CHOICEMAIL ONE

and

CHOICEMAIL FREE

The Unified Spam-Blocking System

Single User Guide

February, 2005

Version 3.0

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Introduction

ChoiceMail One is an email management solution that requires senders to get your permission before they are able to send emails to you. When an unknown person (called a new sender) sends an email to you (the recipient), ChoiceMail One prevents the email from reaching you at that time. Instead, ChoiceMail One 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, something an automated system cannot do. 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 One alerts you with a popup message; you can choose to allow or block the sender from communicating with you.

Design Goals

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

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

Target Users

ChoiceMail One Single User is for anyone who wishes to be able better to manage their email messages and not have to waste time dealing with unwanted email.

Main Features

ChoiceMail One includes the following features:

- Approval-based email management
- Easy installation – Installation wizards make setup and program management a snap
- Permission management
  - User-specific whitelist
  - Optional user-specific blacklist

- Unlimited user-defined rules to accept or reject certain types of email, such as newsletters

- Built-in rules that eliminate as much as 90% of spam

- Works with all POP-based email applications

- Supports secure password authentication (SPA) and SSL

- Supports multiple POP accounts owned by a single user

- Support for MSN, Hotmail, Yahoo and AOL (with IzyMail gateway, see page 17)

- Easy setup – allows "approved" listing to be generated from most of today's contact management software – Outlook Express, Eudora, and Outlook 98, and 2000 – 2003

- Safe previewing of messages without information being sent back to spammers

- Junk box – review automatically deleted mail

- Client-based for complete privacy

- Built-in lightweight email client

Benefits of Using ChoiceMail One:

- Increased productivity – no more wasted time rummaging through useless emails

- Hassle free operation – ChoiceMail One 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

- Affordable – ChoiceMail One is inexpensive, priced for today's consumer

- No annual membership – ChoiceMail One is not a subscription service

ChoiceMail is also available as a multi-user version for small businesses that do not maintain their own mail server, and as an enterprise version for organizations that do have mail servers. The enterprise version is platform-independent and supports virtually all corporate email environments. These products have all the features of the single-user solution but without the need to install a desktop client. They also support web access for remote browsers and wireless PDAs. Please contact sales@digiportal.com for more information about these products.

ChoiceMail Free vs. ChoiceMail One

ChoiceMail Free is identical to ChoiceMail One except for the following:

- Support for one POP3 account only

- Does not protect AOL, Yahoo, MSN, or Yahoo accounts

- Limited number of user-definable permission rules

- Smart Auto-Responder™ is not available

- Remote access is not available

- Challenge message is not customizable

- The lightweight email client is not available.

- Outgoing email messages are tagged

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.

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.

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 One, 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 One 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.

How you choose to deal with this is up to you. Many ChoiceMail users review their unknown email periodically, just to make sure there is no legitimate message there. If you choose to do this, you will find that it takes only a few seconds. Looking through your unknown email list is far less intrusive than having all the unknown email actually reach your inbox, where you must then review all the email messages and delete the spam.

Further, the latest version of ChoiceMail One includes sophisticated analytic rules that you can choose to activate or disable, based on your own preferences. One of the reasons we included these rules was to reduce the amount of unknown email you have to review manually, should you choose to do so.

We said some unkind (but true) things about rule-based spam filtering earlier. Therefore, we should tell you that our rules are not like those contained in other anti-spam products. Our competitors attempt to analyze the content of the message, with only limited success. Our rules examine the programming techniques used to build the message, because spammers use techniques that no legitimate sender would ever has reason to use. ChoiceMail One also lets you automatically delete mail based on the physical location of the server to which the URL link points (e.g., a large percentage of spam currently points to servers located in China). Our rules are not intended to be perfect – only to eliminate email you definitely do not want. Our challenge-response process takes care of the rest. As always with ChoiceMail One, which rules you activate is up to you because ChoiceMail One puts you in control.

Another concern often raised (usually by competitors) is that challenge/response systems cause problems for 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 One is smart enough to recognize mailing lists and does not send a registration request to a list.

System Requirements

ChoiceMail One runs on Windows-based personal computers; we recommend Microsoft NT 4.0, and Windows 2000 or XP with a minimum of 64Mb of RAM and a 90Mhz processor or higher. ChoiceMail One has been tested with Windows 98SE and Windows ME and we are

not aware of any problems at this time. However, make sure you have the latest driver updates for your Win9X installation. There may be conflicts with older Win 9x installations.

Note: Some very old systems may be missing (or have out-of-date versions of) the database support files needed for ChoiceMail One. For more information on how to install these files, please visit http://www.digiportal.com/redirect/msdatabase.htm. The ChoiceMail One installer will also prompt you if it determines that you need to update these system files.

The program requires a dialup or dedicated TCP/IP connection (via DSL, cable modem, etc.) to the Internet.

ChoiceMail One supports standard Internet POP (for incoming mail) and SMTP (for outgoing mail) protocols. If you use an email application such as Eudora or Outlook Express and connect via dialup, DSL, or cable, you most likely have access to POP and SMTP servers. ChoiceMail One also supports Secure Password Authentication (SPA) and SSL.

In addition, ChoiceMail One supports MSN, Hotmail, Yahoo, and AOL through their web-based email sites. A special gateway is required for this (see page 17). Although you can now access (and protect) your AOL email through ChoiceMail One, you cannot do it using AOL's proprietary mail system – you must use an external email application, such as Outlook Express, Eudora, or Outlook 2000.

ChoiceMail One Features at a Glance

ChoiceMail One — Key Features	
Feature	Benefit
Client-based	You do not have to forward your email to a web service – you can use your existing POP sources directly.
Private	Emails are downloaded directly to your PC from your ISP and are not intercepted or stored by a 3rd party, as they would be with a server-based solution.
Works with your email application	ChoiceMail One does not replace your normal email application – you can continue to use your existing email application as long as it supports the industry-standard POP3 protocol.
Sender registration	Any unknown person sending you email must submit a registration request for your approval.
Preapproval management	You can add permission rules to accept or reject senders.
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 nor will a virus be triggered.
SQL Database	ChoiceMail One now uses a SQL database rather than INI files for most items, which greatly reduces memory requirements.
Virtual email addresses	ChoiceMail One includes 5 free virtual email addresses that you can use with vendors and others to whom you do not want to release your real email address. You can buy more virtual email addresses if you want to associate individual virtual addresses with specific vendors.

ChoiceMail One — Key Features

Feature	Benefit
Import existing contacts	ChoiceMail One can import email addresses from many email applications so that your existing contacts are preapproved. You can also drag and drop email addresses and files containing email addresses.
Built-in email client	ChoiceMail One lets you create, reply to, and forward received messages quickly through a lightweight built-in email program. For many quick messages, it's no longer necessary to invoke your full email program.
Away responder	ChoiceMail One can reply automatically to people on your whitelist to let them know their message was received. You can also create a permission rule to send a message to a sender who meets the criteria of the rule.
Junk Box	ChoiceMail One 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 so they are not challenged when they reply to you.
Installation Wizards	Installation is quick, simple, and easy. ChoiceMail One provides automatic support for Outlook Express, Outlook 98, 2000 – 2003, and Eudora.
Multiple Accounts	ChoiceMail One will work with all your POP accounts as well as MSN, Hotmail, Yahoo, and AOL. (Optional plugin required. See page 17.) Regardless of the sources, all your email is aggregated into your primary email application.
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 machine rather than on somebody else's server.
Registrations processed by ChoiceMail One	Registrations from legitimate senders are handled from inside the ChoiceMail One system. They do not appear in your email application so you are not interrupted unnecessarily.
Registration forms in multiple languages	ChoiceMail One users in non-English speaking countries can configure ChoiceMail so that senders see the registration form in a different language.
Enterprise Versions (ChoiceMail Enterprise and ChoiceMail Small Business Server)	
Corporate email support	The ChoiceMail One Enterprise system works with any corporate email system, such as MS Exchange, Lotus Domino, GroupWise and others. The ChoiceMail Small Business server supports a standalone multi-user POP3 environment.
Multi-user support	ChoiceMail One Enterprise and ChoiceMail Small Business erver support multiple users (each of whom can have multiple email accounts) on a single server.
Administrative controls	Central management through an administrator can be used to manage global whitelists, blacklists and permission rules. Individual users may have their own lists and rules or be restricted to the centralized configuration. The ability to customize individual challenge messages and other preferences can be controlled centrally to support the desired management policy
No desktop client necessary	ChoiceMail One Enterprise and ChoiceMail Small Business server can be accessed through a web-based interface that provides the same functionality as the single-user client.
PDA support	ChoiceMail One Enterprise and ChoiceMail Small Business server support access from wireless Pocket PC and Palm devices for users on the go.

| ChoiceMail One — Key Features	
Feature	Benefit
Macintosh and Linux support	The browser-based user interface makes the ChoiceMail environment accessible to users running on any platform that supports a web browser. (***Note***: *A Windows system is still needed for the server portion of ChoiceMail One Enterprise.*)

Getting Started with ChoiceMail One

Installation

If you downloaded ChoiceMail One or ChoiceMail Free from the DigiPortal Web site, the file name is CMOInstaller.exe or CMFInstaller.exe respectively. If you obtained the file from a shareware website, the file may be zipped. In that case, use a utility such as WinZip or PKZIP to extract the file first.

1. Double-click this file to start the installation and follow the Installer prompts as you would for any Windows program installation. Click **Next** to get started.
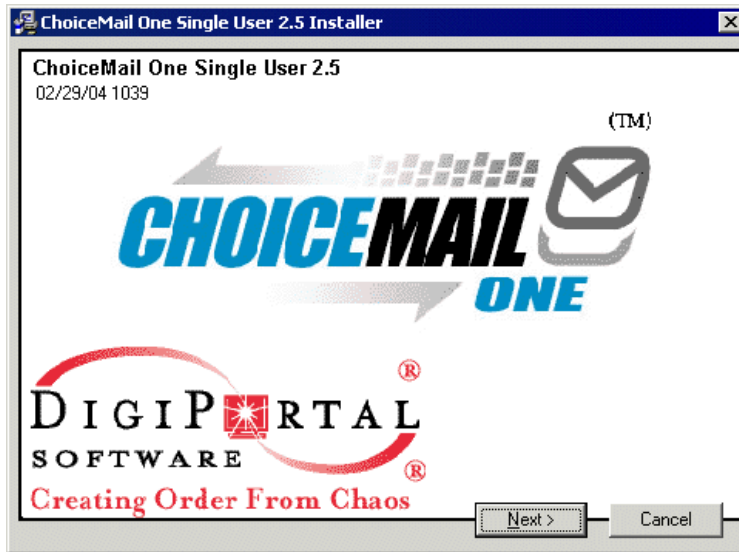
2. When the ChoiceMail One License Agreement window displays, click the **Accept** radio button and then click **OK**.
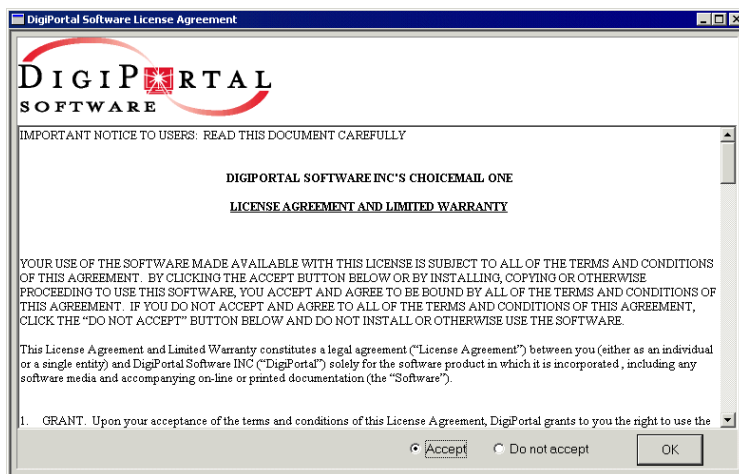
3. Continue through the setup screens. The *User Information* screen may already display your name and company. If it does not, fill in these fields appropriately. (If you have

purchased ChoiceMail One for personal use, you can enter 'None' for the company, if appropriate.)
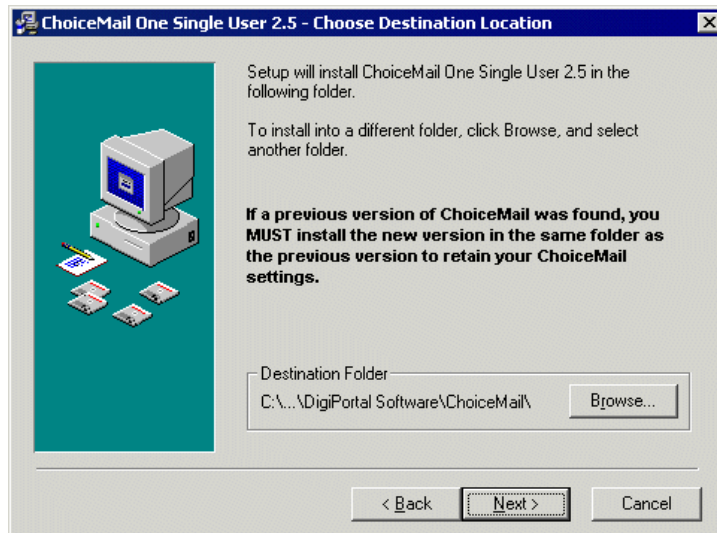
4. The Destination Location is the folder on your hard drive where the ChoiceMail One application will be installed. You can change the Destination Location or accept the default. However, if you've already installed a previous version of ChoiceMail One, you must install the new version in the same folder so that ChoiceMail One can pick up your existing settings.

5. In the *Select Components* window, select the checkbox next to *Run automatically at startup* if you want ChoiceMail One to start up automatically whenever you run Windows. Select the checkbox next to *Add desktop icons* if you want a ChoiceMail One icon on your desktop so you can start ChoiceMail One manually. Selecting this option will also add a shortcut on your desktop for easy access to this user manual. (You can, of course, delete this shortcut later if you wish. The user guide is installed in the HELP folder beneath the folder in which you install the ChoiceMail One application.
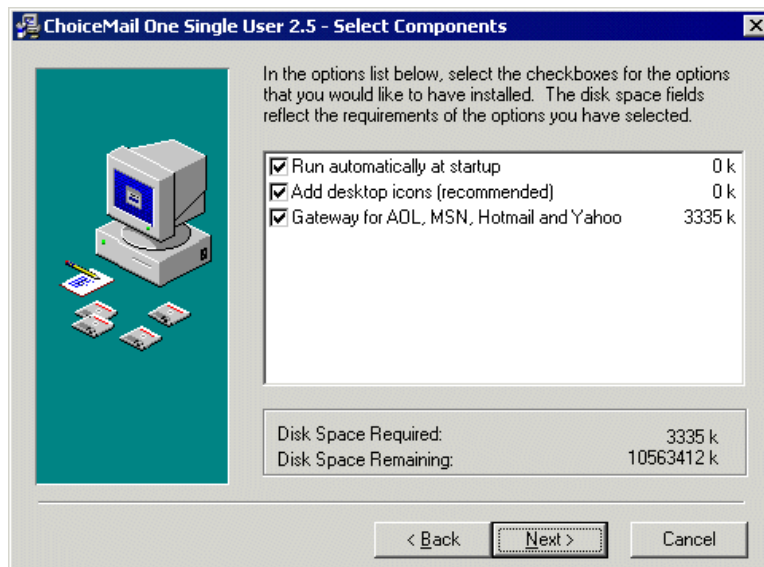
If you have a permanent connection to the Internet, we do recommend that you have ChoiceMail One run automatically.

Make sure you select the *Gateway for AOL, MSN, Hotmail and Yahoo* checkbox if you plan to use ChoiceMail One to retrieve mail from AOL, MSN, Hotmail, or Yahoo. If you do not need to use this option, clear this checkbox so that ChoiceMail One will start up a little faster and use less memory. If you need the gateway in the future, you can always run the ChoiceMail One installer again and install this gateway.

Note: This option is not available for Windows 95 systems.

Click **Next**.

6. You should now be at the *Start Installation* screen. Click **Next** and the ChoiceMail One installation begins.

7. Once installation completes, you can select the checkbox to launch the application and click **Finish**. The ReadMe file displays – be sure to read these notes for any last minute updates. You're now ready to start using ChoiceMail One.

Initial Setup

First Time Setup

ChoiceMail One positions itself between your email application and the mail servers that your email application normally uses. This is accomplished by changing the incoming (POP3) and outgoing (SMTP) server information in your email application so that it now points to ChoiceMail One. ChoiceMail One itself must be configured to connect to your email servers. If you are using an anti-virus program, it may also be necessary to change the ports for these servers (see page 84).

➢ If you did not start ChoiceMail One from the final screen of the installer, go ahead and start it now by double-clicking the icon on the desktop or by choosing **DigiPortal Software applications** and then **ChoiceMail One** from the **Programs** menu.

If you are using ChoiceMail One for the first time, you can run the *Setup* wizard to configure some standard email applications. ChoiceMail One can automatically configure Outlook Express, Eudora (4 & 5), and Outlook 98, 2000 – 2003. If you are using a different email application, you will have to set up ChoiceMail One manually to connect to your email servers, and you will also have to configure your email application manually to connect to ChoiceMail One (see page 105).

If you want to use ChoiceMail One to access web-based email from MSN, Hotmail, Yahoo, or AOL using the IzyMail gateway (see page 17), you can decide at startup whether you want to add a web-based email account or a regular POP3 email account (see page 16). You can also add new accounts at anytime while ChoiceMail One is running.

Using the *Setup* Wizard for POP3 Email

The first time you run ChoiceMail One, the Setup wizard runs automatically. You can also run this wizard by choosing **Run Setup Wizard** from the **Options** menu.
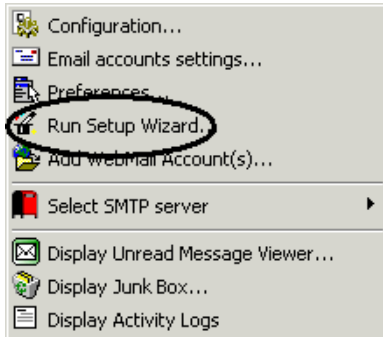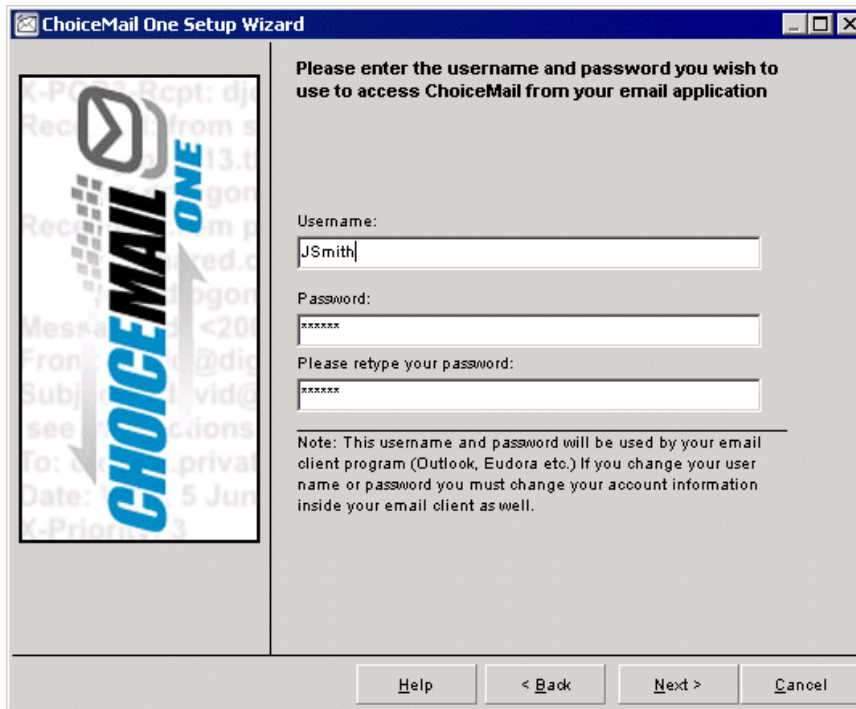
1. Be sure you know both your username and the password you use to access your email accounts. If you do not have this information handy, you will be unable to access your email messages as you will not be able to configure ChoiceMail One without this information. Click **Next** to continue.

   Note: Make certain you've closed your email application before you run the Setup *wizard. If you do not close your email application, ChoiceMail One will not be able to change the necessary account settings.*
   This is CRITICAL!

2. Enter the username and password you want to use to access ChoiceMail from your email application. Retype your password, to make sure you entered it correctly. Click **Next**.

3. You can import your existing email accounts from Outlook Express, Eudora, or Outlook. Click the appropriate radio button. If you're u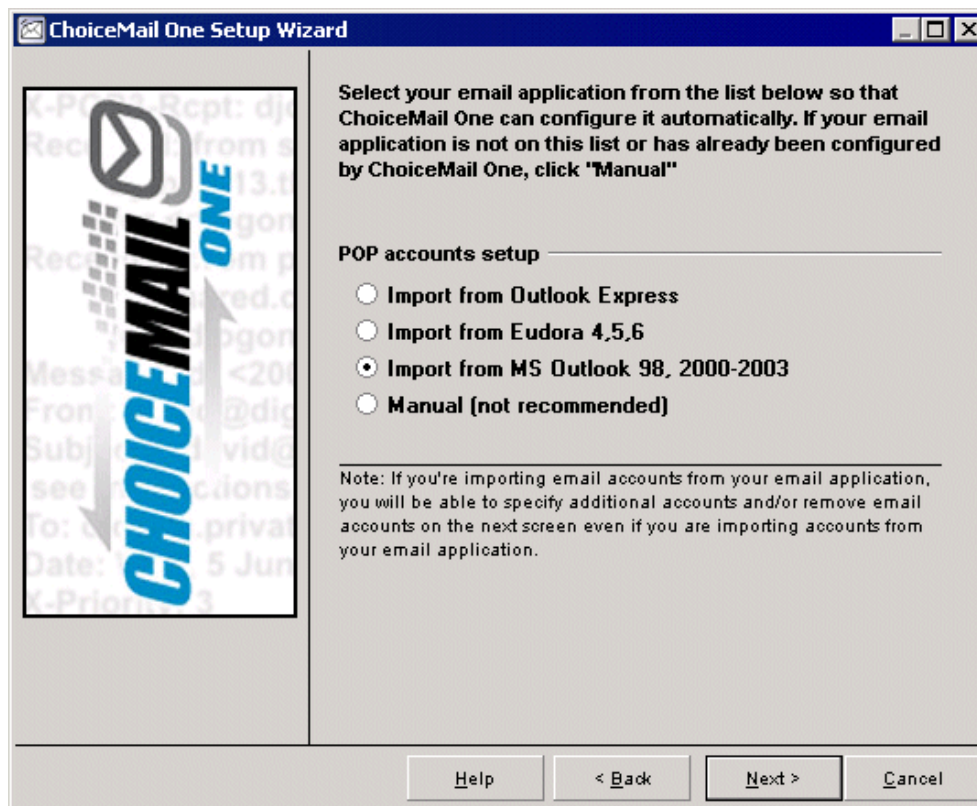sing a different email application or an older version of these applications, click the *Manual* radio button. For manual configuration instructions, see page 105.

Note: Be aware that Outlook and Outlook Express are completely different applications – make sure you choose the correct email application.

4. If you're importing accounts from your email application, you can select which email accounts you want ChoiceMail One to protect from spam. Select an account in the left box and click the **Add** button to include it in the list of protected accounts. Select an account in the right box and click the **Remove** button to remove it from the list of protected accounts.

When you've finished selecting accounts, click **Next**.
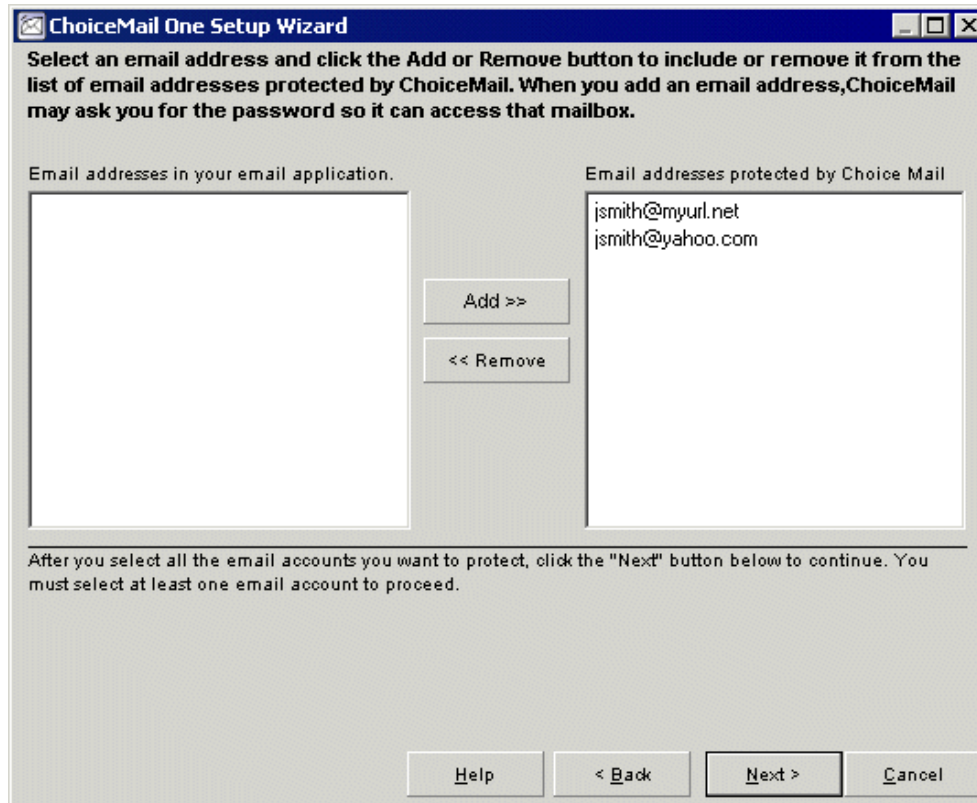
5. If you imported your existing accounts, ChoiceMail One can test the POP3 servers for you – skip to step 6.

   If you're manually entering your email accounts, you can access them one at a time and check them. You may need to know the passwords as well.

   You need to test each account to make sure it is working. Click the **Test** button and ChoiceMail One will attempt to log in to the account. After a short delay, a dialog displays, indicating success or failure. If ChoiceMail One cannot verify the connection, make sure that all your settings are correct and that you've typed in the correct password.

   Note: If you are unable to verify one of your accounts no matter what you do, it may simply be the case that that account is one that you no longer use and was just dormant in your email application. In this case, just delete or exclude that account to bypass ChoiceMail One's testing. You can always add new POP3 accounts later. Deleting an account does not remove it from your email application. Rather, it just tells ChoiceMail not to include that account in its processing.

Usernames and passwords are normally case-sensitive. Make sure you use the correct case.
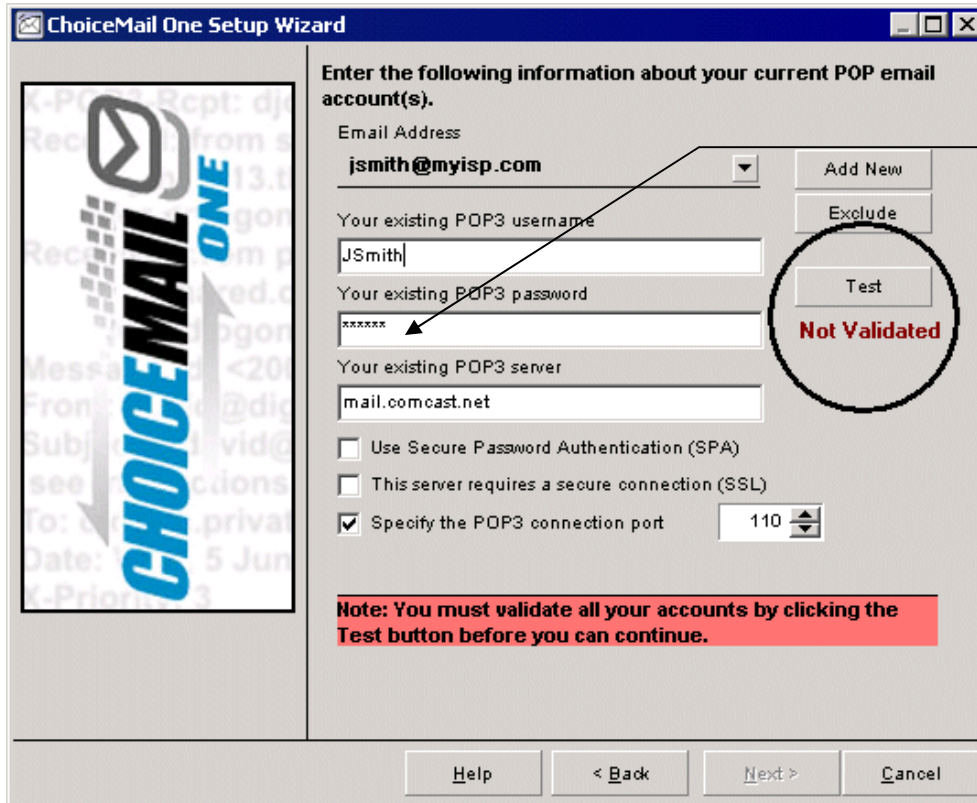
This dialog displays when ChoiceMail One successfully connects to your POP server. Click **OK** after you have read it. If you have more than one POP3 account, ChoiceMail One will offer you the next account for you to test.
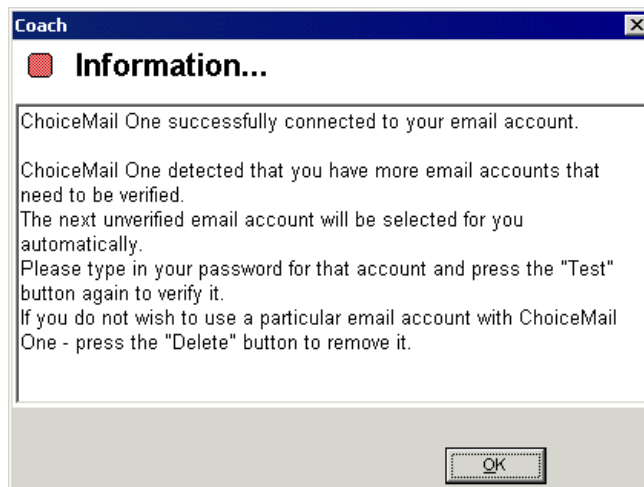
Once you have configured all your existing POP accounts, it's time to configure the settings for your outgoing (SMTP) mail server. Click **Next**.

6. You now need to verify your outgoing email SMTP servers, regardless of whether you imported your email accounts or entered them manually. ChoiceMail One should have

retrieved any SMTP servers associated with the accounts found in your email application. If for some reason ChoiceMail One was unable to retrieve any SMTP accounts, click the **Add New** button and add one manually. If you don't know the name of your SMTP server, you will need to contact your ISP.

Unlike the POP3 dialog, you don't actually need to verify that all your SMTP servers are correct. In many cases, it's not actually possible to verify a particular SMTP server unless you are directly connected to the ISP that owns that server. Therefore, as long as you have selected one SMTP server that works, you are good to go. You can always add other SMTP servers later, if you wish.

In ChoiceMail One, your SMTP servers are NOT actually associated with your POP3 accounts. ChoiceMail One will always use the same SMTP server for all outgoing mail and you should normally use the SMTP server associated with the ISP to which you are connected.

If you use a laptop and travel, you may have multiple SMTP servers. As you travel and connect through different ISPs, you can quickly change the SMTP server for ChoiceMail One using an option on the system tray.

Click the **Test** button to test the connection to the SMTP server. A message displays if the connection is verified. If ChoiceMail One was not able to verify the connection, recheck all your settings, including your password. Consider case as well.

When you've finished testing your SMTP servers, click **Next**.

7. If you have more than one email address that is forwarded to an email account, you must tell ChoiceMail One about the other email addresses, so the messages can pass through to your email application. For example, you might have an address at myname@mydomain.com that gets forwarded to your regular email account. Or some people use an account at a college alumni association that gets forwarded.

You should also tell ChoiceMail One about any mailing lists to which you subscribe. Some mailing lists send out messages from a variety of sender addresses. By defining

your mailing lists when you start using ChoiceMail One, all the messages from the list will be automatically passed through to your email application, rather than staying in the *Unknown Senders* list. ChoiceMail One does recognize that a message came from a mailing list server and never sends a registration request back.

Click **Next**.
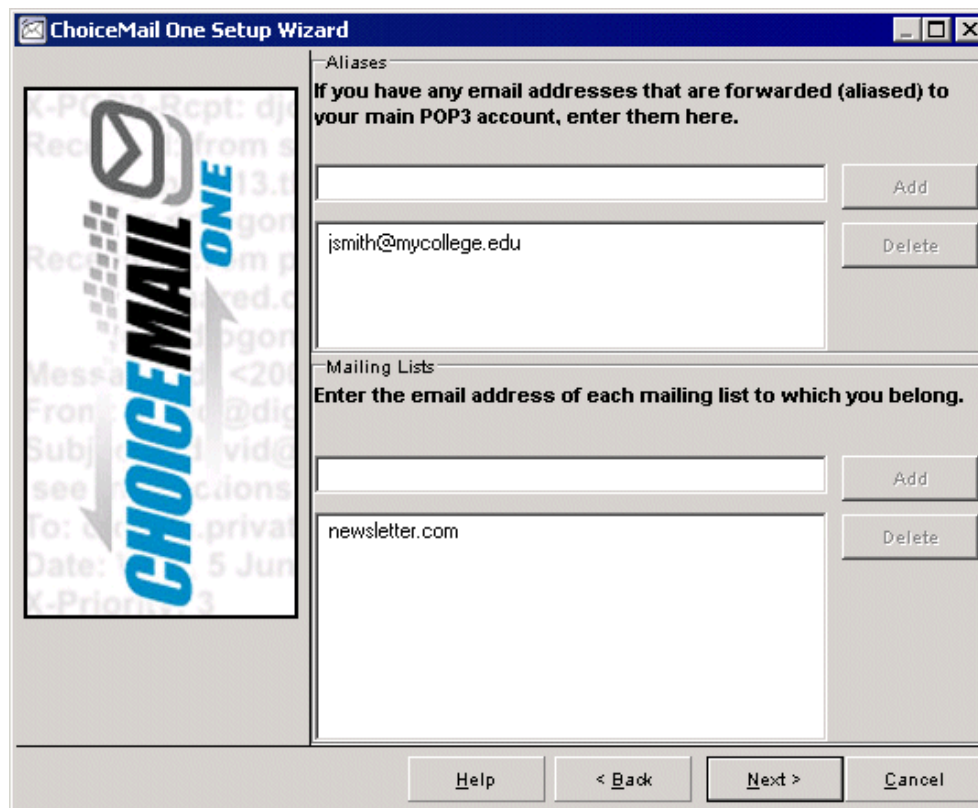
8. The final wizard window displays a list of accounts that have been setup for you. Click the **Finish** button. This completes the ChoiceMail One server portion of the configuration process. You will now be prompted to import your email addresses (see page 22).

> *Note: If you are running a software firewall such as ZoneAlarm or BlackIce Defender, the firewall may pop up a dialog telling you that ChoiceMail One wants to be allowed to be a server and/or to be allowed to connect to the Internet. You MUST grant this permission. Otherwise ChoiceMail One will be unable to function. If there is an option to give ChoiceMail One permission permanently, you should set that option as well.*

Configuring WebMail

Web Accounts vs. POP3 Accounts

In addition to accessing traditional POP3-based email systems, ChoiceMail One also lets you access your email from several web-mail systems, including MSN, Hotmail, AOL, and Yahoo if you have the IzyMail gateway installed. ChoiceMail One will download email from these services and make it inside a standard email application, such as Outlook Express, Eudora, or Outlook.

The IzyMail Gateway

Some retail versions of ChoiceMail One include a gateway plug-in called IzyMail that is used to retrieve mail from various web-based email systems. You can use this plug-in in conjunction with ChoiceMail One to retrieve email from MSN, Hotmail, Yahoo, and AOL. The email messages are retrieved by ChoiceMail One and become available to your POP3 email application connected to ChoiceMail One.

Note: If you are using a cookie manager or are otherwise blocking cookies, make sure that you allow cookies to be accepted for AOL, MSN, Hotmail, or Yahoo if you will be accessing mail through these servers.

The first time you run ChoiceMail One, the following dialog displays:
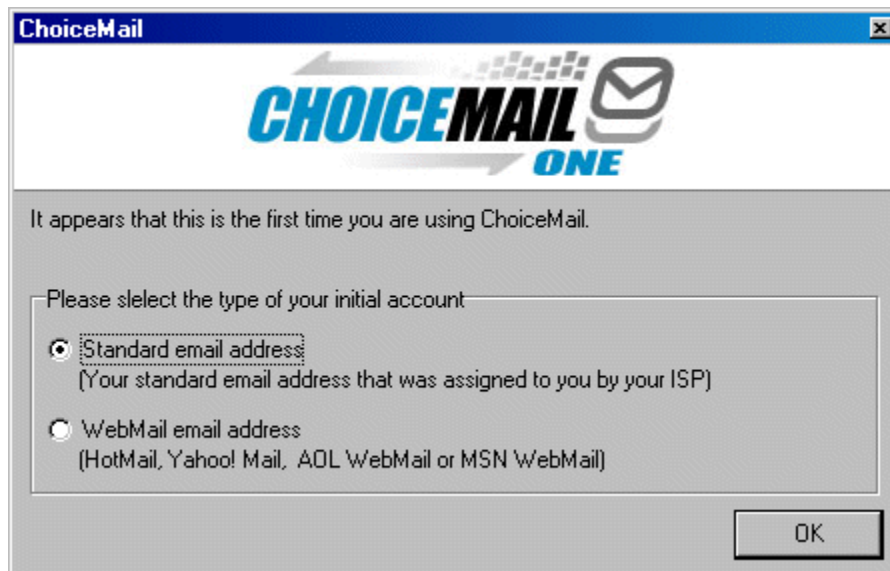
➢ If you want to configure ChoiceMail One to access standard POP3-based email, click the *Standard email address* radio button and click **OK**. Please continue on page 33.

➢ If you want to configure ChoiceMail One to access web-based email, click the *WebMail email address* radio button and click **OK**.

Note: You can always add more web-based accounts later.

Web Configuration Wizard

The *Web Configuration* wizard starts automatically when you run ChoiceMail One for the first time and you choose to add a webmail account. You can add a new webmail account manually at any time by choosing **Add WebMail Account(s)** from the ChoiceMail One **Options** menu.
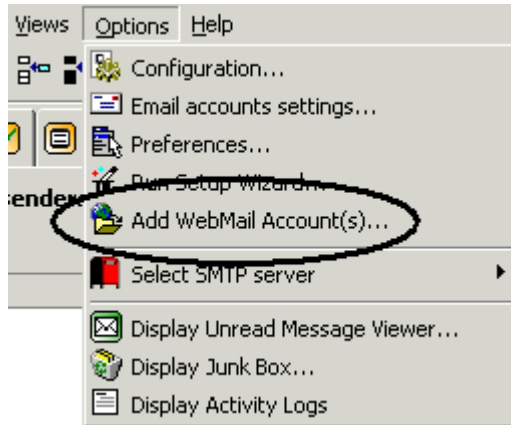
Note: If this option does not display in the **Options** menu, you may not have installed the gateway when you installed ChoiceMail One. Rerun the ChoiceMail One installer and select the Gateway for AOL, MSN, Hotmail and Yahoo *checkbox during the* Select Components *step to make the gateway option available.*

The *WebMail Setup* wizard will configure ChoiceMail One to connect to web-based email accounts supported by ChoiceMail One. You can currently use ChoiceMail One to access your email on Yahoo, MSN, Hotmail, and AOL. In all cases, you will actually read and send your email using a standard email application such as Outlook Express or Eudora. You no longer use your web browser to access these accounts.
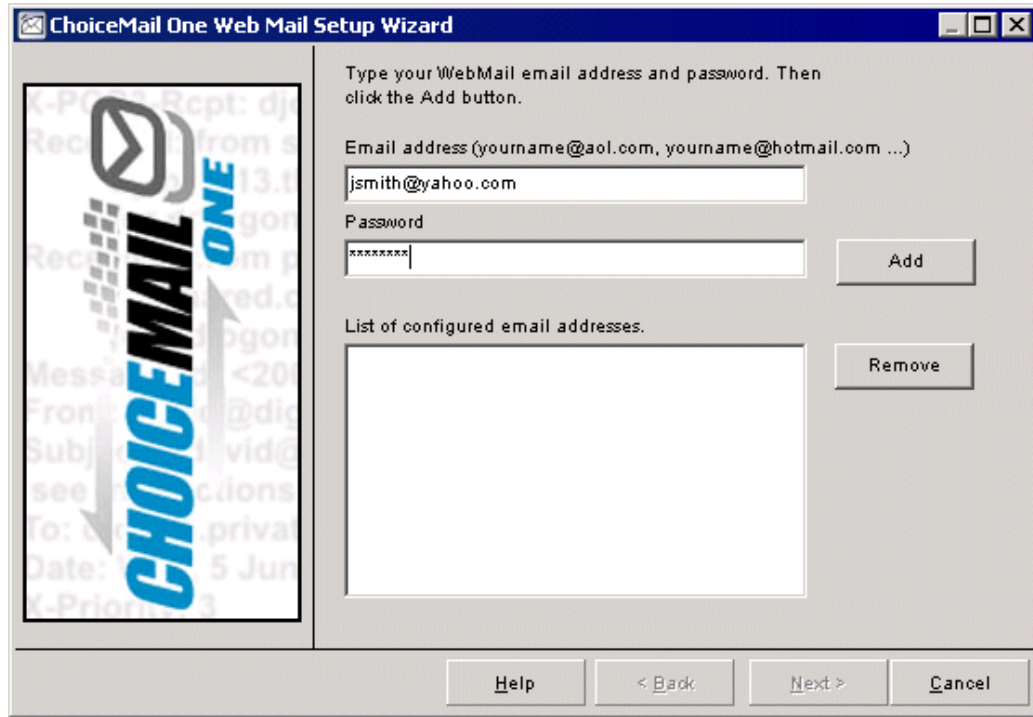
Note: ChoiceMail One does not prevent you from using a web browser but ChoiceMail One will not be able to protect you from spam when you are connected directly through a web browser.

1. If your email application (Outlook Express, Eudora, or Outlook) is running, ChoiceMail One will ask you to close it before the wizard can continue. Click the **Continue** button on the *Welcome* window.

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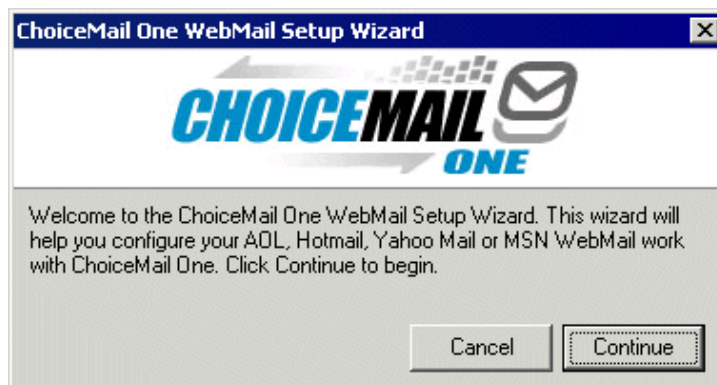
2. Enter the email address of your MSN, Hotmail, AOL, or Yahoo account. Be sure to include the complete address, including the domain.

   Enter the associated password for that account and click the **Add** button.

   ChoiceMail One attempts to connect to your webmail account. If it is successful, the account is added to your list of configured email addresses. If you have more accounts, repeat the steps above to add them. If you did not enter your email address or password correctly, ChoiceMail One will inform you so that you can correct the information. If you do not have the correct information, please check with your ISP. DigiPortal Software does not have this information.

   When you have finished adding webmail accounts, click **Next**.

3. You now need to tell ChoiceMail One which email application you plan to use to access your webmail. If you have never used a standard email application, we recommend that you select Outlook Express, which is bundled with Internet Explorer.

   Click the appropriate radio button and then click **Next**.

   Note: If you have a very old version of Internet Explorer, you may need to update it at Microsoft's website, www.microsoft.com. In fact, you should visit Microsoft's Automatic Windows Update site, http://windowsupdate.microsoft.com, to make sure that your entire system is up to date. This will prevent some obscure problems that could occur due to outdated system files.
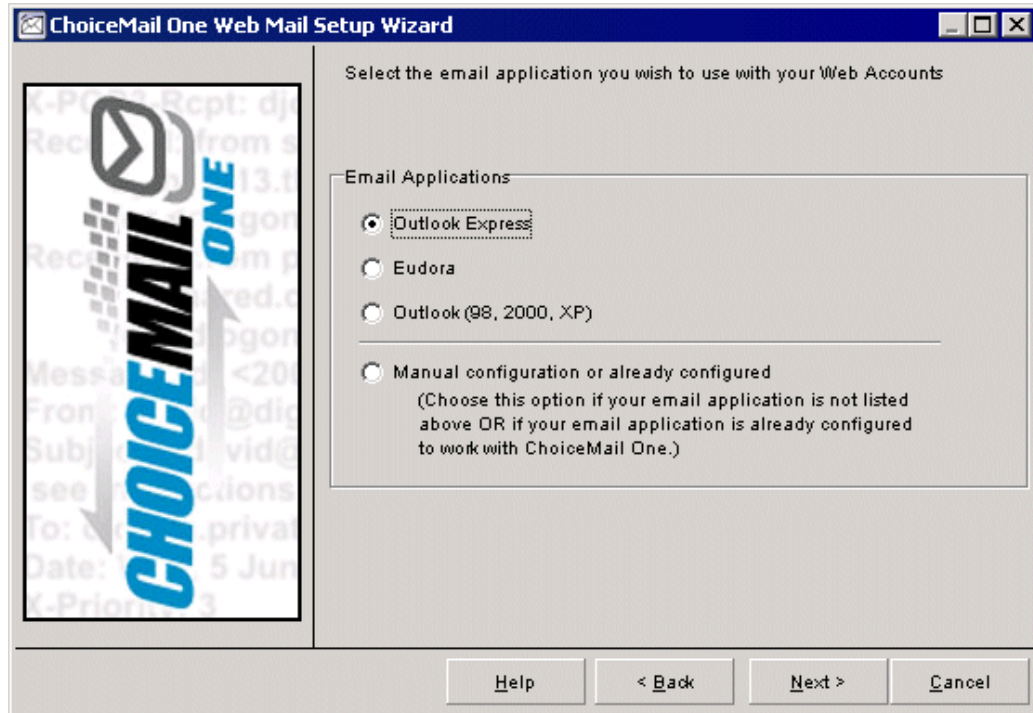
4. Click the **Finish** button to start ChoiceMail One.

Information for AOL Users

AOL uses a proprietary email system within the AOL environment. However, you can also access AOL email through the web using a browser like Internet Explorer or Netscape Navigator. When you use ChoiceMail One with the IzyMail gateway (see page on page 17), you must use a standard email application such as Outlook Express, which should already be installed on your computer.

Note: If you are running an older version of Windows, be sure to update Internet Explorer to a recent version, at least 5.x, to make certain that a recent version of Outlook Express is installed on your system.

If you're using a popup manager or cookie blocker, you must make sure that cookies are enabled for the AOL website.

If you're using AOL over a dial-up connection, you will continue to start your AOL program to connect to the Internet. However, once you are connected, minimize the AOL application window and then use an email application such as Outlook Express to access your email.

Note: Once you are connected to the Internet, you can run a web browser such as Internet Explorer from OUTSIDE the AOL environment. In other words, being connected to the Internet is not the same as being connected to the web. The World Wide Web is simply one of the services available on the Internet.

If you have a broadband connection (i.e., cable or DSL), then you are already connected to the Internet. In this case, there is no need to start the AOL environment to access your email. You simply run ChoiceMail One and use Outlook Express to read and send email.

How Do I Use Outlook Express for Email?

If you have never used a program like Outlook Express, you may initially feel overwhelmed by it. Outlook Express has many features for managing your email – for example, you can store email from different people in different places. Once you get used to it (which doesn't take long), you should be very happy with it.

While DigiPortal Software is considering writing a basic tutorial for Outlook Express, you can find many such tutorials on the Internet. Perform a search using your favorite search engine for "Outlook Express tutorial" and you will find numerous tutorials that can get you started.

Please also check the support section of our website (see page 140). We have added a section specifically for AOL users, where we list various references and tutorials that may be of help to you.

Configuring Firewalls for ChoiceMail One

There are two basic kinds of firewalls: hardware and software. You may have one or both kinds. You should not have to reconfigure a hardware firewall to use ChoiceMail One for normal operation.

If you are using a software firewall, such as ZoneAlarm, BlackIce Defender, or Norton Internet Security, you may be prompted several times for client and server permissions when you run ChoiceMail One for the first time. In general you should just allow all the permissions requested.

The three components are:

1. ChoiceMail One

   Requires permission to act as both a client and a server. Unless you are planning to access ChoiceMail One from other machines (see page 79), you can restrict server permissions to your local trusted zone.

2. ChoiceMail WebGate (also known as IzyMail, see page on page 17)

   Requires permission to act as both a client and as a server. If your software firewall allows, you should always restrict the server permissions of this gateway to your local machine.

3. True Update (also known as cmupdater)

   Requires client permission only.

Note: If you are updating from a previous version of ChoiceMail One or from the trial version, your firewall may detect the change and SILENTLY block the new version. If ChoiceMail does not seem to be working or you are seeing access violations when you start ChoiceMail, make sure that your firewall is really configured to allow ChoiceMail to function.

Importing Existing Email Addresses

If you want, ChoiceMail One can import a list of existing email addresses and preapprove those addresses so that incoming emails from these addresses are automatically accepted.

1. ChoiceMail One prompts you to import your address book when you run the *Configuration* wizard. You can also choose **Import Address Book** from the **Actions** menu to open the *Address Book Selection* dialog.
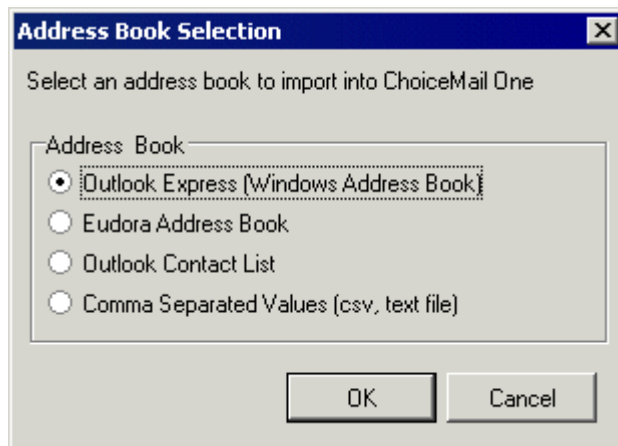
ChoiceMail One can import email addresses that are in the Windows Address Book (WAB) format, which is used by Outlook Express, and from Eudora. If you're using Eudora, ChoiceMail One will prompt you to search for your Eudora's nickname file. This may take a while if you have a lot of files on your system. ChoiceMail One can also import contacts from Outlook 98, 2000, and 2002.

For other email clients, you must first export your contact list into a file so that it can be read by ChoiceMail One. If you are offered different export options, select either the text file or the comma-delimited fields format. Then you can use the *Comma Separated Values* option in the ChoiceMail One *Address Book Selection* dialog.

2. We encourage you to examine your contact list very carefully before importing it into ChoiceMail One to ensure that you really want to preapprove all the addresses, and that some invalid or bogus addresses have not found their way into your contact list. However, after you have imported the list, you can review it and remove individual entries as needed.

Click the checkbox next to each email address you want to import. Click **Select All** to enter a checkmark next to all your email addresses – you can then clear the ones you don't want to import. Or click **Clear All** and then select the addresses to import.

ChoiceMail One User Guide
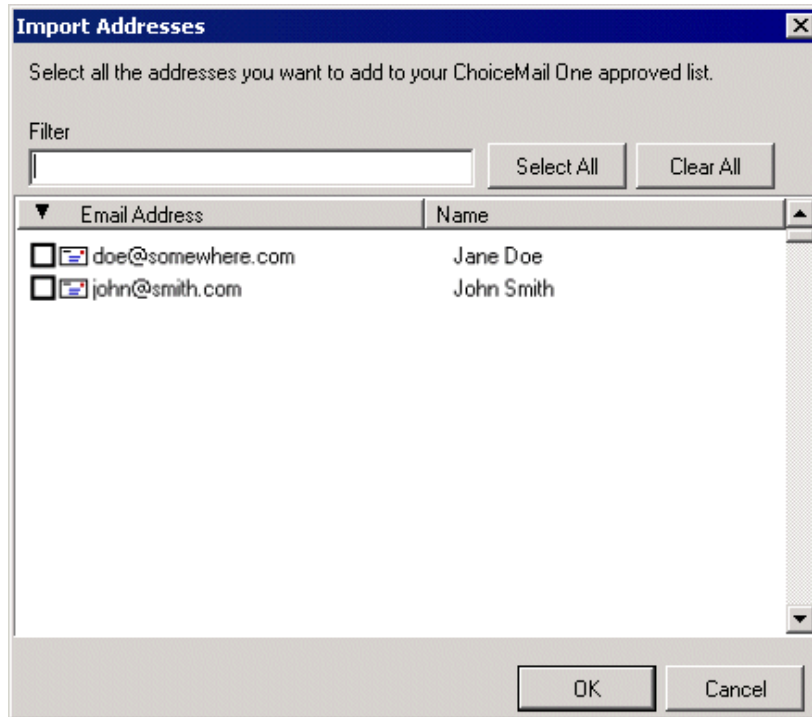
When you click **OK**, all the selected email addresses become preapproved in ChoiceMail One and are added to your whitelist of approved senders. (You can view this list by choosing **Approved Senders** from the **View** menu.)

Drag and Drop Feature

You can also drag an email address or a file containing multiple email addresses from your email application or any other application, such as a text editor or spreadsheet, and drop it into ChoiceMail One.

➢ Open the ChoiceMail One view to which you want to add an email address. Drag and drop the email address into this view. ChoiceMail One checks to make certain the email address isn't already included in one of your lists.

Note: You may have to adjust the windows on your computer monitor so that you can see both the ChoiceMail One window and the other application with the email address to add.

Uninstalling ChoiceMail One

If you decide to uninstall ChoiceMail One, use the Add/Remove Programs application in the Control Panel to start the uninstaller. If ChoiceMail One was able to make a snapshot of your email settings when it was first installed, you will be prompted to restore those original settings.
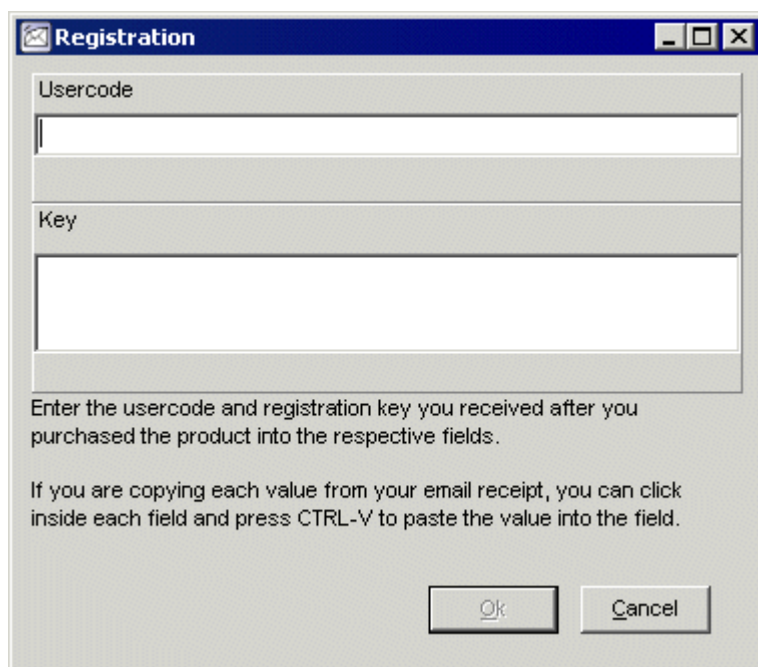
 Warning: Do not simply delete the ChoiceMail One folders – you will lose all email messages that you have not yet approved, as well as messages that have not yet been received by your email application. Before uninstalling, you may first want to disable ChoiceMail One filtering (see page 27) and retrieve all remaining emails that are being

Converting from the Trial Version to the Retail Version

If you are running ChoiceMail One in trial mode and you plan to purchase a retail license, you should NOT uninstall the trial version. Instead, simply purchase a retail license of ChoiceMail One at our website. If you uninstall the trial version of ChoiceMail One, you will lose all your settings, including your registered senders.

When you purchase ChoiceMail One, DigiPortal Software will send you a username and key. Choose **Enter registration key** from the **Help** menu to open the *Registration* window.

> ➢ Enter the Username and Key sent to you by DigiPortal Software and click **OK**. Your copy of ChoiceMail One is now registered.

Tip: When you receive the registration information in an email from DigiPortal, select the entire key by holding down the left mouse button as your roll across the key. Release the mouse and press Ctrl-C on the keyboard. Alternately, you can select the key, click the right mouse button, and choose Copy *from the popup menu. This copies the key to the Clipboard.*

Then open the Registration *window in ChoiceMail, click inside the* Key *field, and press Ctrl-V. Alternately, you can right-click inside the* Key *field and choose* Paste *from the popup menu. This pastes the key from the Clipboard to the* Registration *window.*

Original Email Settings Snapshot

If you configured your email application settings by using the ChoiceMail One *Configuration* wizard, ChoiceMail One takes a snapshot of your original settings before changing them. This information is available to the uninstaller so that, if you do decide to uninstall ChoiceMail One, your original email settings will be restored.

In some cases, the uninstaller may not trigger the applet to restore your original settings. If this happens, the following technote on the DigiPortal Software website has more information on how to deal with this issue:

http://www.digiportal.com/support/choicemail/technotes/notes/restoreoriginalsettings.htm

Note: *If you configured your email settings manually, then you will have to reconfigure your email application yourself after uninstalling ChoiceMail One.*

The First Time You Run ChoiceMail One

You should leave ChoiceMail One running all the time, especially if you have a broadband (DSL or cable) connection to the Internet. If you did not select this option during installation, you can configure ChoiceMail One to start up automatically when you start Windows.

➢ Choose **Configuration** from the **Options** menu and select the checkbox next to *Auto start ChoiceMail when Windows starts* at the bottom of the *Configuration* window. Click **OK**.

If you are using a software firewall product such Zone Alarm or Black Ice Defender, you will probably get an alert the first time you run ChoiceMail One. When prompted, you should allow ChoiceMail One to both connect to the Internet (so that it can access your incoming email) and to act as a server (so that your own email client can connect to ChoiceMail One).

Note: By default, ChoiceMail One Single User does not accept connections from other machines.

Once you have configured ChoiceMail One and it starts running, you will immediately see a hint explaining that, although ChoiceMail One is ready to start operating, it will not begin downloading any emails from your server until it can verify that your email application is indeed able to communicate with ChoiceMail One. Click **OK** to close the hint window.

The main ChoiceMail One window now displays. The red light in the upper right-hand corner of the window indicates that ChoiceMail One is currently disabled. It will remain disabled until your email application has successfully connected to it.
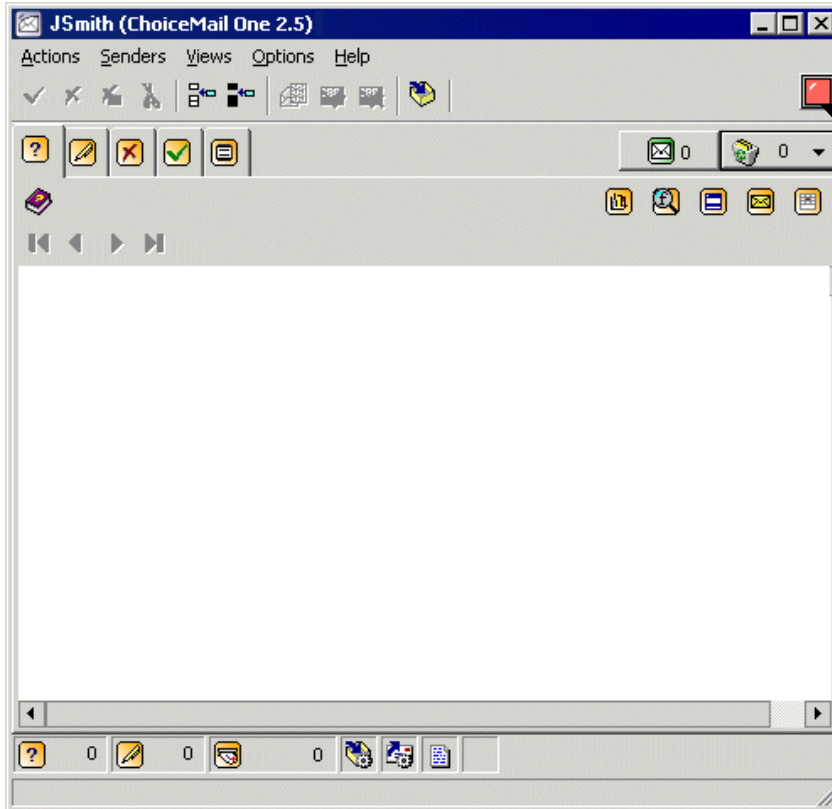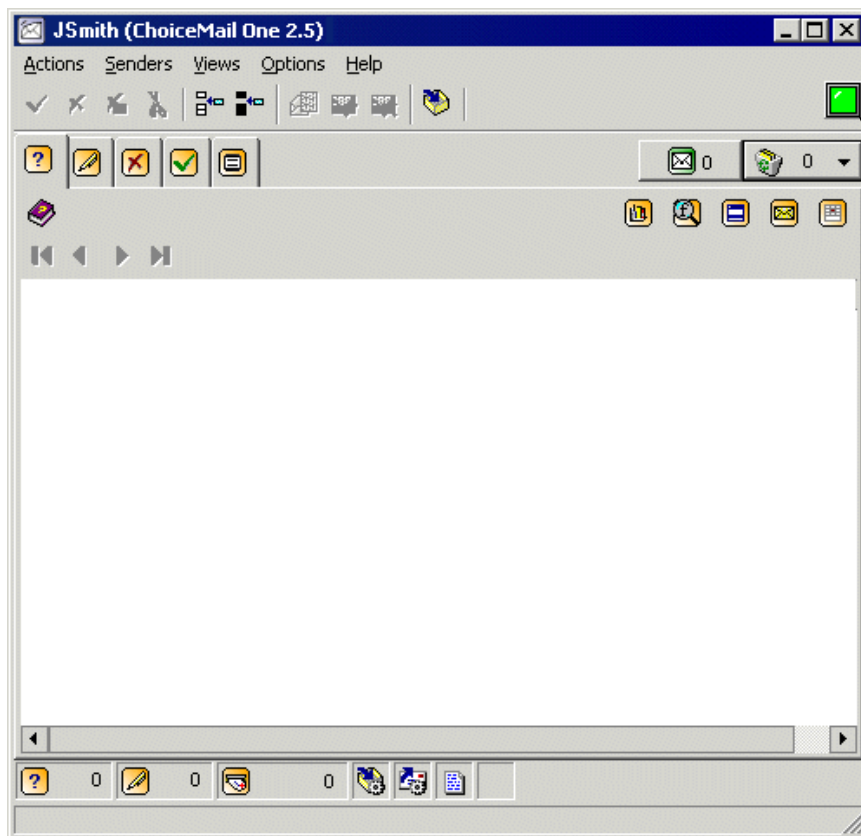

A red light indicates that ChoiceMail One is not filtering your email messages. Your email application must connect with ChoiceMail One before it can begin working.

Leave ChoiceMail One running and launch the email application that you configured with ChoiceMail One. When it starts up, check for new email, if it does not do this automatically. It's quite likely that your email application will prompt you for your password at this point – enter it normally.

Your email application should appear to run normally, although no emails will actually be retrieved.

Note: If your email application does retrieve email messages at this point, then your email application was not configured properly to communicate with ChoiceMail One and you will have to configure it manually. See page 105 for the settings you'll need to do this.

Once your email application has indeed connected successfully to ChoiceMail One, the red light changes to a green light and ChoiceMail One displays another hint, letting you know that it's now ready to run.

A green light indicates that ChoiceMail One is enabled and operating normally. Once ChoiceMail One is activated the first time, you can click this light to disable or enable ChoiceMail One's filtering, if necessary. It's normally not necessary to disable ChoiceMail One.

When ChoiceMail One downloads your email messages for the very first time, it does not attempt to block them, filter them, or send registration messages. This is because ChoiceMail One must first download, and then remove, any old messages that may have been left on your server. It would not be appropriate for ChoiceMail One to send a registration request in response to an old email.

Therefore, if there are old messages on your server, these will all appear again in your email application's inbox. You can review them and delete any old messages.

ChoiceMail One never leaves email on the server. After this first-time download, ChoiceMail One will begin its task of blocking unknown email messages for you.

Locking ChoiceMail One

You can specify that users must enter the ChoiceMail One password to access the program. You can still receive approved email while ChoiceMail One is locked but you cannot review your *Unknown Senders* list or change any other settings in ChoiceMail One itself.

➤ Choose **Lock** from the **Actions** menu.

ChoiceMail One is locked until the user enters the correct ChoiceMail One password.

You can also specify that ChoiceMail One should always start up in the locked state.

➤ Choose **Configuration** from the **Options** menu and select the *Start ChoiceMail One in the locked state* checkbox.

Whenever you launch ChoiceMail One, such as when you start up your computer, you must enter the ChoiceMail One password to open it.

When you configure multiple accounts in your email application, as explained on page 122, you can use either the standard POP3 password or the ChoiceMail One password. (The *Configuration* wizard enters the password from your first configured email account as your ChoiceMail One password when you first set up your accounts.) If you want to use the Lock feature, to keep children from accessing their email without your presence, for example, you should change the ChoiceMail One password.

➤ Choose **Configuration** from the **Options** menu, select the *Allow Change* checkbox, and change the ChoiceMail One password.

This is the password a user must enter to unlock ChoiceMail One once you've set the lock feature. See page 77 for details.

Warning: You can only use a different ChoiceMail One password if you've set up multiple email accounts according to the instructions on page 122!

How ChoiceMail One Works

Once you've properly configured ChoiceMail and your email application, ChoiceMail One connects to your ISP's server and checks for new emails. (You can specify how often ChoiceMail connects by setting a preference.)

- 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 and its sender to the *Unknown Senders* list. The email message is not sent to your email application but rather held within ChoiceMail One. 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 One for processing.

- If the sender does not register within a specified number of days (you can specify how many days by setting a preference), the email is moved to the *Junk Box* window. After another interval (also specified by a preference), the email is automatically deleted.

- If the sender does register, ChoiceMail displays a notification alert (you can specify what type of alert by setting a preference), adds the email to the *Senders Waiting for Your Approval* list, and the icon in the system tray flashes as a bell to alert you that someone has registered. You can approve, reject, reject with a reason, or delete the sender using the toolbar buttons.

- If you send a message to a sender who is not already on your whitelist, ChoiceMail adds this sender to the whitelist automatically. If the sender was on your blacklist, s/he is moved to your whitelist.

- You can preapprove or reject individual senders and/or domains.

- You can set permission rules for accepting and rejecting senders and messages.

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 One 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 One places that sender on your blacklist, and will not permit any email messages from that sender to pass through. Because of the way ChoiceMail One 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 his/her 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 *Safe Message Preview* window from the Unknown Senders view. (See page 41 for details about viewing messages safely.)

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 approved (or blocked) 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 One 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 One. If that sender is already on one of your lists (the *Unknown Senders* list or the blacklist), ChoiceMail One automatically moves 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 One.
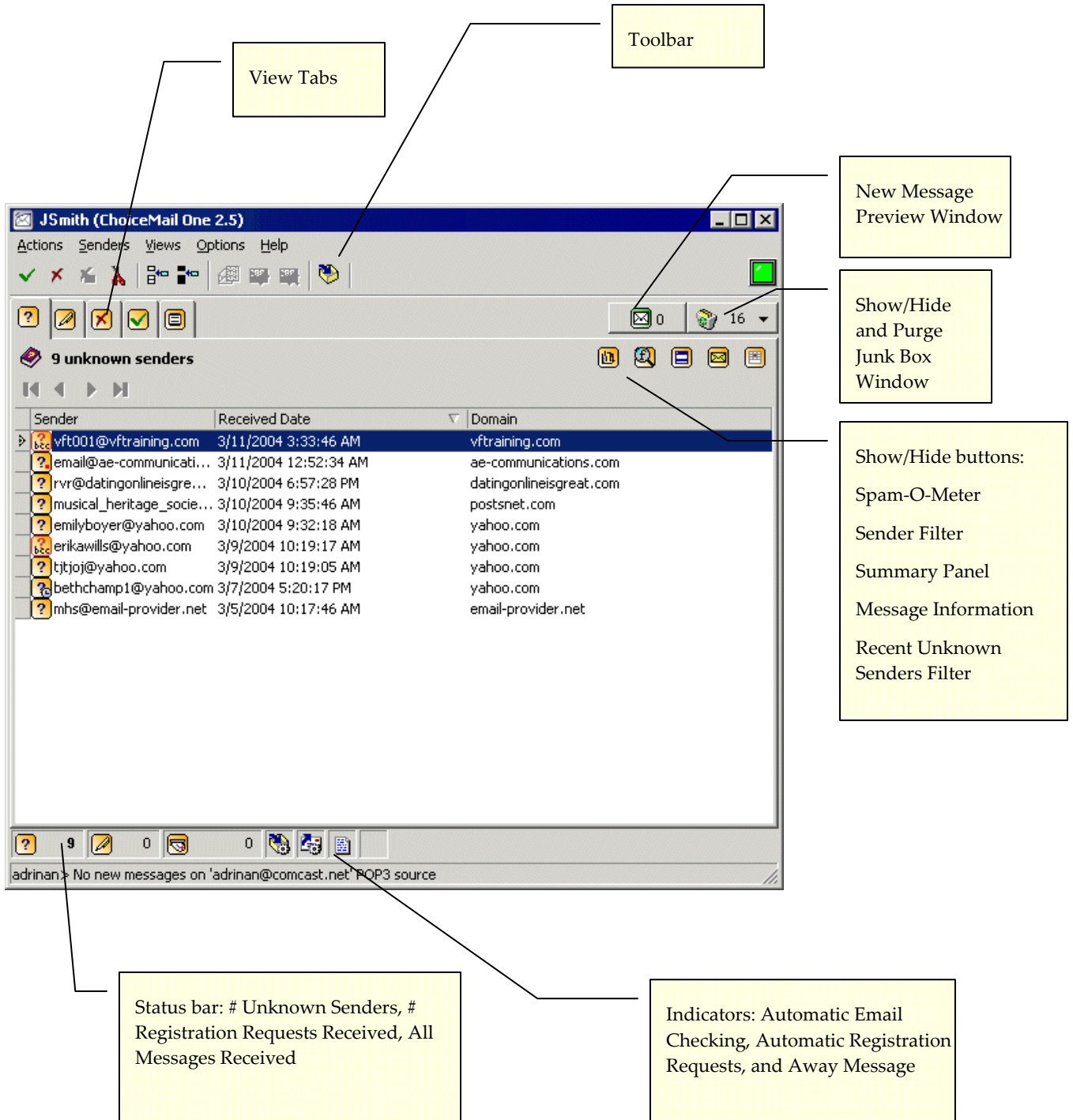
Permission Rules

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 One's automatic approval system, but you may find it useful to automatically accept 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 One look for some identifying information in the header or body of list server messages to determine what to do with them.

ChoiceMail One Components

The Main Client Window

Although normally you will leave ChoiceMail One minimized in the system tray, you can open it at any time to see what it's doing.

Toolbar

View Tabs

New Message Preview Window

Show/Hide and Purge Junk Box Window

Show/Hide buttons:

Spam-O-Meter

Sender Filter

Summary Panel

Message Information

Recent Unknown Senders Filter

Status bar: # Unknown Senders, # Registration Requests Received, All Messages Received

Indicators: Automatic Email Checking, Automatic Registration Requests, and Away Message

View Tabs

The main window has several tabs that provide views of different lists of senders. Click a tab to open a view.

You can also select which view you want to display from the **Views** menu.

Unknown Senders – ChoiceMail One lists all emails received from unknown senders (i.e., email addresses that are not included in your whitelist). ChoiceMail One 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 36.

Senders Waiting for Your Approval – ChoiceMail One lists all the email senders who have responded to the registration message. You must approve or reject each sender.

Rejected Senders – ChoiceMail One 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.

Approved Senders – ChoiceMail One lists all approved senders in the whitelist. These include any addresses 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 One lists all senders: accepted, rejected, and unknown.

Help – Double-click for information on the current view.

Accepting and Rejecting Senders

You can manually accept or reject a sender using ChoiceMail One's toolbar. You can also use the **Senders** menu for a full list of options, or right-click a message in the *Unknown Senders* view to access a popup menu.

Approve Sender – Click this button to approve a sender in the *Unknown Senders* list or the *Senders Waiting for Your Approval* list. ChoiceMail One 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 *Unknown Senders* list or the *Senders Waiting for Your Approval* list. ChoiceMail One 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 *Unknown Senders* list or the *Senders Waiting for Your Approval* list. ChoiceMail One adds the sender's email address to the blacklist, deletes all email messages from this sender, and sends a response to the sender. ChoiceMail One prompts you for a rejection reason that will be sent with the response.

Delete Sender – Click this button to delete the sender from ChoiceMail One. The sender's email address is removed from all ChoiceMail One lists. If this sender sends you another email, ChoiceMail One will send an automated registration email as if it were the first time this sender has contacted you.

Manually Approve a Sender – Click this button to approve a sender manually. ChoiceMail One will prompt you for an email address and optional name. Use this feature if you're expecting an email from someone who is not on your whitelist. (You can also approve a domain, such as a company's domain name, to receive all emails from that domain, regardless of the individual sender.)

Manually Reject a Sender – Click this button to reject a sender manually. ChoiceMail One will prompt you for an email address and optional name. Use this feature if you're expecting an email from someone and you do not wish to receive this email. (You can also reject a domain, such as a company's domain name, to reject all emails from that domain, regardless of the individual sender.)

Preview Message Private – Click this button to read the selected message in the *Safe Message Preview* window. See page 41.

Accept selected Messages – Click this button to accept the selected message(s). This action brings the selected message(s) into your email application inbox but does not approve the sender of the message(s).

Delete Selected Message – Click this button to delete the selected message(s). This action does not delete the sender(s) of these messages.

Check for Emails – Click this button to have ChoiceMail One check your ISP's server for new emails. Use this if you don't want to (or can't) wait for the next automatic mail check or if you have automatic checking disabled (see page 87).

ChoiceMail One Indicators

ChoiceMail One provides several meters or indicators so you can immediately see where your email messages are within ChoiceMail One.
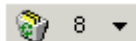
Top Right	Middle Right	Status Bar

New Messages Indicator – Indicates the number of unread messages in your inbox. Click this button to open the *Message Viewer* 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 One. See page 39.

Junk Box Indicator – Indicates the number of messages in the *Junk Box* window that are scheduled for deletion. Click the down arrow to open the *Junk Box* menu and choose whether you want to open the *Junk Box* window or purge all the messages in the Junk Box. When you open the *Junk Box* window, you can preview a message, accept or delete a message, purge all the messages in the *Junk Box*, or refresh the messages displayed in the *Junk Box* window. (You don't need to purge the messages – messages are deleted automatically after a few days.) See page 39 for details.

Show/Hide Spam-O-Meter – Controls whether the Spam-O-Meter displays at the bottom of the main window. This meter indicates the percentage of messages received today that are unknown, and the percentage of messages received that are spam. Click the button again to close the meter.

Show/Hide Sender Filter – Opens the sender filter where you can filter any view by typing a sender's email address. Only those messages that match your criteria display in the list. Click the button again to close the sender filter.

Show/Hide Summary Panel – Opens the summary panel. Click the button again to close the panel.

Show/Hide Message Information – Expands the list of messages to display the subject of each message. Click the button again to hide the message information. When you turn on this feature and select a message, three additional toolbar buttons are enabled that let you preview the message without sending information back to the sender, accept an individual message, and delete a message.

Show/Hide Recent Unknown Senders – Filters the list to display only unknown senders from whom you've received a message within the past 24 hours.

Unknown Senders Indicator – Indicates the number of senders in the *Unknown Senders* list. Unknown senders are automatically sent to the Junk Box if they do not register within the allotted time period (the default is 4 days).

Registered Senders Indicator – Indicates the number of senders who have registered and are waiting for approval in the *Senders Waiting for Your Approval* list.

All Messages Indicator – Indicates the number of unread messages in your email application's inbox. Double-click the icon to open your default email application. If your email application is configured to "leave mail on server," then the number in parentheses indicates the total number of messages held by ChoiceMail One.

Automatic Email Checking Indicator – Indicates whether ChoiceMail is checking for new email messages automatically. (You can set the frequency as a preference.) Double-click to enable or disable.

Automatic Registration Indicator – Indicates whether ChoiceMail is set to send an automated registration response to all unknown senders. Double-click to open the *Preferences* window. Select the checkmark next to *Never send registration requests to unknown senders* to turn off the automatic registration feature. See page 90.

Away Message Indicator – Indicates whether the Away Message feature is enabled. Hold the mouse over the icon – if it turns green, the away message is enabled. Double-click the icon to open the *Away Message Control* window, where you can create new messages and specify to whom you want to send an away message. See page 100.

Unknown Senders View

This window displays a list of unknown senders who have sent you at least one email message. ChoiceMail One has already sent back a registration request and is now waiting for the 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 explicitly**.** 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.

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, select the sender and choose **Selected sender** > **Approve sender** from the **Senders** menu, or right-click the sender and choose **Approve sender** from the popup menu.

2. You can sort the list by any column you choose by clicking the column header. You may find that it's most useful to sort the *Unknown Senders* list by received date, with the most recently received email at the top. You can then quickly see your most recent new senders if you want to monitor new email. You can also 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 **Manually Approve Sender** button 品 on the toolbar or choose **Approve another sender** from the **Senders** menu. The *Approve a sender* dialog displays.
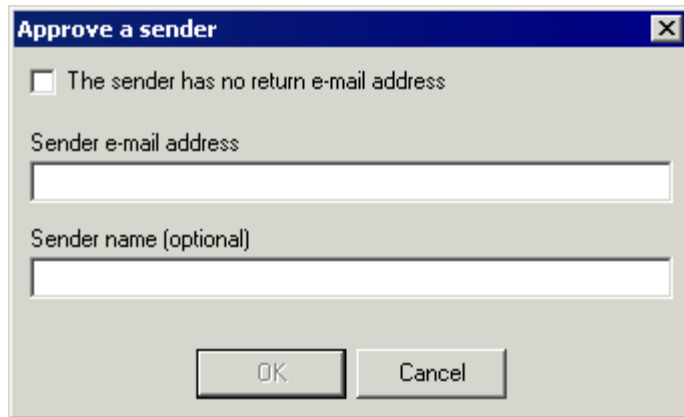
Enter the email address of the sender you want to approve and, optionally, enter the sender's name. Click **OK**.

Sometimes you'll see a blind carbon copy (BCC) icon next to a message in the *Unknown Senders* list. This means that ChoiceMail One did not recognize the address in the TO field as one belonging to you. When an incoming email has a TO address that ChoiceMail One does not recognize as belonging to you, ChoiceMail One 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 57 for details.

Note: If all your incoming email is displayed with BCC icons, it is most likely that the POP3 email address you specified is not the email address that people are actually using to reach you. In that case, you should tell ChoiceMail One about your other email address(es) that are being forwarded to the POP3 address you specified by setting an alias feature. See page 94 for instructions.

The ChoiceMail One System Tray Icon

Most of the time you'll have ChoiceMail One minimized so that it is only accessible through a system tray icon (in the lower right-hand corner of your computer screen). The system tray icon display a green border if new messages are available to be read. If you just move the mouse over the icon, a hint will pop up to provide some more details. Double-click the ChoiceMail One system tray icon to restore the ChoiceMail One main window and click the **New Messages Indicator** button . You can also right-click the system tray icon and choose *Preview approved mail* from the popup menu.
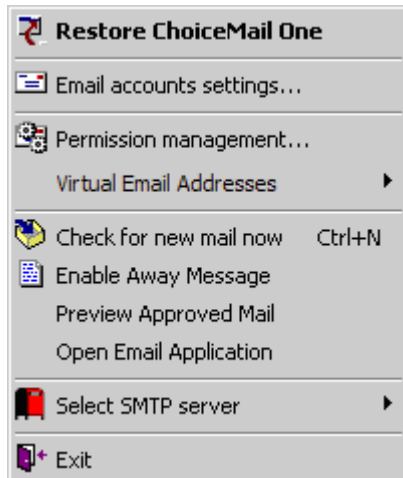
The system tray popup menu options are:

Restore ChoiceMail One – Opens the main ChoiceMail One window.

Email accounts settings – Direct access to your account configuration. See page 77.

Permission management – Direct access to the permission management section of ChoiceMail One. See page 44.

Virtual Email Addresses – If your version of ChoiceMail supports virtual email addresses, you can click on this menu item to quickly select one of your virtual email addresses and copy it to the clipboard.

Check for new email now – ChoiceMail One automatically checks for new mail every 10 minutes. You can change that option in the *Preferences* dialog (choose **Preferences** from the **Options** menu) but you can also have ChoiceMail One check for new mail immediately. This is useful if you are expecting a message and don't want to wait for the next automatic check.

Enable Away Message – Switches on ChoiceMail One's auto-responder so that you can send out automatic replies to people on your whitelist when you're not available.

Preview Approved Mail – Opens the *Message Viewer* window when you have new approved email messages waiting to be downloaded to your inbox. (The ChoiceMail One system tray icon has a green border when you have new approved messages waiting for download.) See the next section for details about viewing messages from within ChoiceMail One.

Open Email Application – Opens your default email application if it is not already open. See page 85 for instructions on how to change your default email application.

Select SMTP server – If you have defined multiple SMTP servers, you can quickly change the server that ChoiceMail One is using. This feature is useful when you're traveling and need to connect to a different SMTP server for a different ISP than the one you normally use.

Exit – Closes down ChoiceMail One completely. Note that if you choose this option, your email application will no longer be able to access email unless you manually reconfigure it.

The Message Viewer

ChoiceMail One lets you view your incoming messages right from inside ChoiceMail One, so you don't have to open your email application to see your latest messages. The ChoiceMail One icon in the system tray has a green border when you have approved messages waiting.

Click the **New Message Indicator** button [icon] **5** on the main window to open the *Message Viewer* window. You can choose **Display Unread Message Viewer** from the **Options** menu, or right-click the ChoiceMail One system tray icon and choose *Preview Approved Mail* from the popup menu.
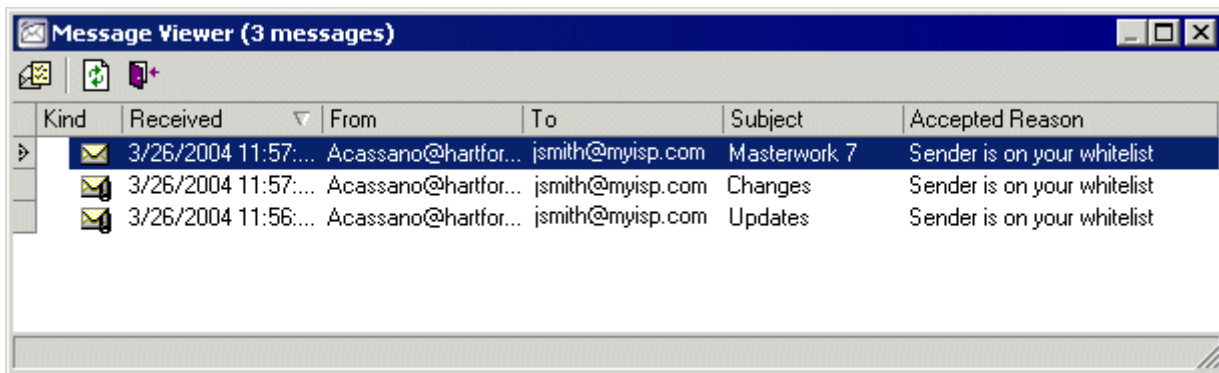
The *Message Viewer* window's toolbar lets you perform several tasks:

| [icon] | **Message Preview** – Click to preview the selected message. You can also double-click a message to preview it. ChoiceMail One opens the *Safe Message Preview* window in which you can read the message. No information is sent back to the spammer and no viruses can be launched. |

| [icon] | **Refresh Messages** – Click to have ChoiceMail One check your ISP server for any new incoming messages that meet your acceptance criteria. Any new messages available are added to the list. |

| [icon] | **Exit** – Click to close the *Message Viewer* window. |

The Junk Box Window

When a message comes in, ChoiceMail One 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 or installed with the program, ChoiceMail One 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 One deletes a message, it moves the message to the *Junk Box* window 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** button on the main window and choosing **Show the Junk Box** from the popup menu. (You can also choose **Display Junk Box** from the **Options** menu.)
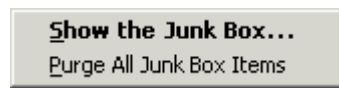
Messages are deleted from the *Junk Box* window after 4 days – you can change this time period by setting a preference.

The *Junk Box* window 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 address to which it was sent (your email address), the subject line, and the reason the message was deleted (i.e., moved to the Junk Box). This last item is particularly useful to help you understand why a particular message was deleted when you expected it to be accepted or challenged.

The *Junk Box* window's toolbar lets you perform several tasks:

Message Preview – Click to preview the selected message. You can also double-click a message to preview it. ChoiceMail One opens the *Safe Message Preview* window in which you can read the message. No information is sent back to the spammer.

Accept Message – Click to accept the selected message. ChoiceMail One undeletes the message and passes it through 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.

Refresh Junk Box – Click to refresh the display of deleted messages in the Junk Box.

Exit – Click to close the *Junk Box* window and return to the main window.

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The Safe Message Preview Window

When you open a message from the *Unknown Senders* window, the *Registered Senders* window, the *Message Viewer* window, or the *Junk Box* window, ChoiceMail One opens the *Safe Message Preview* window.

From the *Unknown Senders* window or the *Registered Senders* window, click the **Show Message Information** button on the main window or choose **Show Message Information** from the **Views** menu to see subject information about the emails sent by all the senders in the list. (You can also double-click a sender to see subject information for that sender.) Then select a message and click the **Preview Message** button on the toolbar or double-click the message to preview it. You can also right-click a message and choose **Preview selected message** from the popup menu.

From the *Message Viewer* or the *Junk Box* window, select a message and click the **Preview Message** button or double-click the message to preview it. You can also right-click a message and choose **Preview message** from the popup menu.

The *Safe Message Preview* window lets you preview a complete message before deciding whether to permit the message into you email application, or whether to delete it.
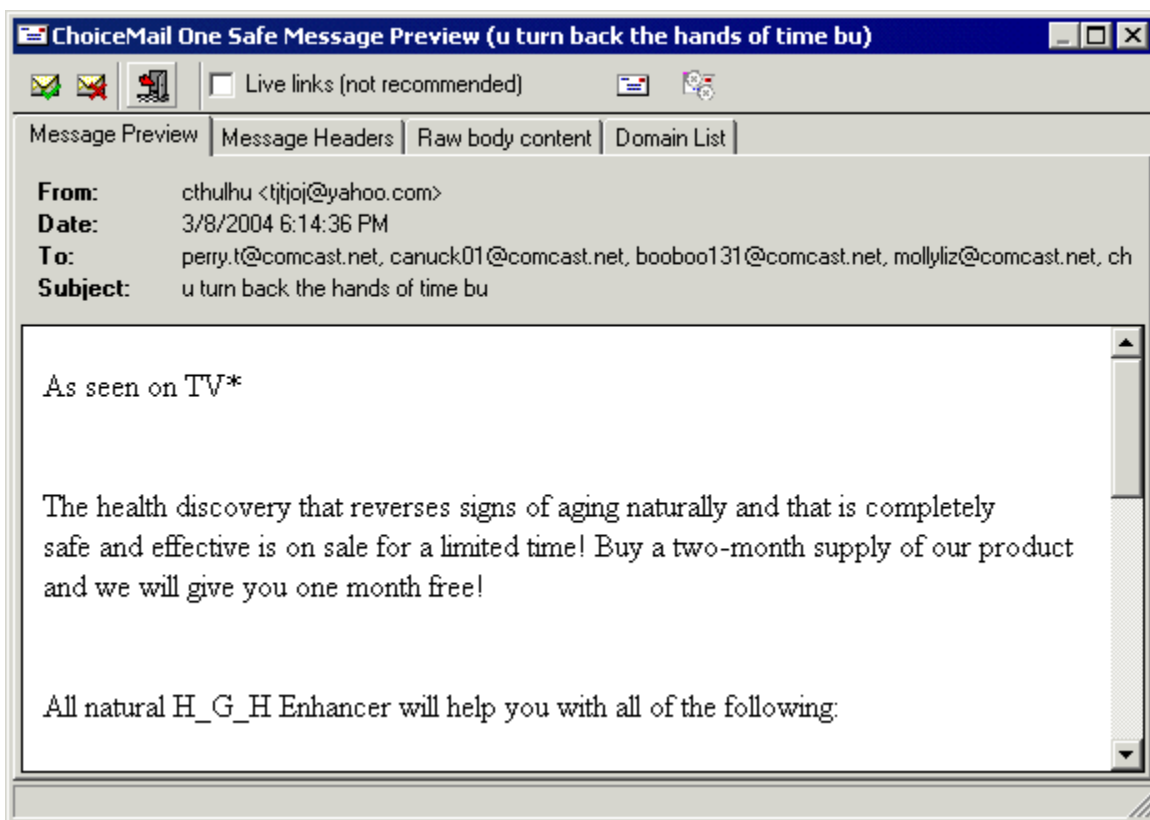
Previewing a message through ChoiceMail One is private, meaning that you can view a message without sending any information back to the sender. When you preview a message, any images that might be in the message are intentionally not available, because the very act

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 One does not retrieve images, "web bugs" – those invisible images that let a sender know that you are looking at a message – are blocked. Nor will the *Safe Message Preview* window let any attached executable be triggered, so you are not at risk of letting a virus loose on your system. Previewing a message within the *Safe Message Preview* window means that you don't need to worry about your privacy being invaded without your knowledge, nor do you need to worry about launching a virus. The *Safe Message Preview* window's toolbar lets you perform several tasks:
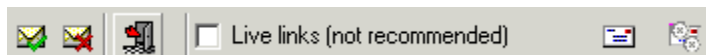
*Note: The **Accept Message** and **Delete Message** buttons do not display when you open the* Safe Message Preview *window from the* Message Preview *window because all the messages in this window have already been accepted.*

 Accept Message – Click to accept the selected message. ChoiceMail One passes the message through to your email application's inbox.

 Delete Message – Click to delete the selected message.

 Exit – Click to close the *Safe Message Preview* window. You can also press the Esc key to close the window.

 Enable Live Links – Clicking URL links in the *Safe Message Preview* window 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 *Live links* checkbox and then click the desired link. Your default web browser opens to the appropriate webpage. The next time you open the *Safe Message Preview* window, however, the *Live links* feature is again disabled, to prevent you from accidentally opening a spammer's webpage.

 Reply to Sender – Click to send an email reply to this sender, from within your email application. The content of the message you're previewing is automatically copied to the Windows Clipboard so you can paste it into your new message, if you wish.

Note: Remember that if you send a message to a sender, that sender will automatically be added to your whitelist.

 Edit Permission Rules – Click to open the *Permission management* dialog, where you can edit your permission rules. This feature is useful if you see messages in the *Safe Message Preview* window that have been accepted or deleted incorrectly, perhaps because of a permission rule whose parameters are too broad. See the next section for details.

You can also view the header information for the message, to see where it came from, and view the raw contents of the body of the message. Click the *Message Headers* tab and/or the *Raw Body Content* tab to view this information.

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The *Domain List* tab extracts all the servers referenced in the email message and finds the IP address for each one (if it exists). Remember that even if most of the message (including the email addresses) is fake, it is not much use to the spammer if it cannot entice you to their real website. (You can also have ChoiceMail One delete any messages whose servers cannot be resolved in the first place.) See page 66 for more information about using the *Domain List* tab.

Virtual email addresses

Usage

A virtual email address is a temporary email address you can create and give out to vendors, newsletter systems and so forth so that you don't have to release your real email address. The main purpose of virtual addresses is to ensure that email from legitimate senders of automated email (i.e., senders whom you can't realistically whitelist in advance, such as online vendors and newsletters) will get to your inbox without your having to search for them. Depending on how you create and give out your virtual addresses, you can also tell who is responsible for passing your address on to a spammer.

Mail send to any of your virtual email addresses will be automatically approved by ChoiceMail One. Virtual addresses eliminate the need to have multiple email address (i.e., a "real" one and a "give to online entities" one).

ChoiceMail One includes up to 5 virtual email addresses. You may find however that you wish to use separate virtual email addresses for each vendor and newsletter/mailing list from whom you receive mail so that if you begin to receive spam, you can just change one address and notify one vendor rather than having to notify lots of vendors. You can also tell which vendor or mailing list was responsible for "exposing" the email address. You can buy more virtual email addresses in paks of 50 per year. Please visit our website at www.digiportal.com for more information.

Virtual email addresses are only available to users who have purchased a retail version of ChoiceMail One. They are not available in the trial version of ChoiceMail One nor in ChoiceMail Free. You will need to create an online account and register your ChoiceMail One license before you can use virtual email addresses. To create an online account, please visit http://www.digiportal.com/accountlogin.html

There are some reasonable restrictions on virtual email addresses. Virtual email addresses are intended to allow things like receipts and notification from vendors, text postings from newsgroups and so forth. They are not intended to be used to receive large attachments such as documents and photographs. The actual size of messages allowed through virtual email is therefore limited to prevent abuse of the virtual email address feature.

To manage your virtual email addresses, click Actions | Virtual addresses from the main ChoiceMail One menu.
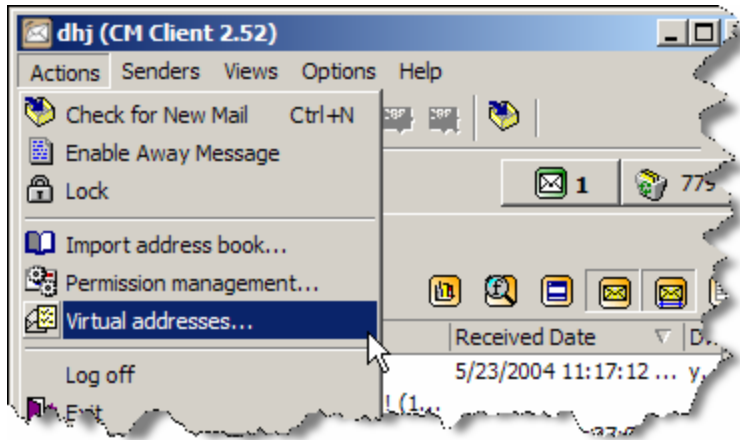
This will open up the online manager dialog. from which you can create and modify virtual email addresses
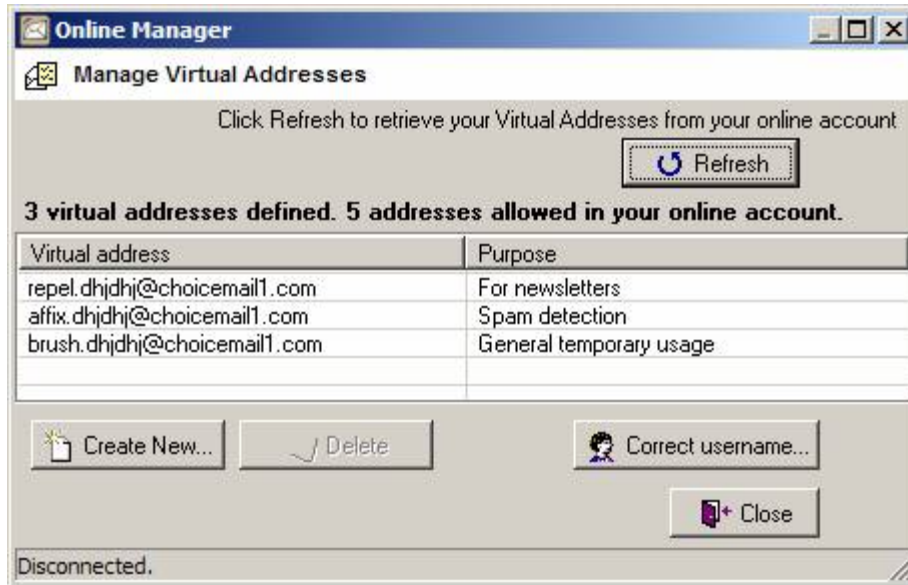
Using virtual email addresses.

You create and manage virtual email addresses directly from inside ChoiceMail One.

Click on "Create New" to create a new virtual email address. You will be prompted to enter a new address. Note that you only can create the first segment of this email address. If you leave the field empty, a random address will be created for you automatically.
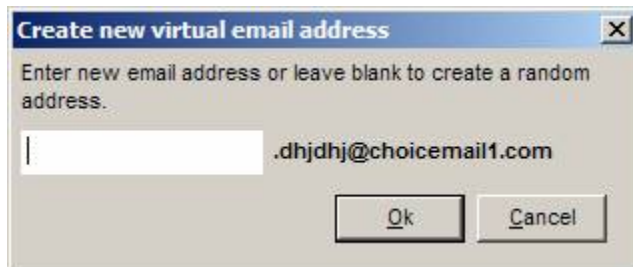
Click OK. You will then be prompted to provide a purpose for this address.
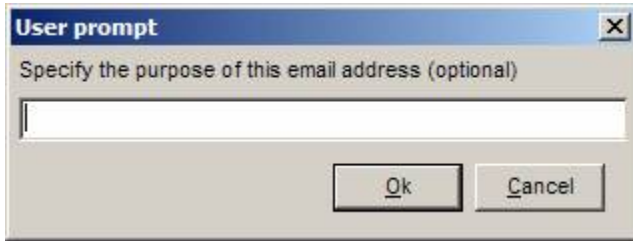
This is optional and intended for your own use to remind you how you are using this particular virtual address.

Click OK. ChoiceMail One will contact the server and update your virtual email address list.

Deleting a virtual email address

To delete a virtual email address that you no longer wish to use, select the address and click the Delete button.

Changing the purpose of a virtual email address

To edit the purpose associated with an existing virtual email address, simply double-click on the email address and you will be prompted to change the purpose message.

Correcting your username.

If you entered your username or password incorrectly, ChoiceMail One will not be able to log in to your online account. You will see an error message indicating this problem. Click on "Correct username" to reenter your username and password.

Permission Management

The Registration Process

A key mechanism ChoiceMail One uses to "defend" 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 person@someplace.com sends you a message. ChoiceMail One will note that the sender is not on your white list, nor does it 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 One.

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 by setting a preference.) 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 One 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 that the sender type this number prevents automatic systems from responding to registration requests. At this point, ChoiceMail One moves person@someplace.com from the *Unknown Senders* list to the *Registered Senders* list.

When a sender registers, ChoiceMail One pops up an alert, to let you know a sender is waiting for your approval. (You can specify what type of alert by setting a preference. See page 83.) The ChoiceMail One system tray icon changes to a flashing alert icon , so you'll know a registration is waiting.
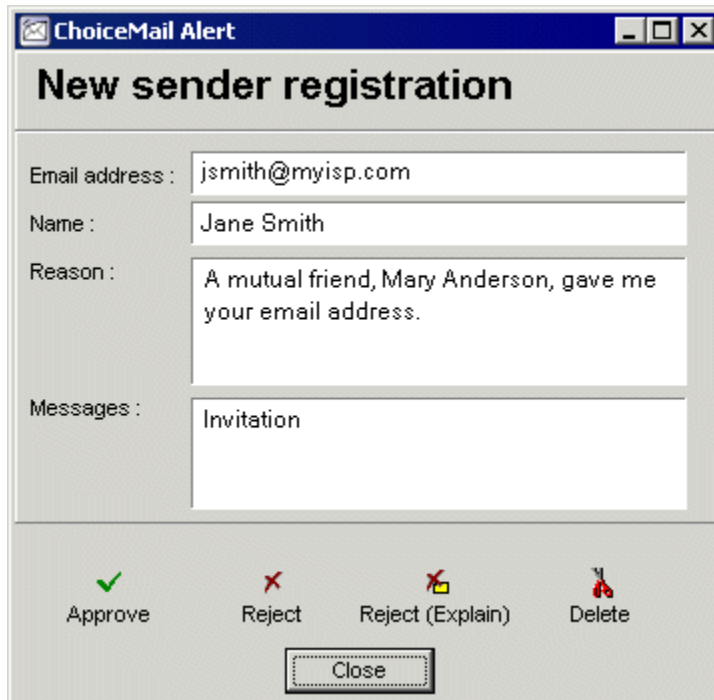
You can approve or reject the sender right from this alert dialog or, at your convenience, you can review the *Registered Senders* list and decide what you want to do with a sender who has registered. After viewing the email address and name, and the reason provided by the registered sender, you have several choices. Right-click a sender to open a popup menu. You can:
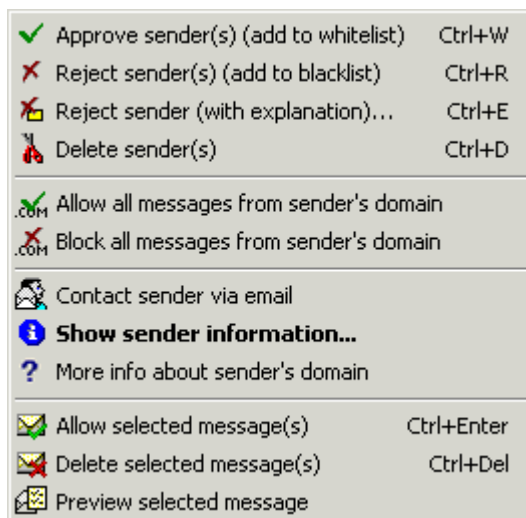
- **Approve the sender** – ChoiceMail One adds the sender to your *Approved Senders* list (the whitelist); all future messages from an approved sender are automatically passed through to your email application's inbox. You only have to accept a sender the first time you receive a message. Any other initial emails from that sender that were held up are also passed through to your email application.

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- **Reject the sender** – ChoiceMail One adds the sender to your *Rejected Senders* 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 this option only if you are feeling sorry for the sender. ☺

- **Delete the sender** – If you delete a sender, ChoiceMail One 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 One automatically deletes new senders that are not approved after a few days, unless you turn off this option, which is not recommended.

  Note: 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.

- **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 newsletter so that all the email messages get through, even if the sender is different each time.

- **Block all messages from the sender's domain** – You'll probably find that you more often want to identify domains from which you never want any email. When you choose to block a domain, ChoiceMail One silently deletes all email messages from anyone at that domain. For example, you may decide to silently delete all email messages coming from any domain that ends with ".tv." However, if you block a domain, you will have to manually approve a legitimate sender from that domain because any attempt by such a sender to contact you will automatically fail and the sender will not get a registration request. (You manually approve a sender by clicking the **Manually Approve Sender** button on the toolbar or by choosing **Approve another sender** from the **Senders** menu.)

- **Contact sender via email** – Choose this option to open your default email application and open a new email message addressed to the selected sender.

- **Show sender information** – Choose this option to view the registration information (if available) returned by the sender. You can read any explanation the sender gave for sending the email.

- **More information about domain of sender** - Choose this option to access a web page that provides detailed information about the domain of this sender.

  The following three menu items become available when you select a message in the Registered Senders *list. Double-click a sender to open the message's subject information.*

- **Accept the message** – Select a message and choose this option to accept individual messages to read without giving any indication to the sender that you've read the message. Note that if there is a "return–receipt" request in the incoming email, ChoiceMail One will remove it automatically.

- **Delete the message** – Select a message and choose this option to delete a message. It's rarely necessary to do this, as ChoiceMail One will eventually delete the message automatically if you don't approve the sender.

- **Preview the message** – Select a message and choose this option to open the message in the *Safe Message Preview* window. You can safely read the message without returning any information to the spammer or triggering any web bugs. See page 41 for details.

Permission Rules

ChoiceMail One lets you create rules that the program will use to make decisions about new emails automatically. ChoiceMail One also has some built-in rules based on common programming techniques used by spammers. Incoming email messages are processed against any email rules stored in the system to determine their fate. When an incoming message (including the sender information) doesn't match any email rule, then ChoiceMail One 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 One, you've already preapproved all these senders. If you've also enabled ChoiceMail One'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 One 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 One from sending registration requests to such senders (who are probably bogus anyway). ChoiceMail One 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 or domain in advance if you're expecting a message from someone new and don't want them to go through the registration process. You can also accept messages that have specific words or phrases in them.

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.

If you have a business or hobby about which you exchange email messages with strangers, you can create a permission rule to always accept messages that contain a specific word or phrase, such as *quilts* and *quilting*, or *gardens*, *gardening*, *landscape design*, etc. Alternatively, you can just use a virtual email address (page 44).

You can also block a specific IP (Internet Protocol) address or an IP range, if you know that spammers are sending messages from that address. DigiPortal Software has identified a set of IP regions that are known to send spam, and you can add additional addresses when you examine a message in the *Safe Message Preview* window. See page 66 for details.

How Incoming Messages Are Processed

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

1. **Is this sender on our Accept list?**
   If so, pass the message through to the user's email application.

2. **Is this sender on the Reject list?**
   If so, silently delete the message.

3. **Check the contents (sender's email address, subject, body of message, IP address, etc.) against the permission 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.

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 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 One 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.

Managing Domains

Accepting or Rejecting Email Based on Domains

You can tell ChoiceMail One 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 One.

➢ To accept all email from a domain, click the *Accepted domains* tab on the *Permission management* window. You can also choose **Allow all messages from another domain** from the **Senders** menu.

➢ To reject all email from a domain, click the *Rejected domains* tab on the *Permission management* window. You can also choose **Block all messages from another domain** from the **Senders** menu.

➢ To accept or reject a domain, type the domain name in the edit box. ChoiceMail One tells you when you've entered a valid domain name. Click the **Add** button.

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

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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 One 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 One 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**, **emailxyzzy.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.

Adding an Email Rule

You can add new rules to automate the disposition of a new incoming email message.

➢ Choose **Permission management** from the **Actions** menu to open the *Permission management* window and click the *Rules* tab.
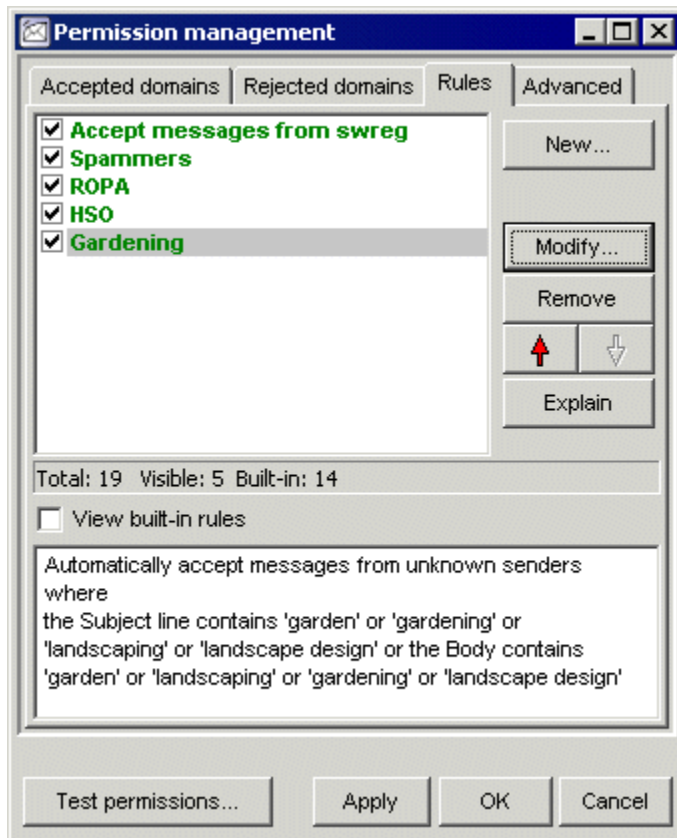
➢ Click the **New** button in the R*ules* tab to open the *New Email Rule* dialog, where you can define and add your own rules for handling incoming emails.

➢ You can enter text that you want ChoiceMail One to search for in any part of a message. Click the appropriate tab – *From, Subject, Body, To, Cc, To or Cc, Other headers*, or *Attachment Names* – and type the desired text. For example, in the *From* tab, enter a name or an email address (one name or address per line). In the *Subject* or *Body* tab, enter a word or phrase (one word or phrase per line).

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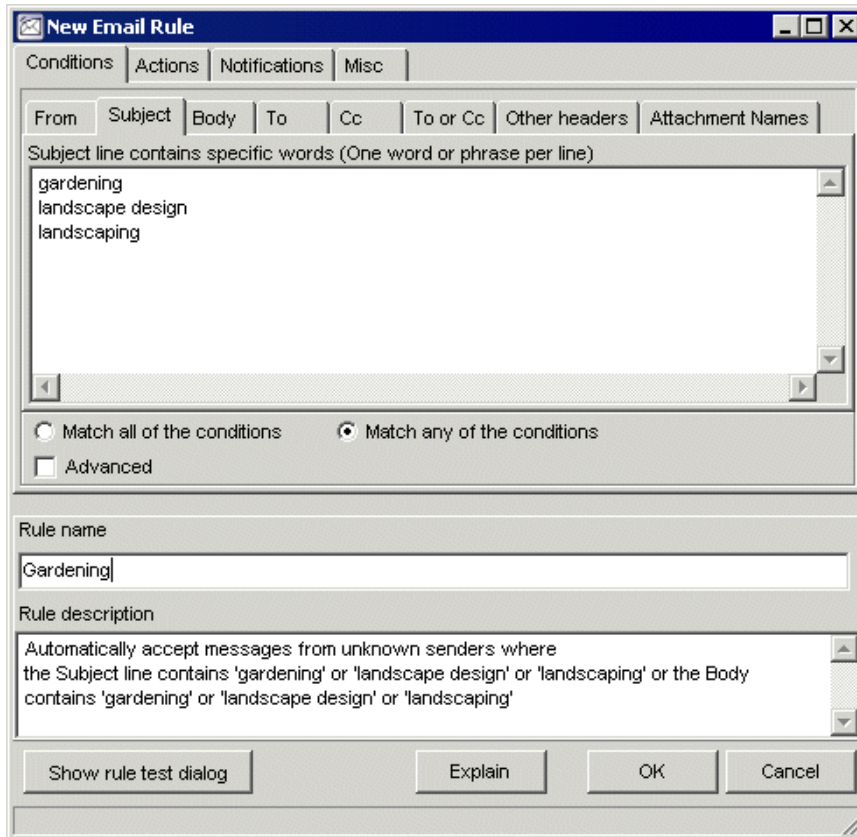
➢ If you've entered text in more than one tab, you must decide if you want the rule to trigger even if only one condition matches, or if you want the rule to trigger only when every condition matches. Click the appropriate radio button: *Match all of the conditions* or *Match any of the conditions*. If you receive email inquiries from strangers about a product or topic, be sure to create a rule with that product or topic name in both the *Subject* and *Body* tabs and click the *Match any of the conditions* option.

➢ Click the *Actions* tab and click the appropriate radio button to determine what ChoiceMail One should do with the email message when it matches these conditions:
   Sender rules

   ▪ Approve the sender
   ▪ Reject the sender
   ▪ Don't send a registration request
   ▪ Delete the sender (and all associated messages) to the Junk Box
   ▪ Delete the sender (and all associated messages) permanently
   ▪ Mark the message as spam using the spam icon in the *Unknown Senders* view

   Message rules

   ▪ Accept the message
   ▪ Delete the message to the Junk Box
   ▪ Delete the message permanently, bypassing the Junk Box
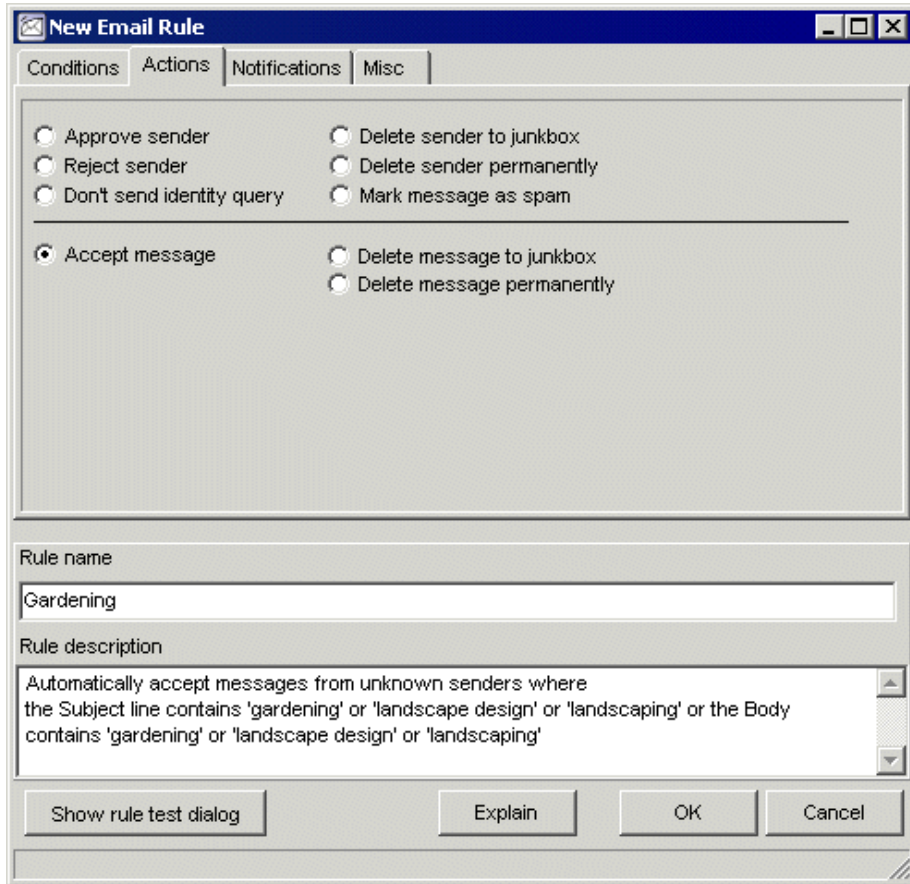
➢ Type a name for this new rule. The name will display in the list on the *Rules* tab of the *Permission management* window.

ChoiceMail One displays the conditions you've defined for this rule in the *Rule description* box.

➢ Click the **Show rule test dialog** button if you want to test the conditions of the rule you've just defined. The *Test Email Rule* dialog displays.

➢ Type text in the different sections of a sample email. ChoiceMail One indicates when the text you type matches the condition(s) you've defined. The text at the bottom of the dialog indicates the action ChoiceMail One will take when it receives a message containing the text you've typed.

For example, if you've defined a rule that ChoiceMail One should accept all emails about gardening, and you type *gardening* in the *Subject* box in the *Test Email Rule* dialog, ChoiceMail One displays "Message automatically accepted" in green.

If you create a rule that automatically deletes a message when it matches your criteria, ChoiceMail One displays a message in red.

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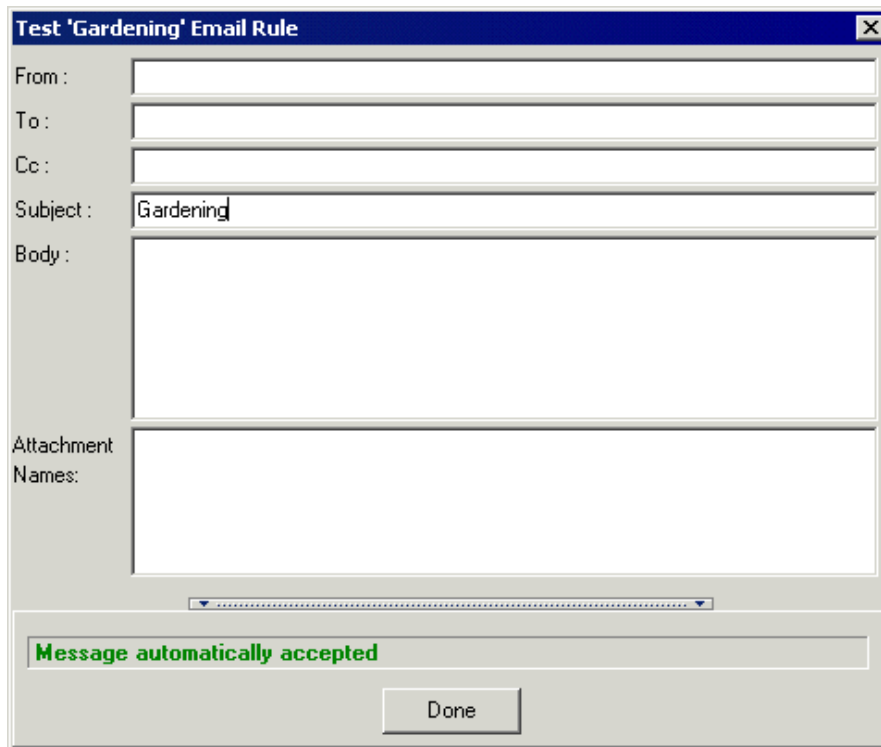
Built-In Rules

ChoiceMail One has several predefined or built-in rules that you can access from the *Rules* tab.

➤ Select the *View built-in rules* checkbox on the *Rules* tab of the *Permission management* window.

The rules you create display in bold, green for an acceptance rule and red for a rejection rule. DigiPortal built-in rules display beneath your rules in unbolded green and red.

Note: If you've installed an update to your copy of ChoiceMail One, rather than a new install, you must import these DigiPortal email permission rules into the updated version of ChoiceMail One. Click the Import *tab of the* Permission Management *window, click the* **Import** *button, and open the* Extras *folder in the* ChoiceMail *program folder. Select the* extrarules.xml *file and click* **Open***. These DigiPortal rules are added to your list of rules in the* Rules *tab.*

Select a rule and click the **Explain** button to see an explanation of the selected rule. For example, the *Delete bogus postmaster emails* rule tells ChoiceMail One that any message from a Postmaster that refers to an email address that's not listed in your whitelist should be deleted. Whenever you send a message to someone, the email address is added to your whitelist, so you can't receive a legitimate Postmaster message about an unknown email address.

➤ Clear the *View built-in rules* checkbox on the *Rules* tab to hide the list of built-in rules.

Notification Messages

You can create a message that ChoiceMail One will automatically email to a sender that matches the criteria of one of your permission rules.

➢ Click the *Notifications* tab in the *New Email Rule* or *Edit Email Rule* dialog.
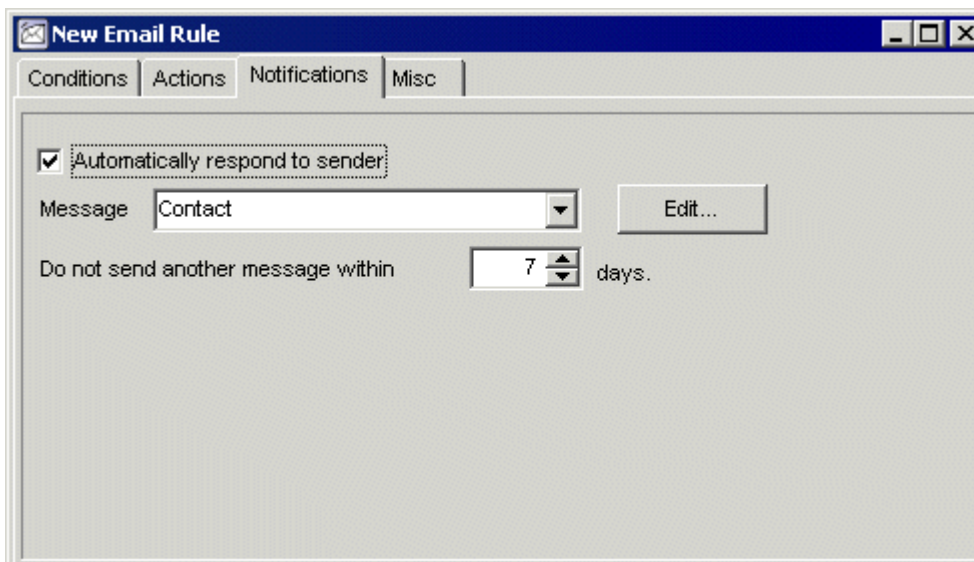
➢ Select the *Automatically respond to sender* checkbox if you want ChoiceMail One automatically to email a message back to senders that meet the criteria of this permission rule.

➢ Click the *Message* down arrow and select the message you want ChoiceMail One to send.

  ▪ Click the **Edit** button to open the *Email Accounts Settings and Preferences* dialog, displaying all the Away and Notification messages you've created. You can create a new message or edit an existing message. (See page 96 for more information.)

➢ Click the up or down arrow to specify how many days you want ChoiceMail One to wait before sending another notification message in response to another email from a sender that meets this criteria.

Rule Explanations

You can create explanations for your own permission rules that will display when you click the Explain button on the Rules tab.

➢ Click the *Misc* tab on the *New Email Rule* dialog and type an explanation for this rule.
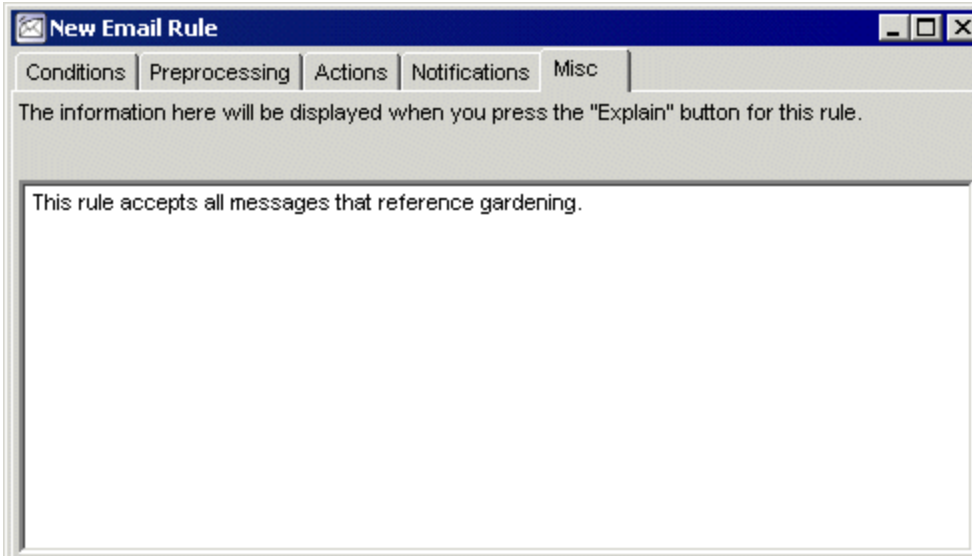
Message Preprocessing

You can specify that certain preprocessing procedures (i.e., transform rules) be applied to email messages from a sender who meets the criteria of this permission rule. These transform rules perform formatting processes on an email message to more readily detect spam.

➢ Select the *Advanced* checkbox on the *Conditions* tab in the *New Email Rule* dialog. A new *Preprocessing* tab displays.
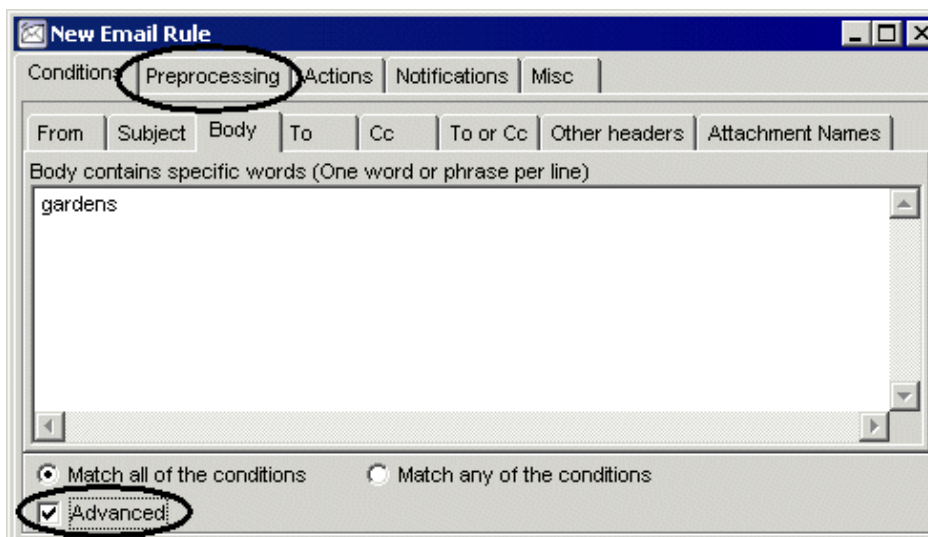
➢ Click the *Preprocessing* tab and type the name of the transform rule you want to apply to email messages that meet this permission rule's criteria in the *Message preprocessor name* box.
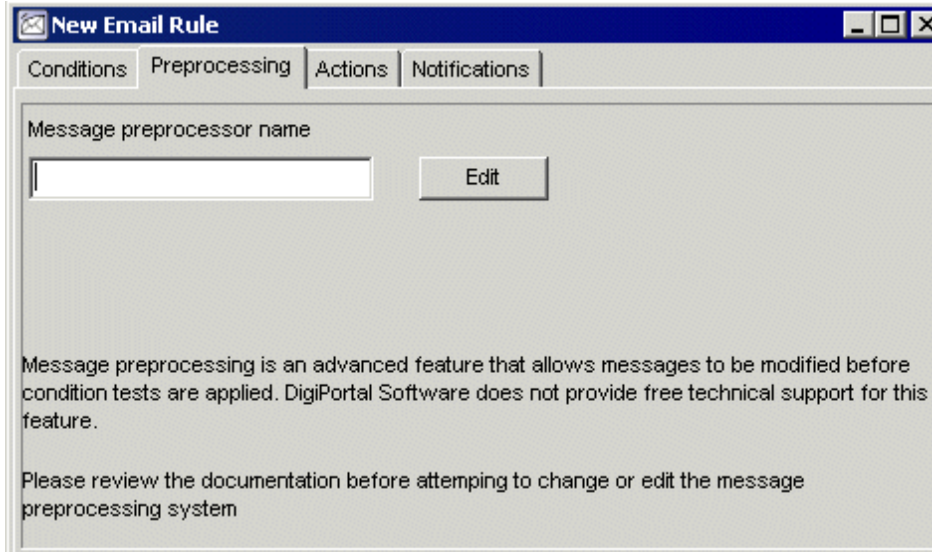
➢ Click the **Edit** button to view the transform rules already installed; the name of a transform rule is inside square brackets.

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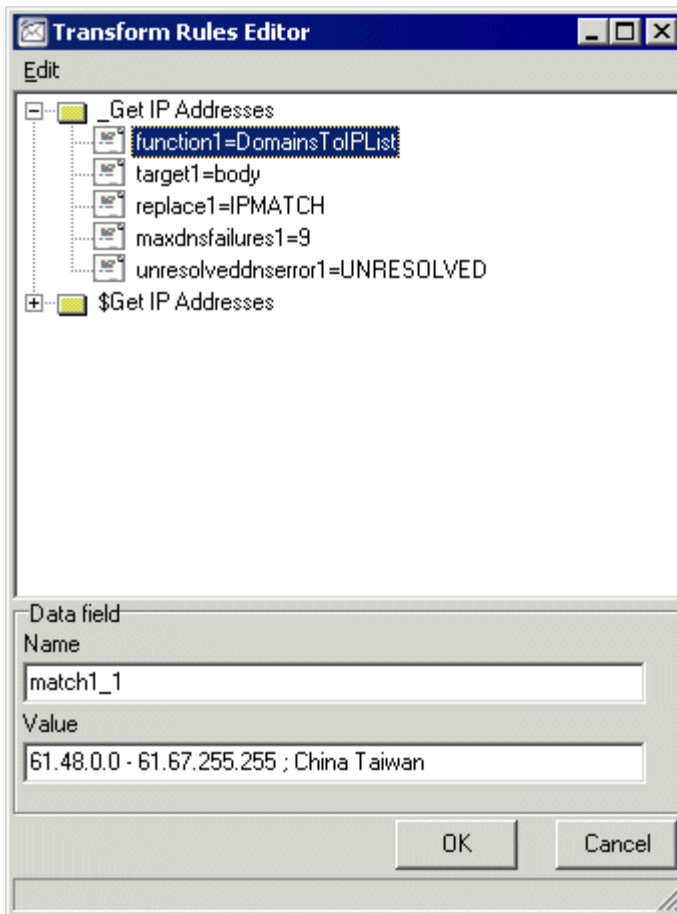
Note: The transform rules installed with ChoiceMail One can be found in the transformrules.ini *file in the* Transforms *folder in the ChoiceMail One* Programs *folder. However, you should not edit this file unless you are* very *familiar with how HTML and email messages work. DigiPortal Software does* **NOT** *provide technical support for preprocessing transform rules.*

Mailing Lists and BCC Messages

If you're a member of 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 One doesn't recognize the To address as a legitimate address for you, it holds these messages in the *Unknown Senders* view with a BCC icon – you must manually approve these messages because ChoiceMail One does not send out a registration request to lists, 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.

➤ Click the *To* tab in the *New Email Rule* window and enter the email address the mailing list uses in the *To* field. Click the *Actions* tab and select what you want ChoiceMail One to do with these 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. ChoiceMail One will send them to your email inbox and will not display then in your *Unknown Senders* view (see page 36.).
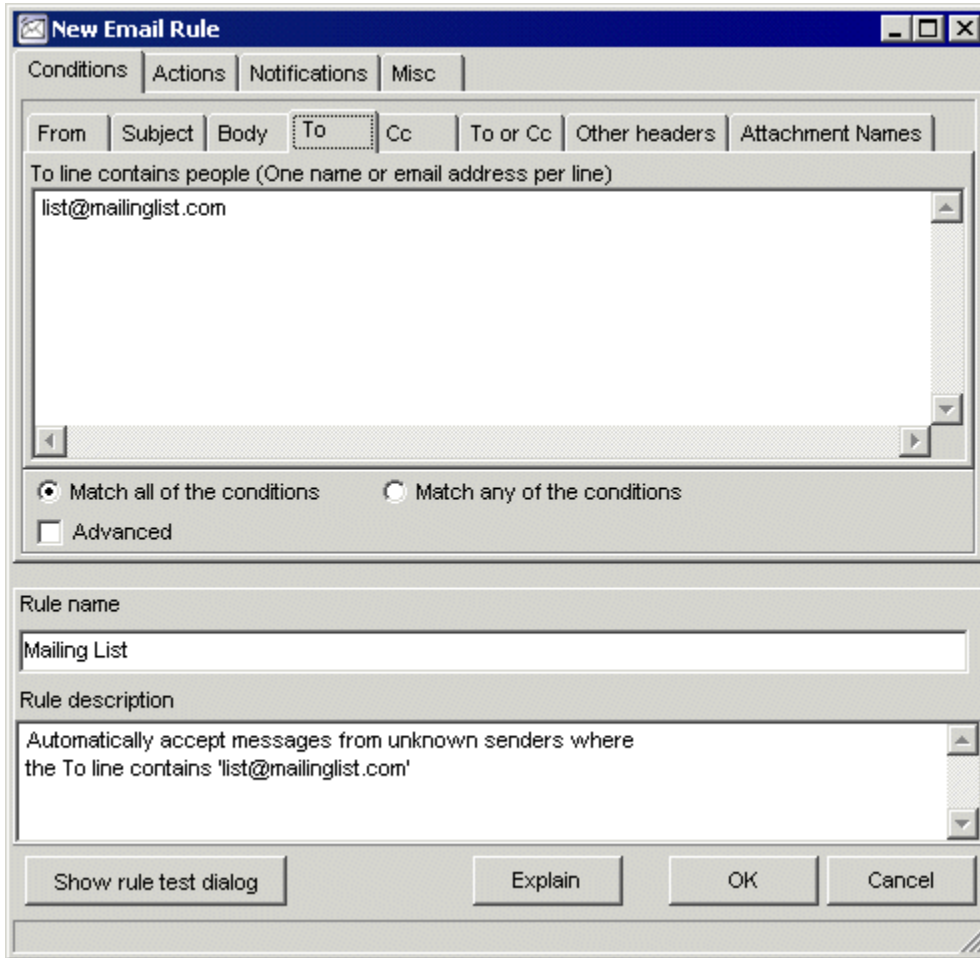
Other Headers

You can create rules that look for specific headers in an incoming email.

1. Click the *Other headers* tab and type the name of the header type for which you want to define a filter. Do not add a colon after the header name. Click the **Add** button.

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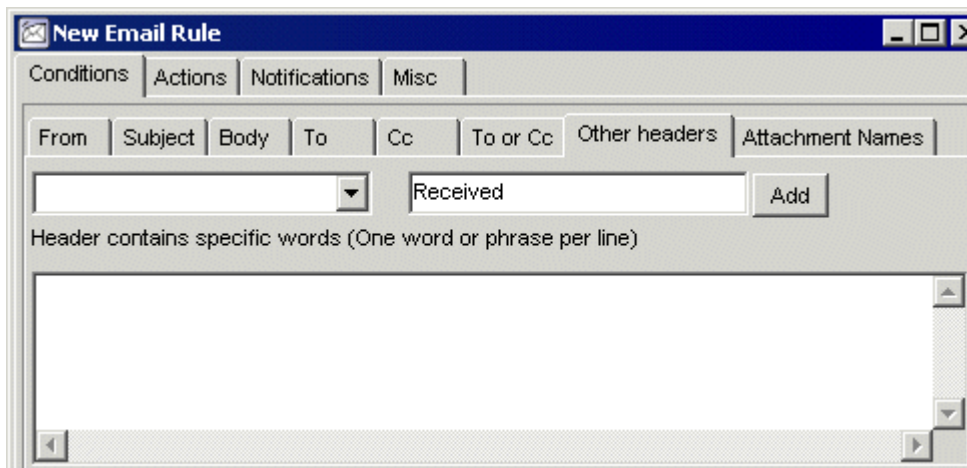
2. Type the words you want to use as the criteria for this type of header.
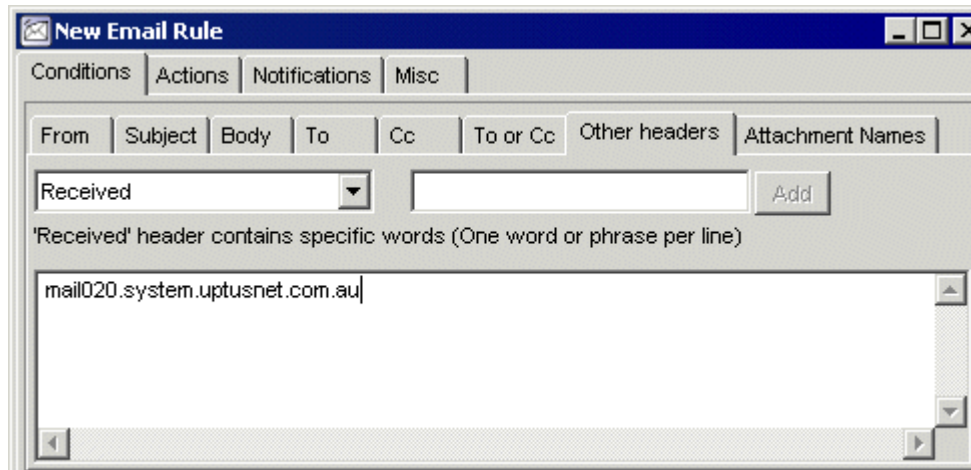
3. Complete the rest of the window as explained in the previous section.

Although most headers can only appear once, the *Received* header may actually appear multiple times. If you use *Received* as your header name in an email rule, ChoiceMail One makes a match with the content that appears in <u>any</u> 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.

Notes: It is important to understand that most of the information in Received headers can be forged by spammers. Indeed, in general the only item that cannot be forged is the actual IP address associated with the first Received header (which is why we provide a mechanism to refer to specific Received headers).

A complete description of the Other 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 below and in the Tips and Tricks *section on page 129. You can also check the ChoiceMail One online help for additional information – see* Email Rules, Special Keywords, Regular Expressions, *and* Transform Rules.

Special Keywords

ChoiceMail One 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 the 'not' keyword at the beginning of any permission rule to invert the meaning of the rule.

Note: Prior to ChoiceMail One version 2.2, the 'not' keyword did not require parentheses around it. It does now. If you have created your own permission rules using this keyword, you must edit them to add the parentheses around the 'not' keyword.

(me) – The 'me' keyword translates to mean any email address defined in POP3 or ALIASES. You can use the 'me' keyword to 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.

(empty) – Can be used to check if a field is empty - typically use it to test whether the subject line or the body of a message is empty. Note: you cannot use this function to test whether the FROM field is empty. Incoming messages with empty FROM fields are deleted automatically by ChoiceMail before the permission rules are applied. Also be aware that if you use this function to test the TO field, an invalid email address in that field will be treated as if there was no email address.

(seq) – Use the 'seq' keyword to match a word that has been broken up by non- alphabetical characters in an attempt to disguise it. For example, *(seq)viagra* will match such character sequences as *v!i!a!g!r!a*.

(seqword) – The 'seqword' keyword is similar to 'seq' except that it will only match complete words. For example, to match a word that has been broken up by non- alphabetical characters in an attempt to disguise it. For example, *(seqword)agra* will not match such character sequences as *v!i!a!g!r!a*.

(word) – The 'word' keyword forces a match on individual words and will ignore character sequences that are embedded in a larger word. For example, *(word)hell* will match the phrase *life is hell* but it will not match the phrase *hello there, my name is John*.

(phrase) – The 'phrase' keyword can find matches for words that are separated by other words. For example, *(phrase)reduce debt* will match the phrase *Click here to reduce your mortgage debt.*

(iprange) – The 'iprange' function lets you specify a list of dotted IP address ranges against which to match. It's particularly useful in the *Received1* header section (see above), the only place where an IP address cannot be faked.

> *Example 1:* Detect any incoming mail from a server defined within the entire Latin American and Caribbean IP address Regional Registry
> *(iprange) 200.0.0.0 – 200.255.255.255*

> *Example 2:* Detect any incoming mail from a server defined within the Asia Pacific Network Information Center
> *(iprange) 221.0.0.0 – 221.255.255.255*

> *Example 3:* Combine the two tests above into a single test (note the comma separating the two ranges)
> *(iprange) 200.0.0.0 – 200.255.255.255, 221.0.0.0 – 221.255.255.255*

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Note: These examples are probably far too general for most users. Although they will detect a number of well-known spam sources, they can also block some legitimate senders who happen to live in that part of the world. DigiPortal Software cannot provide technical support to help you find and define IP address ranges. For more information on this topic, use your favorite search engine to look for topics such as "ip address range" and "whois."

Please also see the section on IP/domain blocking on page 66. The new (as of version 2.2) domain-checking tool is another mechanism in place for detecting spam based on the URLs that are actually in the messages.

Managing Your Permission Rules

Once you've defined a permission rule, it displays in bold, either green or red, in the list in the *Rules* tab of the *Permission management* window.

➢ Click the **New** button to add another rule. See page 52 for instructions.

➢ Select a rule and click the **Modify** button to edit the conditions of a rule.

➢ Select a rule and click the **Remove** 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** button if you want ChoiceMail One to apply the rules you've defined or edited to senders who've already sent you an email.

➢ Click the **Test permissions** button to enter text to test the criteria you've set. ChoiceMail One indicates when the conditions trigger a rule, and indicate what action will be taken. Select the *Include disabled rules in the test* checkbox to apply the test to rules you've disabled. See page 56 for details.

Setting Priorities

ChoiceMail One executes email rules in the order they appear in the list.

➢ Select a rule and click the red up or down arrow to change a rule's position in the list.

Keep moving rules until you have the rule priority list you want. By default, ChoiceMail One executes your rules first, and then the built-in rules.

➢ Select the *View built-in rules* checkbox to display the built-in rules if you want to change the order and have ChoiceMail One execute some of the built-in rules first.

Importing Rules

You can import permission rules if you downloaded or received email rules from another ChoiceMail user. DigiPortal Software also releases extra permission rules from time to time and these can be found through the downloads section of our website.

➢ Click the *Advanced* tab in the *Permission management* window and click the **Import** button. In the *Open* dialog, navigate to the folder in which you've saved the rules to import. (Permission rules are in the .xml format.)

➢ Alternatively, if you have downloaded a permission rule and saved it on your desktop (say), you can simply drag it into the Rules section of the Permission management tab to import the rule (ChoiceMail One only).

ChoiceMail One adds the imported rules to the list on the *Rules* tab. You can delete the ones you don't want, enable or disable a rule by selecting or clearing the checkbox next to it, and change a rule's position in the list.

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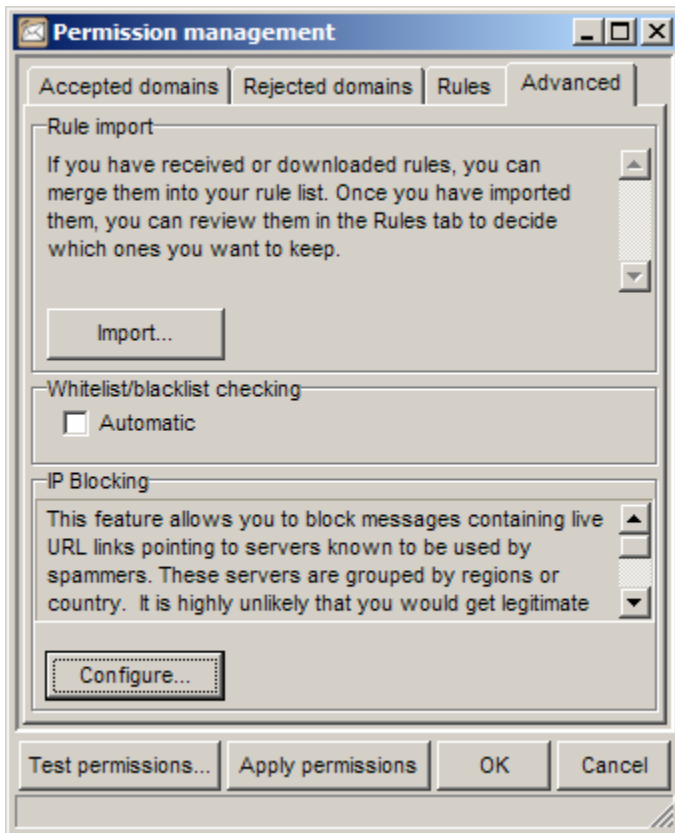
Overriding the automatic whitelist/blacklist test

Normally, an incoming message is tested against your whitelist and blacklist before the permission rules are applied. However, in some rare cases, you may want to have finer control over when your message is tested against the whitelist and blacklist. You can do this by disabling the automatic test and instead have those tested performed during the permission rule process.

➢ Click the *Advanced* tab in the *Permission management* window and uncheck the checkbox called **Automatic**.

When you uncheck this box, ChoiceMail One automatically adds two new permission rules to the list of available rules. You can see these new rules, called Whitelist and Blacklist, by clicking on the *Rules* tab in the *Permission management* window. These rules are "read-only". You can move them up and down to control when they are checked relative to other rules in the list but you cannot modify or delete these rules unless you re-enable Automatic whitelist and blacklist processing again.

Blocking IP Addresses

ChoiceMail One version 2.5 has a new, powerful feature that lets you block email messages from specific IP addresses or a range of IP addresses that you know are sending out spam email messages. You can access the IP address-blocking feature by clicking the **Configure** button in the IP Blocking section of the *Advanced* tab of the *Permission management* window. (Choose **Permission management** from the **Actions** menu to open this window.)

ChoiceMail One's *Safe Message Preview* window lets you check the contents of a message without any risk of sending information back to a spammer or triggering a virus. (See page 41 for details.) The *Domain List* tab provides detailed information about the domain and IP address from which the suspect email originated.
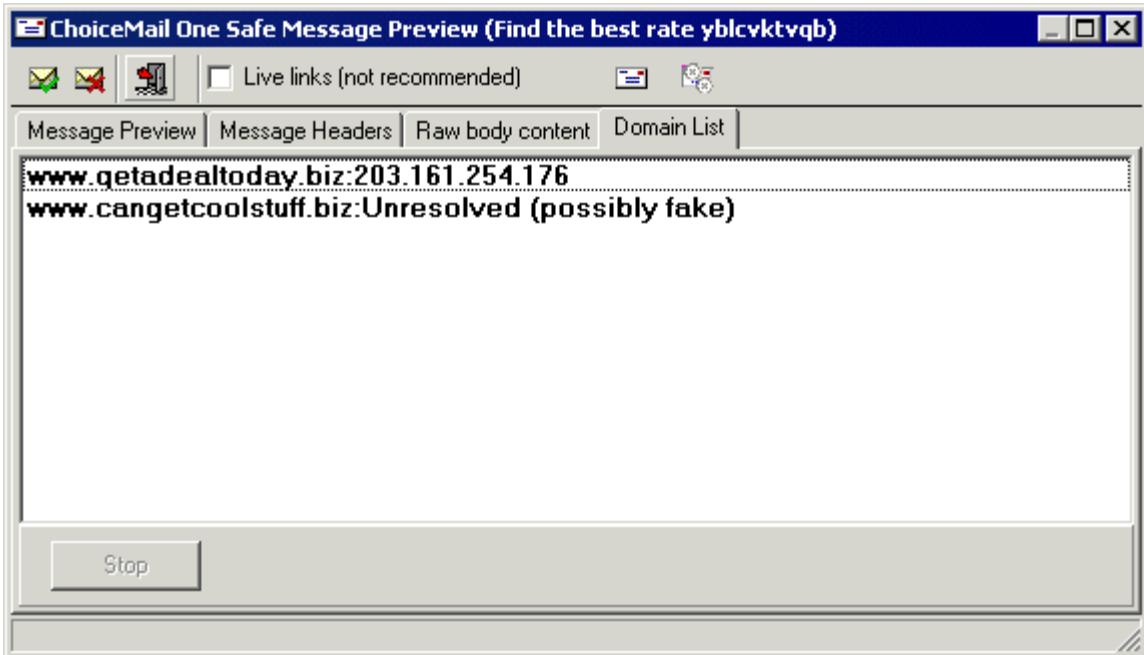
ChoiceMail One extracts all the servers referenced in an email message, finds the IP address for each one (if it exists), and displays this information in the *Domain List* tab.

Note: You can also create a permission rule to have ChoiceMail One delete any message whose servers cannot be resolved in the first place. However, multiple servers can be associated with the same IP address, so blocking the actual IP address works much better in blocking all email from this address.

➢   Right-click a server name in the *Domain List* tab to access a popup menu.
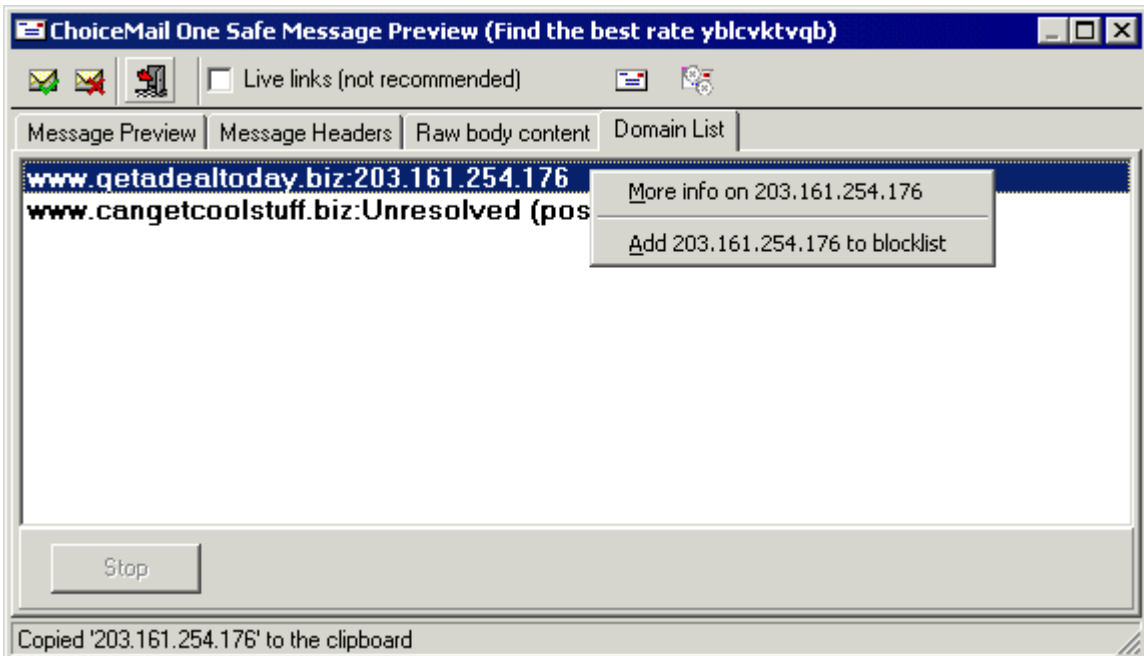
➢   Choose *More info on IP address* to get more information about a particular server. See the next section for details.

➢ Choose *Add IP address to blocklist* to block any future messages that originate from this IP address. ChoiceMail One will move these messages directly to the Junk Box, bypassing the *Unknown Senders* view altogether. See page 70 for more information.

More Information about an IP Address

When you request more information about an IP address, ChoiceMail One opens a web browser to a page containing information about that server – this process uses an Internet protocol known as "WhoIs."

If you already have your own WhoIs application installed (there are many such 3rd party applications available), you can configure ChoiceMail One to use this application rather than opening a web browser.

➢ Choose **Configuration** from the **Options** menu, and click the *Client options* tab. In the *Helper apps* box at the bottom of the dialog, click the Browse **…** button and select the WhoIs application you want ChoiceMail One to launch when you request more information about an IP address.
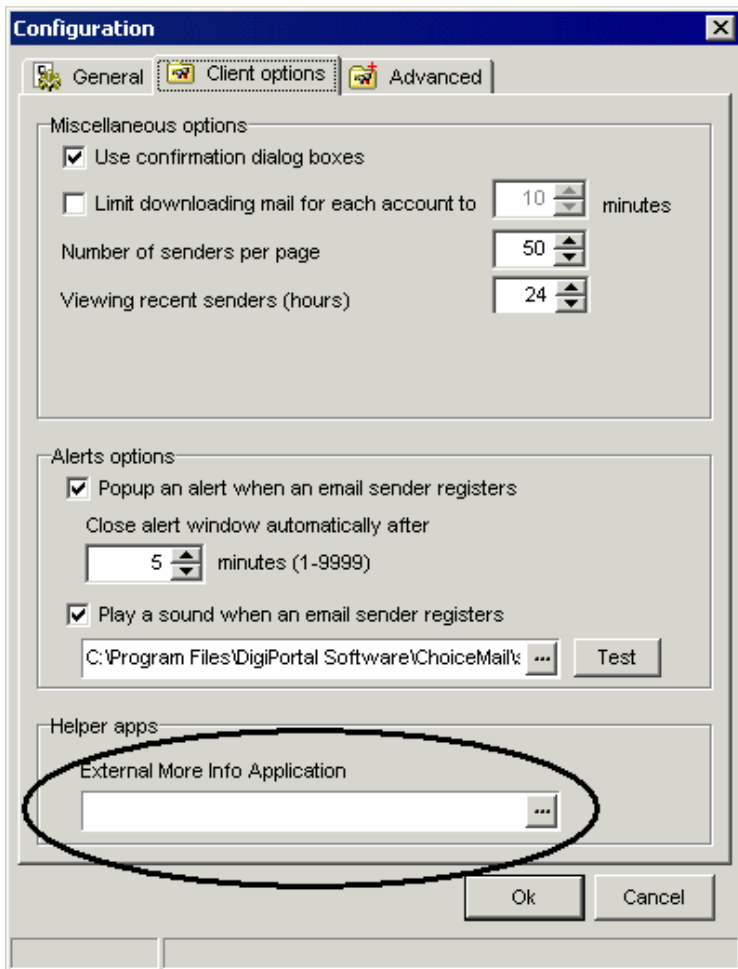
Adding an IP Address to the Block List

When you request that a server be blocked (by choosing *Add IP Address to blocklist* from the popup menu in the *Safe Message Preview* window's *Domain List* tab), ChoiceMail One displays a simple dialog to confirm that you want to block this IP address.
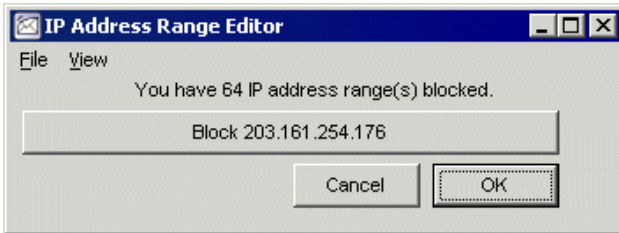
➢ Click the **OK** button to add the IP address to your blocklist. This IP address or range is added to the *Domain Address Check* permission rule.

You can also manually add an IP address to your blocklist. When you click the **Configure** button on the *Advanced* tab of the *Permission management* window, a simple *IP Address Range Editor* dialog displays, indicating the number of IP addresses currently on your blocklist.

Note: When you install ChoiceMail One, no IP addresses are included on your blocklist.

The first time you click the **Configure** button, ChoiceMail One prompts you to select some IP addresses from a list of addresses that DigiPortal Software has confirmed are responsible for sending out spam email messages.
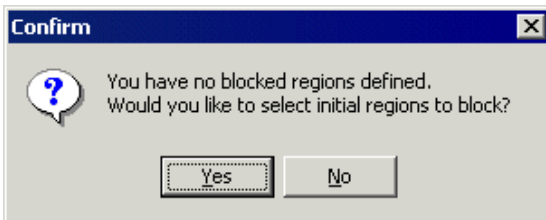
➢ Click the **Yes** button to display the list of spam IP address regions.
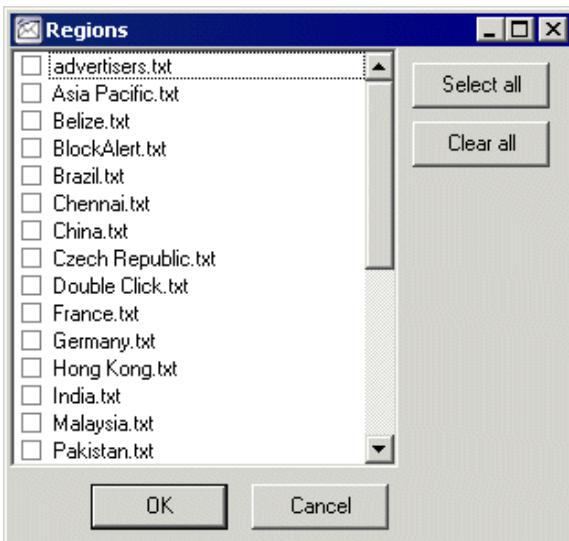
You can also access the *Region* dialog by choosing **Merge regions** from the **File** menu on the *IP Address Range Editor* dialog.
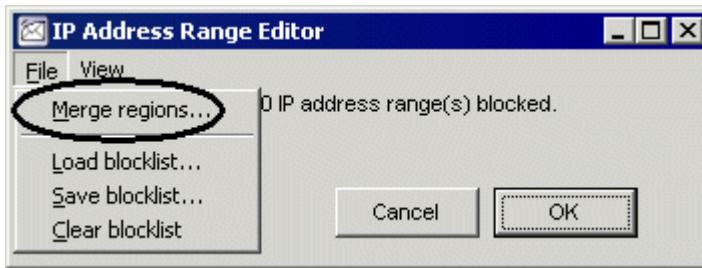
➤ In the *Regions* dialog, click the **Select all** button to enter a checkmark next to all IP regions. You can then clear the checkbox next to the IP regions you don't want to block.

➤ Click the **Clear all** button to clear all the checkboxes. You can then select the regions you want to block.

DigiPortal Software has provided a starting set of regions that contain IP address ranges that have been found to be associated with sending out spam. Based on your needs, you can use all or a partial set of these regions to start with. You can then add more IP addresses and regions manually as needed.

ChoiceMail One adds these blocked IP regions to the *Domain Address Check* permission rule, which is now accessible as a built-in rule.
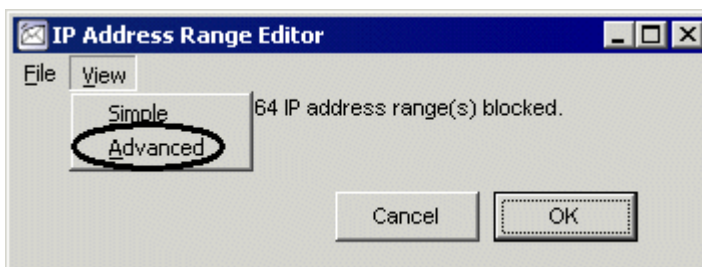
➤ Choose **Advanced** from the **View** menu to expand the *IP Address Range Editor* dialog.
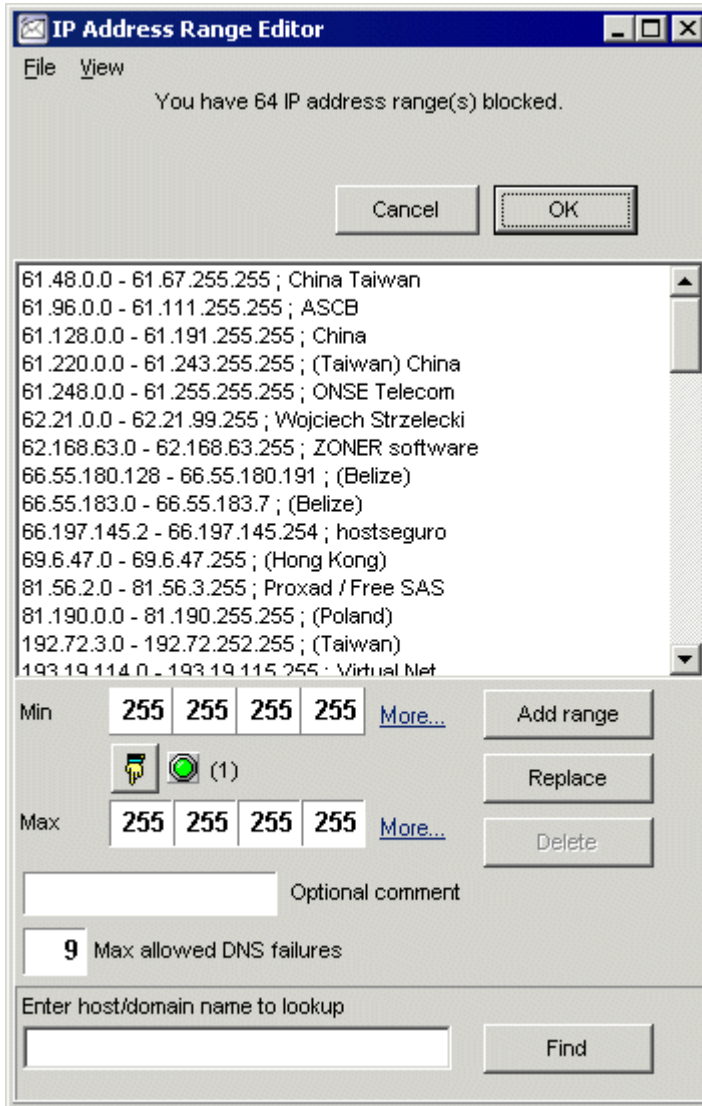
You can manually block single IP addresses or IP address ranges to cover the complete set of mail servers owned by an entity from whom you don't wish to receive email.

1. Type the IP address in the Min boxes: xxx.xxx.xxx.xxx. Click the **More** hyperlink to open a webpage that accesses the WhoIs application.

    *Note: If you've set a configuration option to use a 3rd party WhoIs application, ChoiceMail One launches this application when you click the **More** hyperlink. See page 69.*

2. Click the finger button to copy the Min IP address as the Max IP address. You can then edit the Max IP address to specify a range of addresses. The green light indicates that the IP address or range you've entered is valid.

3. In the *Optional comment* box, enter a description that identifies this IP range. The description displays next to the IP numbers in the *IP Address Range Editor* dialog.

4. Click the **Add range** button to add this IP address or range to the list of blocked IP addresses.

➤ In the *Max allowed DNS failures* box, enter the maximum number of DNS failures you're willing to accept before refusing additional attempts from a server. This feature protects you from spammers who may try to break the system by generating large numbers of fake server addresses in an attempt to slow down your system.

➤ To edit an IP range in the list, select the range and edit the IP address numbers in the *Min/Max* boxes. Then click the **Replace** button to overwrite the IP range with the edited IP numbers.

➤ Select an IP range and click the **Delete** button to remove it from the list of blocked IP addresses.

ChoiceMail One provides a host or domain name lookup feature.

➤ Enter the domain name or the server name in the *Enter host/domain name to lookup* edit box and click the **Find** button. The IP address or range of the server/domain you entered displays in the *Min/Max* boxes. You can then choose to block this IP address/range.

Note: ChoiceMail One adds the IP addresses and ranges you've added to your blocklist to the $Get IP Address *transform rule, that is called by the* Domain Address Check *permission rule. Do not delete this permission rule (in the* Permission management *window) or you will delete your IP address blocklist.*

Managing Your Blocklist

Use the **File** menu on the *IP Address Range Editor* dialog to manage your IP address blocklist.

➤ Choose **Load blocklist** from the **File** menu to import an IP blocklist you've created, downloaded, or received from another ChoiceMail One user. The *Load an IP Region File* dialog prompts you to locate the IP Region file (.ipr) to import. Click the **Open** button and ChoiceMail One installs the specified region file, merging it with your current IP address blocklist.

➤ Choose **Save blocklist** from the **File** menu to save your list of blocked IP addresses as an IP Region file (.ipr), so you can load it onto another computer or email it to a friend or colleague. The *Save an IP Region File* dialog prompts you to locate the folder in which to save the IP Region file (.ipr). Click the **Save** button and ChoiceMail One exports your blocklist as an IP region file and saves it in the specified folder.

➤ Choose **Clear blocklist** from the **File** menu to delete all the IP addresses on your blocklist.

Adding Server Domains to your Blocklist

You can add a server to the IP address blocklist even if you don't know the server's IP address. In the *Safe Message Preview* window, click the *Message Headers* tab to examine the message headers of suspect email messages. Select some text and right-click – ChoiceMail One automatically extracts the IP address from the selection.

Note: The IP address in the first "Received" header cannot be faked and so tells you where the message really originated.
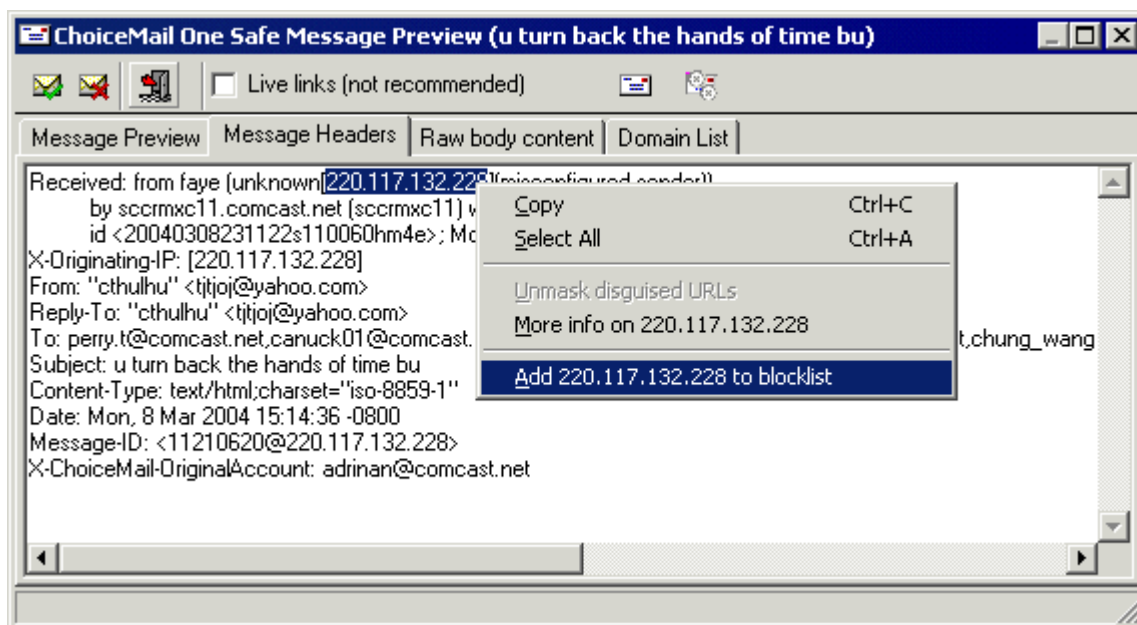
You can then add this IP address to your blocklist to block all future email coming from this server (or range of servers where appropriate).

➢ Right-click the server IP address and choose *Add IP address to blocklist* from the popup menu. ChoiceMail One adds this IP address/range to the *Domain Address Check* permission rule.

➢ Right-click the IP address and choose *More info on IP address* to open a webpage that accesses the WhoIs application.

Note: If you've set a configuration option to use a 3ʳᵈ party WhoIs application, ChoiceMail One launches this application when you click the __More__ hyperlink. See page 69.

The QuickMail email client

ChoiceMail One now includes a built-in lightweight email client that can be used to create messages as well as the ability to reply to or forward existing messages. Although it is absolutely not intended to replace a full featured email program, it's extremely convenient for creating and sending messages quickly. The intent is to save you having to run your main email program if you simply want to send out a quick message to someone, perhaps while you're previewing your messages from within ChoiceMail itself. In spite of its lightweight nature, QuickMail does provide some rather useful features including the ability to send an email using any of your POP3 accounts, aliases, or virtual email addresses. It can associate individual signatures with each email address and will remember the email addresses of recipients to whom you send messages. To create a new email message from the main ChoiceMail Window, you can click on Actions | QuickMail | New or simply press Ctrl-Alt-M.
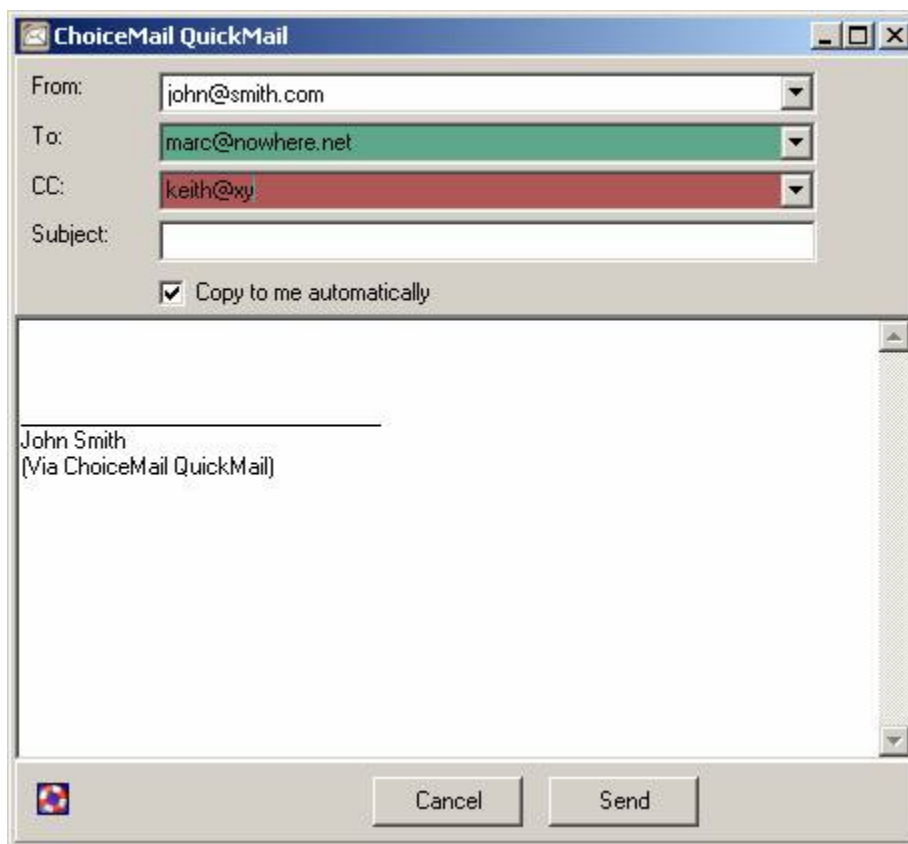
Filling in the fields

- **From**: The From field should display your first email address. If you have multiple email addresses, then you can click on the dropdown button and select one of your other email addresses. Your POP3 accounts, aliases, and virtual email addresses are all available. Be aware however that your ISP may prevent you from sending out emails with arbitrary email addresses.

- **To**: You can enter a single address or multiple addresses separated by a comma. The background will change from red to green as the field determines that the email address is correctly formatted. Note that correctly formatted does not mean that the email address is correct - only that it is a legally valid email address. Although you cannot select addresses from your senders list (this IS a lightweight client), ChoiceMail will remember addresses that you use and they will be available the next time you want to send an email to the same person.

- **CC**: This field is optional so can remain empty. It behaves the same way as the To field

- **Subject**: Enter a subject line - you cannot leave this line empty

- **Copy to me automatically**: if checked (the default), a copy of the email is sent to the FROM address.

- Enter your message in the body of the message. When you are done, click the Send button. Click Cancel if you do not wish to send the message.

For the To and CC fields only, if the dropdown box is open and an entry highlighted, pressing the DEL key will delete that entry from the list.

Automatic signatures

ChoiceMail QuickMail can insert a signature automatically in the body of your message. ChoiceMail looks for signatures inside the subfolder called **QMSig** which needs to be in the same folder where ChoiceMail itself is installed. If you are creating signatures for the first time, you will need to create this folder as well.

You can create a default signature and you can create signatures that should be associated with your individual email addresses. Signatures can be created with any text editor such as Notepad. Do not use a word processor such as Microsoft Word unless you know how to save files in text-only format.

ChoiceMail will first try to find a signature associated with a specific email address displayed in the **From** dropdown box. If it cannot find it, it will then try to load the default signature. If you change the selected account from the **From** dropdown box, the signature will be changed automatically.

The file naming for signatures is simple. For address-specific signatures, the filename will be the email address followed by **_sig.txt**. For example, if one of your email addresses is **john@smith.com**
then the signature file should be called **john@smith.com_sig.txt** and be stored in the **QMSig** folder.
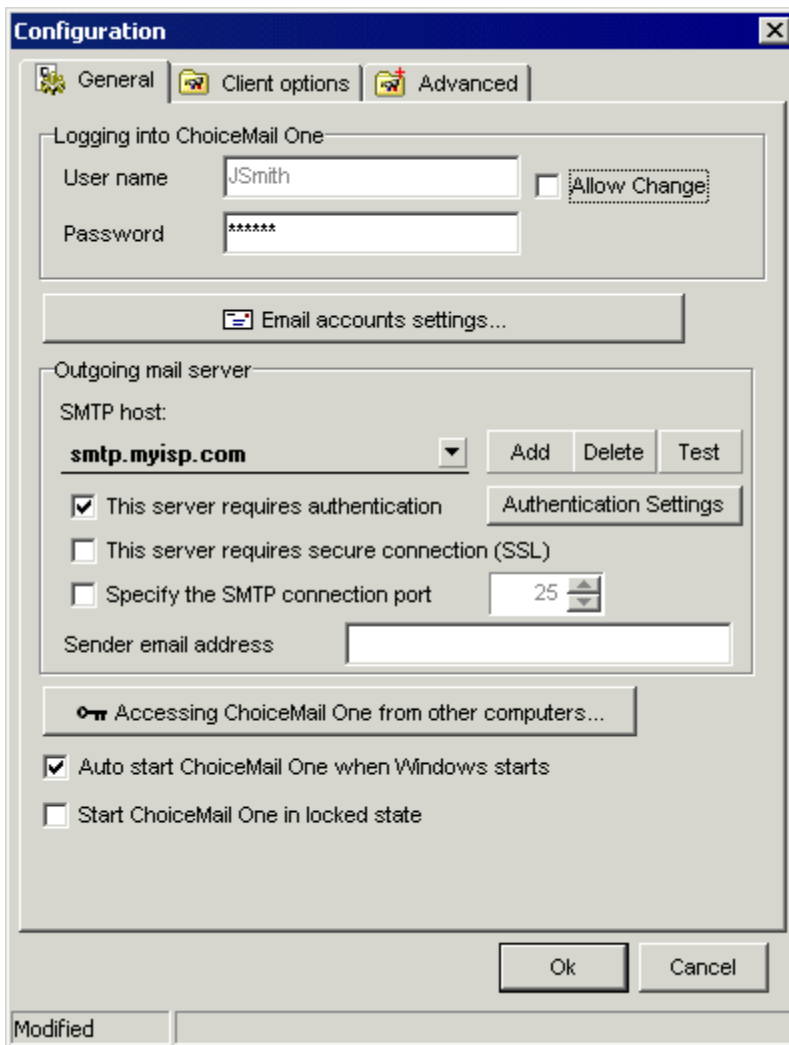
If an address-specific signature can not be found, then ChoiceMail will look for a default signature file called **mail_sig.txt** in the **QMSig** folder.

Configuration Options

When you install ChoiceMail One, the *Configuration* wizard steps you through the process of setting up ChoiceMail One to work with your email application. If you need to make any changes, or if you opted to configure ChoiceMail One manually, open the *Configuration* window by choosing **Configuration** from the **Options** menu.

General Configuration Options

The *General* tab on the *Configuration* window lets you edit your username and password, and change your email account settings and outgoing mail server address.

Logging In to ChoiceMail One

Instead of accessing your email directly from your mail server, you will now access your email through ChoiceMail One. When you try to connect to ChoiceMail One from your email application, you will need a username and password. That username and password is defined in this section – you can use whatever name and password you wish but it is critical

that the account you create or modify in your email application also uses the same username and password.

➢ If you need to change your username and/or password, select the *Allow Change* checkbox. ChoiceMail One displays a warning message, to make certain that you really want to make a change. Make any necessary changes and deselect the *Allow Change* checkbox.

This checkbox is intended to prevent you from accidentally changing this information, which would cause problems with ChoiceMail One's communicating with your email application.

*Note: This username and password is used internally by ChoiceMail One **and** as a username for your email client. You do not need to change this username if your ISP email account username changes.*

Mailbox and POP Account Configuration

➢ Click the **Email account settings** button to open the POP3 account information stored in your *Email accounts and preferences*.

ChoiceMail One supports multiple POP email accounts and will retrieve your email from all of your accounts. Use this dialog to set up and change your account information. See page 105 for details.

Outgoing Mail Server

In normal usage, the *Configuration* wizard configures your email application to send outgoing email through ChoiceMail One. ChoiceMail One then uses the server specified here to send registration messages as well as to act as a proxy for your outgoing email. When you send your emails through ChoiceMail One, the program can detect the email address of the person to whom you are sending a message and automatically preapprove that person, so s/he does not need to register when they respond to your message. Use the *General* tab to configure the settings for each of your SMTP servers.

➢ Click the down arrow to select a different server, or you can quickly switch from one server to another using the system tray popup menu (see page 37).

1. Click the **Add** button and type the name of the new SMTP server in the *Add SMTP host* dialog. Click **OK**.

2. Select the appropriate checkboxes if this server requires authentication, uses the Secure Socket Layer protocol (SSL), or uses a different port number.

   ➢ Click the **Authentication Settings** button to specify an account name and password, if this SMTP server requires authentication.

3. Enter the sender's email address if you experience SMTP relay problems.

Accessing ChoiceMail One from Other Computers

ChoiceMail One is normally configured so that it can only be accessed from the same computer on which it is running. However, some people may want to run ChoiceMail One on one computer but still run their main email application on another machine on their local area network. This remote-access feature is provided by DigiPortal as a courtesy for advanced users, and assumes that you have some basic knowledge about TCP/IP, configuring local area networks, and firewalls.

Note: DigiPortal Software regrets that it cannot provide technical support for configuring your network or firewall to allow access to ChoiceMail One.

You can configure ChoiceMail One so that it will allow an email application on another machine to access it. You will need to know the IP address(es) of the other machine(s) you want to use. Note that to perform operations such as approving senders and modifying permissions, you will still need to do this on the machine that is running the ChoiceMail One client.

1. Click the **Accessing ChoiceMail from other computers** button to open the *IP Address Control* dialog.

   By default, IP filtering is disabled and ChoiceMail One will only allow access from email applications running on the same computer as ChoiceMail One. The IP address 127.0.0.1, known as 'localhost,' is always enabled.
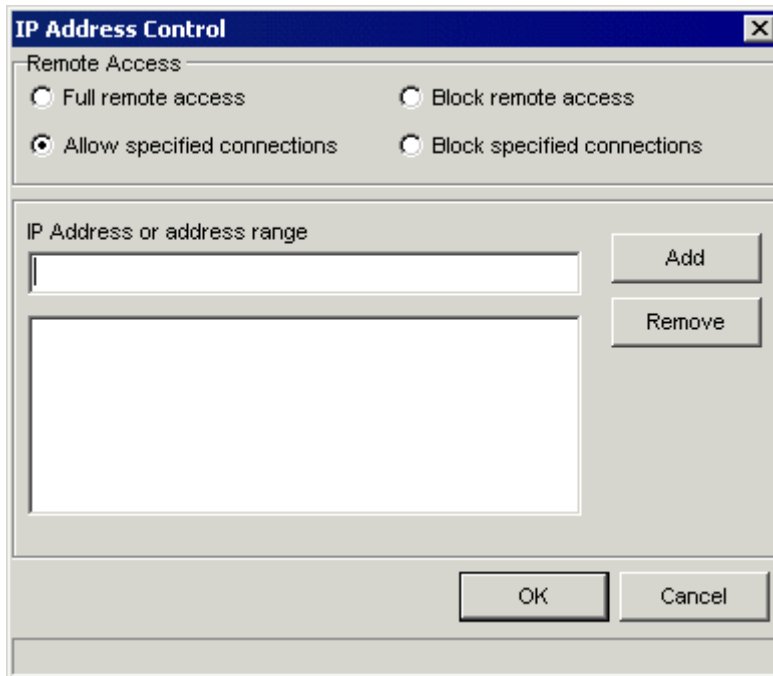
2. To allow other computers to access the ChoiceMail One server, click the *Allow specified connections* radio button.

   ➢ Type a specific IP address in the *IP Address or address range* edit box and click the **Add** button.

   ➢ To remove an IP address from the list, select the address and click the **Remove** button.

   ➢ To add an IP address range (a subnet), use the * character to replace any sub-address in the given subnet. For example:

      ▪ 192.168.1.* would include all addresses that start with 192.168.1. (e.g., 192.168.1.1 – 192.168.1.255)

      ▪ 192.168.* would do the same but the subnet would include all addresses that start with 192.168.

   ➢ You can also choose to block specific IP connections by clicking the *Block specified connections* radio button, or block all remote connections by clicking the *Block remote access* radio button.

Note: We do not recommend that you select the Full remote access *option unless you are running behind a firewall <u>and</u> you are certain that no unauthorized systems can access your machine. Otherwise you run the risk of allowing your email server to be used by others for sending out spam.*

Automatically Starting ChoiceMail One

➢ Select the checkbox next to *Auto start ChoiceMail when Windows starts* if you want ChoiceMail One to start up automatically whenever Windows is running.

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We recommend that you use this option if you have a permanent connection to the Internet (e.g., DSL, cable, or T1). Otherwise you should make sure you have dialed up to the Internet before running ChoiceMail One.

Starting ChoiceMail One Locked

➢ Select the *Start ChoiceMail One in locked state* checkbox if you want ChoiceMail One always to start up in the locked state.

Users must enter the ChoiceMail One password to access the ChoiceMail One application. See page 28 for details.

Client Options

The *Client options* tab lets you control certain options about how ChoiceMail One works, and how registration alerts function. You can specify:

- whether ChoiceMail One should display a message when you exit the application or make changes

- whether you want to limit the time allotted for downloading mail from each email account

- the number of senders ChoiceMail One should display on a page in each view

- how many hours is meant by "recent senders" (when you filter the *Unknown Senders* view)

- whether ChoiceMail One should display a popup alert window whenever a sender has registered

- how long (after how many minutes) the popup alert should automatically close

- whether you want ChoiceMail One to play a sound when a sender registers

- what application you want to use, other than the Internet WhoIs application, to identify suspect server domains
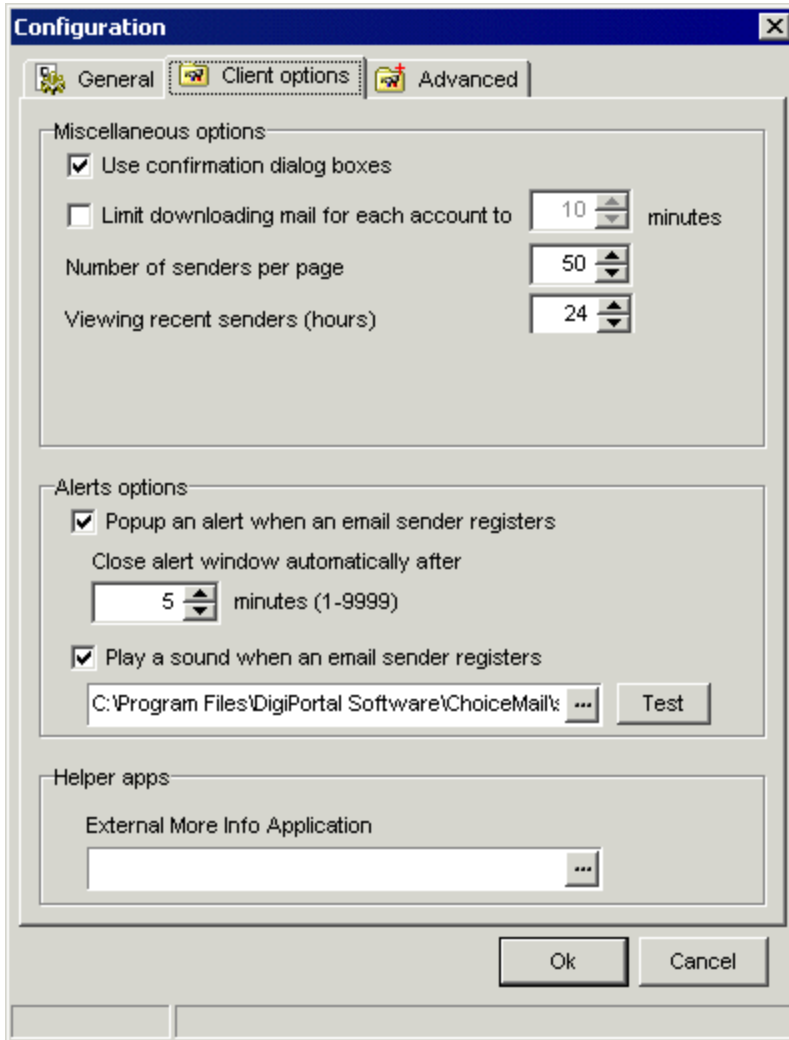
Miscellaneous Options

➢ Select the *Use confirmation dialog boxes* checkbox if you want ChoiceMail One to display a confirmation message whenever you make a change or exit the application.

➢ Select the *Limit downloading mail for each account to x minutes* if you want to set a limit on the amount of time ChoiceMail One spends receiving email from each of your accounts. Use the up and down arrows to set the time limit in minutes. This feature may be useful for users with a slow Internet connection who receive a high volume of messages.

➢ By default, ChoiceMail One displays 50 senders a page in the View tabs. Click the *Number of senders per page* up or down arrow to change this number, depending on your computer screen's resolution.

➢ When you click the **Show Recent Senders** button on the main window, ChoiceMail One displays only the unknown senders received in the past 24 hours. You can change this value – click the *Viewing recent senders* up or down arrow to specify the time period (in hours) ChoiceMail One should use when filtering recent senders.

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Alert Options

➢ Select the *Popup an alert when an email sender registers* checkbox if you want ChoiceMail One to display a message whenever it receives a registration reply from an unknown sender.

You can specify how long ChoiceMail One should leave a registration message up on your screen.

➢ Click the *Close alert window automatically after x minutes* up or down arrow to set the time limit, in minutes.

➢ Select the *Play a sound when an email sender registers* checkbox if you want ChoiceMail One to play a sound file whenever it receives a registration reply from an unknown sender. Click the **…** Browse button to select the audio file (.wav) you want to use. Click the **Test** button to hear the file.

When you request more information about a suspect IP address or server domain in the Permission Management IP blocking feature, or in the *Safe Message Preview* window, ChoiceMail One launches the WhoIs Internet application. You can specify that ChoiceMail One should launch a different 3rd party WhoIs application. See page 69 for details.

➢ In the *Helper apps* box, click the **…** Browse button to select the external application you want ChoiceMail One to launch when you request more information about an IP address or server domain.

Advanced Options
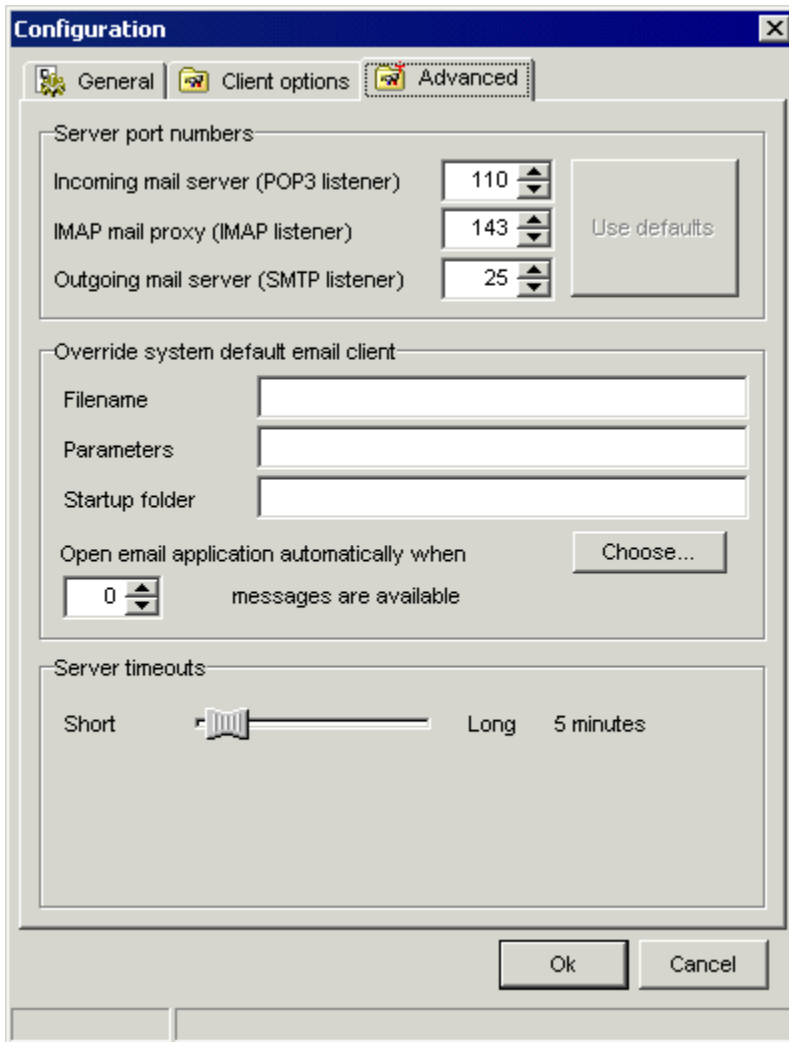
Server Port Numbers

If you have another application that needs to use the same ports that ChoiceMail One uses by default for incoming and outgoing email (for example, an older anti-virus product that installs email proxies), you have two choices:

1. Reconfigure the port settings of the other application

2. Reconfigure the port settings in ChoiceMail One.

  ➢ Use the *Incoming mail server*, *IMAP mail proxy*, and/or *Outgoing mail server* up or down arrows to change the port number of these servers. Click the **Use defaults** button to return all three port settings to the default (110 for the incoming POP3 server, 143 for the IMAP proxy server, and 25 for the outgoing SMTP server).

In any case, you will have to reconfigure your email application to work with the new ports.

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Override System Default Email Client

You can choose to have ChoiceMail One open a different email client than the one you normally use. Indeed, in advanced cases, you can cause any application you want to be triggered.

➢ Click the **Choose** button to open a popup menu of the email applications ChoiceMail One finds installed on your system.
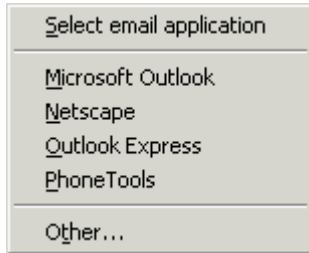
➢ Select the email application you want to use, or type the full pathname of the executable file (.exe).

You can also specify that certain parameters be used with your chosen email application. The parameters are very application-dependent – check your email application documentation for details. Please also review our special notes for dealing with particular email applications on page 143.

Specifying the default startup folder for your email application is usually not required but may be useful in some cases. If you choose an email application, the startup folder will default to the same directory as the application.

Note: Changing to a different default email application does not configure that application to communicate with ChoiceMail One. If you want to use a different email application, you must configure it manually to communicate with ChoiceMail One.

Opening Your Email Application Automatically

You can specify that ChoiceMail One should open your email application automatically once a certain number of messages are available.

➢ Type a non-0 value in the *Open email application automatically when x messages are available* edit box, or use the up/down arrow, to specify the number of emails that should trigger ChoiceMail One to launch your email application.

Server Timeouts

If your ISP server is particularly slow, you can change the amount of time that ChoiceMail One waits to keep the program from timing out. We recommend that you keep the default of 5 minutes under normal circumstances.

Preferences

ChoiceMail One provides a variety of preferences you can set. Choose **Preferences** from the **Options** menu to open the *Email accounts settings and preferences* window. Click the left and right arrows to view all the available tabs.

General Preferences

The General preferences let you specify options regarding the basic functioning of ChoiceMail One.
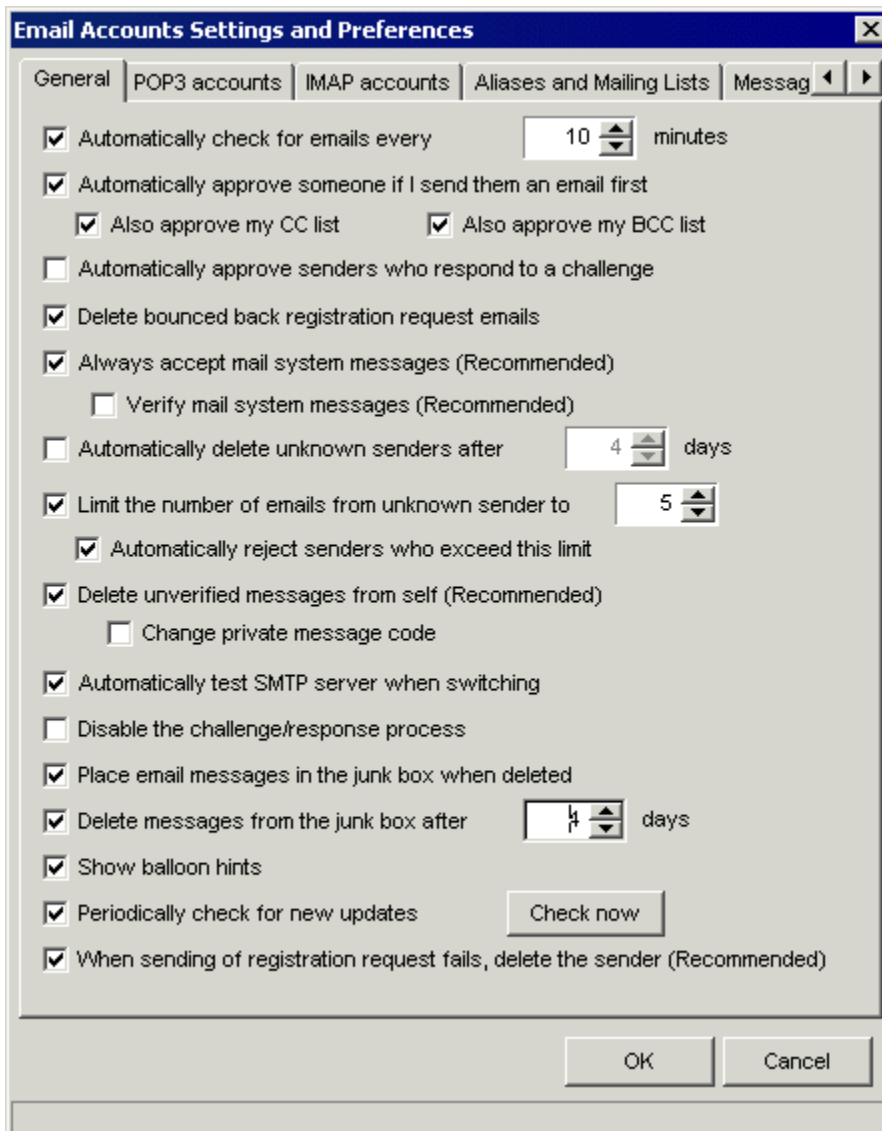
Checking for New Email

By default, ChoiceMail One connects to your email server(s) every 10 minutes to see if new email messages are available. Depending on your connection speed and your needs, you may want to change this connection rate or even disable automatic checking altogether.

➢ Type a new value or use the up/down arrow to specify how frequently you want ChoiceMail One to check for new email messages.

Note that you can always have ChoiceMail One check for new email immediately by right-clicking the system tray icon and choosing **Check for new mail now** from the popup menu.

Approving New Senders To Whom You Are Sending an Email

Normally your email application is configured such that your outgoing email messages are processed through ChoiceMail One. This is done so that, when you send an email to someone with whom you have not previously corresponded, ChoiceMail One can preapprove that sender (by adding the sender to your white list) 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.

Automatically Approving Senders Who Respond to a Challenge

Normally, when a sender responds to a registration request or challenge, ChoiceMail One sends you a popup alert and, optionally, an audio alert. (See page 83 for instructions on setting these options.) If you're not connected to the Internet when a sender responds or if you're away from your computer, the ChoiceMail One icon in the system tray changes to a flashing bell , indicating that a sender has registered and is awaiting your approval. You then decide explicitly whether you want to approve or reject the sender.

➢ Select the *Automatically approve senders who respond to a challenge* checkbox to have ChoiceMail One automatically accept any sender who registers and add that sender's email address to your white list.

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 One will simply be bounced back, along with an error message. Most of the time, you won't want to see these messages, and ChoiceMail One 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* checkbox 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 One 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 One 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 unknown at the other end.

You can prevent most bounce backs completely by hiding your email address in outgoing registration requests. See page 99 for more information on this option.

(To accept an individual message, double-click the sender to see the individual email messages associated with the sender. Then right-click the message and choose **Allow selected message** from the popup menu. 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 double-click the message to read it in the *Safe Message Preview* window.)

Always Accepting 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.

➢ Select the *Verify mail system message* checkbox to have ChoiceMail One 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 One deletes the message.

Automatically Deleting Unregistered Senders after x Days

ChoiceMail One holds up mail from new, unknown senders until the sender submits a registration. The senders themselves are listed in the *Unknown Senders* view 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, the *Unknown Senders* list will essentially contain only junk mail senders.

➢ Select the *Automatically delete unknown senders* checkbox to cause new unknown senders to be deleted automatically after a specified number of days. Type a new value or use the up/down arrow 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.

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Limiting 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 One 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 One, 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 sender* checkbox and type a number or use the up/down arrow to specify the number of emails you'll accept.

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

➢ Select the *Automatically reject senders who exceed this limit* checkbox to delete senders who don't register after the default number of messages.

Deleting Unverified Messages from Self and Managing Emails With Your Own Email Address

By default, ChoiceMail One 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 messages from self* checkbox to disable ChoiceMail One'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!

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 One adds an extra header to all outgoing email messages that are sent to yourself.

When an incoming email from "yourself" is received, ChoiceMail One checks 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.

➢ Select the *Change private message code* checkbox to change your private message header to a new random string. (See also Alias and Mail List Settings on page 94.)

Automatically Testing SMTP Server When Switching

ChoiceMail One now supports multiple SMTP servers. Normally, when you switch from one server to another as you travel, ChoiceMail One tests the new connection to ensure that it is

accessible. This can take a little time. If you are sure that you know to choose the correct SMTP server for your current connection, you can disable this test.

➢ Deselect the *Automatically test SMTP server when switching* checkbox if you don't want ChoiceMail One to test the connection when you switch SMTP servers.

Never Sending Registration Requests to Unknown Senders

If you prefer to review all new messages before ChoiceMail One sends any registration requests, you can disable the automatic registration process.

➢ Select the *Disable the challenge/response process* checkbox to turn off automatic registration.

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 One prompts you to see if you want registration requests sent to the remaining unknown senders.

➢ You can also quickly enable or disable the registration process by clicking the **Registration Process** icon in the status bar of the main window. Hold the cursor over the icon to see a message indicating whether registration is enabled or disabled.

Placing Email Messages in the Junk Box When Deleted

ChoiceMail One maintains a Junk Box in which messages that have been deleted are temporarily stored (see page 39.). The Junk Box feature gets messages out of your way but still lets you review them if you so desire.

➢ Deselect the *Place email message in the junk box when deleted* checkbox if you want to bypass the Junk Box and have ChoiceMail One permanently delete unwanted email immediately.

Deleting Messages from the Junk Box after x Days

You can control how many days deleted email stays in the *Junk Box* window before ChoiceMail One 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 arrow to specify the number of days to keep messages in the Junk Box.

Showing Balloon Hints

➢ Select the *Show balloon hints* checkbox if you want ChoiceMail One to display a popup hint when you move the cursor over certain items, such as the buttons and icons on the main window.

Once you get used to using ChoiceMail One, you may want to disable these hints.

Periodically Checking for New Updates

ChoiceMail One can automatically check the DigiPortal Software website to see if a new version is available. We recommend that you leave the *Periodically check for new updates* checkbox selected.

However, if you're using a dial-up connection and/or you have limited memory or resources on your system, you may want to deselect this checkbox and check for updates manually from time to time. Choose **Check for updates** from the **Help** menu, or visit http://www.digiportal.com/support/choicemail/downloads.htm.
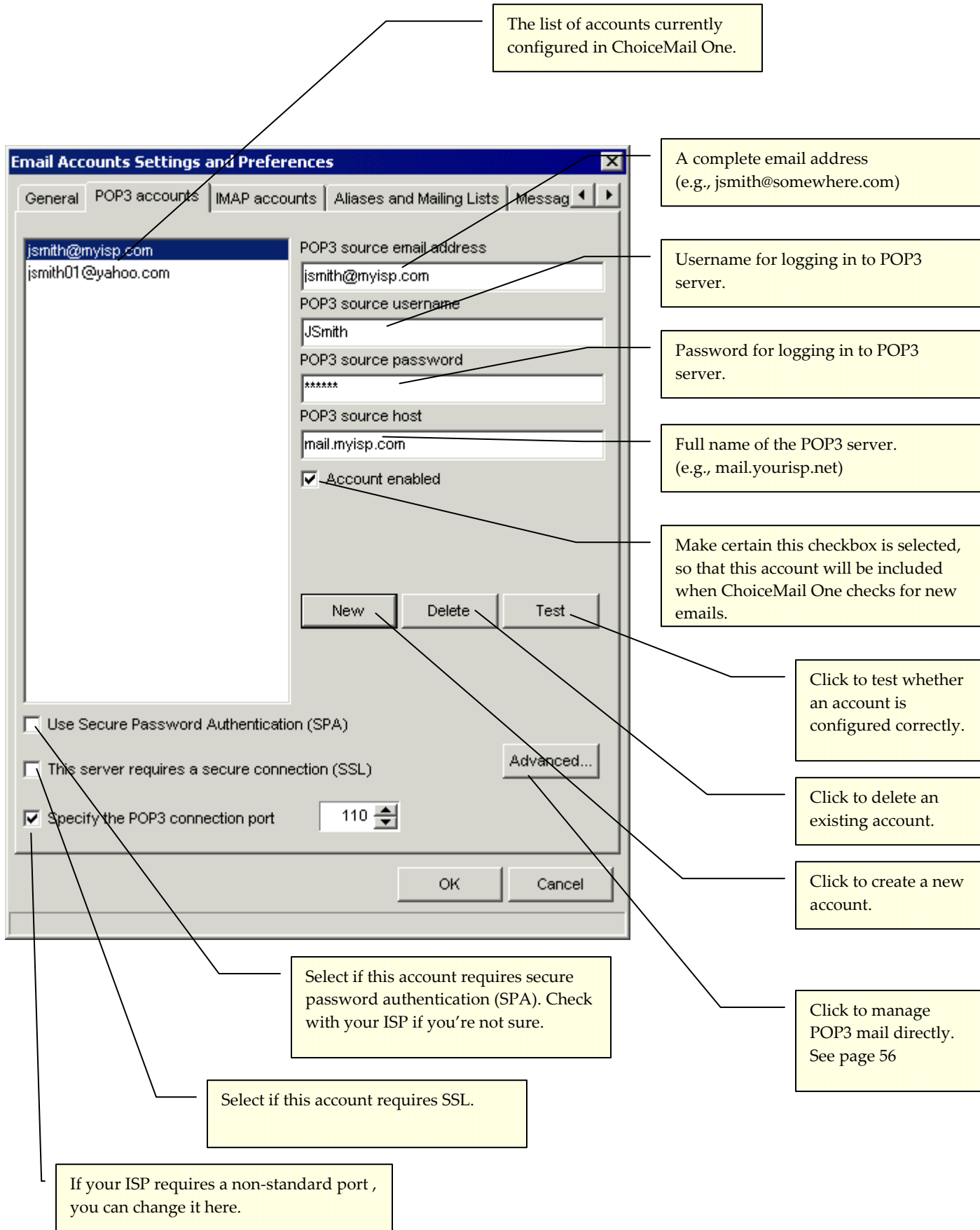
When Sending Registration Request Fails, Deleting the Sender

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

POP3 Account Settings

Use the *POP3 account* tab to add a new email account or edit an existing email account.

1. Click the **New** button to add an email account.

2. Enter the full email address, your username and password, and the address of the POP3 host server.

3. Click the **Test** button to test the connection with ChoiceMail One.

4. Make certain the *Account enabled* checkbox is selected, so ChoiceMail One checks for email for this account.

5. Select the appropriate checkboxes if this account requires Secure Password Authentication (SPA), uses the Secure Socket Layer (SSL) protocol, or requires a special port number.

6. Click the **Advanced** button to manage your POP3 messages directly. See page 102.

Email Accounts Settings and Preferences

General | POP3 accounts | IMAP accounts | Aliases and Mailing Lists | Messag ◄ ►

jsmith@myisp.com
jsmith01@yahoo.com

POP3 source email address

jsmith@myisp.com

POP3 source username

JSmith

POP3 source password

******

POP3 source host

mail.myisp.com

☑ Account enabled

New | Delete | Test

☐ Use Secure Password Authentication (SPA)

☐ This server requires a secure connection (SSL)

Advanced...

☑ Specify the POP3 connection port   110 ⬍

OK | Cancel

The list of accounts currently configured in ChoiceMail One.

A complete email address (e.g., jsmith@somewhere.com)

Username for logging in to POP3 server.

Password for logging in to POP3 server.

Full name of the POP3 server. (e.g., mail.yourisp.net)

Make certain this checkbox is selected, so that this account will be included when ChoiceMail One checks for new emails.

Click to test whether an account is configured correctly.

Click to delete an existing account.

Click to create a new account.

Click to manage POP3 mail directly. See page 56

Select if this account requires secure password authentication (SPA). Check with your ISP if you're not sure.

Select if this account requires SSL.

If your ISP requires a non-standard port , you can change it here.

IMAP Account Settings

The Internet Message Access Protocol (IMAP), a client-server protocol for receiving email on the server was available in previous versions of ChoiceMail, albeit experimentally. We regret that IMAP will no longer be supported in ChoiceMail One. However, as we know some people were using it, we have left the feature available without modification so that existing IMAP customers can continue to leverage the other benefits of ChoiceMail One.

➢ Use the *IMAP account* tab to add a new IMAP email account or edit an existing IMAP email account. (This tab is very similar to the *POP3 accounts* tab.)

1. Click the **New** button to add an IMAP email account.

2. Enter the full email address, your username and password, and the address of the IMAP source host server.

3. Click the **Test** button to test the connection with ChoiceMail One.

4. Make certain the *Source enabled* checkbox is selected, so ChoiceMail One checks for email from this account.

5. Select the appropriate checkboxes if this account requires Secure Password Authentication (SPA), uses the Secure Socket Layer (SSL) protocol, or requires a special port number.

6. Enter the following username in your email application for the IMAP account you plan to use with ChoiceMail One:

    ChoiceMail:CMusername;youremailaddress

    For example, if your ChoiceMail username is john and your email address is jsmith@someisp.com, your IMAP email account should have the following username:

    ChoiceMail:john;jsmith@someisp.com

Alias and Mailing List Settings

Email Aliases

If you send a message that includes your own email address as one of the recipients, ChoiceMail One 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 One 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 One already knows about your real email addresses because you added them as part of setting up your POP3 accounts. However, if you have created email address aliases, you need to tell ChoiceMail One about them so that it can recognize them as well.

For example, if your real email address is jsmith@someisp.com, you'll have a POP3 account set up in ChoiceMail One with this address. If you send a message to jsmith@someisp.com, ChoiceMail One 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 One 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 One, 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 One 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 One 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.

➢ Type your alternate email address in the *Aliases* edit box and click the **Add** button.
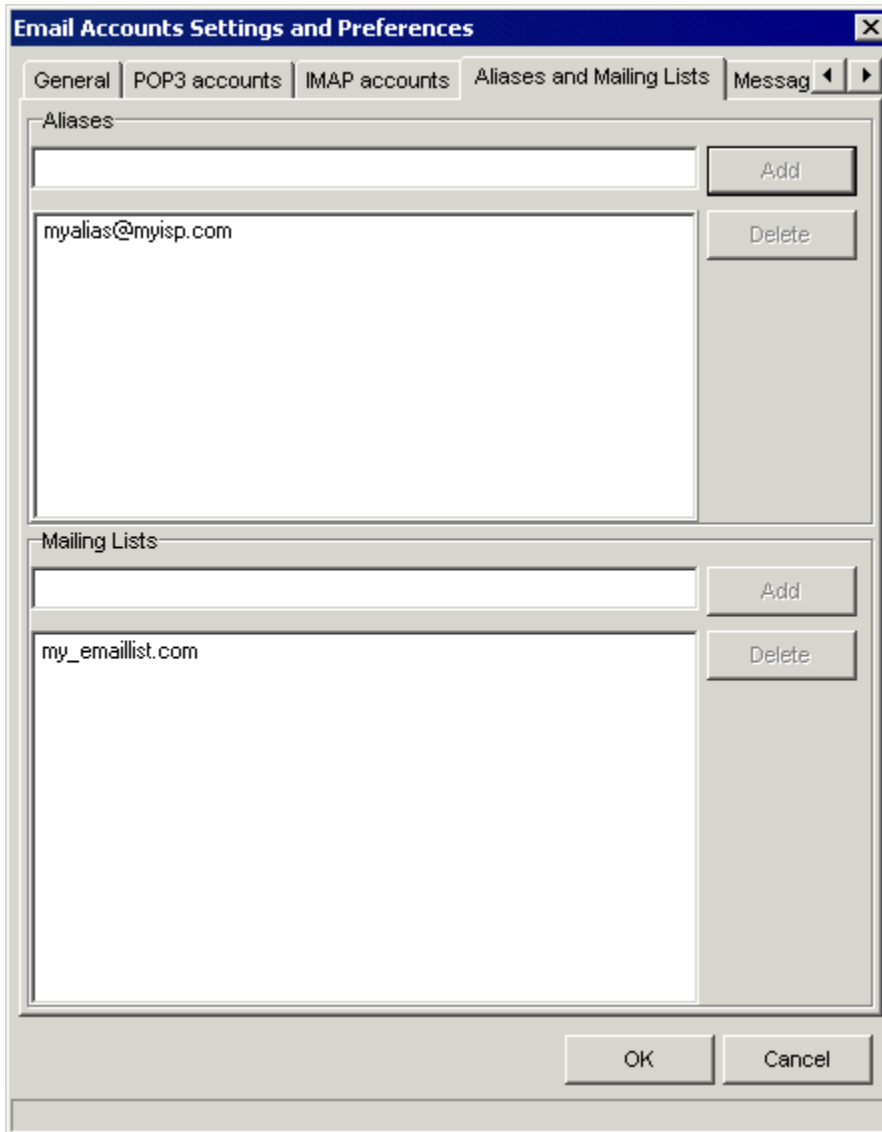
Mailing Lists

You should also tell ChoiceMail One 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 identifying each of your mailing lists, all the messages from the participants in the list will be automatically passed through to your email application.

➢ Type the domain name of a mailing list to which you subscribe in the *Mailing Lists* edit box and click the **Add** button.

Message Customization

You can customize the messages that ChoiceMail One sends to unknown senders using the *Messages customization* tab.
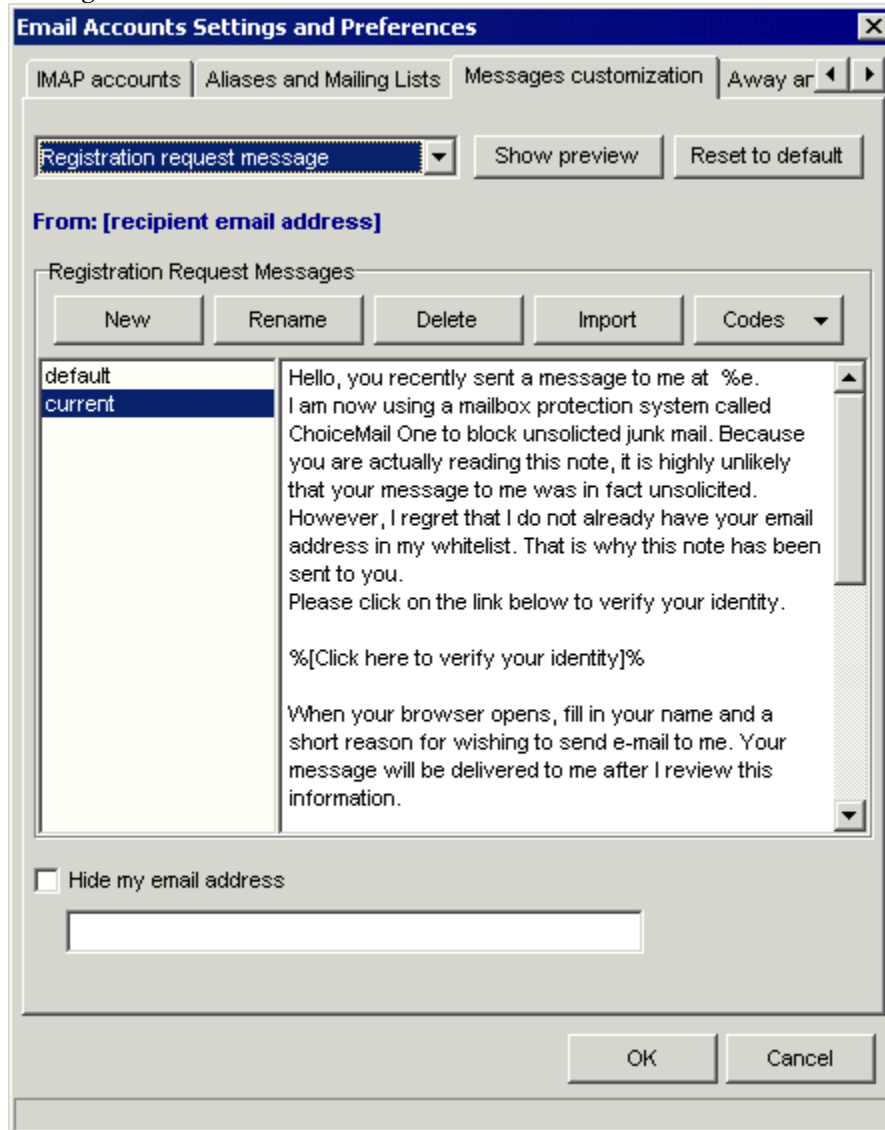

➢ Select which message you want to change – the Registration Request message or the Acceptance message – by clicking the down arrow and selecting the message type from the drop-down list.

Registration Request Message

The Registration Request message is the first message that an unknown sender will see. You can use one of the messages that come with ChoiceMail One, or you can make up your own

message. You must include either your email address or your real name, so the sender knows who is requesting him/her to register. But you can customize as much of the message as you like.

➢ Click the **New** button to create a new message. In the *Add Identity Query Message* dialog, give your new message a name and click **OK**.
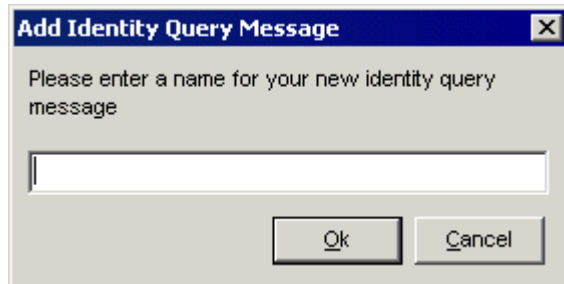

➢ Type the Registration Request message you want to use in the right-hand pane of the *Messages* window.

**Inserting Codes Into Your Message**

You can insert codes in your message that ChoiceMail One will replace with values, such as your email address or a URL.

➢ Position the cursor where you want the code, click the **Codes** button, and select the code to insert from the list of available codes. You can also just type the actual code into your message, if you prefer.
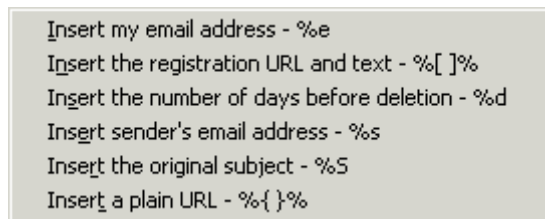

%e   Inserts your email address into the new message at this point.

%[ ]%   Inserts the ChoiceMail One Registration URL and the text of the link to the Registration URL. The sender will be required to register using the ChoiceMail One default Registration URL. ChoiceMail One displays a dialog in which you must type the text for the link to the Registration URL.
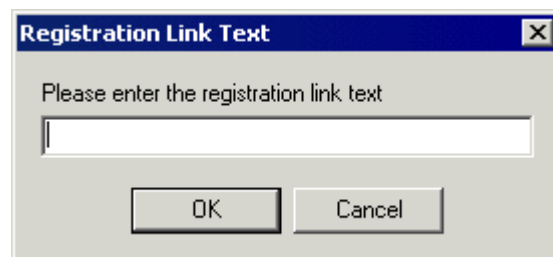
For example, the default Registration Request message uses the following text for the Registration URL: Click here to verify your identity.

%d   Inserts the number of days before the sender's message will be deleted. This number is taken from the General preference you've set. (See page 88 for details.) Use this code to include a warning that emails from unregistered senders will be deleted after a certain number of days.

%s   Inserts the sender's email address into the new message at this point.

%S   Inserts the subject line of the sender's original email into the new message at this point.

%{ }% Inserts a URL into the new message at this point, if you want to use your own authentication mechanism rather than the ChoiceMail One registration URL. ChoiceMail One displays a dialog in which you must type the URL (e.g., http://www.digiportal.com) and the text for the link to the URL (e.g., Click here for confirmation).
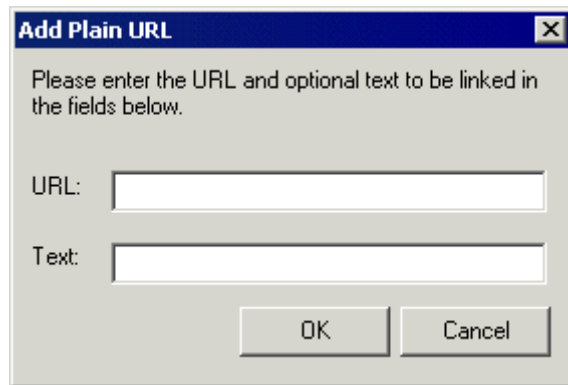
In this case, ChoiceMail One will not include the registration URL in the registration email it returns to new senders, and you must provide your own method for new senders to contact you for permission. DigiPortal Software cannot provide technical support or otherwise help you create your own authentication scheme.

➢ 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.

When you've finished creating your message, select it to have ChoiceMail One use it as the Registration Request message. Select a message name and click the **Rename** button to assign it a different name. Select a message name and click the **Delete** button to remove it from the message list.

Importing Registration Request Messages

You can import Registration Request messages you've created using another version of ChoiceMail One. Click the **Import** button and browse to the XML query to import. Click the **Open** button.

Acceptance Message

Once you approve a sender who has registered, ChoiceMail One 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.
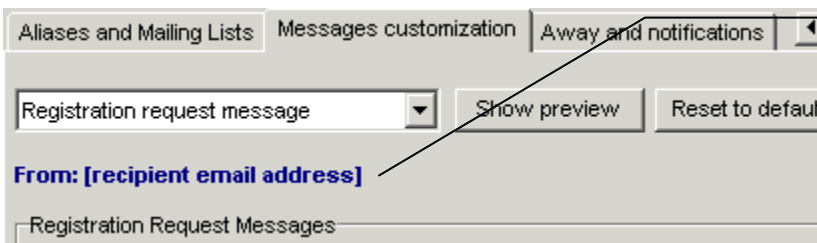
Hiding Your Email Address

You can also hide your real email address when ChoiceMail One 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 that must be processed

- 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 *Hide my email address* checkbox. ChoiceMail One displays the Change Display Name dialog – type your name or any other identifying information that you'd like the sender to see in the FROM address of the challenge message.

Change Display Name

Please enter your first and last name. This will let legitimate people know who is sending the registration request.
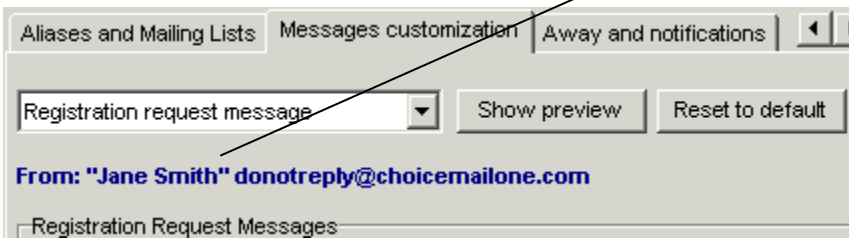
Jane Smith

Ok   Cancel

Note: It's important that you enter something that identifies you, which will be included in the registration email. Otherwise, legitimate senders will not be able to tell who is sending the registration request.

ChoiceMail One will send the registration request with your name in the message rather than your real email address. Notice how the From: information changes from "recipient email address"

Aliases and Mailing Lists | Messages customization | Away and notifications | ◄

Registration request message ▼ | Show preview | Reset to default

From: [recipient email address]

Registration Request Messages

The From address is normally your real email address.

to the actual name you supplied:

Aliases and Mailing Lists | Messages customization | Away and notifications | ◄ ►

Registration request message ▼ | Show preview | Reset to default

From: "Jane Smith" donotreply@choicemailone.com

Registration Request Messages

You can hide your real email address and just use your name in the email message itself to identify yourself.

ChoiceMail One uses a donotreply@choicemailone.com address, which doesn't exist, and uses 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.
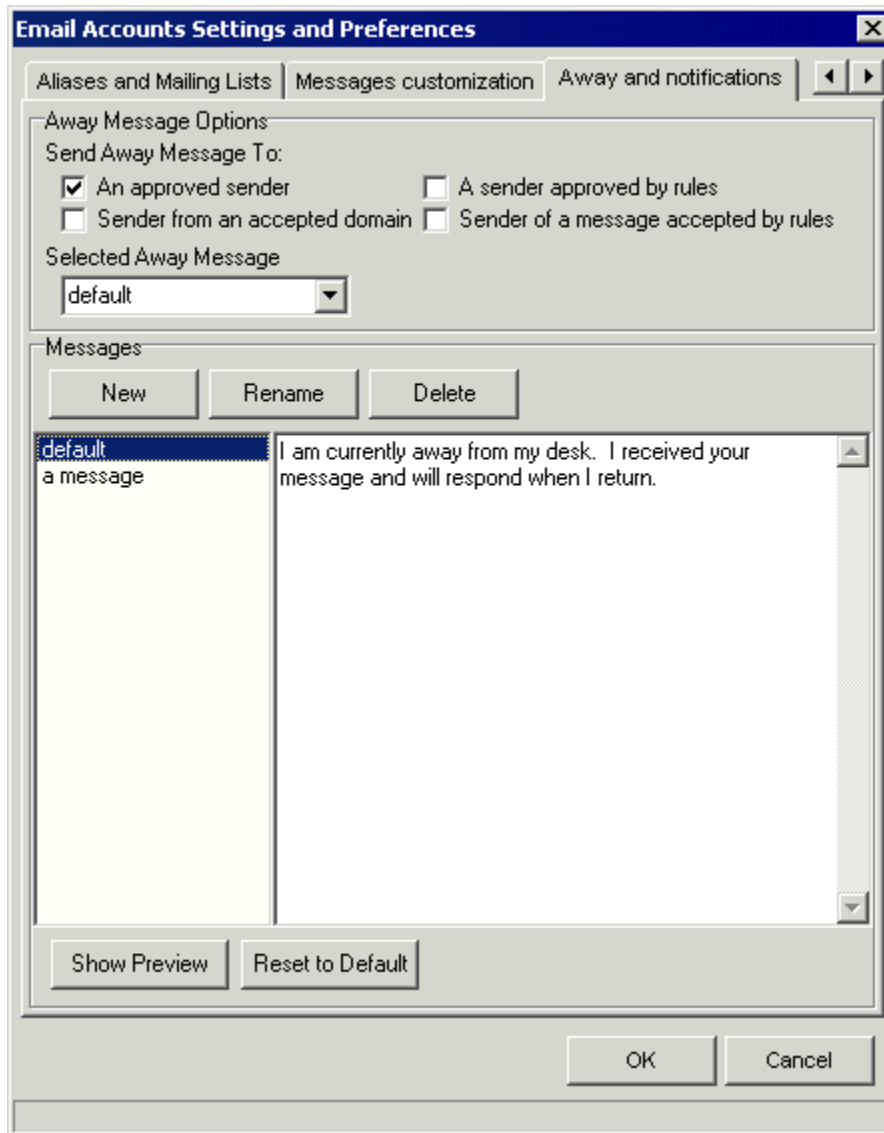
Sending an Away Message

You can configure ChoiceMail One 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.

ChoiceMail One User Guide

You can also use this tab to create notification messages to email to senders who match the criteria of a permission rule. See page 57 for details.

➢ Select the checkboxes next to the senders whom you want to receive an automated Away message when they send you an email:

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

Email Accounts Settings and Preferences

| Aliases and Mailing Lists | Messages customization | Away and notifications | ◀ | ▶ |

Away Message Options

Send Away Message To:
- ☑ An approved sender
- ☐ A sender approved by rules
- ☐ Sender from an accepted domain
- ☐ Sender of a message accepted by rules

Selected Away Message

| default ▼ |

Messages

| New | Rename | Delete |

| default | I am currently away from my desk. I received your |
| a message | message and will respond when I return. |

| Show Preview | Reset to Default |

| OK | Cancel |

You can edit the default message or create a new one.

➢ Click the **New** button and type a name for the new message. Select the new name and enter the text of the message in the right pane. Then select the name of the Away message you want to use.

Note: You specify which Notification message to use for a permission rule on the Notifications *tab of the* New Email Rule *dialog. See page 57.*

➢ 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.

You can enable and disable the Away message by clicking the **Away Message** icon ▦ in the status bar of the main window. When you've enabled the Away message, this icon flashes to remind you.

Direct Access to Messages at your ISP

Managing "Broken" Messages

On a few occasions, spammers have managed to find ways to prevent ChoiceMail One from working properly. By reverse-engineering ChoiceMail One, spammers look for special cases that are not handled properly and thereby cause ChoiceMail One to crash or otherwise prevent legitimate messages from being retrieved. Their goal, of course, is to get users sufficiently annoyed that they stop using ChoiceMail.

Up until now, the only workaround for stuck emails has been for users to temporarily re-enable their original email application to retrieve the "broken" message. Although such attacks have become rare as ChoiceMail One has matured, it still makes sense to allow users to explicitly delete broken messages on their servers.
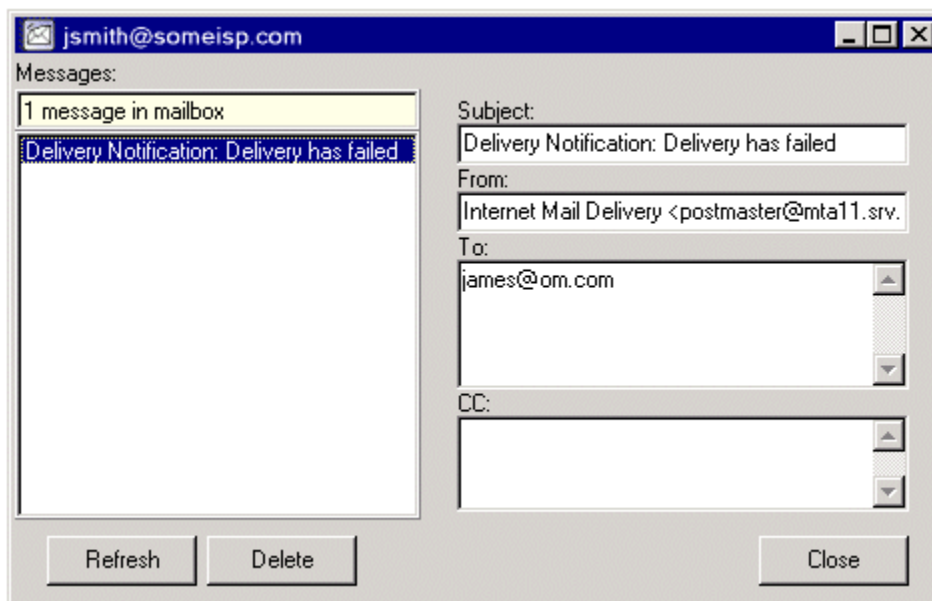
➢ Select one of your accounts in the *POP3 accounts* tab (see page 91) or the *IMAP accounts* tab (see page 93) and click the **Advanced** button.

The *List Messages* dialog displays and immediately connects to your server to get a list of all messages that are still on your server.

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➢ Click the **Refresh** button to refresh the list if you don't see the "broken" message. You can then click any of the messages to see a summary of the message on the right. To delete that message, click the **Delete** button.

Note: Do not arbitrarily delete messages that you do not recognize. You should only use this mechanism to delete messages that ChoiceMail was not able to download. **In other words, use this feature with care***. When you are finished, click the* **Close** *button to close this window.*

Activity Logs

Monitoring the Behavior of ChoiceMail One

ChoiceMail One has a logging facility through which you can monitor what it's doing as it runs. You can view these logs for interest and they also can help pinpoint possible problems. Choose **Show activity logs** from the **Options** menu to open the *Activity logs* window.
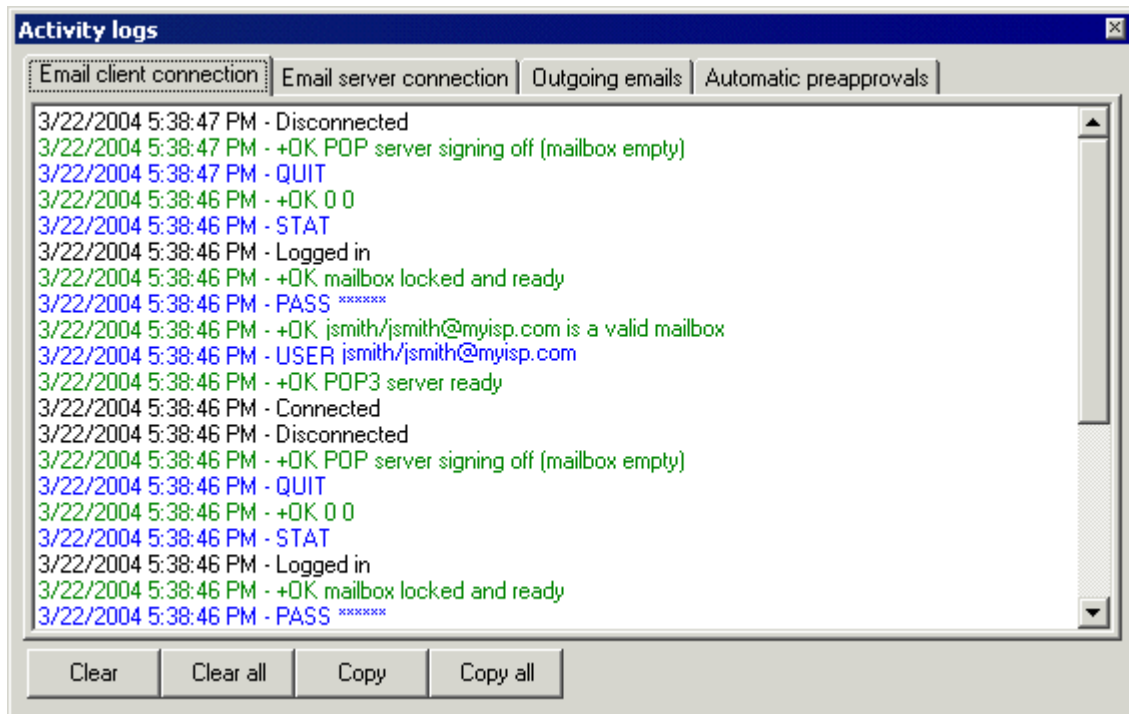
There are four tabs available:

- *Email client connection* – displays the progress as your email application connects to ChoiceMail One and downloads the emails that have been approved.

- *Email server connection* – displays the progress as ChoiceMail One retrieves all the email from your original email accounts on the email servers at your ISP and determines their disposition.

- *Outgoing emails* – indicates whenever ChoiceMail One sends out a registration request or an acceptance message. Also indicates whether it was successful or not (and if it wasn't, that's normally fine – it just means the return email address was bogus, a typical example of a junk email).

- *Automatic preapprovals* – whenever you send an email to someone who is not already on your *Approved Senders* list, ChoiceMail One adds that address automatically. This view displays such actions.

Configuring ChoiceMail One Manually

If you choose not to run the *Setup* wizard, or if you're using an email application other than Outlook Express, Outlook or Eudora, you must configure ChoiceMail One manually. This section is broken down by email application.

Eudora

1. In ChoiceMail One, choose **Email accounts settings** from the **Options** menu. The *POP3 accounts* tab displays so you can set up your incoming email server.

2. Click the **New** button to add an email account.

3. Enter the full email address, the username and password of your Eudora email account, and the address of the POP3 host server.

4. Make certain the *Account enabled* checkbox is selected, so ChoiceMail One checks for email for this account.

5. Select the appropriate checkboxes if this account requires Secure Password Authentication (SPA), uses the Secure Socket Layer (SSL) protocol, or requires a special port number.

6. Click the **Test** button to test the connection with ChoiceMail One. If successful, click **OK**. If not, verify that you have the correct username, password, and host address and test again. If you still have errors, contact your ISP to make certain you have the correct passwords and account names.

7. Choose **Configuration** from the **Options** menu to set up your SMTP (outgoing email) server.

8. Click the **Add** button and type the name of your SMTP server in the *Add SMTP host* dialog. If you're not certain, ask your ISP. Click **OK**.

9. Select the appropriate checkboxes if this server requires authentication, uses the Secure Socket Layer protocol (SSL), or uses a different port number. Enter the sender's email address if you experience SMTP relay problems. Again, if you're not certain, ask your ISP.

10. Test your SMTP server connection by clicking the **Test** button. If you have any errors, verify that you've entered the correct name of the SMTP server.

11. Once the test completes successfully, open Eudora and choose **Options** from the **Tools** menu. Then click the **Getting Started** icon in the left pane.
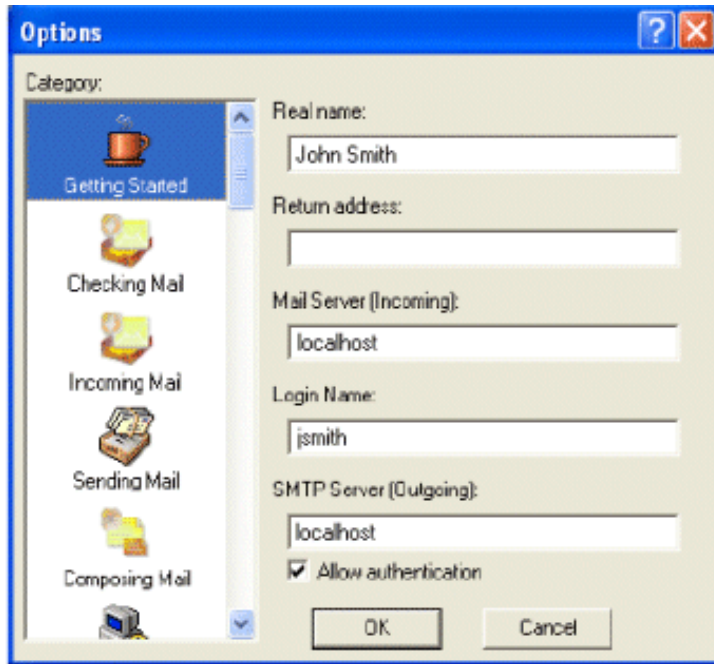
In the *Mail Server (Incoming)* and *SMTP Server (Outgoing)* fields, enter *localhost*. This setting tells Eudora to check with ChoiceMail One to send and receive email messages.

Note: "localhost" is all one word, lower case.

12. Click the **Checking Mail** icon in the *Category* box. The Mail Server should now say *localhost* and the Login Name should be what you entered in ChoiceMail One.
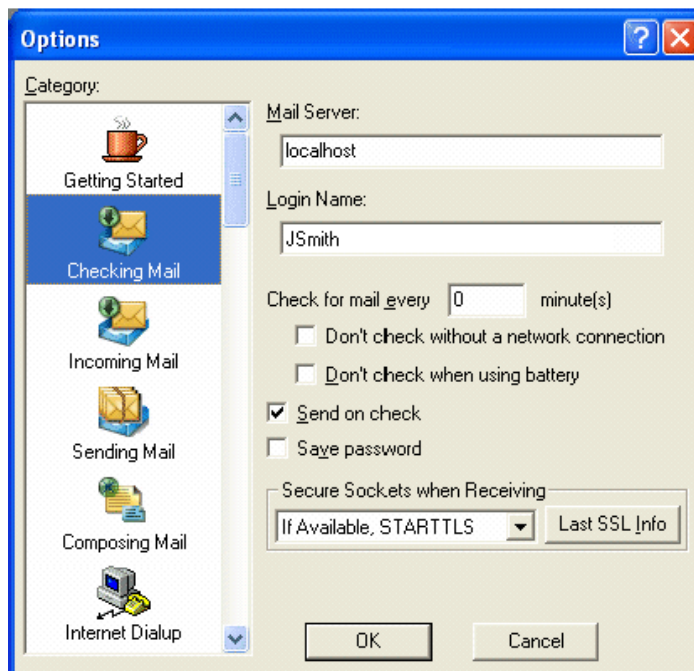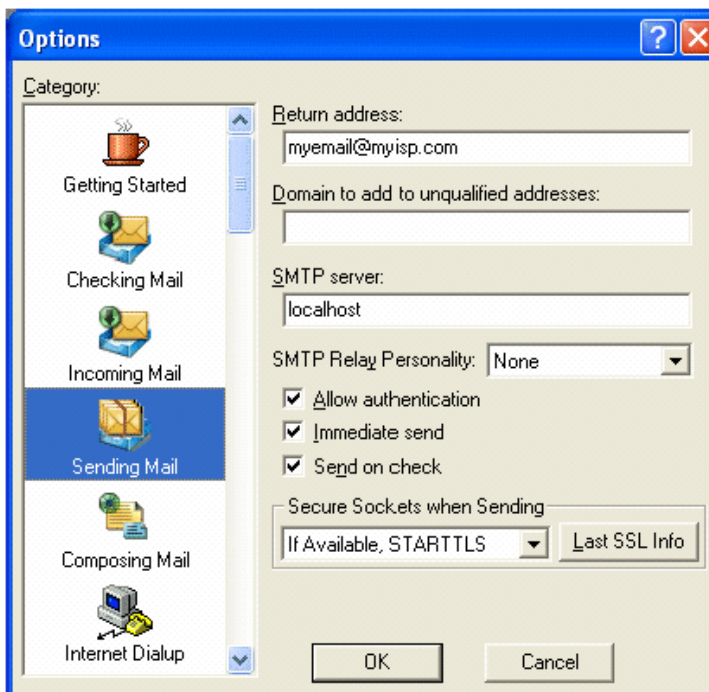

13. Click the **Incoming Mail** icon in the *Category* box. Make certain *POP* is selected as the *Server configuration* and the *Leave mail on server* checkbox is cleared.
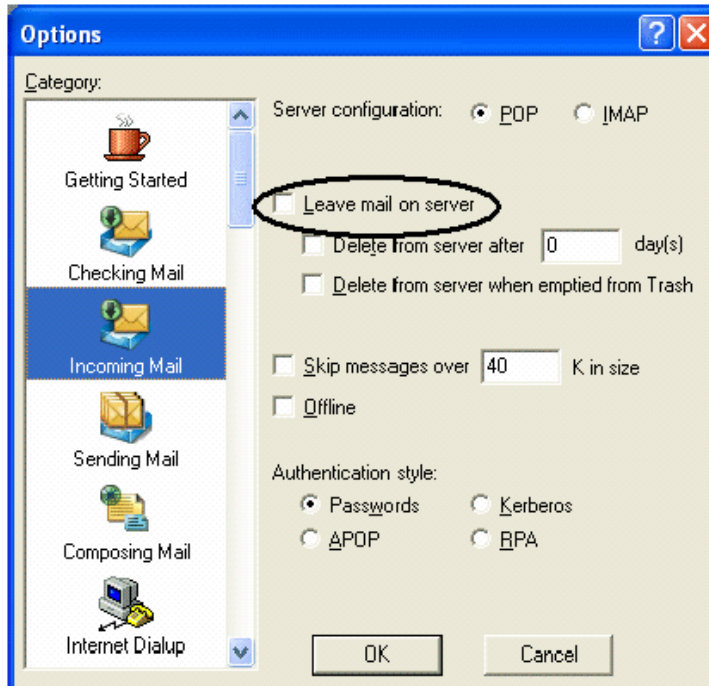
Note: ChoiceMail One does not support the Leave mail on server option!

14. Click the **Sending Mail** icon in the *Category* box. The *Return address* should display the address you want Eudora to insert in the *From* field of your outgoing mail, and the *SMTP server* should be *localhost*.

15. Click the **Internet Dialup** icon in the *Category* box. Make certain that the *Only do automatic mail checks when a network connection is already established* checkbox is selected, and all others are cleared.
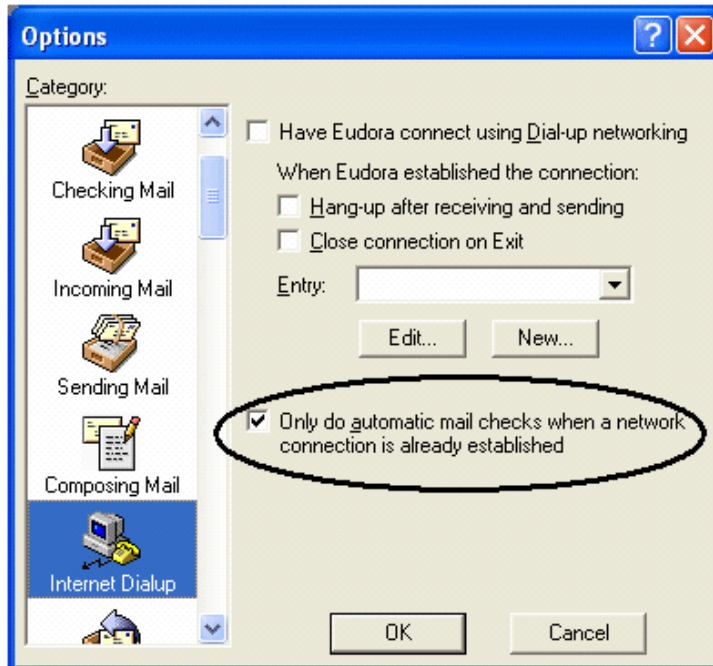
16. Click **OK** at the bottom of the *Options* dialog. You have now completed the setup/checking of settings for Eudora. Now click **Send/Receive** in Eudora so that the application will connect to ChoiceMail. ChoiceMail will not start downloading any mail until it has connected to Eudora first.

17. If you encounter difficulties, go back to ChoiceMail One. Double-click the **All Messages** indicator on the status bar to open Eudora. If Eudora does not open, choose **Configuration** from the **Options** menu, and click the *Advanced* tab. In the *Override system default email client* box, click the **Choose** button and select *Eudora* from the popup menu. If Eudora is not in the list, choose **Other**, browse to the folder where Eudora is installed, and select the Eudora executable file. Click **OK**.

18. Click the **All Message** indicator on the status bar again to open Eudora and check for new messages.

19. If you're still not able to connect, check the username and password in ChoiceMail. Choose **Configuration** from the **Options** menu. The *General* tab displays your ChoiceMail username and password – make certain this is the username and password you entered in Eudora.

   ➢ Choose **Options** from the **Tools** menu and click the **Getting Started** icon in the left pane. Verify that the username in the *Login Name* field is the same as the username you entered in ChoiceMail One.

   ➢ Choose **Change Password** from the **Special** menu to view your user password in Eudora. This must be the same as the password you entered in ChoiceMail One.

   Note: You must enter your password in Eudora every time you launch the application and check for email. You can set an option to have Eudora remember your password – choose

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Options from the Tools menu. Then click the Checking Mail icon in the left pane. Select the Save password checkbox.

20. If changing the password does not solve the problem, then you may have a port conflict. You must find the Eudora information file, eudora.ini, which is usually in the same folder as the Eudora application. Shut down the Eudora application first. (You can quickly locate the file by opening the Windows Explorer or My Computer window, click the Search button, enter the name of the file, and click **Search Now**.)

DigiPortal Software has a technical note with detailed instructions on editing the eudora.ini file:

http://www.digiportal.com/support/choicemail/technotes/notes/eudoraports.htm

In the eudoral.ini file, set the incoming POP3 port to 115, 120, 125, 130, or 135, and the outgoing SMTP port to 30, 35, 40, 45, or 50. Then go back to ChoiceMail One and choose **Configuration** from the **Options** menu. Click the *Advanced* tab and set the ports there to whatever you set them to in the eudora.ini file. Click **OK**. Make sure you use the same port numbers in both applications, as they must match.

Selecting port numbers is a trial-and-error process – if the first set of numbers doesn't work, then try the next set until you're able to connect.

Outlook and Outlook Express

1. In ChoiceMail One, choose **Email accounts settings** from the **Options** menu. The *POP3 accounts* tab displays so you can set up your incoming email server.

2. Click the **New** button to add an email account.

3. Enter the full email address, the username and password of your Outlook or Outlook Express email account, and the address of the POP3 host server.

4. Make certain the *Account enabled* checkbox is selected, so ChoiceMail One checks for email for this account.

5. Select the appropriate checkboxes if this account requires Secure Password Authentication (SPA), uses the Secure Socket Layer (SSL) protocol, or requires a special port number.

6. Click the **Test** button to test the connection with ChoiceMail One. If successful, click **OK**. If not, verify that you have the correct username, password, and host address and test again. If you still have errors, contact your ISP to make certain you have the correct passwords and account names.

7. Choose **Configuration** from the **Options** menu to set up your SMTP (outgoing email) server.

8. Click the **Add** button and type the name of your SMTP server in the *Add SMTP host* dialog. If you're not certain, ask your ISP. Click **OK**.

9. Select the appropriate checkboxes if this server requires authentication, uses the Secure Socket Layer protocol (SSL), or uses a different port number. Enter the sender's email address if you experience SMTP relay problems. Again, if you're not certain, ask your ISP.

10. Test your SMTP server connection by clicking the **Test** button. If you have any errors, verify that you've entered the correct name of the SMTP server.

11. Once the test completes successfully, open Outlook or Outlook Express and choose **Accounts** from the **Tools** menu. Then click the *Mail* tab. Select the email account you want to configure with ChoiceMail One (you can configure all your email accounts but you must do them one by one) and click the **Properties** button.

12. Click the *Servers* tab. In the *Incoming Mail (POP3)* and *Outgoing Mail (SMTP)* fields, enter *localhost*.
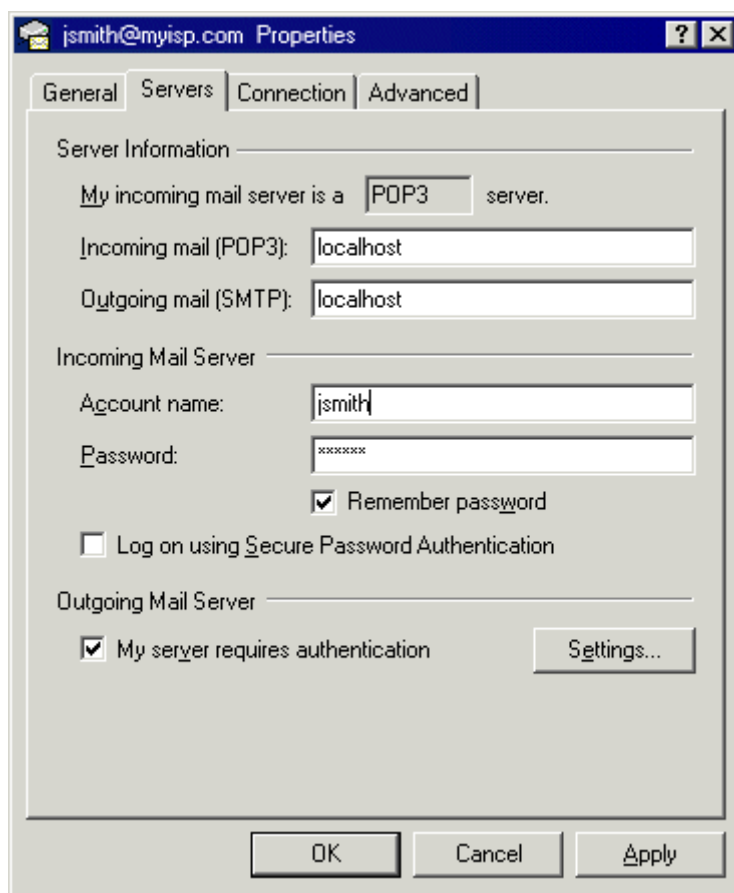
This setting tells Outlook or Outlook Express to check with ChoiceMail One to send and receive email messages.

Note: "localhost" is all one word, lower case.

13. Go back to ChoiceMail One. Double-click the **All Messages** indicator on the status bar to open Outlook or Outlook Express. If Outlook or Outlook Express does

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not open, choose **Configuration** from the **Options** menu, and click the *Advanced* tab. In the *Override system default email client* box, click the **Choose** button and select *Microsoft Outlook* or *Outlook Express* from the popup menu. If they're not in the list, choose **Other**, browse to the folder where it's installed, and select the Outlook or Outlook Express executable file. Click **OK**.

14. Click the **All Message** indicator on the status bar again to open Outlook or Outlook Express and check for new messages.

15. If you're still not able to connect, check the username and password in ChoiceMail. Choose **Configuration** from the **Options** menu. The *General* tab displays your ChoiceMail username and password – make certain this is the username and password you entered in Outlook or Outlook Express.

    - Choose **Accounts** from the **Tools** menu. Then click the *Mail* tab. Select the email account you're configuring and click the **Properties** button. Click the *Servers* tab. In the *Incoming Mail Server* box, verify that the *Account Name* and *Password* are the same as the username and password you entered in ChoiceMail One.

16. If changing the password does not solve the problem, then you may have a port conflict. In Outlook or Outlook Express, choose **Accounts** from the **Tools** menu. Then click the *Mail* tab. Select the email account to configure and click the **Properties** button. Click the *Advanced* tab.
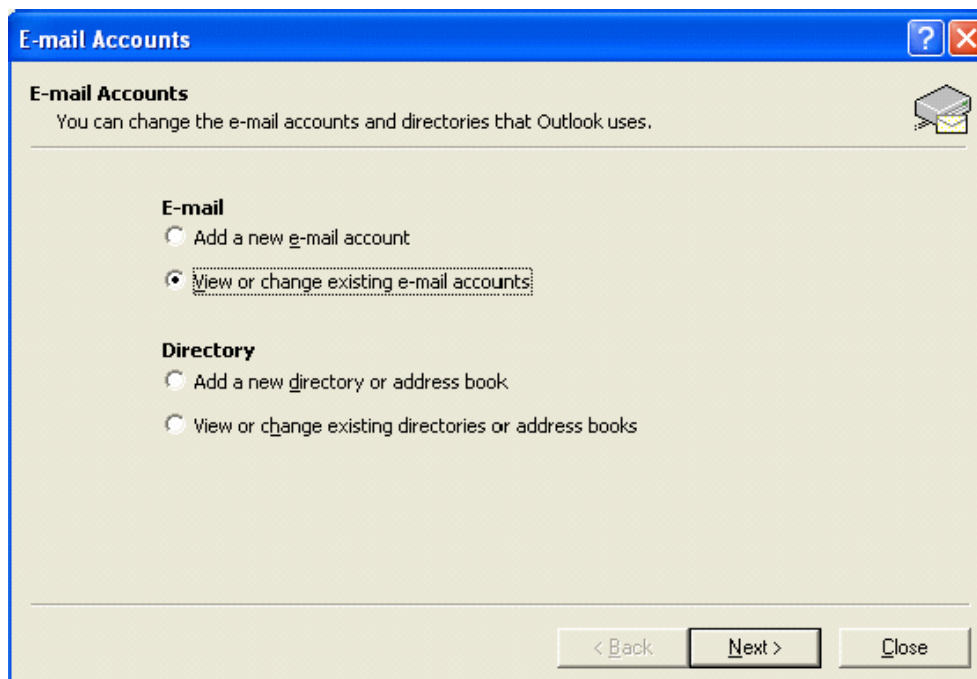
    Set the *Incoming Mail (POP3)* port to 115, 120, 125, 130, or 135, and the *Outgoing Mail (SMTP)* port to 30, 35, 40, 45, or 50. Then go back to ChoiceMail One and choose **Configuration** from the **Options** menu. Click the *Advanced* tab and set the ports there to whatever you set them to in Outlook or Outlook Express. Click **OK**. Make sure you use the same port numbers in both applications, as they must match.

    Selecting port numbers is a trial-and-error process – if the first set of numbers doesn't work, then try the next set until you're able to connect.
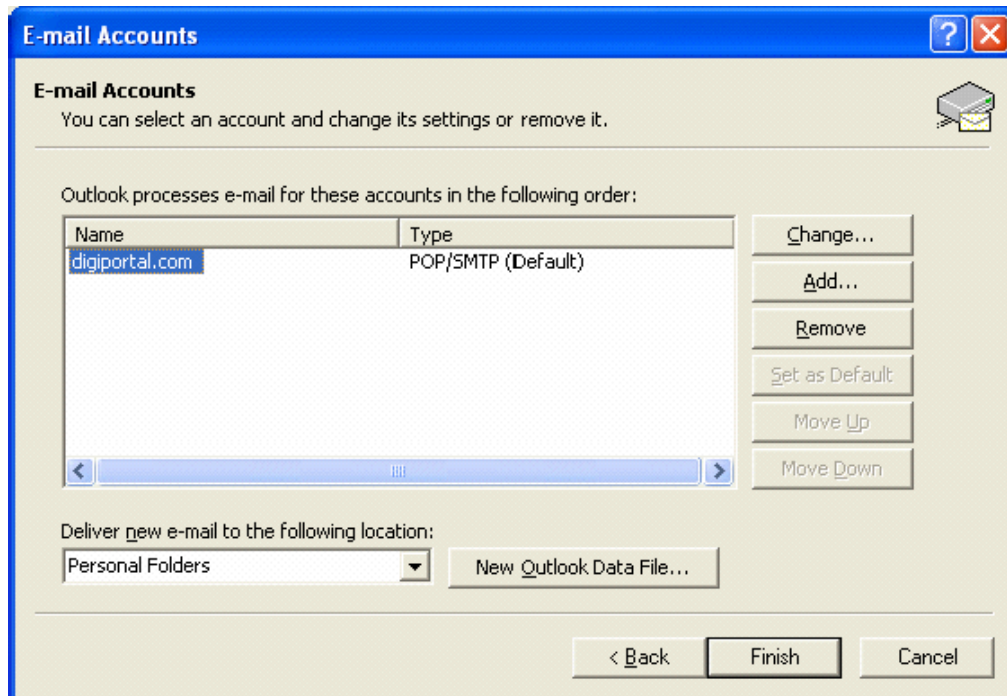
Outlook 2002

1. In ChoiceMail One, choose **Email accounts settings** from the **Options** menu. The *POP3 accounts* tab displays so you can set up your incoming email server.

2. Click the **New** button to add an email account.

3. Enter the full email address, the username and password of your Eudora email account, and the address of the POP3 host server.

4. Make certain the *Account enabled* checkbox is selected, so ChoiceMail One checks for email for this account.

5. Select the appropriate checkboxes if this account requires Secure Password Authentication (SPA), uses the Secure Socket Layer (SSL) protocol, or requires a special port number.

6. Click the **Test** button to test the connection with ChoiceMail One. If successful, click **OK**. If not, verify that you have the correct username, password, and host address and test again. If you still have errors, contact your ISP to make certain you have the correct passwords and account names.

7. Choose **Configuration** from the **Options** menu to set up your SMTP (outgoing email) server.

8. Click the **Add** button and type the name of your SMTP server in the *Add SMTP host* dialog. If you're not certain, ask your ISP. Click **OK**.

9 Select the appropriate checkboxes if this server requires authentication, uses the Secure Socket Layer protocol (SSL), or uses a different port number. Enter the sender's email address if you experience SMTP relay problems. Again, if you're not certain, ask your ISP.

10. Test your SMTP server connection by clicking the **Test** button. If you have any errors, verify that you've entered the correct name of the SMTP server.

11. Once the test completes successfully, open Outlook 2002 and choose **E-mail Accounts** from the **Tools** menu. Under E-mail, click the *View or change existing e-mail accounts* radio button and click **Next**.

12. Select the email account you want to configure with ChoiceMail One (you can configure all your email accounts but you must do them one by one) and click the **Change** button.

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13. In the *Incoming Mail (POP3)* and *Outgoing Mail (SMTP)* fields, enter *localhost*. This setting tells Outlook 2002 to check with ChoiceMail One to send and receive email messages.

Note: "localhost" is all one word, lower case.
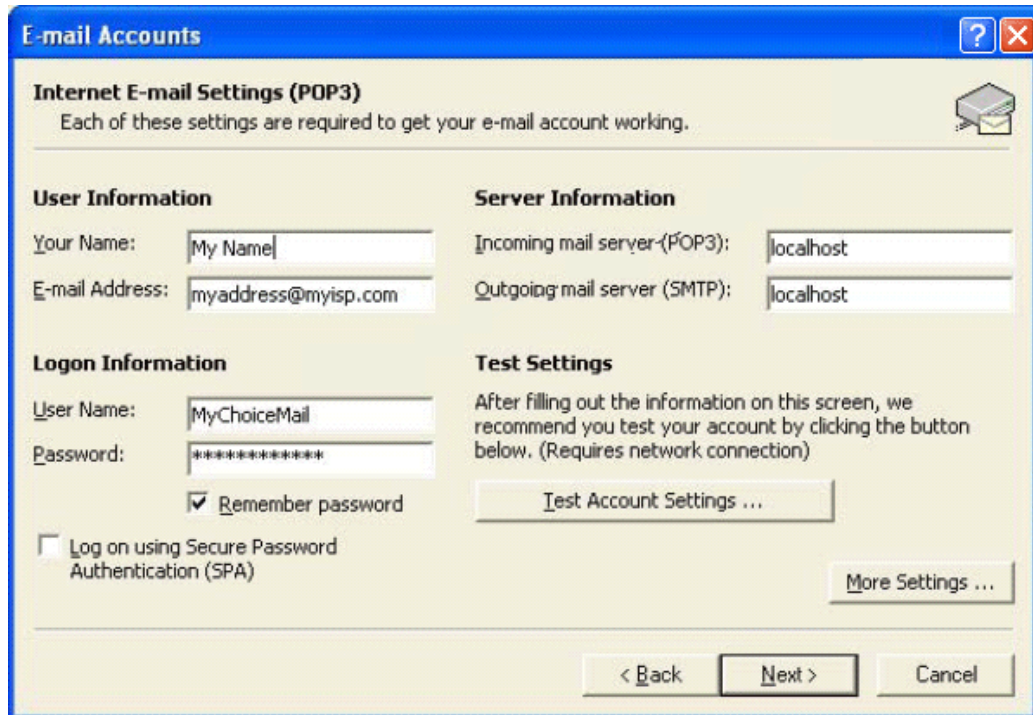
Enter your name and the email address you want Outlook to display in the FROM field of outgoing emails. Enter your logon user name and password. Click the **Test Account Settings** button to make certain you can connect to your server.

14. Click the **More Settings** button. In the *General* tab, enter a name for this email account. If desired, enter your organization's name and the reply email you want to use.
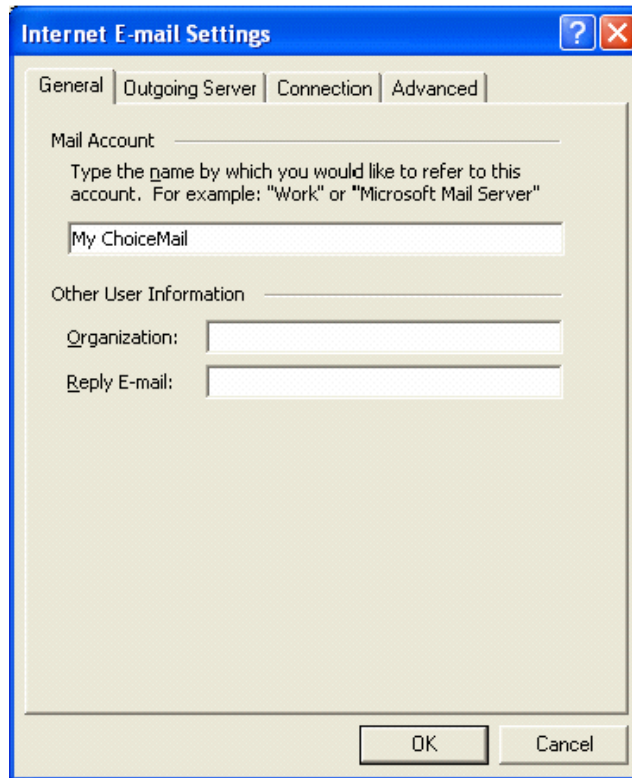
15. Click the *Outgoing Server* tab. Make certain the *My outgoing server (SMTP) requires authentication* checkbox is cleared. If you need to specify server authentication information, do this within ChoiceMail One.

16. Click the *Advanced* tab. Make certain all checkboxes are cleared. If you need to specify an SSL connection, do this within ChoiceMail One. Be sure you don't select to leave a copy of messages on the server; ChoiceMail One does not support this option.

17. Click the **OK** button.

18. Go back to ChoiceMail One. Double-click the **All Messages** indicator on the status bar to open Outlook XP. If Outlook XP does not open, choose **Configuration** from the **Options** menu and click the *Advanced* tab. In the *Override system default email client* box, click the **Choose** button and select *Microsoft Outlook* from the popup menu. If it's not in the list, choose **Other**, browse to the folder where it's installed, and select the Outlook XP executable file. Click **OK**.

19. Click the **All Message** indicator on the status bar again to open Outlook XP and check for new messages.

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20. If you're still not able to connect, check the username and password in ChoiceMail. Choose **Configuration** from the **Options** menu. The *General* tab displays your ChoiceMail username and password – make certain this is the username and password you entered in Outlook 2002.

> ➢ Choose **E-mail Accounts** from the **Tools** menu. Under E-mail, click the *View or change existing e-mail accounts* radio button and click **Next**. Select the email account you're configuring and click the **Change** button. Verify that the *Account Name* and *Password* are the same as the username and password you entered in ChoiceMail One.

21. If changing the password does not solve the problem, then you may have a port conflict. In Outlook XP, choose **E-mail Accounts** from the **Tools** menu. Under E-mail, click the *View or change existing e-mail accounts* radio button and click **Next**. Select the email account to configure and click the **Change** button. Click the **More Settings** button, and then click the *Advanced* tab.

Set the *Incoming Mail (POP3)* port to 115, 120, 125, 130, or 135, and the *Outgoing Mail (SMTP)* port to 30, 35, 40, 45, or 50. Then go back to ChoiceMail One and choose **Configuration** from the **Options** menu. Click the *Advanced* tab and set the ports there to whatever you set them to in Outlook 2002. Click **OK**. Make sure you use the same port numbers in both applications, as they must match.

Selecting port numbers is a trial-and-error process – if the first set of numbers doesn't work, then try the next set until you're able to connect.

Netscape 7.1

1. In ChoiceMail One, choose **Email accounts settings** from the **Options** menu. The *POP3 accounts* tab displays so you can set up your incoming email server.

2. Click the **New** button to add an email account.

3. Enter the full email address, the username and password of your Eudora email account, and the address of the POP3 host server.

4. Make certain the *Account enabled* checkbox is selected, so ChoiceMail One checks for email for this account.

5. Select the appropriate checkboxes if this account requires Secure Password Authentication (SPA), uses the Secure Socket Layer (SSL) protocol, or requires a special port number.

6. Click the **Test** button to test the connection with ChoiceMail One. If successful, click **OK**. If not, verify that you have the correct username, password, and host address and test again. If you still have errors, contact your ISP to make certain you have the correct passwords and account names.

7. Choose **Configuration** from the **Options** menu to set up your SMTP (outgoing email) server.

8. Click the **Add** button and type the name of your SMTP server in the *Add SMTP host* dialog. If you're not certain, ask your ISP. Click **OK**.

9. Select the appropriate checkboxes if this server requires authentication, uses the Secure Socket Layer protocol (SSL), or uses a different port number. Enter the sender's email address if you experience SMTP relay problems. Again, if you're not certain, ask your ISP.

10. Test your SMTP server connection by clicking the **Test** button. If you have any errors, verify that you've entered the correct name of the SMTP server.

11. Once the test completes successfully, open Netscape and choose **Mail & Newsgroups Account Settings** from the **Edit** menu. In the left pane, click the arrow next to the account to configure to open the submenu. Click the *Server Settings* option in the left pane. In the *Server Name* field, enter *localhost*.
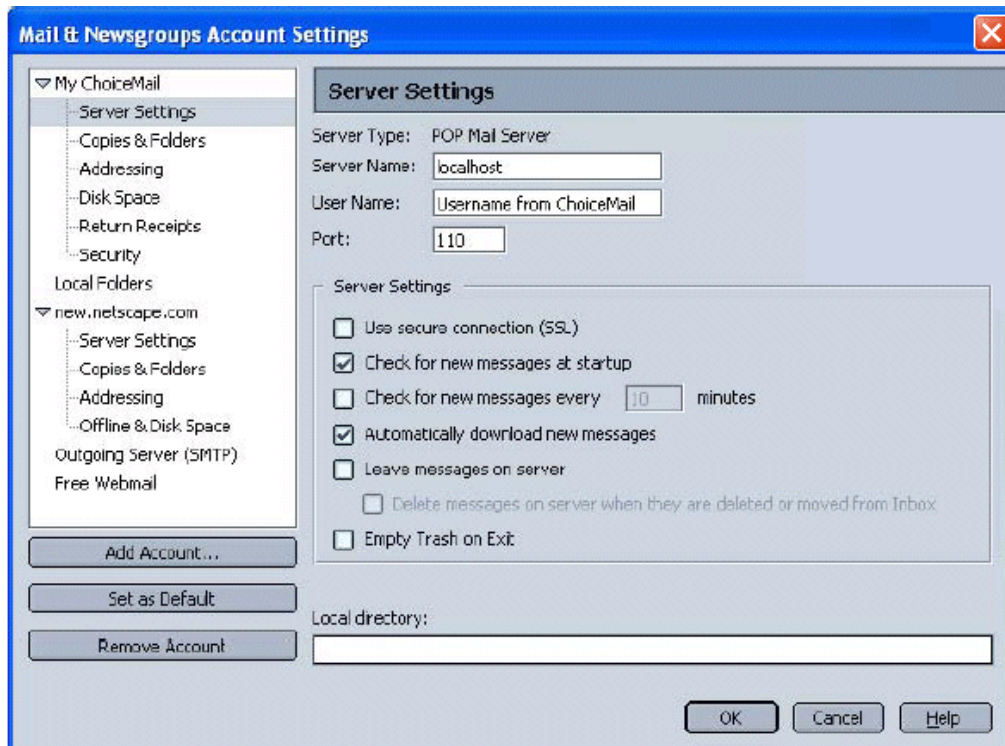
This setting tells Netscape to check with ChoiceMail One to send and receive email messages. Make certain the *Leave messages on server* checkbox is cleared.

Note: "localhost" is all one word, lower case.

12. In the left pane of the *Mail & Newsgroups Account Settings* window, click the *Outgoing Server (SMTP)* option. In the *Server Name* field, enter *localhost*, lower case and all one word.

ChoiceMail One User Guide
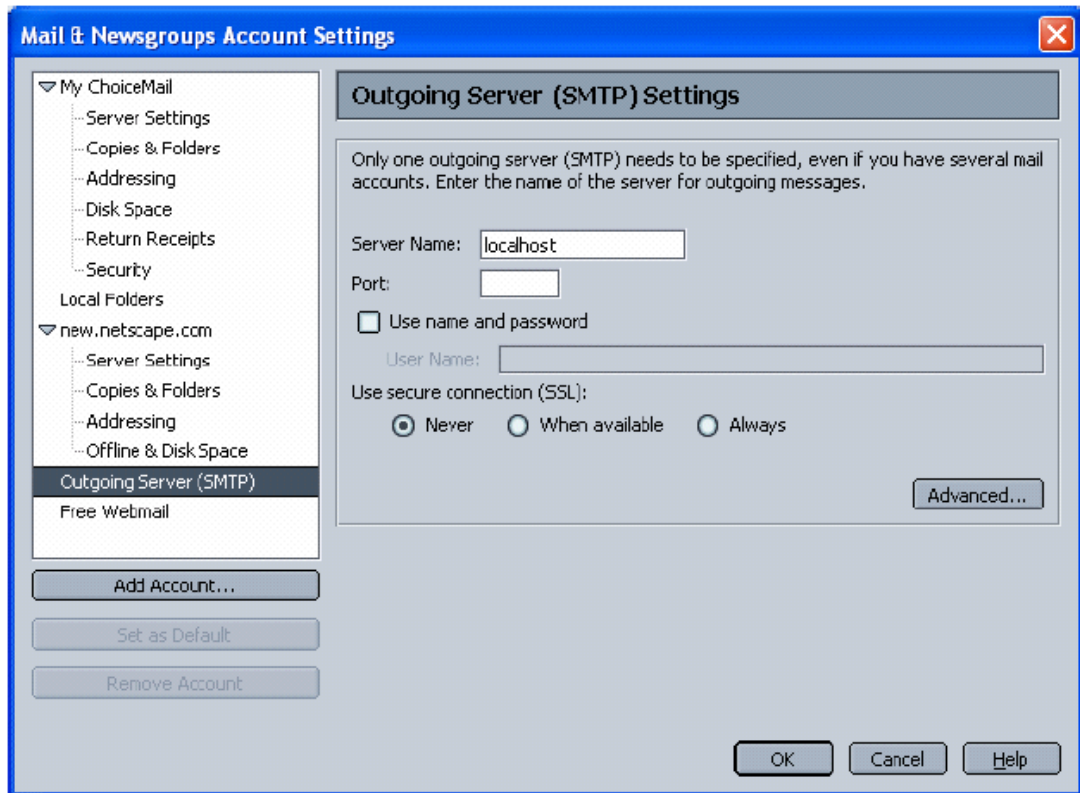
Make certain the *Use name and password* and *Use secure connection (SSL)* checkboxes are cleared. If you need to enter this information, do so within ChoiceMail One.

13. Go back to ChoiceMail One. Double-click the **All Messages** indicator on the status bar to open Netscape. If Netscape does not open, choose **Configuration** from the **Options** menu and click the *Advanced* tab. In the *Override system default email client* box, click the **Choose** button and select *Netscape* from the popup menu. If it's not in the list, choose **Other**, browse to the folder where it's installed, and select the Netscape executable file. Click **OK**.

14. Click the **All Message** indicator on the status bar again to open Netscape and check for new messages.

15. If you're still not able to connect, check the username and password in ChoiceMail. Choose **Configuration** from the **Options** menu. The *General* tab displays your ChoiceMail username and password – make certain this is the username and password you entered in Netscape.

   ➢ Choose **Mail & Newsgroups Account Settings** from the **Edit** menu. In the left pane, click the arrow next to the account you're configuring to open the submenu. Click the *Server Settings* option. Verify that the *Account Name* is the same as the username you entered in ChoiceMail One.

> ➤ Choose **Password Manager** from the **Tools** menu. Then choose **Manage Stored Passwords** from the submenu. Verify that the email account password stored here is the same as the password you entered in ChoiceMail One.

16. If changing the password does not solve the problem, then you may have a port conflict. In Netscape, choose **Mail & Newsgroups Account Settings** from the **Edit** menu. In the left pane, click the arrow next to the account you're configuring to open the submenu. Click the *Server Settings* option. Set the port to 115, 120, 125, 130, or 135 and click **OK**.

Click the *Outgoing Server (SMTP)* option and set the port to 30, 35, 40, 45, or 50. Click **OK**.

Then go back to ChoiceMail One and choose **Configuration** from the **Options** menu. Click the *Advanced* tab and set the ports there to whatever you set them to in Netscape. Click **OK**. Make sure you use the same port numbers in both applications, as they must match.

Selecting port numbers is a trial-and-error process – if the first set of numbers doesn't work, then try the next set until you're able to connect.

IncrediMail

1. In ChoiceMail One, choose **Email accounts settings** from the **Options** menu. The *POP3 accounts* tab displays so you can set up your incoming email server.

2. Click the **New** button to add an email account.

3. Enter the full email address, the username and password of your Eudora email account, and the address of the POP3 host server.

4. Make certain the *Account enabled* checkbox is selected, so ChoiceMail One checks for email for this account.

5. Select the appropriate checkboxes if this account requires Secure Password Authentication (SPA), uses the Secure Socket Layer (SSL) protocol, or requires a special port number.

6. Click the **Test** button to test the connection with ChoiceMail One. If successful, click **OK**. If not, verify that you have the correct username, password, and host address and test again. If you still have errors, contact your ISP to make certain you have the correct passwords and account names.

7. Choose **Configuration** from the **Options** menu to set up your SMTP (outgoing email) server.

8. Click the **Add** button and type the name of your SMTP server in the *Add SMTP host* dialog. If you're not certain, ask your ISP. Click **OK**.

9. Select the appropriate checkboxes if this server requires authentication, uses the Secure Socket Layer protocol (SSL), or uses a different port number. Enter the sender's email

address if you experience SMTP relay problems. Again, if you're not certain, ask your ISP.

10. Test your SMTP server connection by clicking the **Test** button. If you have any errors, verify that you've entered the correct name of the SMTP server.

11. Once the test completes successfully, open IncrediMail and choose **Accounts** from the **Tools** menu.
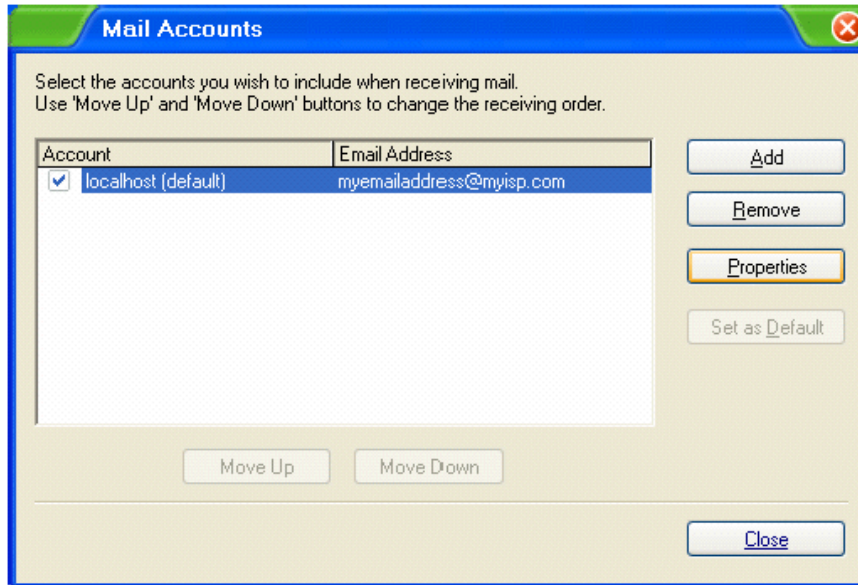
Select the email account you want to configure with ChoiceMail One (you can configure all your email accounts but you must do them one by one) and click the **Properties** button.

12. Click the *Servers* tab. In the *Incoming Mail (POP3)* and *Outgoing Mail (SMTP)* fields, enter *localhost*. This setting tells Outlook XP to check with ChoiceMail One to send and receive email messages.

Note: "localhost" is all one word, lower case.

Make certain the *Log on using Secure Password Authentication* and the *My server requires authentication* checkboxes are cleared. If you need to specify this information, do so within ChoiceMail One. Click the **OK** button.
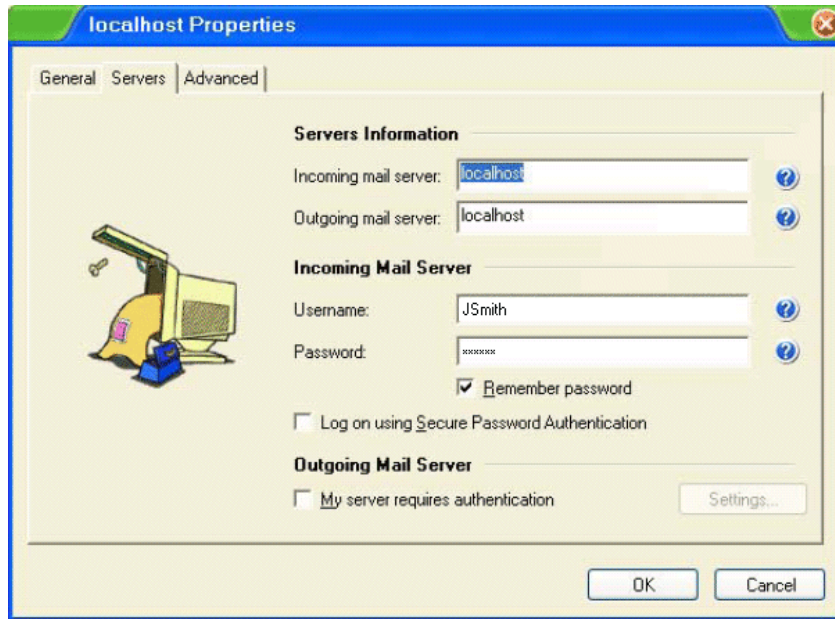
13. Go back to ChoiceMail One. Double-click the **All Messages** indicator on the status bar to open IncrediMail. If IncrediMail does not open, choose **Configuration** from the **Options** menu and click the *Advanced* tab. In the *Override system default email client* box, click the **Choose** button and select *IncrediMail* from the popup menu. If it's not in the list, choose **Other**, browse to the folder where it's installed, and select the IncrediMail executable file. Click **OK**.

14. Click the **All Message** indicator on the status bar again to open IncrediMail and check for new messages.

15. If you're still not able to connect, check the username and password in ChoiceMail. Choose **Configuration** from the **Options** menu. The *General* tab displays your ChoiceMail username and password – make certain this is the username and password you entered in Outlook XP.

> ➢ Choose **Accounts** from the **Tools** menu. Then choose **Mail** from the submenu. Select the email account you're configuring and click the **Properties** button. Then click the *Servers* tab. Verify that the *Account Name* and *Password* are the same as the username and password you entered in ChoiceMail One.

16. If changing the password does not solve the problem, then you may have a port conflict. In IncrediMail, choose **Accounts** from the **Tools** menu. Select the email account you're configuring and click the **Properties** button. Then click the *Advanced* tab.
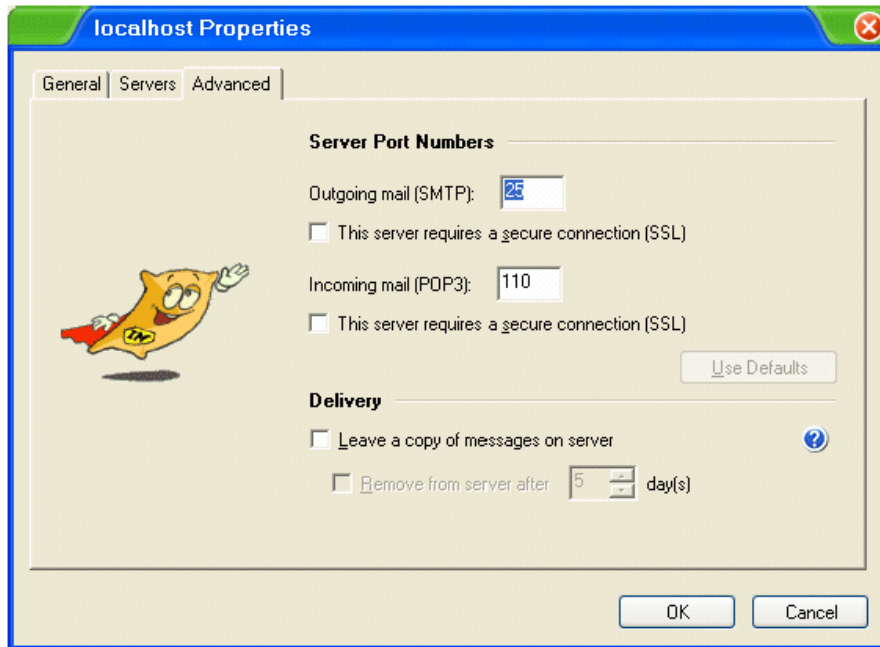
Set the *Incoming Mail (POP3)* port to 115, 120, 125, 130, or 135, and the *Outgoing Mail (SMTP)* port to 30, 35, 40, 45, or 50. Then go back to ChoiceMail One and choose **Configuration** from the **Options** menu. Click the *Advanced* tab and set the ports there to whatever you set them to in IncrediMail. Click **OK**. Make sure you use the same port numbers in both applications, as they must match.

Selecting port numbers is a trial-and-error process – if the first set of numbers doesn't work, then try the next set until you're able to connect.

Using Multiple Email Accounts with ChoiceMail One

One of the major advantages of using ChoiceMail One to manage your incoming email is that you can configure ChoiceMail One to handle all your email accounts automatically. Once you've configured your accounts, ChoiceMail One will automatically log into the ISP server for each of your accounts, retrieve the email found there, and check all of it for spam. Only email from known senders shows up in your inbox, and you never have to bother checking in with each separate account.

But more importantly, when you connect to ChoiceMail One from your email client, ChoiceMail One can serve up just those email messages associated with a particular email account in your email client. (This is a change from previous versions of ChoiceMail One, where all incoming email retrieved by ChoiceMail One was funneled into a single account in your email client). The purpose of the new approach is so that, when you reply to a message from your email client, the From address in the outgoing email uses the same email account as that to which the email was sent. You don't have to keep track of whether a message was sent to your business or personal account; ChoiceMail One does that for you.

For example, suppose you have a personal account – john@personal.net, a business account – jsmith@corporate.com, and a web account for surfing the web – js01@yahoo.com. When you're checking your business email from home, you want to use the jsmith@corporate.com address as the From address when you respond to the boss. But if you're handling a lot of email messages from a variety of senders, it's easy to forget to change the outgoing account before you click Send.

If you configure your email application to use ChoiceMail One to handle all your email accounts, ChoiceMail One always uses the incoming address of each message as the From address when you reply to a message.

Note: ChoiceMail One does not yet support this feature for the Eudora email application.

ChoiceMail One can also handle the situation where you may have only one ISP server but have several different accounts with that server for the different members of your family. You only need one copy of ChoiceMail One to handle all of your family's accounts, whether with one or more ISPs – ChoiceMail One delivers only the email intended for each family member into that person's email inbox.

Configuring Multiple Email Accounts with Multiple ISP Accounts

1. Choose **Email accounts settings** from the **Options** menu to open the *Preferences* window.

2. Make certain all of your email accounts are defined and that the *Account enabled* checkbox is selected for each account.

    Now you must configure your email application to use ChoiceMail One for each email account you have.

3. In the *Server* tab of your email application *Internet Accounts* window, make certain that the POP3 incoming server and the SMTP outgoing server are both set to *localhost*.

   Note: "localhost" is one word, with no spaces and all lower case.

4. Set the account name as your ChoiceMail One username/email address. Use your regular ChoiceMail One or POP3 password.

   For example, suppose your ChoiceMail One username is johns, and you have three email accounts with three different ISPs: jsmith@corporate.com, john@personal.net, and js01@yahoo.com. Your account names in your email application for these accounts will be:

   johns/jsmith@corporate.com

   johns/john@personal.net

   johns/js01@yahoo.com

By entering the ChoiceMail One username first, you are essentially instructing your email application to retrieve email for each account from the ChoiceMail application rather than directly from your ISP server. Whenever you're connected to the Internet, ChoiceMail One will check each of these ISP servers for new email messages at the time interval you set in your preferences (see page 87).

Configuring Multiple Email Accounts with the Same ISP Server

Everyone in your family can use the same copy of ChoiceMail One to eliminate spam from incoming email messages. Set up all the email accounts as described above, one for each member of the family, inside ChoiceMail One. If everyone uses the same computer, you're done.

If you have a local area network (LAN) set up inside your house, one quick change will let everyone access ChoiceMail One, even though it's only installed on one machine.

- In the *Server* tab of the email application *Internet Accounts* window for each family member, make certain that the POP3 incoming server and the SMTP outgoing server are both set to the IP address of the computer running ChoiceMail One, NOT to localhost.

The IP address is the unique Internet Protocol number assigned to your computer; it identifies your machine when sending and receiving information packets over the Internet. By substituting your machine's IP address for "localhost," your family members or others on your LAN will route their incoming and outgoing email messages through the ChoiceMail One application installed on the "main" computer.

1. To find the IP address of a machine, choose **Run** from the **Start** menu. Type *cmd* and click **OK**.

2. In the window that opens, type *ipconfig* at the C:\> prompt and press Enter.
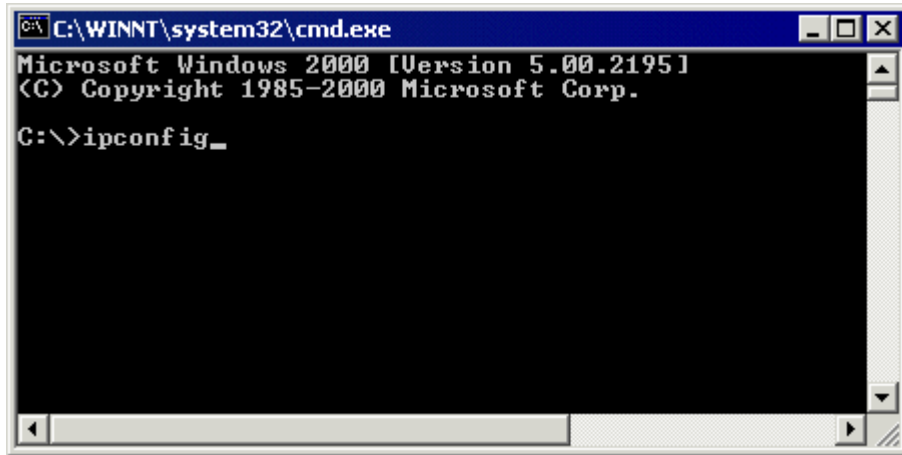
3. Windows returns the IP address of your machine, a 10-digit number in the format xxx.xxx.x.xxx. Enter this IP number in the Server tab of your email accounts window for both the POP3 and SMTP servers for all the accounts on the LAN.

ChoiceMail One will now process incoming and outgoing email messages for everyone using your local area network.

You can use the Lock feature to disable ChoiceMail One – users must know the ChoiceMail One password to access the application. See page 28 for details.

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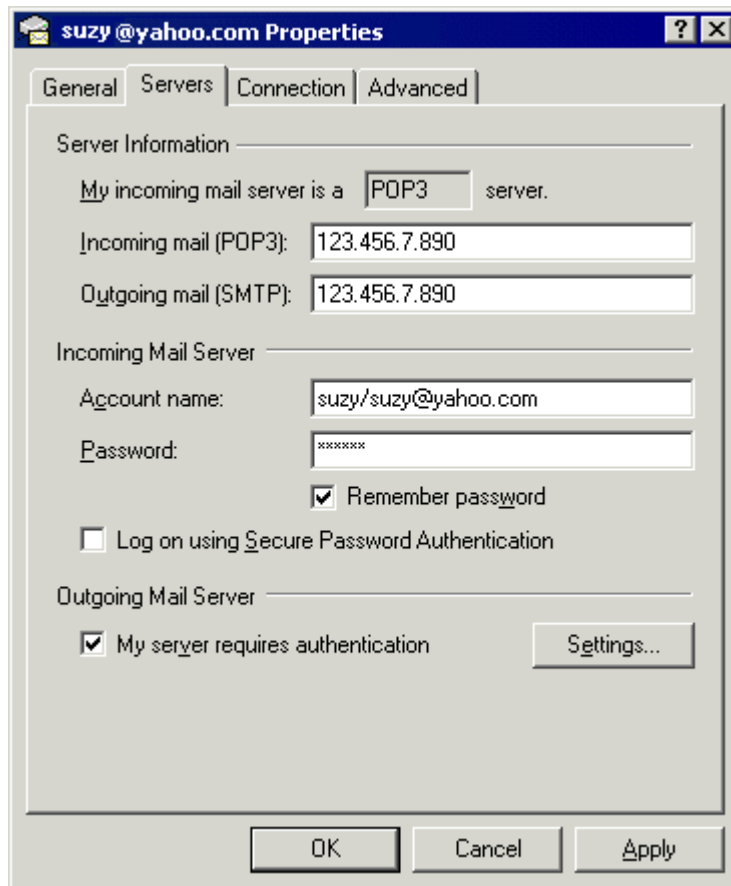
Synchronizing ChoiceMail One Files

If you're using ChoiceMail One on multiple computers, you need to synchronize a number of files as you switch from one computer to another, so that ChoiceMail has the correct data to process incoming mail. If you don't synchronize your files, you run the risk of losing registration replies. If ChoiceMail One sends out a registration request from one computer, and receives it on another, it will ignore the incoming registration response because ChoiceMail One running on the second computer doesn't realize that it previously sent out a request from the first computer.

You also need to synchronize your files so that your whitelist, blacklist, and permission rules are always up to date.

Make sure you have shut down ChoiceMail One completely before you copy or restore these files, to avoid losing any information.

The following table has a list of the key ChoiceMail One files and/or folders, with an indication as to whether they should be synchronized. If a filename is not mentioned in this table, you can safely assume that it doesn't matter whether you synchronize it or not.

Some files are optional – if the file does not exist on your machine, then you can safely ignore it.

All references to filenames or folders assume that you are starting in the folder where ChoiceMail is installed.

Make sure you keep backups. DigiPortal Software cannot help you restore these files if you lose them or otherwise cause them to become corrupted. DigiPortal Software cannot provide support for problems due to mistakes caused by synchronization.

You can easily backup the entire ChoiceMail system simply by copying the contents of the ChoiceMail folder and subfolders to some other location on your system. ChoiceMail does not install any files in the Windows System folders, and so is completely self-contained.

Please make certain that you have a legally purchased copy of ChoiceMail for each computer on which you wish to run ChoiceMail.

File or Folder Name	Type	Purpose	Synchronize
AcceptedDomains	Folder	Your list of accepted domains is stored inside this folder	Yes
Cmdb.mdb	Database	Your senders and your alias list are stored inside this database	Yes
AwayMessage	Folder	Data for the away auto-responder	Yes
mailboxes	Folder	Contains all your mail messages (approved, blocked and deleted)	Yes
PendingRequests	Folder	Your list of pending requests is stored in	Yes

		this folder	
RejectedDomains	Folder	Your list of rejected domains is stored inside this folder	Yes
Rules	Folder	Your permission rules	Yes
Choicemail.ini	File	Stores configuration information for connecting to your ISP as well as port information for your email application	NEVER
PopManager.ini	File	Stores more information about your connections	NEVER
CoachSettings.ini	File	Remembers your coach settings	No
SmptQueue.ini	File	Queued registrations	Yes
Users.ini	File	Preferences and accounts	Never
Custom.ini	File	Foreign language support	Yes

Expert Quick Start

If You Are Familiar with POP and SMTP

ChoiceMail One™ sits between your email application and the existing POP3 and SMTP email servers at your ISP. The basic concept is that ChoiceMail One takes over the role of retrieving all email messages from the mail servers at your ISP.

ChoiceMail One itself behaves as a combined POP3 and SMTP server running on your PC, and you configure your email application so that there is just one account enabled. The incoming (POP3) and outgoing (SMTP) servers should be set to the IP address 127.0.0.1 (also known as **localhost**). This means that when your email application runs, it connects directly to ChoiceMail One on your machine to receive emails.

If you have multiple POP3 accounts, you can configure ChoiceMail One to retrieve messages from all of them. It is important that you change the settings on your email application so that it does not also try to retrieve mail directly from your ISP. If you have multiple email accounts set up in your email application, you should switch them off and add equivalent accounts into ChoiceMail One. This will allow ChoiceMail One to retrieve email from all your existing email accounts and make them available to your email application. If you do not turn off direct access to your original accounts in your email application, ChoiceMail One will not be able to intercept and block unwanted messages.

You need a username and password for ChoiceMail One and you can use any username and password that you like. Whatever you choose, those values are what you will use in your email application to log in to ChoiceMail One.

ChoiceMail One comes with a Configuration wizard that can handle Outlook Express, Outlook, and most recent versions of Eudora. If you are running a different email application such as Netscape Mail, you will have to configure your accounts manually.
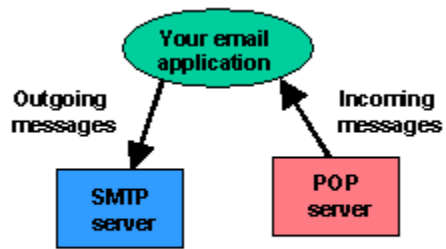
Setup **before** installing ChoiceMail
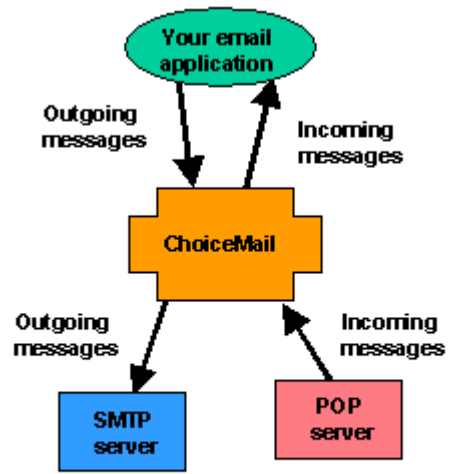
Setup **after** installing ChoiceMail

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Default Permission Rules

ChoiceMail One 2.5 comes with several email permission rules already installed. These rules are helpful in eliminating spam messages as they are, but you can also use them as models to create your own permission rules.

Note: All permission rules created by DigiPortal Software begin with a '$.'

$Remove ADV: emails

Theoretically, advertisements are supposed to start with 'ADV' in the Subject field. For those that helpfully do, this permission rule detects and deletes these messages.

$Stuff after end of HTML page

A legitimate HTML message ends with the </HTML> tag, but spammers often add extra random characters after that tag to try and break systems that look for duplicate messages. This permission rule looks for messages with extra characters after the </HTML> tag – these messages are almost certain to be spam.

$URLs with email portion

This permission rule detects the trick where spammers try to hide the REAL server by using an "@" character in the URL, preceded by a character string that typically looks like a well-known web server address. For example: http://www.ibm.com@somenastyserver.com.

$Bogus postmaster message

This permission rule detects spammers who try to break through by pretending to be the postmaster at some website.

$Bad words in body

This permission rule is included as a sample rule, showing how to detect objectionable words in the body of the message. (This writer doesn't know too many bad words and so extending this rule is left as an exercise for the user. ☺)

$Images with webbugs

Web bugs are essentially image URLs that contain arguments such that, when you try to view the image, the server processes the arguments. Web bug arguments are often unique to each recipient, which lets the spammer know who actually looked at a message. This permission rule deletes messages that contain web bugs.

$HTTP as argument

A favorite trick of spammers is to use a well-known server, such as Yahoo, to redirect you to a spamming site. This permission rule detects messages using this trick.

$Masked URL prefix

This permission rule detects attempts by spammers to disguise a URL.

$Words split by bogus HTML tags

Spammers try to break up words by using fake HTML tags that are ignored by your browser. Their goal is to disguise words like VIAGRA by writing them as

V<x>I<ddd>A<ssdsd>G<qw>R<fdf>A.

This permission rule doesn't try to decode the actual word – it simply deletes any message that contains this kind of sequence.

$BODY tag before HTML

This permission rule detects any attempt by spammers to send a message with incorrectly formatted HTML tags.

$URL with digit portion or %

This permission rule detects URLs that are raw IP addresses.

$Drugs

This permission rule detects email messages with a few well known drugs in the Subject field. Use this as an example of how to detect drugs or other objectionable items.

$Anti-Bayesian detector

Spammers break through Bayesian filters by including large numbers of random words in a message so that a Bayesian filter cannot leverage history to determine whether the message is spam. This permission rule detects random words in a message.

$Empty body and subject

This permission rule deletes empty messages. Sometimes there are ONLY attachments in these messages, and people you don't know should not be sending you attachments.

$Domain Address Check

This permission rule invokes the domain-checking system that examines the body of a message, extracts server names, looks them up, and determines whether the actual IP addresses are in restricted ranges (i.e., are coming from an unexpected country).

The important point to make about all these rules is that they only apply to people who are **not** already on your white list. DigiPortal Software take the position that legitimate people whom you don't know but who are contacting you for the first time would NOT include the items described above, therefore making it safe to delete such messages received from unknown senders.

ChoiceMail One User Guide

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 One 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 One 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.

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. Choose **Permission Management** from the **Actions** menu, click the *Accepted domains* tab, 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.

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.

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 36),

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

Headers are always followed by a colon character to separate them from the values.

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.

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.

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.

ChoiceMail One User Guide

Configuring ChoiceMail One with Older Anti-Virus Products

ChoiceMail One does not actually extract attachments from incoming emails, so it never actually creates files that might contain a virus. The process of extracting attachments is performed only by your own email application or by an anti-virus product that is configured to examine raw attachments in emails.

The latest anti-virus products monitor email ports directly and are completely compatible with ChoiceMail One. If you are using an older anti-virus product and/or ChoiceMail One is informing you of a conflict, please read on.

Users that use Norton AV 2001 or some other application that uses port 110 (for example, some other email server on their machine) could see the message that PORT 110 is already taken by some other application.

Alternatively, you may just see error messages in your email application indicating that a connection could not be made to the email server. For example: in Outlook Express you might see a message as follows:

```
There was a problem logging onto your mail server. Your User
Name was rejected. Account: 'Your account name', Server:
'localhost', Protocol: POP3, Server Response: '-ERR unknown
user name or bad password', Port: 110, Secure(SSL): No, Server
Error: 0x800CCC90, Error Number: 0x800CCC91"
```

Earlier versions of ChoiceMail One were not handling this problem automatically. The solution in that case was to change the POP3 port number in ChoiceMail One to a value other than 110 or to shut down the other application.

If you change the POP3 port setting in ChoiceMail One, you must also change your port setting for the account in your email application that connects to ChoiceMail One, so that they match.

As of version 1.226, ChoiceMail One handles this problem completely automatically if you run the Configuration wizard and you are using Outlook Express or Eudora.

For this automatic process to work correctly, the application that is using port 110 (such as your anti-virus application with email protection enabled) must already be running so that ChoiceMail One can detect the conflict. In that case, ChoiceMail One quietly changes the appropriate ports in the email application automatically.

If you are using an email application other than Outlook Express, Eudora, or Outlook, then you must change the POP3 port in your email application manually. If this is necessary, ChoiceMail One will pop up a message box indicating what needs to be done, and it will also indicate the new port number that needs to be set in your email application. Please refer to the documentation for your email application to find out how to change the ports. The changes are not always exposed in the user interface of your email application and it may be necessary to change registry entries or, in the case of Eudora, the Eudora.ini file.

In the case where the other application (such as Norton Anti Virus 2001) was not running at the time when ChoiceMail One was installed, then if you subsequently run the other application while ChoiceMail One is running, the other application will typically fail and indicate that the port is taken.

In this case, you will have to change the POP3 port in ChoiceMail One and in your email application manually to a value other than 110. For example, try port 115, 120, 125, etc until you find one where there's no conflict.

Do NOT change the port in the other application, as ChoiceMail One at this time can only connect to POP servers running on port 110. Support for ports other than 110 will be added to ChoiceMail One as soon as possible.

Trouble-Shooting

I get a socket error

A socket error means that ChoiceMail One was unable to connect to the Internet for one reason or another. The usual reasons are:

1. Your firewall is preventing ChoiceMail One from connecting to the Internet. See [Firewalls and Server Permissions](#) for more info

2. You specified an invalid server name for the POP3 or SMTP server so that the server could not be found. Check carefully that your POP3 server and SMTP server names are correct.

3. You have a [port conflict](#) due to some other application.

The trial version worked perfectly but when I installed the retail version, it didn't work or it generated access violations.

Based on feedback from a number of customers, we have determined that this problem is invariably due to a software firewall on your machine that is blocking ChoiceMail from connecting to the Internet. In general, what happens is that your firewall notices that the executable is now different (i.e., retail vs. trial) but, depending on how your firewall is configured, it may or may not inform you of this and ask for permission again.

Please review the following two tech notes for more information on solving this problem:

1 [Firewalls and Server Permissions](#)
2 [Access Violation at Startup](#)

This problem can also occur if you are upgrading to a newer version of ChoiceMail One.

Also make sure that the colored button on the top right of the ChoiceMail One main window is green. If you were running the trial version and it expired, that button will have turned red. **Installing the retail version does not automatically make that button turn green again**. Just click the button to turn it green. Note that this only works once your email application has already successfully connected to ChoiceMail One.

ChoiceMail never sends out registration requests

Please check the following items:

1. Make sure that ChoiceMail One is using the correct SMTP server for your Internet connection.

2. If the icon associated with every new sender has a red border, then the most likely possibility is that ChoiceMail One does not know your own email address. This can happen for two reasons:

    a. your full email address was not specified in the POP3 accounts configuration

    b. you have multiple email addresses (aliases) and you have not configured ChoiceMail so that it recognizes those aliases.

ChoiceMail fails to download some email

Before going any further, make sure you have downloaded and are running the latest version of ChoiceMail.

I am receiving duplicate emails in my AOL account.

Please see the technote [AOL Users Receive Duplicate Messages](#) on our website.

When I click Test to check an account, ChoiceMail fails to connect

First - **MAKE SURE YOU ARE CONNECTED TO THE INTERNET!** You must stay connected to the Internet while you are testing your accounts with ChoiceMail One.

Once you are certain you are connected to the Internet (you are connected right now if you are able to read this), if your test still fails, then make sure that you entered the correct information for your username, password and POP3 server. In particular, your password is most likely to be case sensitive, so make sure that you typed the password characters in the right case. You might want to check your CAPS LOCK key to make sure you don't have CAPS enabled inadvertently.

I sent a message to myself to test the approval process, but the message just went through

ChoiceMail One will recognize that this message actually came from you and allow it through. Note that that only works if you sent the message out from the email application that is using ChoiceMail One. If you try to send a message from your own email address but use some other email connection that is not going through ChoiceMail, ChoiceMail One will assume that someone is trying to spoof your own address and will quietly block the message.

My computer keeps dialing the Internet even though I have closed my email application.

Even though you have turned off your email application, you have left ChoiceMail running and every time it connect to the Internet to get your email, your dialup connection is triggered.

Two suggestions:

1. When you close your email program, make sure that you EXIT ChoiceMail by choosing **Exit** from the **Actions** menu.

- 2. Change the refresh rate from the default 10 minutes to something like two hours (120 minutes), so that the connections occur less frequently.

I am using the Configuration Wizard but the Next button is disabled.

ChoiceMail One requires you to test all accounts to make sure they are working properly. If you have imported more than one account, you need to test each one of them. Please see the section about the [Configuration Wizard](#) in the [online help](#).

I downloaded the retail version of ChoiceMail but I'm still seeing the trial version when I run it.

There are two possibilities here. First of all, make sure you copy the new version of ChoiceMail One into the folder where you originally installed the trial version. During the copy operation, you should get a message about overwriting your previous version of ChoiceMail.exe. If you did not get that message, then you probably copied the file to the wrong folder. Also, if your original ChoiceMail One were still running, then you would not be able to perform the copy, as the file would have been in use. Make sure that ChoiceMail is not actually running.

Note that it's not sufficient to just "close" ChoiceMail by clicking on the X icon on the window's titlebar. You must actually open the **Actions** menu and choose **Exit**.

My anti-virus program pops up twice when I send an email out.

If you have your anti-virus program configured to check outgoing email, you may see this behavior because your anti-virus program is seeing two connections to port 25, the standard port used by SMTP (outgoing) mail servers. This is harmless. In Norton AV 2002, you can disable this popup dialog by choosing **Email Settings** from the **Options** menu.

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

Main index to ChoiceMail One support which includes our new searchable knowledgebase and access to our online support request system.
http://www.digiportal.com/support.html

TechNotes
http://www.digiportal.com/support/choicemail/technotes/index.htm

Contacting DigiPortal Software

DigiPortal Software uses an online ticket support system to help customers on issues that are not covered in our knowledgebase. We try to respond to support requests within 1-2 business days. If you need to submit a problem through our support system, make sure that you check back for an answer through the support system.

Glossary

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 One, 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 One'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. See page 21.
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. IMAP is not supported in ChoiceMail One.
IzyMail gateway	A special plugin that allows ChoiceMail One to access mail from several web-based email systems. See page 17.
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 One greatly facilitates this process by requiring the sender to do some extra work before the recipient is notified.
POP3 protocol	A standard Internet protocol specifying how your email application retrieves incoming messages from a server. If you are using a standard email program such as Outlook Express or Eudora and you retrieve mail from your ISP via dialup, DSL, or cable, you are most probably using the POP protocol. See also IMAP, SMTP, AOL Mail Protocol, and webmail.
Recipient	The person receiving a message, normally you!
Registered sender	In ChoiceMail One, this means a sender who has submitted a registration request through the web. That sender is now waiting for you to approve him/her to allow emails to reach you.

Glossary

Word	Meaning
Registration process	A sender unknown to ChoiceMail One is automatically requested to visit a webpage where s/he enters information and submits it to you for approval. Once a sender goes through this process, ChoiceMail One will inform you and you can choose to approve or reject the sender.
Rejected sender	If you have marked a sender as rejected, then all future email messages from that sender are silently deleted. If you are rejecting a sender who has submitted a registration request, then you have the option (but not the obligation) to inform the sender as to why he or she is being rejected.
Return-receipt	A header in an email message that tells your email application that the sender of an email wishes to be notified when you have read that email.
Secure Password Authentication	A mechanism that encrypts your password when it is being sent to a mail server to protect your password from being stolen.
Sender	The person sending you an email message
SMTP	(Simple Mail Transfer Protocol) A standard Internet protocol used for sending email messages.
SMTP Proxy	ChoiceMail One intercepts your application's outgoing email so that it can determine the email address of the person to whom you are sending the email message. That email address can then be automatically preapproved by ChoiceMail One (i.e., the email address is added to ChoiceMail One's whitelist) so that when that person responds to your message, s/he will not be asked to register.
Unknown sender	An unknown sender is someone who sends you an email for the first time and is not known by ChoiceMail One, either directly or through existing email rules. In most cases, ChoiceMail One will send him/her an email message asking him/her to register for approval (see Registration Process). Emails from these senders are held up until they have registered and you have approved them. You can, however, choose to approve senders manually if you so wish.
Webmail	Many online companies such as Yahoo, Hotmail, or Excite offer email accounts that are accessible through a web browser using the HTTP protocol rather than through a standard email protocol such as POP or IMAP. A number of these companies now offer POP3 access as well.
Whitelist	A list of sender email addresses that have been preapproved by the recipient such that those senders can send email to the recipient without the messages being blocked.

Appendix 1 – Special Notes for Different Email Applications

Microsoft Outlook 98, 2000 – 2003

If your system's default email application is one of the above, you may find that each time you invoke it from ChoiceMail One (or ChoiceMail One invokes it automatically), you get a completely new window, and, over time, you end up with dozens of Outlook windows on your screen. The solution to this problem is to explicitly tell ChoiceMail One to use Microsoft Outlook as your default email application (rather than ChoiceMail One simply querying your system to find the default email application) and then adding the parameter **/recycle** in the parameters field. See page 85 for details on how to do this.

Eudora

By default, Eudora loads a file called eudora.ini which contains all settings. Some users have multiple versions of that INI file and you can include parameters to tell ChoiceMail One which eudora.ini file to use. Please refer to your Eudora users guide for more details on specifying parameters.

Outlook Express

Outlook Express normally does not require any parameters. We have discovered that entering invalid parameters for Outlook Express can, depending on which version of Windows you are running, actually crash your system. Therefore, be very careful if you do decide to include parameters for Outlook Express.

Netscape and Mozilla

If you are using either of these applications for email, use the parameter –mail so that these applications will open up the "Messenger" mail system rather than the browser itself.

Other Email Applications

Please refer to your email application's documentation for required parameters.

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