ChoiceMail Small Business Web Administration Guide

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Creating Order From Chaos

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ChoiceMail Small Business

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2   ChoiceMail Administrative Login

ChoiceMail Enterprise and ChoiceMail Small Business provide you with an Administrative Login section through which you can control Global settings and administer user accounts from a web browser. The administrative section gives you the ability to establish company-wide settings such as a global whitelist, blacklist and permission rules that should apply to all messages received by ChoiceMail Enterprise.

Global settings will be applied to every user's account and supersede the user's individual settings. Regular users do not have access to these global rules when they login to their individual account.

For example, if you decide that your company should not receive mail from the xyz.com domain, just add that domain to the Global blacklist. It won't matter if a user has xyz.com on their own whitelist, they will still never receive mail from any address at that domain. Of course the system works the same in reverse meaning that you can add domains to the Global whitelist and you don't have to worry about users not being able to receive messages from people at that domain regardless of their local settings.

This guide applies to the settings controllable through the web browser. For all other settings accessible only through the program itself running on your server, please consult your installation guide.

Except where noted, the information below applies to both ChoiceMail Enterprise and ChoiceMail Small Business.

3 Accessing the administration section

The web address you use to administer ChoiceMail Enterprise is:
http://ChoiceMailServerIP-or-Name:8080/admin_login.html
If you changed the HTTP server port connection in ChoiceMail Enterprise from 8080 to some other port then please replace 8080 with the other port value in the URL.
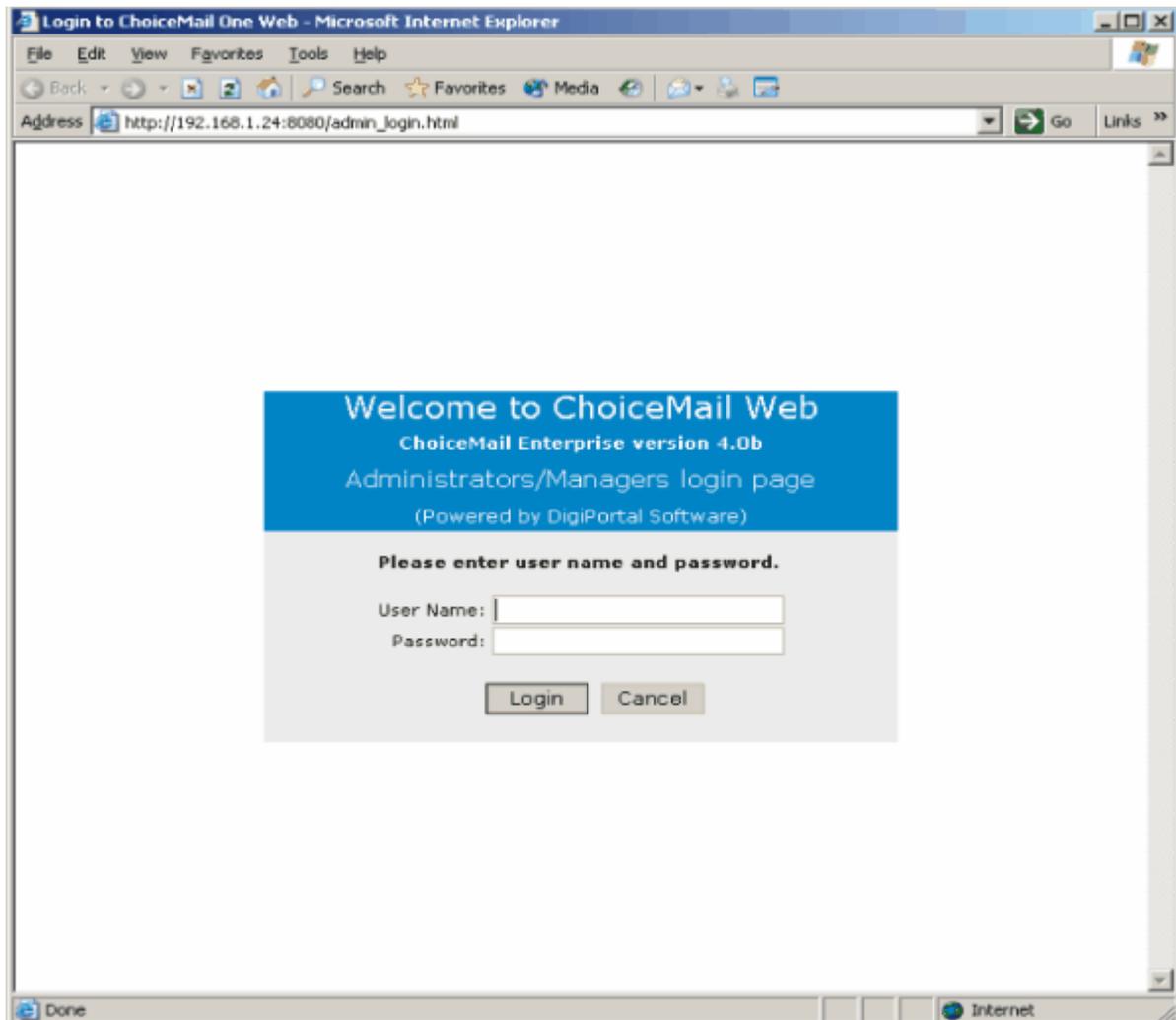

Figure 1

4 ChoiceMail's Administrative Login Screen

Your username and password are exactly the same as those you use as a regular user to log into ChoiceMail normally. When originally setting up your account in ChoiceMail you should have chosen your Access Level to be Administrator. If you are not able to login as an adminstrator, please go back and make sure that you did indeed set yourself as an Administrator and that you are using the correct username and password. Alternatively, you can create a separate "Administrator" user account that you can use to log in to the administrative section. You do not have to add any email addresses to that account – it will simply serve as a administrative login account.

5 The Global blacklist and whitelist

This is the first view you will see after logging in. These pages are exactly the same as for individual users except that addresses here apply on a global level. From that page you can view the email addresses of senders that are on your Global blacklist or whitelist

6 Approve another global sender

From the Approve Another Global Sender page, you can continue to build your whitelist by typing in an individual's email address and either a name or description. This isn't the most efficient way of building a whitelist but can be convenient sometimes.

7 Reject another global sender

This page is just like the Approve page but is where you would enter in email addresses of senders that you wish to blacklist. It is important to note that there is no way to upload a blacklist to ChoiceMail because there is no need. ChoiceMail will block everything that either isn't on a whitelist or for which a permission rule hasn't been written to allow it in. We do not recommend that you add email addresses to the blacklist unless you know the actual source of the email. Almost all email addresses from spammers are bogus and rarely repeated and adding them to ChoiceMail will not really decrease the amount of Unknown Senders you receive.

8 Add a Domain to the Accepted domains list

To add a domain to the Accepted Domains list, select Global Accepted Domains type, type the desired domain into the entry field and click Add. Please keep in mind that you should be careful about adding domains to your accepted list because it does expose that domain to potential abuse if a spammer uses one of these domains to gain access. However most personal or company domains are probably safe so if your company does

business with another entity on a regular basis just enter in their domain and all email from their company will pass through ChoiceMail with out a Challenge.
Note: if a domain you need really does get abused, then you can remove it from the accepted domains list and build a special-purpose permission rule that examines the appropriate headers of messages for that domain to verify their legitimacy.
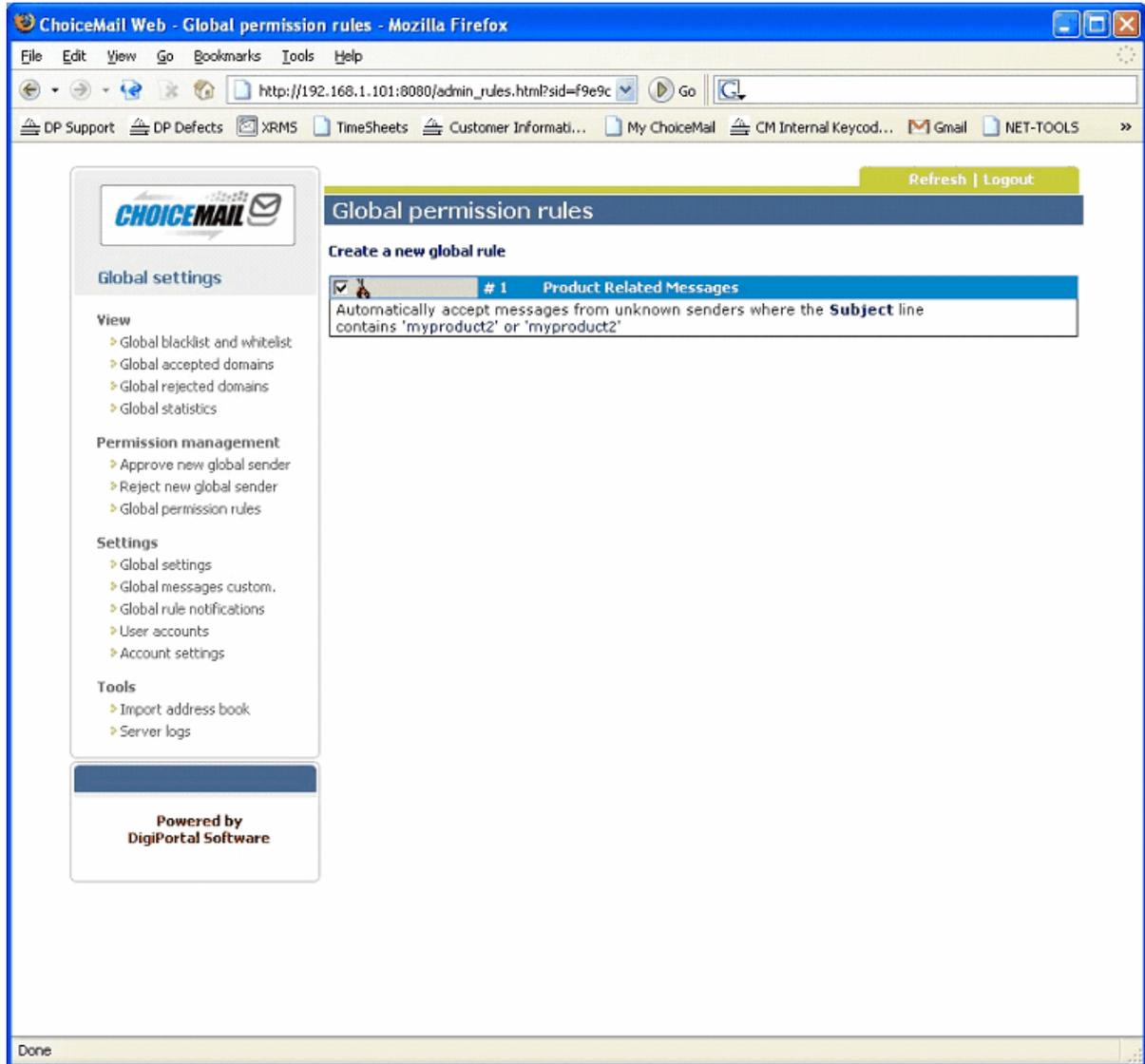

Figure 2

9   Permission rules

Permission rules allow you to either let mail in or keep mail out based on their content. Because ChoiceMail already blocks all mail coming in if the address is not on one of your whitelists, permission rules are typically used to create exceptions for mail that should be

allowed through without being challenged.

For example, in some cases (but surprisingly, not that many cases) the sales department of a company would like to cut down on the number of potential customers being challenged yet still be protected from spam. To do this you might create permission rule that looks for key words that may appear in a typical email from a potential customer. On the other hand, if this only applies to your sales team, it might be better to create such rules in their individual accounts rather than globally. This is a policy question for your company
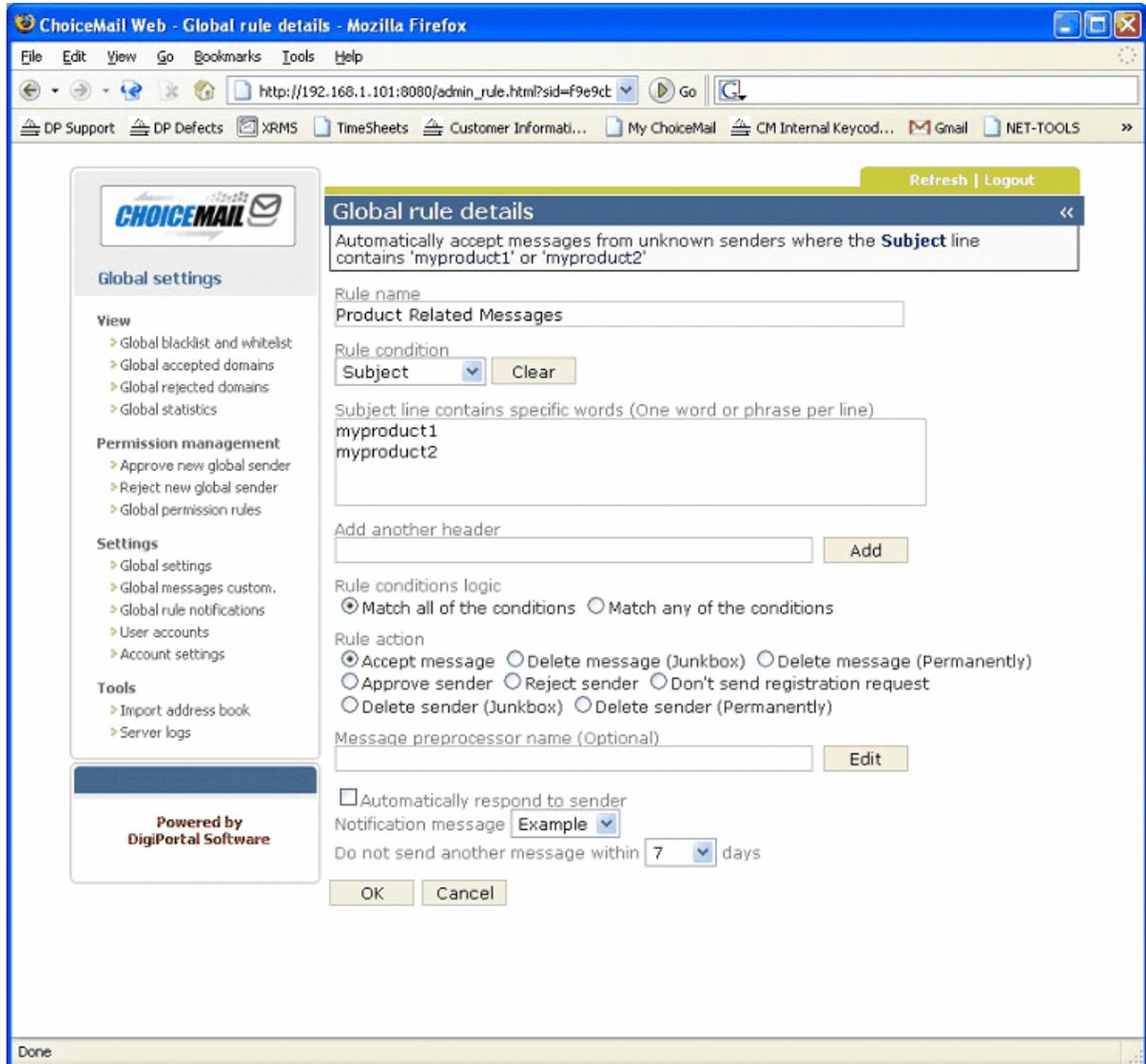

Figure 3

9.1   Create a new permission rule

Let's suppose we want to create a new rule for the sales department (See figure 3):

Rule Name : Simply type in a name for your rule, in this case 'Product Related Messages'
Rule Condition: This is where you tell ChoiceMail in what part of the email to look. In this example, we have chosen the Subject line only.

Next you need to type in what words or phrases you would like ChoiceMail to look for in the subject line. We have chosen "myproduct1" and "myproduct2". As you can see from the screen shot, each word or phrase must be entered on a separate line.

Rule Condition Logic: This is where you tell ChoiceMail whether all conditions must match or just any of them. Note that individual entries within a single condition are treated as OR. In other words, a match for any of the entries will cause that condition to be TRUE. If you only have a single condition, then the value of the "Rule Condition Logic" doesn't matter.
Rule Action: Once ChoiceMail has determined that at least one of the words or phrases is present in the Subject line, we need to tell ChoiceMail what we want it to do with the email. In this case we have chosen to accept the email. So this email will pass through ChoiceMail on to its intended recipient without the sender ever being sent a challenge message.

Message Preprocessor name: Ignore this
Automatically Respond to Sender (Optional): You can choose a message (see below for creating messages) that will be sent to the sender whose message matched a particular permission rule.
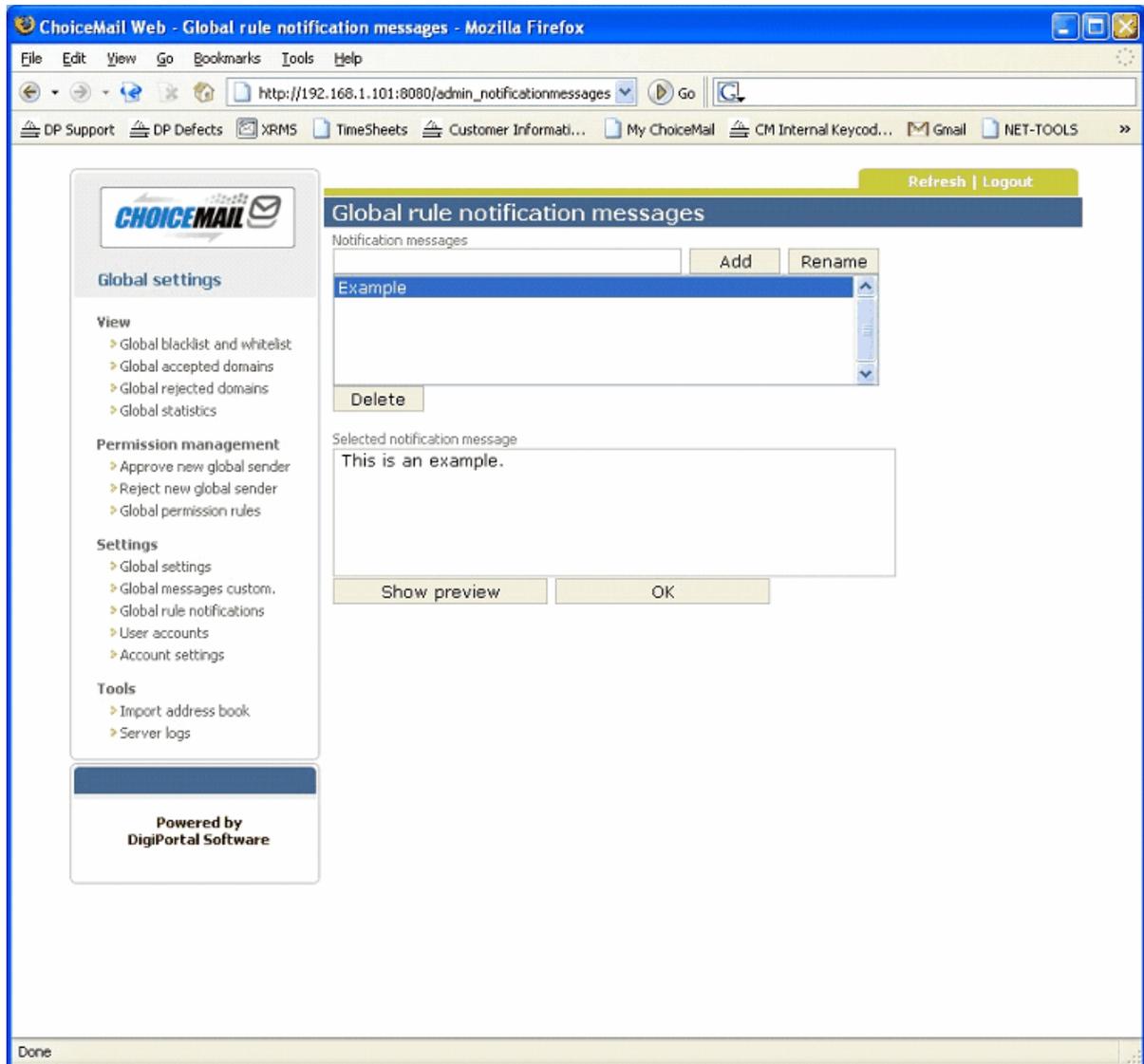Here we have already created one that just sends out a Thank you note to the sender.
        We encourage you to use his
notification sparingly.

To save your rule, click the OK button at the bottom of the page.

9.2   Ordering your rules

As you add new ones you can move them up or down based on the order in which you would like them to be processed.

9.3 Global Rule Notifications

To create a new notification message (to be used with particular permission rules), perform the follow steps:
1) Type a name into the "Notification messages" field and click Add
2) Type in the message text into the "Selected notification message" and click OK

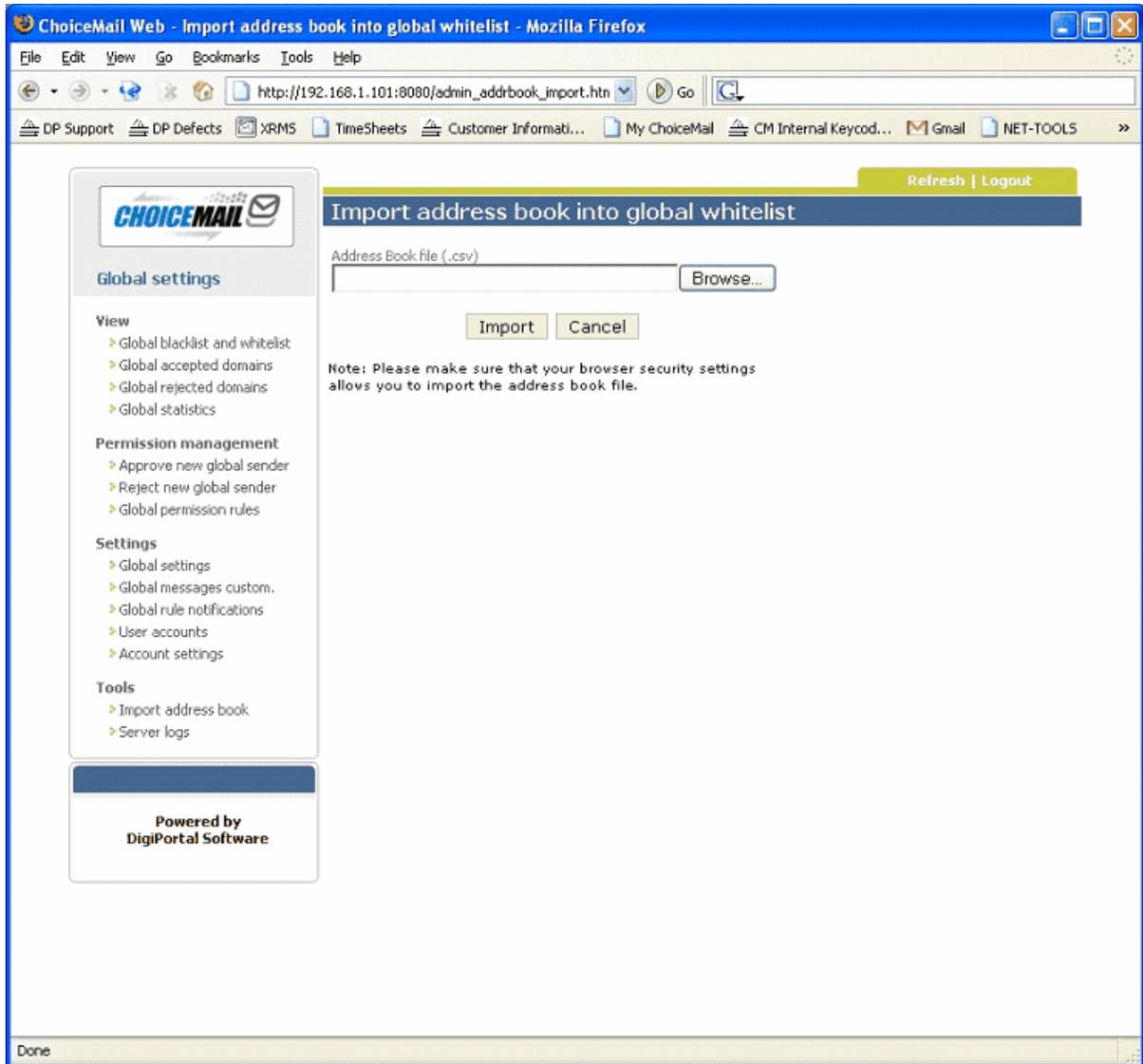# 10   Import the global addressbook

Figure 4

If you would like to create a Global whitelist you can export everyone's contact lists to standard **.csv** file format and import it here. So rather then just importing an individual's contact list to their individual ChoiceMail account where only one user will receive the benefit, you can import all users' contacts lists into a global whitelist. This is particularly beneficial when you have a customer who deals with more then one person in your company. You do not have to worry about their receiving multiple challenge messages every time they send an email to someone new in your company.

11 The Spam-O-Meter

This indicator shows you the total amount of spam and valid messages that are being sent to ChoiceMail Enterprise users
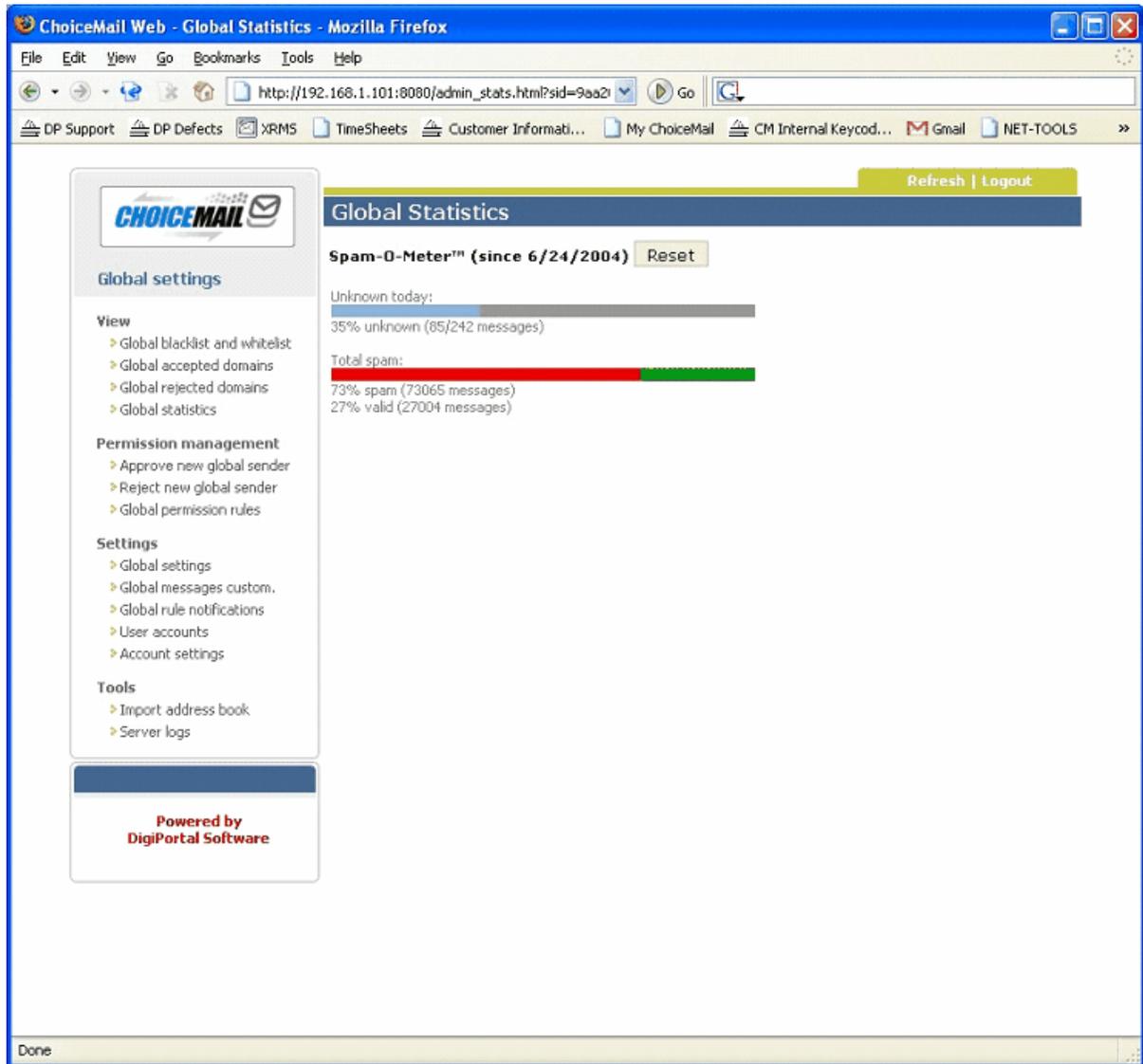

Figure 5

12 Account settings

The only global account setting available is the "Automatically logout after x minutes of inactivity" option. This option controls how long a user can stay logged into ChoiceMail without any activity taking place. After x minutes of inactivity, the session will be expired and the user will have to log in again if they want to configure their ChoiceMail Enterprise

settings.

13   User Accounts

In ChoiceMail Small Business we recommend that users are administered from the program itself.

14   Exporting user whitelists

You can export a whitelist for a user by opening the ChoiceMail Control Panel on the server, then selecting User Management.

A dialog with all you usernames will be displayed - select a user you want to export the whitelist from and the click on the "Export Whitelist" button.

Please make sure that the filename ends in .csv extenstion.

15   Clean mail forwarding

ChoiceMail can now forward clean mail to another email account.

This is useful if a user has a smartphone or is going on a vacation and wants to forward all clean mail to an offline account - like a gmail account for example.

To do this in ChoiceMail Small Business you have to do the following

1) Open up the folder where ChoiceMail Small Business is installed and create a new folder called "Forward"
2) Inside that folder create a new folder for every user you want to enable the forwarding for. IMPORTNAT: The folder name must match the username so please make sure you open up your user management in ChoiceMail and double check for the exact username for that user
3) Within that new folder - create a file names forward.to.txt and type in the email address you want to forward the messages to.
4) save the file and restart ChoiceMail service.

That's it - all clean mail for that user should be forwarded to the address you entered into the forward.to.txt file.

To undo the forwarding - simply delete the user folder from the Forward folder.
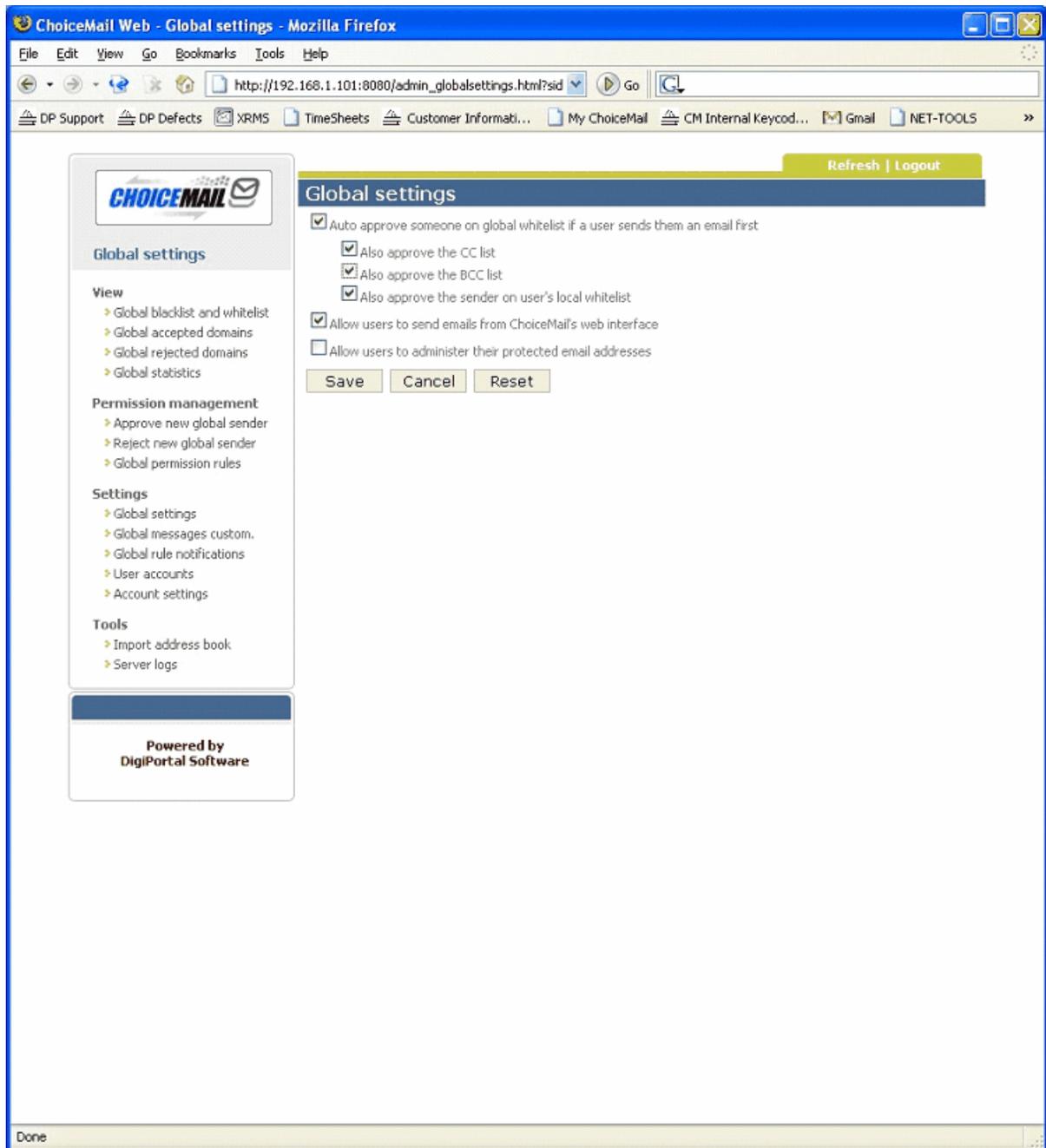
16 Account (Global) Settings

Figure 8

16.1 Auto Approve

Automatic approval allows you to control how the global white list is populated. You can
select the option to add an email address to the global white list when any ChoiceMail

user in your organization sends an email to that address. This will mean that if one employee sends an email to foo@bar.com then foo@bar.com will be able to send emails to anyone within your organization without being challenged

16.2 Allow users to send mail through the web interface option

You can control whether ChoiceMail users are allowed to send mail through the ChoiceMail web interface.

16.3 Allow users to manage their email addresses option

This option controls whether users are allowed to change the email addresses connected to their account. In general, this option should be disabled.

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