/2006 11:38:44 AM
cluckinghomeyness's@accounts.eirtrade.ie	Reggie Sheldon	Received 12/28/2006 11:36:38 AM
ham'shemorrhaging@abj-cheminee.com	Rachel Ellison	Received 12/28/2006 11:22:36 AM
tomahawkfollies@absolutebiz1.com	Bonnie Maynard	Received 12/28/2006 11:16:35 AM
frizzle@absolutemotion.com	RC Casino	Received 12/28/2006 11:16:33 AM

Each entry includes a "Delete" button and "Approve" and "Delete" options. The page is numbered "Page 1 of 35".

The interface is powered by DigiPortal Software.

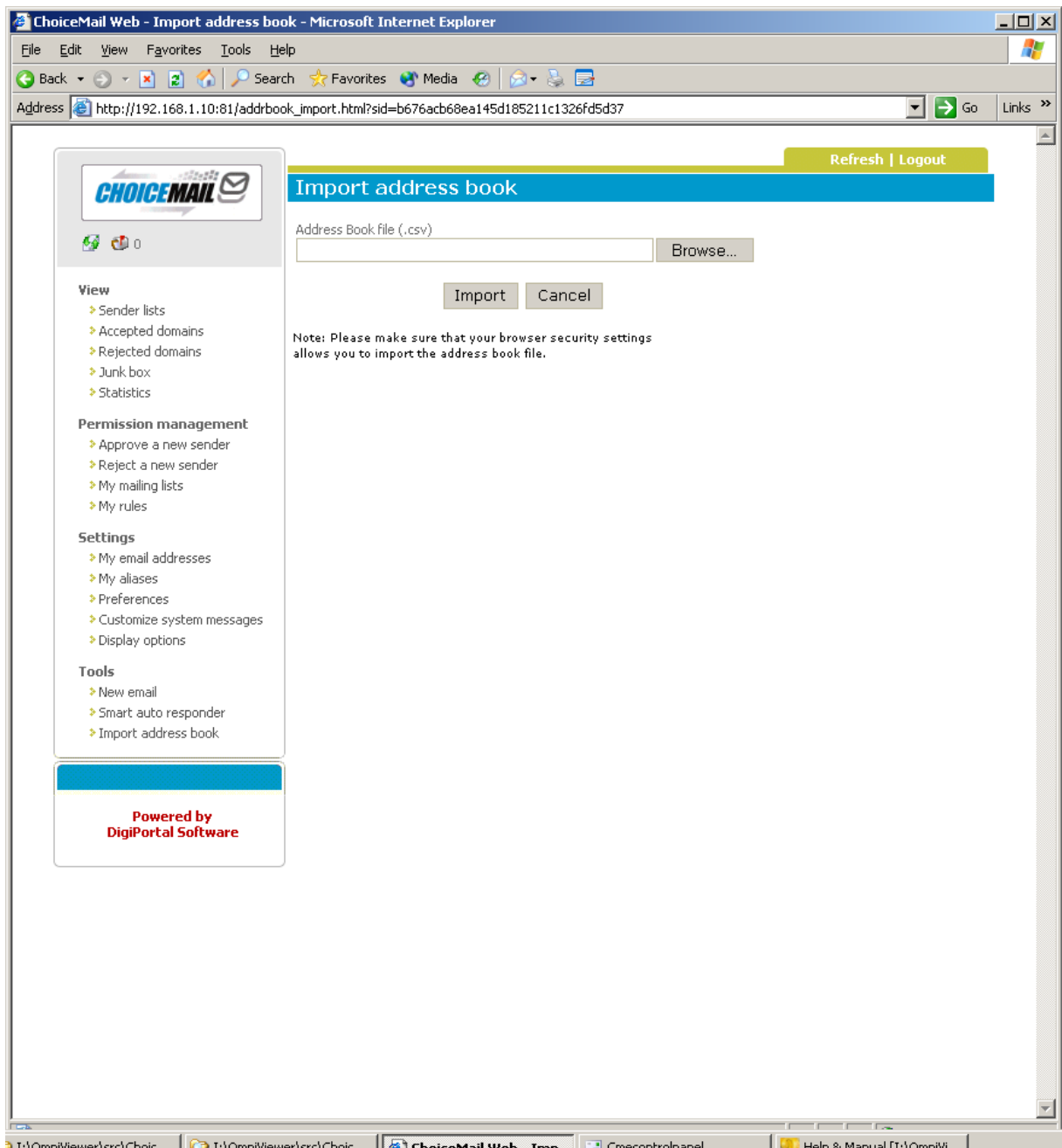
The menu on the left provides access to all the main features of ChoiceMail. If you are accessing ChoiceMail from a wireless PDA, the page will be formatted differently to accommodate the small screen. In particular, rather than a menu down the left hand side, there will be a little dropdown menu at the top of the screen.

Note: if ChoiceMail does not detect any activity from your browser within a set period of time (normally 15 minutes), it will log you out automatically for security purposes.

4.1 Importing Existing Email Addresses

ChoiceMail can import a list of existing email addresses and preapprove those addresses so that incoming emails from these addresses are automatically accepted. You must create a comma-separated file (.csv) of your email address book before you can import it into ChoiceMail.

1. Open your email application and export your address book as a comma-separated file. (Consult your email application documentation for instructions on creating a csv file.)
2. Click **Import address book** in the ChoiceMail menu.
3. Click the **Browse** button and navigate to the folder containing the .csv file of your email addresses. Select the file and click the **Open** button.
4. Click the **Import** button to import all your email addresses into ChoiceMail.



When you click **Import**, all the email addresses in the file will be uploaded to ChoiceMail (this may take a little time depending on the size of your file) and appended to your whitelist of approved senders. (You can view this list by clicking the **Whitelist (approved)** tab on the **Senders** toolbar at the top of the home page.) ChoiceMail will not re-import addresses that are already in your whitelist.

4.2 Senders Page







The Senders page has a set of tabs that provide views of different lists of senders. Click on a tab to open a view.

Unknown (quarantined)	ChoiceMail lists all emails received from unknown senders (i.e., email address that are not included in your whitelist). ChoiceMail has sent each email address a registration request and is waiting for a response. Normally you should just leave these message in the list – when the registration expiration time has expired, the message is moved to the Junk Box and will eventually be deleted. See page 14.
Approval pending	ChoiceMail lists all the email senders who have responded to the registration message. You must approve or reject each message. This button blinks red when there are senders waiting for your approval.
Blacklist (rejected)	ChoiceMail lists all the email addresses you've manually rejected on the blacklist. There is no need to reject most messages, as they will be deleted automatically when the registration period expires.
Whitelist (approved)	ChoiceMail lists all approved senders in the whitelist. These include any address from a contact list or email address book you imported, any senders you've manually approved, and any senders to whom you've sent a message.
All Senders	ChoiceMail lists all senders.

4.3 Accepting and Rejecting Senders

You can manually accept or reject a sender using the **Sender** toolbar. This toolbar displays when you open the sender properties by clicking on a sender email address or when you click on a message subject in one of the senders views.



	Approve Sender	Click this button to approve a sender in the <i>Unknown Senders</i> list or the <i>Senders Waiting for Your Approval</i> list. ChoiceMail adds the sender's email address to the whitelist and accepts all email messages from this sender.
	Reject Sender	Click this button to reject a sender in the <i>Unknown Senders</i> list or the <i>Senders Waiting for Your Approval</i> list. ChoiceMail adds the sender's email address to the blacklist and deletes all email messages from this sender.
	Reject Sender and Send Email	Click this button to reject a sender in the <i>Unknown Senders</i> list or the <i>Senders Waiting for Your Approval</i> list. ChoiceMail adds the sender's email address to the blacklist, deletes all email messages from this sender, and sends a response to the sender. ChoiceMail prompts you for a rejection reason that will be sent with the response.
	Delete Sender	Click this button to delete the sender from ChoiceMail. The sender's email address is removed from all ChoiceMail lists. If this sender sends you another email, ChoiceMail will send an automated registration email as if it were the first time this sender has contacted you.
	Approve Domain	Click this button to approve all email messages coming from this domain.
	Reject Domain	Click this button to reject all email messages coming from this domain.

4.4 ChoiceMail Indicators









ChoiceMail provides several indicators so you can immediately see where your email messages are within ChoiceMail.

Top of Menu



Middle Right



	Refresh Page	Click this button to refresh the Senders page.
	Check manually for new mail (ChoiceMail Small Business only)	Click this button to request the server to check for and download any new mail from your ISP. In normal usage, ChoiceMail Small Business will check for new mail automatically so this button is only useful for special cases.
 0	New Messages Indicator	Indicates the number of unread messages on the server that have not yet been sent to your inbox. Click this button to open the <i>Message Viewer</i> window and see a list of the messages waiting for you in your email application's inbox. You can preview your new messages right from inside ChoiceMail. See page 17. NOTE: In ChoiceMail Enterprise this button will usually display 0 or quickly change from 1 to 0 unless the mail cannot be moved to your real mail server. This is because ChoiceMail Enterprise is explicitly forwarding approved mail to your corporate mail server rather than waiting for it to be picked up.
	Show/Hide Sender Filter	Opens the sender filter. Click the button again to close the panel.
	Show/Hide Message Information	Expands a list of messages to show the subject of each message. Click the button again to hide the message information. (You can also click the email address of the sender to expand a message.) When you turn on this feature and select a message, two additional buttons are enabled   that let you accept an individual message, and delete a message. Click the subject of the email to read the message.
	Show/Hide Recent Unknown Senders	Filters a list to show only unknown senders received within the past 24 hours.

5 Unknown Senders List

This page displays a list of unknown senders who have sent you at least one email message.

ChoiceMail Web - Sender list - Microsoft Internet Explorer

Address: http://192.168.1.10:81/senders.html?sid=b676acb68ea145d185211c1326fd5d37

Refresh | Logout

Sender list

Unknown (quarantined) | Whitelist (approved) | Blacklist (rejected) | Approval pending | All senders

359 unknown senders

Page 1 of 35

Sender	Name	Received
adam@comcast.net	Stephen	Received 12/28/2006 12:02:32 PM
poethyl@day.by	Terence Smallwood	Received 12/28/2006 11:44:48 AM
rifort@shasta.com	Earle Christiansen	Received 12/28/2006 11:44:43 AM
qmanumitted@lok.alservice.dk	Jean Jeffries	Received 12/28/2006 11:40:48 AM
juana.hernandez@club-gourmet.com	Jimmie Shook	Received 12/28/2006 11:40:39 AM
nferemotely@fsmail.net	Tammi Cortes	Received 12/28/2006 11:38:44 AM
cluckinghomeyness's@accounts.eirtrade.ie	Reggie Sheldon	Received 12/28/2006 11:36:38 AM
ham'shemorrhaging@abj-cheminee.com	Rachel Ellison	Received 12/28/2006 11:22:36 AM
tomahawkfollies@absolutebiz1.com	Bonnie Maynard	Received 12/28/2006 11:16:35 AM
frizzle@absolutemotion.com	RC Casino	Received 12/28/2006 11:16:33 AM



Powered by DigiPortal Software

ChoiceMail has already sent back a registration request to the sender and is now waiting for that sender to register. From time to time you may want to browse this list, so that you can manually accept emails from people you recognize. In most cases you can just wait until a sender registers, at which point you will be notified with an email message from ChoiceMail. In other words, under normal circumstances, there is no need to explicitly reject or delete new senders that show up in this window. Leave them alone, and they will go away by themselves after a while.


Click the sender's email address to see details about the sender. Click the email's subject to read the message. See page 19 for details about previewing messages.



If you have subscriptions to email newsletters that are sent out by an automated system, or receive other emails that are sent automatically, you will need to approve the sender manually. You only have to do this once. There are three ways you can do this process.

1. Wait until you receive an automated email in the *Unknown Senders* list. You can then select the sender of that email and click the **Approve Sender** button  on the toolbar.
2. You can filter the list to show only those unknown senders received in the past 24 hours by clicking the **Show Recent Senders** button . You can then approve the sender as described above.
3. You can manually approve the sender by clicking the **Preapprove a New Sender** link on the ChoiceMail menu.

4. Enter the email address of the sender you want to approve, and optionally, enter the sender's name. Click the **Submit** button. If the sender you are trying to approve is already on your unknown or black list ChoiceMail will not allow you to add this sender. In that case – find the sender using the filter button and the approve it from there.

Sometimes you'll see a blind carbon copy (BCC) icon  next to a message in the

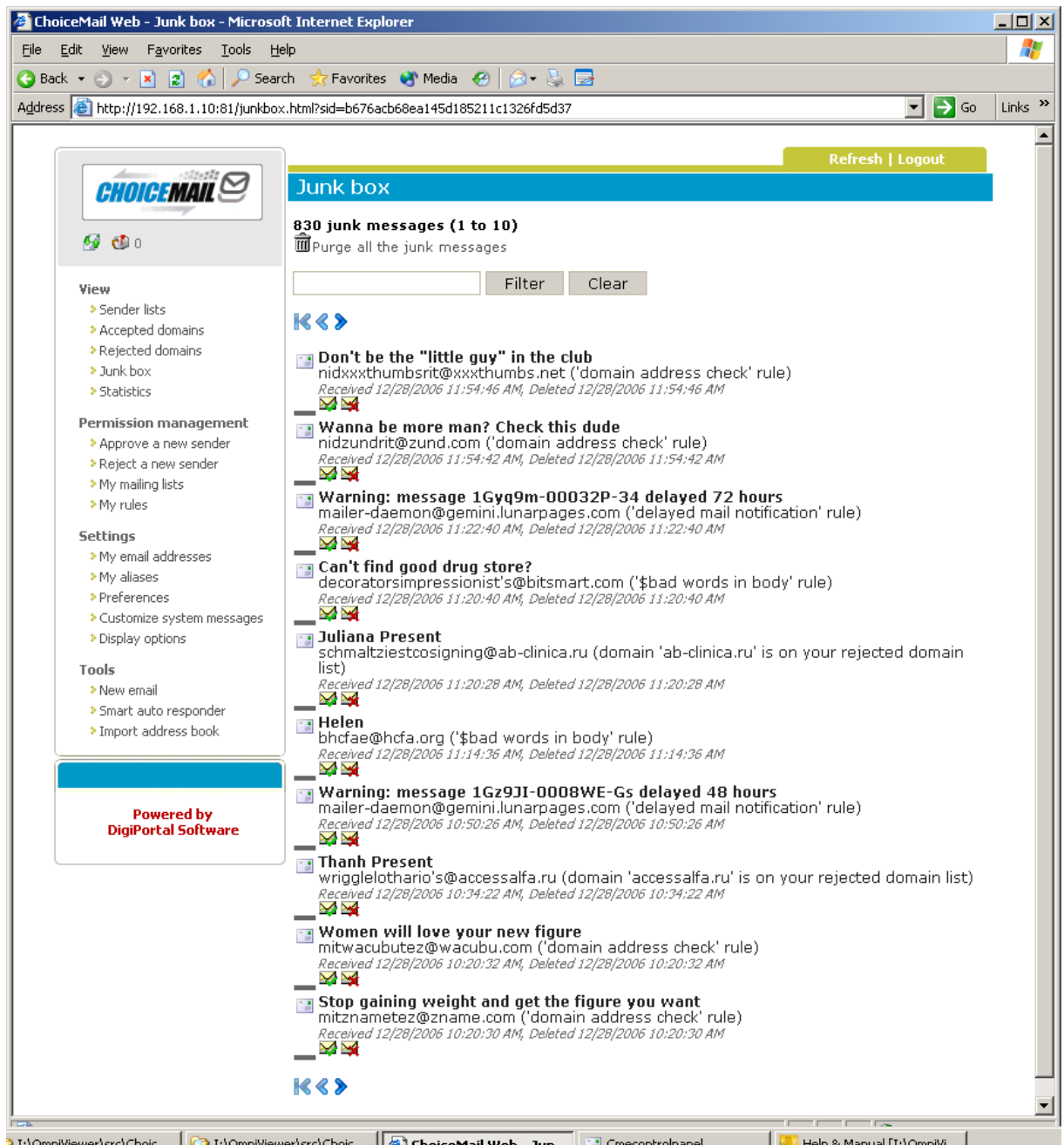
Unknown Senders list. This means that ChoiceMail did not recognize the address in the TO field as one belonging to you. When an incoming email has a TO address that ChoiceMail does not recognize as belonging to you, ChoiceMail does **not** send a registration request to these senders. Typically these messages are from a mailing list, and the registration request would be sent to everyone on the list, in essence spamming the entire mailing list. You must manually approve a message with the BCC icon. A better idea is to create a permission rule that automatically accepts email messages from this mailing list. See page 28 for details.

Note: *If all your incoming email is displayed with BCC icons, it is most likely that the email address you specified is not the email address that people are actually using to reach you. In that case, you should tell ChoiceMail about your other email address(es) that are being forwarded to your main addresses by using the alias feature. See page 38 for instructions.*

6 The Junk Box




When a message comes in, ChoiceMail needs to determine what to do with it. By examining the message headers, your existing whitelist and blacklist, and any permission rules you may have created, ChoiceMail can determine whether the message should be passed through to your email application, blocked pending registration (for cases when a registration request is sent back), or actually deleted.

When ChoiceMail deletes a message, it moves the message to the Junk Box as a safety measure. Some users like to be able to review the messages scheduled for permanent deletion, to make sure that nothing important is deleted by mistake (though this is a very unlikely occurrence). You can review the contents of the Junk Box at your convenience by clicking the **Junk box** link on the ChoiceMail menu. Messages are deleted from the Junk Box after 4 days – you can change this time period by setting a preference. See page 37.




The Junk Box displays the kind of message, the date the message was received, the date the message was moved to the Junk Box, the sender's email address, the subject line, and the reason why the message was deleted.


The Junk Box lets you perform several tasks:

	Accept Message	Click to accept the selected message. ChoiceMail undeletes the message and makes it available to your email application's inbox.
	Reject Message	Click to permanently delete the selected message.
	Purge Junk Box	Click to permanently delete all the messages in the Junk Box. Filter allows you to search your junk box. Type in the search term and click on the "Filter Button. Click "Clear" To clear the current search term.

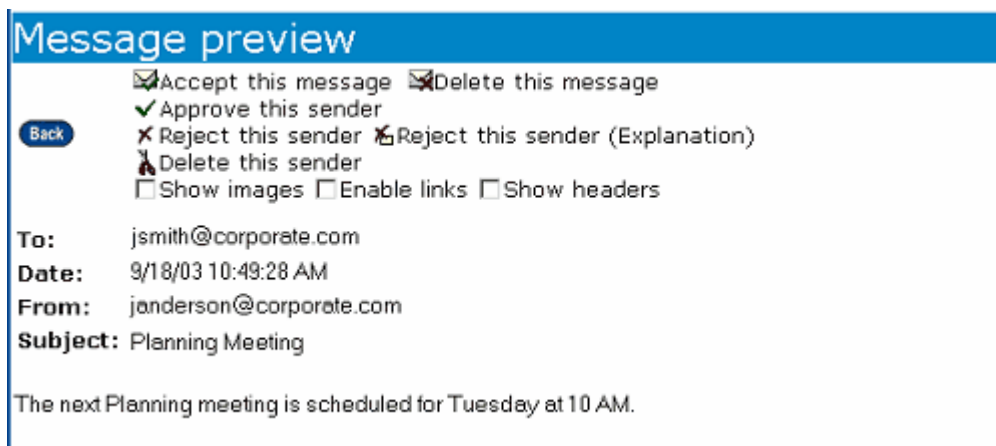
7 The Safe Message Preview Window

When you open a message while on the *Unknown Senders* page, the *Registered Senders* page, or the *Junk Box* page, ChoiceMail opens the *Safe Message Preview* page so you can safely view a message without alerting a spammer or launching a virus. **Click the subject of the message to open the message in the Message Preview page.**

ChoiceMail Small Business also lets you view your incoming messages right from inside ChoiceMail, so you don't have to open your email application to see your latest messages. When you have messages waiting, the **New Messages** indicator  above the menu indicates how many messages are waiting. Double-click this icon to see a list of the new messages waiting for you.

From the *Unknown Senders* page or the *Registered Senders* page, click the **Show Message Information** button  on the toolbar to see subject information about the emails sent by all the senders in the list. (You can also click the sender's email address to see subject information about a message.) Then click the message's subject to preview it. From the *Unread Emails* or the *Junk Box* page, click the message's subject to preview it.







The *Safe Message Preview* window lets you preview a complete message before deciding whether to permit the message into your email program, or whether to delete it.



Previewing a message through ChoiceMail is private, meaning that you can view a message without sending any information back to the sender. When you preview a message, any images that might be in the message are intentionally not available, because the very act of retrieving a secondary image from a web server is sufficient to send back information that allows a sender to identify your email address. Because ChoiceMail does not retrieve images, "webbugs" – those invisible images that let a sender know that you are looking at a message – are blocked. Nor will the *Safe Message Preview* page let any attached executable be triggered, so you are not at risk of launching a virus. Previewing a message with the *Safe Message Preview* page means that you don't need to worry about your privacy being invaded without your knowledge, nor do you need to worry about letting lose a virus on your computer.

The *Safe Message Preview* page lets you perform several tasks:

Note: *The Accept Message and Delete Message buttons do not display when you open the Safe Message Preview page from the Unread Emails page because all the messages in this list have already been accepted.*

	Accept Message	Click to accept the selected message. ChoiceMail passes the message through to your email application's inbox.
	Delete Message	Click to delete the selected message.
	Approve Sender	Click this button to approve a sender in the <i>Unknown Senders</i> list or the <i>Senders Waiting for Your Approval</i> list. ChoiceMail adds the sender's email address to the whitelist and accepts all email messages from this sender.
	Reject Sender	Click this button to reject a sender in the <i>Unknown Senders</i> list or the <i>Senders Waiting for Your Approval</i> list. ChoiceMail adds the sender's email address to the blacklist and deletes all email messages from this sender.
	Reject Sender and Send Email	Click this button to reject a sender in the <i>Unknown Senders</i> list or the <i>Senders Waiting for Your Approval</i> list. ChoiceMail adds the sender's email address to the blacklist, deletes all email messages from this sender, and sends a response to the sender. ChoiceMail prompts you for a rejection reason that will be sent with the response.
	Delete Sender	Click this button to delete the sender from ChoiceMail. The sender's email address is removed from all ChoiceMail lists. If this sender sends you another email, ChoiceMail will send an automated registration email as if it were the first time this sender has contacted you.
<input type="checkbox"/> Show images	Show Images	Select the <i>Show images</i> checkbox to display the images in an email message. You should not use this unless you are certain you know where the message came from.
<input type="checkbox"/> Enable links	Enable Live Links	Clicking URL links in the <i>Safe Message Preview</i> page is disabled by default, even though you can see the URL link in a message. Opening a webpage from an email message may send information back to a spammer that your email address is valid. If you really want to view the webpage, select the <i>Enable links</i> checkbox and then click the desired link. Your default web browser opens to the appropriate webpage. The next time you open the <i>Safe Message Preview</i> page, the <i>Live links</i> feature is again disabled, to prevent you from accidentally opening a spammer's webpage.
<input type="checkbox"/> Show headers	Show Headers	Select the <i>Show headers</i> checkbox to view the header information for the message, to see where it came from.

Note: When you preview a message from the Junk Box, you can only accept or delete a message. You cannot reject or delete a sender from the

Junk Box *page*.

8 Permission Management

The Registration Process


A key mechanism ChoiceMail uses to protect you from junk mail is to require a sender to register with you. This process is almost completely automatic from your perspective.

Let's assume that you have not yet created any permissions manually or imported any existing contacts. A sender whose email address is **person@someplace.com** sends you a message. ChoiceMail will note that it does not already have a rule about this sender and/or the contents of the message. It will therefore place that sender on the *Unknown Senders* list and send an automatic reply back to the sender, requesting him/her to register. The email is stored temporarily pending receipt of that registration. Your email system does not see the email at this time.

Because most junk email is sent using fake email addresses, the steps above are sufficient to eliminate all automated junk email messages. The registration requests will simply fail to go anywhere, and the sender's email is eventually deleted from ChoiceMail.

If the return email address is valid and the original sender receives the registration message, then that sender has a certain amount of time to register before the message is deleted. (The default is four days but you can change this to suit your own needs.) The sender registers by going to a webpage and filling in a form explaining who s/he is and why s/he wants to contact you. The sender must also type some numbers displayed in a graphic. The submitted form is then sent to ChoiceMail for processing.

If the sender cannot see the number due to some visual disability, s/he has the option to download an audio wave file that plays the number so that s/he can enter it. Requiring this number prevents automatic systems from responding to registration requests. At this point, ChoiceMail moves **person@someplace.com** from the *Unknown Senders* list to the *Registered Senders* list.






When a sender registers, ChoiceMail sends you an email to let you know a sender is waiting for your approval. Log in to ChoiceMail and click the **Senders Waiting for Your Approval**  button on the Senders toolbar to approve or reject the sender. (This button flashes red when a sender has registered.)

Senders

? [edit] [delete] [check] [reply] [reply all] [reply to sender] [reply to sender]

1 sender waiting for your approval

[edit] [check] [x] [trash] [lock] [lock] [lock] [lock]	
jsmith@myisp.com	Smith, John
<i>Registered 9/17/2003 10:36:01 PM</i>	
<i>Reason: Meeting</i>	
[check] [x] Meeting	

	Approve the sender	ChoiceMail adds the sender to your <i>Approved Senders</i> list (the whitelist); all future messages from an approved sender are automatically passed through to your email application's inbox. You only have to accept a sender the first time you receive a message. Any other initial emails from that sender that were held up are also passed through to your email application.
	Reject the sender	ChoiceMail adds the sender to your <i>Rejected Senders</i> list (the blacklist); all future messages from a rejected sender are silently deleted. Any cached emails from this sender are also silently deleted.
	Reject the sender (with explanation)	You can reject a sender but send back a note, explaining why you won't accept the email – use only if you are feeling sorry for the sender. ☺
	Delete the sender	If you delete a sender, ChoiceMail treats that sender as if s/he never sent you anything in the first place. In particular, if the sender subsequently sends you another email message, s/he will get a new chance to register for approval. You very rarely need to explicitly delete new senders. ChoiceMail automatically deletes new senders that are not approved after a few days, unless you turn off this option, which is not recommended. Note: <i>If you delete a sender and s/he subsequently submits a registration request, that request will be silently deleted. All pending email messages are also deleted when you delete a sender.</i>
	Allow all messages from the sender's domain	You may decide that you want to accept all messages coming from a particular domain. We don't recommend that you do this very often because it is so easy for junk email senders to fake a domain address. For example, accepting all email from yahoo.com is probably a bad idea because many spammers use yahoo.com or fake the yahoo.com domain in their junk email. There is one situation where you may want to accept a domain. If you have a newsletter subscription from an organization or through a list server, you may want to accept the domain of that senders so that all the email

9 Message Rules

ChoiceMail lets you create rules that the program will use to make decisions about new emails automatically. Incoming email messages are processed against any email rules you've defined to determine their fate. When an incoming message (including the sender information) doesn't match any email rule, then ChoiceMail sends a registration request back to the sender.

Note that in most cases you don't need to create explicit permissions. If you've imported your existing contacts or address book into ChoiceMail, you've already preapproved all these senders. If you've also enabled ChoiceMail's ability to preapprove all email addresses to which you send an email (this option is set by default), then you can just leave it to ChoiceMail to manage unknown senders without your having to do anything.

On the other hand, you may want to add some explicit permissions to cover some special circumstances. For example, if you decide that any email coming from the domain 'junk.com' is unwanted email, you can add a rule that silently deletes incoming email from any sender from that domain. The only benefit of doing so is to stop ChoiceMail from sending registration requests to such senders (who are probably bogus anyway). ChoiceMail will automatically delete any registration requests that get bounced back to you.

You can choose to add a rule so that all incoming email messages containing a signature unique to your organization are automatically accepted, so that even if a sender from that organization is not already on your preapproved list, the messages will get through. Remember that you can manually preapprove an email address in advance if you're expecting a message from someone new and don't want them to go through the registration process.

Use the Accepted Domains feature with care. In general we do not recommend that you use this feature for well-known domains or even for your own domain. Spammers can easily fake a domain name and will often use well-known domain names in an attempt to get you to look at a message.

9.1 How Incoming Messages Are Processed

When ChoiceMail receives an email, it goes through a process to determine whether the email should be passed through to your email application.

1. Check the contents (sender's email address, subject, etc.) against the email rules

If there's a match with one of the rules, then apply the associated action (accept it, reject it, etc.). Note that you can change the order of rules to prioritize one over another.

2. Is this sender on our Accept list?

If so, pass the message through to the user's email application.

3. Is this sender on the Reject list?

If so, silently delete the message.

4. Is this sender on the *Unknown Senders* list?

If so, is the message a registration? If it is, display a message stating that a sender has just registered. The user can then decide whether to accept messages from this person.

If it's not a registration, then just hold it until the sender does register.

5. Is the domain of the sender in the Rejected Domains list?

If it is, just delete the message.

6. Is the domain of the sender in the Accepted Domains List?


If it is, pass the message through to the user's email application.

7. This sender is new!

If a sender doesn't fall into any of the categories, then the sender is new. Send an email back to the sender asking him/ her to register, add the sender to the *Unknown Senders* list, and hold the email pending registration.

ChoiceMail performs some other tests as well, to ensure that you don't receive bogus messages, such as a bounced-back registration request or a spoofed message pretending to come from your own email address.

9.2 Mailing Lists and BCC Messages

If you're on an email mailing list where the messages are from many different senders and the messages are sent to the same address, the To address usually has a list of recipients set up as BCCs (blind carbon copies). Because ChoiceMail doesn't recognize the To address as a legitimate address for you, it holds these messages in the *Unknown Senders* list with a BCC icon  – you must manually approve these messages because ChoiceMail does not send out a registration request, to avoid spamming the entire mailing list.

You can avoid this situation by creating a rule to accept the messages, or approve the senders, of email messages that come in with an unknown To address that

uses a BCC list.

- Select *To* from the *Rule condition* drop-down list and enter the email address the mailing list uses in the *To* field. Select what you want ChoiceMail to do with the messages – accept the message or approve the sender. Enter the name of the mailing list as the Rule Name.

Now all the messages from this mailing list will be automatically accepted and will not display in your *Unknown Senders* list. (See page 16.)

Permission rule details
Automatically accept messages from unknown senders where the **To** line contains 'list@mailinglist.com'

Rule name
Mailing List

Rule condition
To

To line contains people (One name or e-mail address per line)
list@mailinglist.com

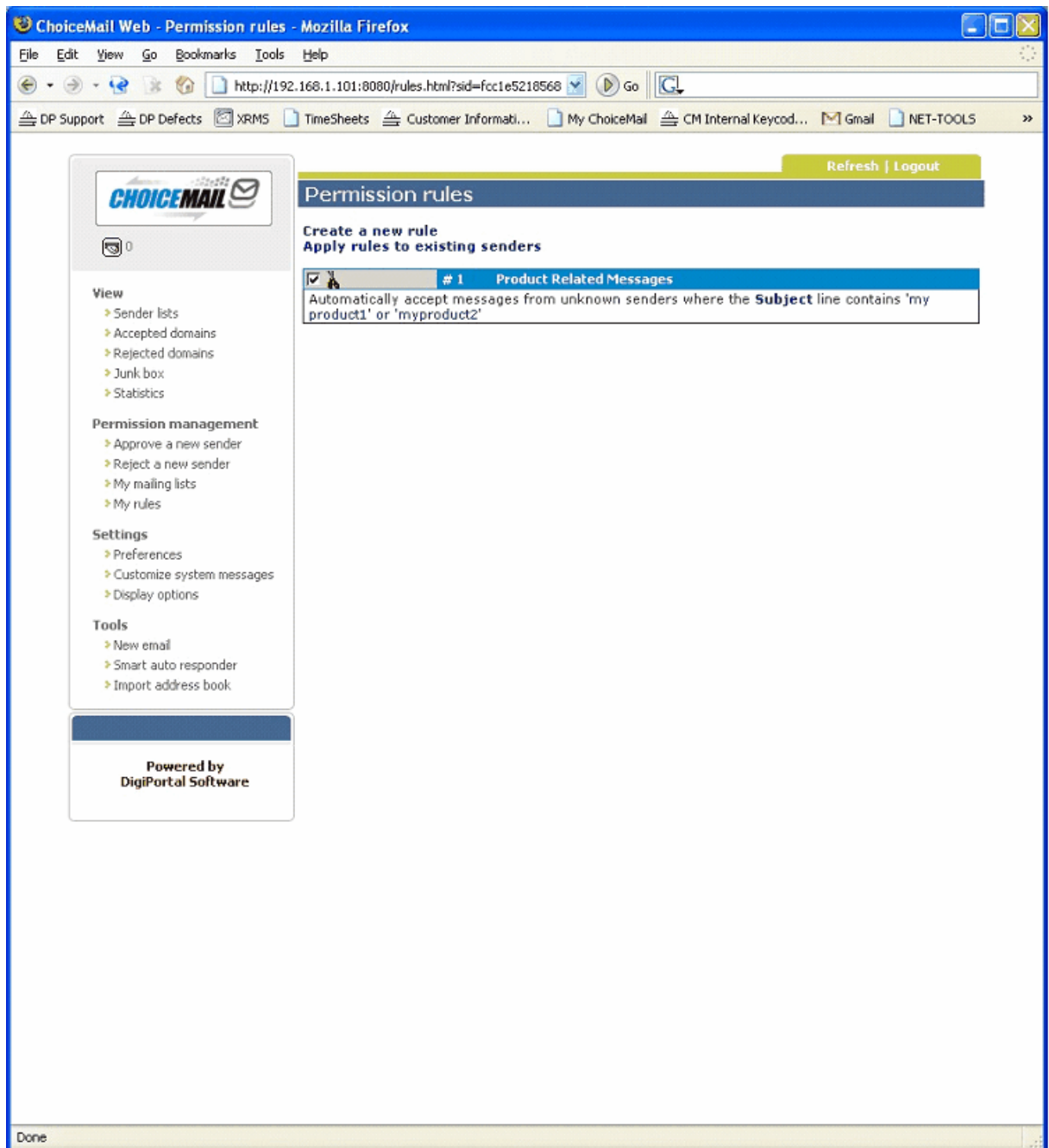
Add another header

Rule conditions logic
 Match all of the conditions Match any of the conditions

Rule action
 Accept message Delete message
 Approve sender Reject sender Delete sender

9.3 Adding an Email Rule

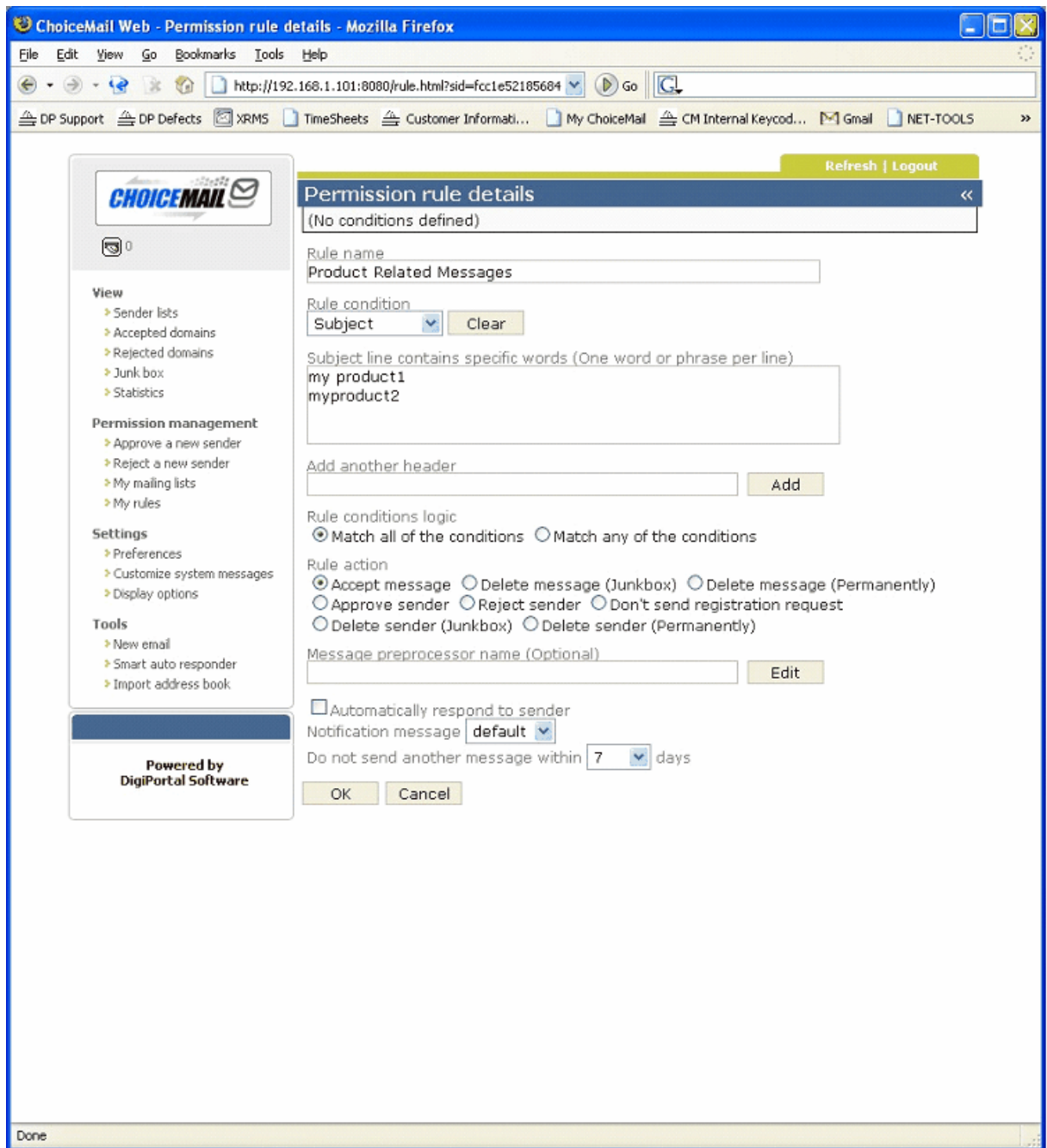
You can add new rules to automate the disposition of a new incoming email message. Click **Permission rules** on the ChoiceMail menu to open the *Permission rules* page.



Click the **Create a new rule** link in the **Permission rules** menu to open the *Permission rule details* page, where you can define and add your own rules for handling incoming emails.

- Type a name for this new rule. The name will display in the list on the *Permission rules* page.
- You can enter text for which you want ChoiceMail to search in any part of a message. Click the *rule condition* down arrow and select the part of the message from the drop-down list: From, Subject, Body, To, Cc, or To or Cc.

- Type the desired text. For example, in the *From* field, enter a name or an email address (one name or address per line). In the *Subject* or *Body* field, enter a word or phrase (one word or phrase per line). You can enter text in multiple fields.
- You can create rules that look for specific headers in an incoming email. See page 29 for details.
- If you've entered text in more than one field, you must decide if you want the rule to trigger even if only one condition matches, or if you want the rule to trigger only when every condition matches. Click the appropriate radio button: *Match all the conditions* or *Match any of the conditions*.
- In the *Rule action* section, click the appropriate radio button to determine what ChoiceMail should do with the email message when it matches the conditions you've set:
 - Accept the message
 - Delete the message
 - Approve the sender
 - Reject the sender
 - Delete the sender
- Automatically respond to a sender option allows you to send a pre-defined message to the sender if the rule conditions match. The messages can be defined on the same page as your away messages. You can then select the message from the drop down box and select if the message should not be sent again within certain number of days.



ChoiceMail displays the conditions you've defined for this rule at the top of the *Permission rule details* page.

9.4 Other Headers

You can create rules that look for specific headers in an incoming email. Type the name of the header type for which you want to define a filter in the *Add another header* field. Click the **Add** button.

Rule condition
 From Clear

received header contains specific words (One word or phrase per line)

Add another header
 Received Add

Type the words you want to use as the criteria for this type of header.

Rule condition
 "received" header Clear

received header contains specific words (One word or phrase per line)

mail020.sys.uptusnet.com.au

Add another header
 Add

Complete the rest of the window as explained in the previous section. Although most headers can only appear once, the *Received* header can actually appear multiple times. If you use Received as your header name in an email rule, ChoiceMail makes a match with the content that appears in any Received header. You can specify individual Received headers by using the following notation: Received1, Received2, Received3, ... to refer to the first, second, or third Received header, starting from the top.

9.5 Special Keywords

ChoiceMail supports some special keywords that you can use to match messages whose content has been deliberately distorted by spammers to try and prevent filter systems from recognizing them as spam.

NOT – place it at the beginning of any permission rule to invert the meaning of the rule.

(me) – translates to mean any email address defined in POP3 or ALIASES. You can use this to keyword see if any of your own email addresses are in any of the fields of a message.

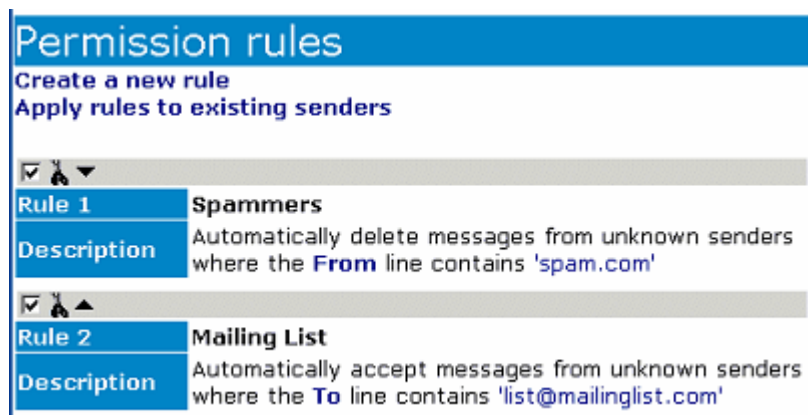
(email address in whitelist) and **(no email address in whitelist)** – you'll typically use these special keywords in the BODY section of a permission rule. Use them to check whether an email address in the body of the message is (or is not)

in your whitelist. These are most often used in a permission rule where the FROM address contains 'postmaster@' or 'mailer-daemon@' so you can block spoofed system messages.

Note: A complete description of the Add another header feature is beyond the scope of this document, and requires detailed knowledge about how email messages are constructed. DigiPortal Software cannot provide technical support on this topic. A few additional instructions regarding special keywords are included in the Tips and Tricks section on page 44. You can also check the ChoiceMail online help for additional information – see *Email Rules, Special Keywords, Regular Expressions, and Transform Rules*.

9.6 Managing Your Message Rules

Once you've defined a message rule, it displays in the list in the *Permission rules* page.



- Click the **Create a new rule** link to add another rule.
- Click the name of a rule to open the *Permission rule details* page and edit the conditions of a rule.
- Select a rule and click the **Delete** button to delete it.
- Clear the checkmark next to a rule to disable it. Select the checkmark again to enable it.
- Click the **Apply rules to existing senders** link if you want ChoiceMail to apply the rules you've defined to senders who've already sent you an email.

Setting Priorities

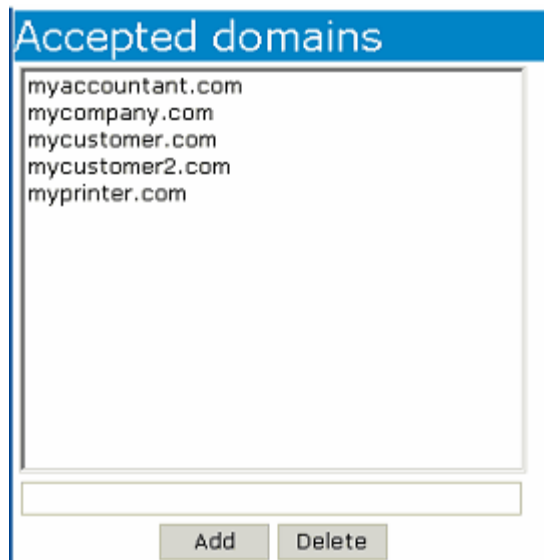
ChoiceMail executes email rules in the order they appear in the list. Select a rule and click the **Move Up** or **Move Down** button to change a rule's position in the list. Keep moving rules until you have the rule priority list you want.

10 Managing Domains

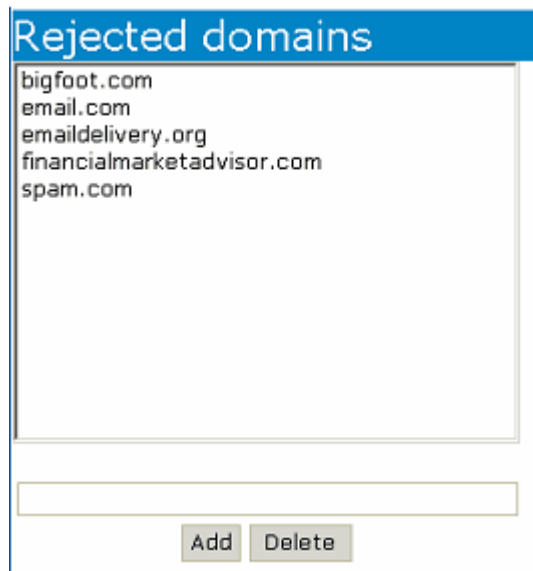
Accepting or Rejecting Email Based on Domains

You can tell ChoiceMail to accept or reject all email messages whose address matches a particular domain. Most of the time, you'll want to reject a domain. Although it is not strictly necessary to do this to prevent spam from reaching your email inbox, rejecting certain domains known for being originators of spam will reduce the number of unknown senders that appear on the list in ChoiceMail.

- To accept all email from a domain, click the **Accepted domains** link on the ChoiceMail menu. Type the name of a domain in the field at the bottom and click **Add**.



- To reject all email from a domain, click the **Rejected domains** link on the ChoiceMail menu. Type the name of a domain in the field at the bottom and click **Add**.



You can add a complete domain, a subdomain, or a partial domain. You can also use wildcards to specify a group of similarly named domains.

Examples:

- 1) Suppose you receive an email from **foo@junk.email.com** and you want to block all emails coming from **junk.email.com** in the future. Just enter **junk.email.com** in the edit field and click the **Add** button. ChoiceMail tells you when you've entered a valid domain name.
- 2) Blocking mail from **junk.email.com** will not prevent you from getting email messages from the domain **spam.email.com**. However, rather than adding this new domain to the list, you can remove **junk.email.com** and replace it with **email.com**.
- 3) Now, a minor problem blocking **email.com** is that this will block all messages that end with email.com, which means that a message coming from **yourfriend@myemail.com** would also be rejected. If you don't want this to happen, change **email.com** to **.email.com** (note the period in front of the domain name).
- 4) Sometimes a spammer using fake domains will use a related group of domains such as **email1.com**, **email2.com**, **email3.com**. In this case it's clearly not practical to add each domain separately. Instead, the solution is to specify the domain using a wildcard. ChoiceMail accepts two kinds of wildcards.
 - Use the question mark **?** to represent any single character.
 - Use the asterisk ***** to represent a variable number of characters (including none).

So specifying **email?.com** will block any messages whose domain ends with the name **email** followed by any single character. A specification of **email*.com** will block **email.com** itself as well as domains such as **email123.com**, **emailxyzy.com** and so forth.

Blank Domains

Sometimes spammers send emails without any domain at all. You can automatically block emails with no domains by specifying **(none)** as the domain name. Please note that the parentheses are required.

11 Account Settings

ChoiceMail provides a variety of preferences you can set. Click the **Account Settings** link on the ChoiceMail menu to open the *Account settings* page.

Account settings
You are presently logged in as "jsmith"

- Automatically check for e-mails
- Auto approve someone if I send them an email first
 - Also approve my CC list
 - Also approve my BCC list
- Change private message code
- Delete bounced back registration request e-mails
- Always accept mail system messages (Recommended)
 - Verify mail system messages (Recommended)
- Auto-delete unknown senders after day(s)
- Limit the number of e-mails from unknown senders to
 - Auto reject senders who exceed this limit
- Delete unverified messages from self (Recommended)
- Never send registration requests to unknown senders
- When sending of registration request fails, delete the sender (Recommended)
- Place e-mails in the Junk Box when deleted
- Delete message from the Junk Box after day(s)
- Send a notification e-mail when a sender registers
- Ask for confirmation before deletions

11.1 Approving New Senders To Whom You Are Sending an Email

Your email application is configured such that your outgoing mail messages are processed through ChoiceMail. This is done so that, when you send an email to someone with whom you have not previously corresponded, ChoiceMail can preapprove that sender so that the sender does not have to register when replying to your message. We recommend that you leave this option enabled. You

can also automatically approve people on your CC list and/or on your BCC list.

11.2 Managing Emails With Your Own Email Address


When a group of people correspond using a CC list, it's sometimes the case that you will end up sending a message to yourself. Normally this is not a problem. Unfortunately, you may run into a situation where a spammer tries to get a junk email through to you by making it look like that message is coming from your own email address. To guard against this situation, ChoiceMail adds an extra header to all outgoing email messages that are sent to yourself. When an incoming email from "yourself" is received, ChoiceMail will check that header to verify that the message was indeed sent by the real "you." In the extremely unlikely event that a spammer manages to discover that code, you can easily change it to a new random string by selecting the *Change private message code* checkbox. (See also Alias and Mail List Settings on page 38.)

11.3 Checking for New Email

By default, ChoiceMail connects to your mail server(s) every 10 minutes to see if new emails are available. Depending on your needs, you may want to disable automatic checking. Clear the *Automatically check for emails* checkbox to turn off this feature. You can get new email messages manually from within your email application.

11.4 Dealing With Bounced Back Registration Requests

Because most spammers use bogus email addresses, there is a strong possibility that the automatic registration request sent out by ChoiceMail will simply be bounced back, along with an error message. Most of the time, you won't want to see these messages, and ChoiceMail can recognize that an incoming email is in fact a bounced registration request and delete it silently. We recommend that you leave the *Delete bounced back registration request emails* option selected. Sometimes the server at the other end returns the bounced message in a changed format, so that it's no longer recognizable to ChoiceMail as a registration request. In these cases, you often receive a message from a server whose email address is something like postmaster@somedomain.com or admin@somedomain.com. ChoiceMail will send a registration message right back to them, and the bounced message will just sit in your *Unknown Senders* list until it's automatically deleted. If you are reviewing your *Unknown Senders* list from time to time and you see a message from Postmaster at a domain (or something similar) to which you recently (typically within 10 minutes) sent a message, you may want to look at the message. It's most likely telling you that you mistyped the name of the recipient so that it's not known at the other end.

(To accept an individual message, click the sender's email address to see the individual email messages associated with the sender. Then click **Accept message**  button. This option lets that message only be passed through to your email system while leaving the sender on the *Unknown Senders* list. You can also click the message's subject to read it in the *Safe Message Preview* page.)

11.5 Always Accept Mail System Messages

Although you don't want to see bounced registration messages (which are really just mail system messages), you will probably want to see other system messages. For example, if you send an email to someone and mistype their email address, the message will be bounced back and you need to know about it. We recommend that you leave the *Always accept mail system messages* checkbox selected.

Some spammers are starting to send bogus system messages in an attempt to get through to you. Selecting the *Verify mail system messages* checkbox causes ChoiceMail to check the body of the system message to see if the message is related to an email that you actually sent out. If it's not, then ChoiceMail deletes the message.

11.6 Automatically Delete Unregistered Senders after x Days

ChoiceMail holds up mail from new senders until the sender submits a registration. The senders themselves are listed in the *Unknown Senders* list so you can review them if you wish to manually add senders to your Preapproved list. Assuming that legitimate senders will register or be preapproved by you, this list will essentially contain only junk mail senders.

Select the *Auto-delete unknown senders* checkbox to cause new senders to be deleted automatically after a specified number of days. Type in a new value or use the up/down arrows to specify the number of days.

ChoiceMail deletes any pending email from that sender when it deletes the sender (Note that this does not apply to individual email messages from that sender that you have already accepted, because those messages have already passed through to your email application.)

Note: Once ChoiceMail deletes a sender, s/he will again receive a new registration request if s/he sends you another email message.

11.7 Limit the Number of Emails from Unknown Senders

It's possible that a spammer will send you lots of messages, trying to fill up your mail box. You can configure ChoiceMail to silently (i.e., without telling the sender)

stop accepting emails from a particular sender after a certain number of messages have been received. Note that even though these emails have been received by ChoiceMail, they are still not visible to your email application, so you don't have to worry about them. Select the *Limit the number of emails from unknown senders* checkbox and type in a number or use the up/down arrows to specify the number of emails.

You can also tell ChoiceMail to automatically reject a sender if that sender has sent more than this number of messages without registering.

11.8 Delete Unverified Messages from Self

By default, ChoiceMail silently deletes email messages from your own email address if it cannot verify that you were in fact the sender. Some users may choose to allow such messages to be received all the time. Deselect the *Delete unverified message from self* checkbox to disable ChoiceMail's verification process. We do not recommend that you disable this option but, if you do, please don't contact us to complain about spam coming in from your own email address!

11.9 Never Send Registration Requests to Unknown Senders

If you prefer to review all new messages before ChoiceMail sends any registration requests, you can disable the automatic registration process by selecting the *Never send registration requests to unknown senders* checkbox. In this case, you can look through the *Unknown Senders* list at your convenience, accepting the ones you know are real, and then re-enable the registration process. When you re-enable registration, ChoiceMail prompts you to see if you want registration requests sent to the remaining unknown senders.

11.10 When Sending Registration Request Fails, Delete the Sender

In general, if ChoiceMail could not send a registration request, it's because the outgoing email address was bogus, usually indicative of a spam email. Leave this checkbox selected to allow ChoiceMail to automatically delete messages when a registration request cannot be sent. (Note that automatically-deleted messages will still be available in the Junk Box.)

11.11 Place Email Messages in the Junk Box When Deleted


ChoiceMail maintains a Junk Box in which messages that have been deleted are temporarily stored (see page 17.). The Junk Box feature gets messages out of your way but still lets you review them if you so desire. Clear the *Place email message in the junk box when deleted* checkbox if you want to bypass the Junk

Box and have ChoiceMail permanently delete email immediately.

11.12 Delete Messages from the Junk Box after x Days

You can control how many days deleted email stays in the Junk Box before ChoiceMail permanently deletes it. Typically 2 or 3 days is sufficient. We highly recommend that you leave this option enabled. Type a value or use the up/down arrows to specify the number of days.

11.13 Send a Notification E-Mail When a Sender Register

ChoiceMail can send you an email message, informing you that a sender has registered. When you receive the email, log in to your ChoiceMail account and click Senders on the menu. Then click the Senders Waiting for Your Approval button .

11.14 Ask for Confirmation Before Deletions

Select this checkbox if you want ChoiceMail to display a confirmation message before deleting a message.

11.15 POP3 Accounts

In a future version of ChoiceMail, you will be able to configure additional POP3 accounts, so that ChoiceMail Once can retrieve messages from multiple accounts, in addition to your corporate account. This option is currently disabled.

12 Email Aliases

Your email administrator has set up your ChoiceMail account to use your regular email address(es). If you send a message that includes your own email address as one of the recipients, ChoiceMail automatically adds an extra header to the copy of the message that will be sent to you. This is so that if an incoming message arrives that purports to be from you, ChoiceMail can check whether it is indeed your message and not a spammer trying to send you a message that looks like it came from you.

ChoiceMail already knows about your real email addresses because they were added when the system was set up. However, if you have created email address aliases, you need to tell ChoiceMail about them so that it can recognize them as

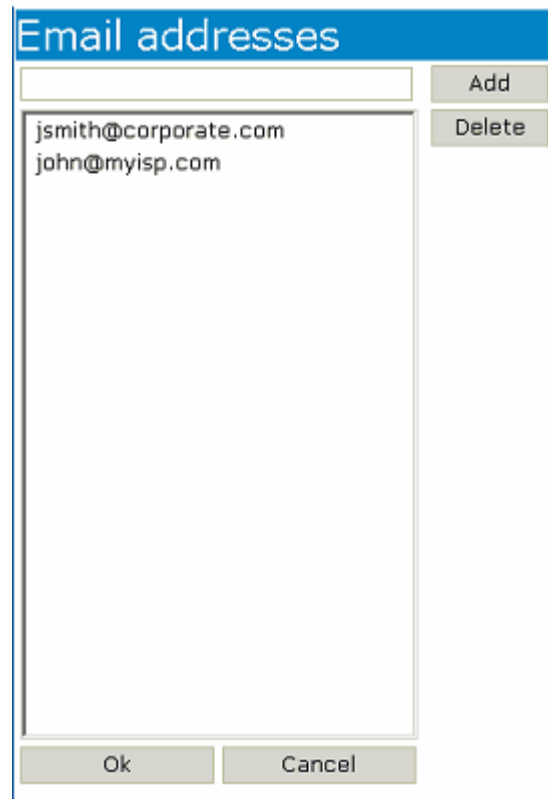
well.

For example, if your real email address is jsmith@someisp.com, you'll have this email address already set up in ChoiceMail. If you send a message to jsmith@someisp.com, ChoiceMail adds your private header so that when you receive the message, it is recognized. Now suppose you have another email address, john@yourowndomain.com, that you give out to certain people. Mail sent to that address is forwarded to jsmith@someisp.com. The question is, what happens if someone tries to send a message to you that is "apparently" from one of your aliases? If ChoiceMail did not know about your aliases, it would see that message as a new sender and send a registration request out. You might also manually accept the message, thinking it was something you sent out yourself.

However, if you provide your aliases to ChoiceMail, then it can detect both of these situations, checking for the secret code that is embedded in all messages that come from you and sending a normal registration request to other people who contact you using these other email addresses.

ChoiceMail does not support wildcards in aliases. In other words, if you have a domain configured so that email sent to any user at that domain should be forwarded to you, you cannot tell ChoiceMail to recognize all these users. This was done by design and will not be changed. Although it's easy for spammers to find out domain names, it's a little harder to find legitimate email addresses within those domains. If your ISP allows ALL email messages to come through, you are simply making it easier for spammers to get through to you. You should define the specific email addresses that are relevant for your domain and have your ISP's email server reject all other email. There is no reason whatsoever for a legitimate sender to be trying to contact you at an arbitrary email address.

- Click the **Email Addresses** link on the ChoiceMail menu.
- Type your alternate email address in the edit box and click the **Add** button.
- Click **OK** when you're done.



13 Mailing Lists

You should also tell ChoiceMail about any mailing lists to which you subscribe. Some mailing lists send out messages from a variety of senders, and you don't want to send a registration message to everyone on a mailing list. By defining each of your mailing lists, all the messages from the participants in the list will be automatically passed through to your email application.

- Click the **Mailing lists** link on the ChoiceMail menu.
- Type the email address of the mailing list to which you subscribe in the edit box and click the **Add** button.
- Click **OK** when you're done.



14 Message Customization

You can customize the messages that ChoiceMail sends to unknown senders using the *Messages customization* link on the ChoiceMail menu. Select which message you want to change – the registration request message or the acceptance message – by clicking the down arrow and selecting the message type from the drop-down list.

Messages customization

Registration request message ▾ Show preview Reset to default

Hello, you recently sent a message to

[Recipient email address] or [Alternate From address]

.
 I am now using a mailbox protection system called ChoiceMail One to block unsolicited junk mail. Because you are actually reading this note, it is highly unlikely that your message to me was in fact unsolicited. However, I regret that I do not

Include registration link
[Registration page url]

When your browser opens, fill in your name and a short reason for wishing to send e-mail to me. Your message will be delivered to me after I review this information.

 There is no need to send your original message again.

Include the "unregistered senders auto-delete" notice below
Please be aware that a response is required within 4 day(s) to prevent your messages from being automatically deleted.

Use alternate From address

OK Cancel

14.1 Registration Request Message

The registration request message is the first message that an unknown sender will see. Certain mandatory components of the message are always included, including your email address and the registration URL. You can change the text around those mandatory items by editing the three visible fields. Under normal operation, leave the *Include registration link* checkbox selected.

Clear the *Include registration link* checkbox only if you want to use your own authentication mechanism rather than the ChoiceMail registration URL. In this case, ChoiceMail will not include the registration URL in the registration email it returns to new senders, and you must provide your own method for new senders to contact you for permission. DigiPortal Software cannot provide technical support or otherwise help you create your own authentication scheme. If you do decide to use your own authentication, make sure you edit the outgoing message accordingly.

You can also specify whether to include the warning that emails from unregistered senders are deleted after a certain number of days (depending on how many days you specified in the *General* tab).

Acceptance Message

Once you approve a sender who has registered, ChoiceMail sends an acknowledgement, along with mandatory references to the previous emails they sent you. You can edit the text of the acceptance message to suit your taste.

Click the **Show preview** button to open a *Message Preview* window to see what the edited message looks like. Click the **Reset to default** button to remove your edits and return to the default message.

Hiding Your Email Address

You can also hide your real email address when ChoiceMail sends out a registration message. You might want to hide your real email address to:

- prevent your real email address from being validated as "live" by spammers
- reduce the number of bounce-back messages
- prevent a potential spam trick where a spammer could recognize that a challenge were coming and simply respond with a new spam using a new fake From address, thereby attempting to fill up your POP3 inbox

To hide your email address, select the *Use alternate From address* checkbox. ChoiceMail and type your real name.

Use alternate From address

John Doe

Note: *It's important that you enter your real first and last name, which will be included in the registration email. Otherwise, legitimate senders will not be able to tell who is sending the registration request.*

ChoiceMail will send the registration request with your name in the message rather than your real email address. ChoiceMail uses a donotreply@choicemail.one.com address, which doesn't exist, and fills your real name in the email instead of your email address. Throughout the entire registration process, the unknown sender never sees your email address, just your name.

15 Sending an Away Message

You can configure ChoiceMail to send a message back automatically to people who are already on your whitelist or who have otherwise been approved. Note that this

is completely different from the registration request message that is sent to unknown senders.

An Away message can be useful if you will be away from your system for a while and would like people on your whitelist to be aware of this, or if you want to tell them about alternate ways of contacting you. Senders only receive a response the first time they send you an email message after you enable the auto-responder. Select the checkboxes next to the senders whom you want to receive an automated Away message when they send you an email:

- an approved sender
- a sender from an approved domain (such as a member of a mailing list)
- a sender approved by a permission rule
- a sender of an email message that was approved by a permission rule

Away message

Send away message to:

- An approved sender
- A sender from an accepted domain
- A sender approved by rules
- A sender of a message accepted by rules

Away messages

default

Delete

Selected away message

I'm away from my desk but will respond to your email as soon as I return.

Show preview Turn on away message

You can edit the default message or create a new one. Type a name for the new message and click the **Add** button. Select the new name and enter the text of the message in the bottom edit box. Then select the name of the Away message you want to use.

Click the **Show preview** button to open an *Away Message Preview* page to see what the edited message looks like. Click the **Reset to default** button to remove your edits and return to the default message.

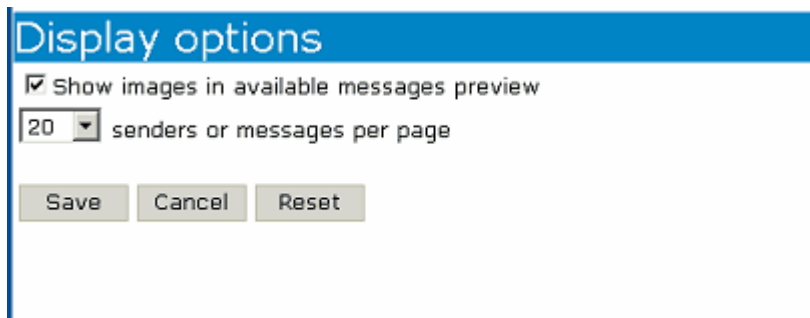
You can enable and disable the Away message by clicking the **Turn On Away**

Message button. ChoiceMail displays a flashing Away icon to remind you that you've turned on the Away message.



16 Display Options

ChoiceMail One lets you set several display options. Click the **Display options** link on the ChoiceMail menu.



Show Images in Message Preview Page (Multi-User System Only)

Select the *Show images in available messages preview* checkbox if you want ChoiceMail to display images in the incoming messages you view in the *Message Preview* page. (These are the messages that ChoiceMail has approved but has not yet sent to your email inbox.)

Limit Number of Senders/Messages Per Page

By default, ChoiceMail One displays 20 senders or messages on a page. You can customize this number. Type in a new number or click the up/down arrows to specify a different number of items per page.

17 Tips and Tricks

The First Week or Two

You will probably find that you want to monitor your incoming email for a while to see what's going on and, as one user put it, "[to] enjoy looking at the ChoiceMail list of new senders to see who is not getting through."

There may be some senders whom you recognize and choose to preapprove in advance. In particular, if you have any online newsletter subscriptions, you will want to preapprove them the first time they come in so that all future messages are allowed through. See below for more details on newsletters and other automated services. Once you have configured ChoiceMail to your taste, you will find that you can simply forget it's there.

Just leave it in the system tray and never be disturbed by unwanted email again.

17.1 Dealing with Newsletters

If you subscribe to various newsletters from well-known services, consider adding the domains of those emails to your Accept permissions list. Click the **Accepted domains** link on the ChoiceMail menu and add the domain here.

Note that you should only use this method if the actual email address of the sender is different each time you receive a newsletter from the same service. If the service always uses the same email address, then it's sufficient to just approve that particular sender.

For example, if you are subscribed to a news letter whose address is always something like subscribers@newsletters.com, then you can just approve that sender. Some services create new email addresses for each letter and so you may see a series such as a023949@newsletters.com, a91849@newsletters.com, b94829@newsletters.com and so on. In this case, add the domain 'newsletters.com' instead of approving each of these senders.

17.2 When You Purchase Something Online

When you purchase something from an online store, you will typically get an email notification from them soon after you make your purchase. If it is your first time dealing with that particular store, you may not know the actual email address used by the online store – sometimes the address will have the online store's own domain but some smaller vendors may use a 3rd party service for their e-commerce needs. Just monitor the *Unknown Senders* list for a while (sort by date, most recent sender first) and you will quickly recognize the legitimate email coming from your online vendor. You can then decide whether to approve that particular sender or their domain in general – the former is better as some vendor's email messages will come from domains that are frequently used by spammers.

17.3 Online Billing

The process here is much the same as with newsletters except, of course, that you may not know when your next bill will come in. If you already have an online account for your utility bill or your mortgage, check your existing email messages to find out the email address used by the billing company. You can then add that sender manually (see page 16),

17.4 List Servers

Some groups sharing a common interest set up a list server so that whenever a member of the group sends a message to the list server, it is automatically sent to each member of the group. Let's look at an example of a message from a list server. Here is a typical message from the Mid-Atlantic Linux User Group Mailing List.

X-Mailer: Novell GroupWise Internet Agent 6.0.2 Beta

```
From: Someone <someone@addressremoved.com>
To: <ma-linux@tux.org>
Subject: [ma-linux] Any user can't log in graphically
Sender: ma-linux-admin@tux.org
X-BeenThere: ma-linux@tux.org
X-Mailman-Version: 2.0.1
List-Help: <mailto:ma-linux-request@tux.org?subject=help>
<mailto:ma-linux-request@tux.org%3Fsubject=help>>
List-Post: <<mailto:ma-linux@tux.org>>
List-Subscribe: <<http://www.tux.org/mailman/listinfo/ma-linux>>,
<mailto:ma-linux-request@tux.org?subject=subscribe>
<mailto:ma-linux-request@tux.org%3Fsubject=subscribe>>
List-Id: Mid-Atlantic Linux Enthusiasts <ma-linux.tux.org>
List-Unsubscribe: <<http://www.tux.org/mailman/listinfo/ma-linux>>,
<mailto:ma-linux-request@tux.org?subject=unsubscribe>
<mailto:ma-linux-request@tux.org%3Fsubject=unsubscribe>>
List-Archive: <<http://www.tux.org/mailman/private/ma-linux/>>
Date: Mon, 24 Jun 2002 09:59:14 -0400
```

The body of the message

```
ma-linux mailing list
ma-linux@tux.org<http://www.tux.org/mailman/listinfo/ma-linux>
```

Below is what one of our users suggested as a way to handle this list server.

I would create rules such that, if ma-linux@tux.org was in the To: or CC: or [ma-linux] is in the subject field, then I would accept the message. However, I would probably feel it's OK to accept the sender. With this particular list, I would make the action be to accept the sender.

Now, if you're asking why I would add to the rule '[ma-linux] in the subject', here is why. If I decide to send a question to the list if I need help with something for some particular reason, while uncommon, sometimes people decide to send messages back to you directly. What I would say in my outgoing email is make sure to include '[ma-linux]' in the subject line, which is not too much to ask.

I would set the actions for the To: and CC: rules to "Accept sender" and the rule that recognizes the Subject: "Accept message."

Anyway, if someone sends a message to the list and I get it, I'm not worried about accepting those people because they have to be on the list to send a message. However, if I see that someone signed up and sent a spam to the list (which is unconventional, but has happened in the past, usually an on-topic spam), then I would just reject that email address.

17.5 Defining Mailing Lists

Consider the following email message received from a typical mailing list server:

```
From: Subba Rao <subba9@cablespeed.com>
To: DC Linux Users <dclug@tux.org>
Reply-To: Subba Rao <subba9@cablespeed.com>
Subject: [dclug] Linux gateway and home net clients
Sender: dclug-admin@tux.org
X-BeenThere: dclug@tux.org
X-Mailman-Version: 2.0.13
List-Help: <mailto:dclug-request@tux.org?subject=help>
List-Post: <mailto:dclug@tux.org>
List-Subscribe: <http://www.tux.org/mailman/listinfo/dclug>,
  <mailto:dclug-request@tux.org?subject=subscribe>
List-Id: Washington DC Area Linux Users Group <dclug.tux.org>
List-Unsubscribe: <http://www.tux.org/mailman/listinfo/dclug>,
  <mailto:dclug-request@tux.org?subject=unsubscribe>
List-Archive: <http://www.tux.org/mailman/private/dclug/>
Date: Mon, 19 May 2003 22:31:54 -0400
```

Notice a few things:

1. The message is from the actual sender... subba9...
2. The message is to the mailing list... dclug@tux.org
3. My email address, to which it's delivered, (roneill@linuxraw.com) is nowhere in the headers
4. Because this is a 'Mailman' list, there is a list-id header where dclug@tux.org --> dclug.tux.org is listed. (All mailman lists do this)

Now, if I added roneill@linuxraw.com to my current ChoiceMail now and received

this message, here is what would have happened BEFORE adding the mailing list stuff. The message would have come in to ChoiceMail and because subba9... is not on my whitelist, this would have been a BCC unknown message.

Now, AFTER adding the mailing list stuff, I could put dclug@tux.org in the mailing lists section, and because it recognizes the message is a mailing list message, it will allow it through.

This is processed after the whitelist/blacklist, so if someone is sending numerous annoying messages to the mailing list, you could always blacklist them. Also for anyone on your whitelist, that message will automatically come through.

This is processed before the rules because then it gives you a smaller set of messages to worry about with rules. Rules aren't processed before the whitelist, and to me mailing list is just kind of like adding the To or CC email address to your whitelist. Also, if you were concerned about messages on that particular mailing list (not well run), you could always leave that email address off the mailing list section and process it with a rule.

17.6 Spoofed Postmaster Messages

This is to dump postmaster messages that are not bounced-back messages. The idea was that if you send a message out, that person will be added to your whitelist, and if that message bounces back, the body of the message will contain the email address you sent it to, which is someone on your whitelist.

People can now add a rule (and it has been added to the default rules for future versions) which looks like this:

```
From:
  postmaster@
  mailer-daemon@
Body:
  (no email address in whitelist)
Rule Action:
  Delete sender
```

The rule above says that if an email arrives from a sender that starts with postmaster or mailer-daemon AND if the body of the message does not contain an email address that's on your white list THEN delete this message.

The parentheses around the words in the body text above indicate that those words mean something special to ChoiceMail. The entire sequence should be regarded as a single "token." Currently, there are three tokens available:

1) **(no email address in whitelist)**

Represents that the message does NOT contain an email address that is in your whitelist

2) **(email address in whitelist)**

Represents that the message DOES contain an email address that is in your whitelist

3) **(me)**

Represents that the message contains an email address that belongs to you. When using these special tokens, it's critical that you write them exactly as written or else they won't work. Note that these keywords can be used in any section. However the first two are most likely to be useful in the 'body' section and the third in the 'To' section.

18 Technical Support

DigiPortal Software Technical Support

Our home page is <http://www.digiportal.com> and technical support is available through our website.

The following URLs on our website should be helpful in answering many questions as well providing technical notes for special cases. These pages are growing continuously and you should check them often for updates. Animated tutorials are also available.

Support URLs

Direct access to the ChoiceMail support site and knowledgebase

<http://www.digiportal.com/esupport/uploadZend/>

Contacting DigiPortal Software

Please make sure you review our knowledgebase before submitting a support request. It is extremely likely that your issue has already been addressed. You may also want to contact the administrator in your company who is responsible for managing ChoiceMail.

In the unlikely event that your problem has not already been addressed on our website, and you do need to contact DigiPortal Software, please use the following URL to enter a trouble-ticket:

<http://www.digiportal.com/esupport/uploadZend/>

Glossary

Word	Meaning
Alias	An email address that does not have its own POP account but whose messages are automatically forwarded to some other POP3 account.
AOL Mail Protocol	A proprietary undocumented protocol used within the AOL environment.
Blacklist	A list of senders who are not allowed to send you email. In ChoiceMail, a Rejected Sender is black-listed. You rarely have to worry about explicitly black-listing senders. If they don't register, their emails will simply go away automatically.
Deleted sender	If you delete a sender, then the next time that sender sends you a message, they will be asked to register.
Domain	The characters that follow the '@' character form the domain of an email address. A domain name corresponds to an actual machine somewhere on the Internet that is able to accept email messages on behalf of the user whose name is the sequence of characters preceding the '@' character.
Email rules	You can add specific rules to override ChoiceMail's default behavior when new email messages are received. You can define rules that will accept, reject, or delete senders based on the content of incoming messages. It's normally not necessary to add specific email rules as the combination of your preapproved sender list and automatic approval of senders to whom you send messages is usually sufficient.
Exchange	A corporate email system implemented and supported by Microsoft
Firewall	Software or hardware whose purpose is to protect your computer from being accessed by people (or programs) without your permission.
IMAP protocol	A more recent Internet protocol for handling email messages. With the IMAP protocol, email messages always live on the server so that they are accessible in a synchronized manner from various devices. IMAP is often used within the Enterprise environment.
Localhost	A synonym for the IP address of your own computer. Its value is always 127.0.0.1
Permission-based email	An approach to managing email where the sender must get permission from the recipient before s/he can send any emails. This is traditionally done using white-list filters managed by the recipient. However, ChoiceMail greatly facilitates this process by requiring

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