



ChoiceMail Anti-Spam Quick Start Guide

2005

Version 3.x

Welcome to ChoiceMail

Welcome to ChoiceMail Enterprise, the most effective anti-spam protection available. This guide will show you how to set up your account and explain the basic features of ChoiceMail.

ChoiceMail is not a spam filter. It is a permission-based system that only delivers email to you if it is from a known, approved sender or meets other criteria that you create. These processes will approve the vast majority of your “good” email. When a message is not approved, ChoiceMail notifies the sender with an automatic “verification request” message. If the sender responds to this message (spammers don’t, by the way), ChoiceMail will approve their message and send it to your inbox.

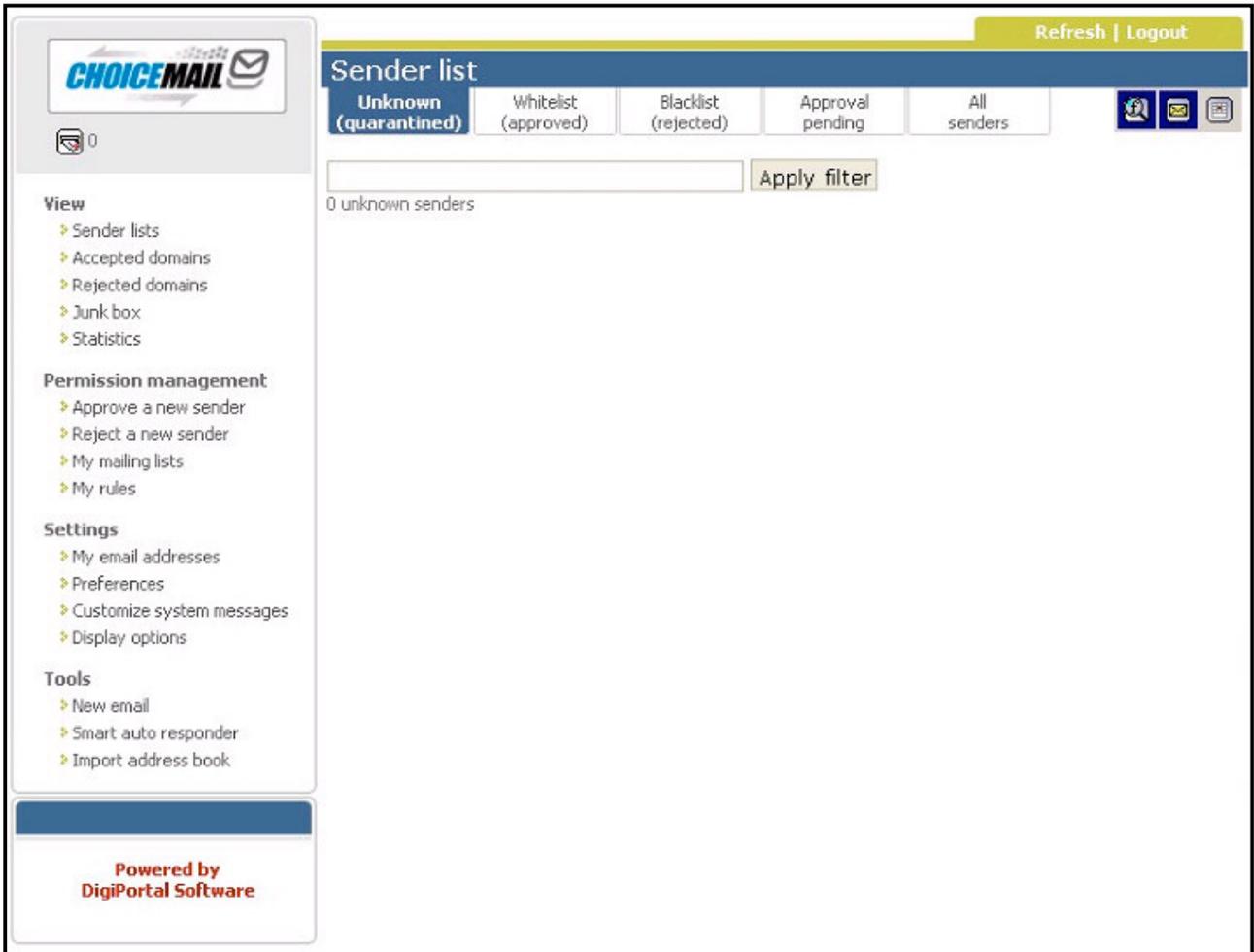
Even though ChoiceMail is a centralized application on your company’s network, the protection it provides will be customized to you. You will continue to receive mail just as do now (except that it will be 100% spam free). However, you will also have a ChoiceMail account that you can access from your computer or any device with a web browser (including many cell phones and PDAs) for complete control over your personal protection from spam.

This guide will introduce you to the basic features of ChoiceMail and help you get started. ChoiceMail is easy to use and has many controls and features that let you tailor it exactly to your needs. Best of all, it works! As soon as you start to use it, you will know the feeling of getting your privacy and productivity back.

Logging into ChoiceMail and Creating Your Whitelist

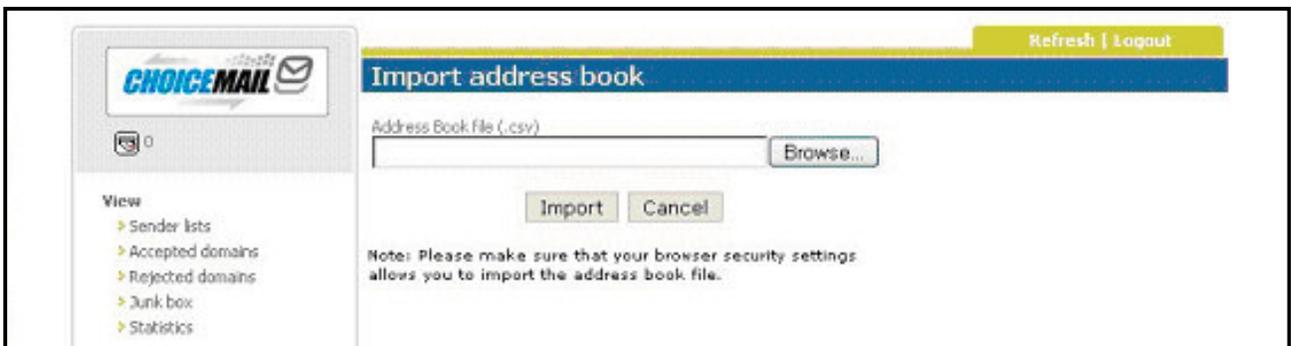
If your network administrator has sent you a ChoiceMail username and password, ChoiceMail is already protecting your inbox. **The first thing you will want to do is import your contacts list** so that ChoiceMail doesn’t block messages from people you know. Please take the following steps immediately:

1. Before logging into ChoiceMail for the first time, **export your contact list from your email program** (i.e., Outlook, Outlook Express, etc.) into a Windows .csv (comma separated values) file. The export command is usually on the File menu. Check your email program’s documentation if necessary. Save this file in an easy-to-find location (i.e., your Desktop). You will need it as soon as you log in to ChoiceMail.
2. **Open your web browser and navigate to the address given to you by your network administrator.** Enter your username and password. You will see a page that looks like this (you may want to refer to this throughout this guide):



Hint: You may want to visit this page often, so we recommend that you drag your ChoiceMail web address to the Links, Favorites or Toolbar section of your web browser.

3. From the navigation menu on the left-hand side of the window, **click Import address book**. You will see a screen that looks like this:



4. Click the **Browse** button and navigate to the .csv file that contains the contacts you exported earlier. Select the file and click the **Open** button.
5. Click the **Import** button to import all of your email addresses into ChoiceMail. Depending on the size of your address book and your connection speed, this may take a few minutes. When the import process is finished, ChoiceMail will tell you how many addresses it imported.
6. Click on **Senders** in the main navigation and then click on the tab that says “**Whitelist** (approved)” to view your imported addresses.

This is your “**whitelist.**” ChoiceMail will automatically approve messages from any email address on this list. Any time you send a message, ChoiceMail will check to see if the recipient(s) are on your whitelist. If not, it will add them. And whenever a sender responds to the verification request message, they will be added as well.

Your network administrator has decided whether to have ChoiceMail screen your messages based on your personal whitelist alone, or to combine your list with others to create a group-wide or company-wide whitelist. A group- or company-wide whitelist means that a sender approved by you will not be blocked if they try to send messages to others in your organization.

Verify Your Email Addresses

Next, ChoiceMail needs to know about all of the email addresses you want it to protect. This includes any aliases - addresses you have forwarded to a ‘real’ address at this location (for example, if you have an email address at your college alumni organization that forwards mail to your email address here).

1. From the main navigation, choose **My email addresses**.
2. All email addresses that deliver messages to your inbox should appear on this list. If an address is missing, type it in the space provided and click **Add**. Repeat this step for all missing addresses. (If you don’t see “My email addresses”, your network administrator has restricted access to this feature. In this case, ask your administrator to verify your protected addresses and add any that are missing.)

Approve Other Senders Manually

If you get legitimate email from senders who are not in your address book, such as newsletters, electronic invoices, distribution list messages, etc., you can add them to your whitelist now:

1. Choose **Approve a new sender**, from the main navigation.

2. **Enter the sender's information in the space provided.** Repeat this step for each address you wish to add.

Hint: If you cannot remember a sender's email address, don't worry. Any sender who is not on your whitelist will receive a verification request. When they respond to it, ChoiceMail will add them to your whitelist.

Hint: Some automated senders (i.e., newsletters, bills, etc.) may not be able to respond to the verification message. If you get this kind of mail and don't know the sender's address, you may want to watch your quarantined mail for a little while and approve these senders manually.

3. If you subscribe to any distribution or newsgroup lists, choose **My mailing lists** from the main navigation and enter the names of your lists in the space provided.

Hint If you are not sure whether a message is from a "newsletter" or mailing list, it is probably a newsletter, and you should follow directions 1 and 2 above. A mailing list (also called newsgroup or distribution list) is a service in which messages can come from more than one sender – usually any subscriber is able to send messages to the entire list. Typically the name of the mailing list, rather than the name of the recipient, appears in the "To:" field.

Viewing Senders and Messages from Within ChoiceMail

Many users like to check their quarantined mail periodically. This is a good idea at first, just to make sure you haven't forgotten to add a newsletter or electronic bill to your whitelist. You are likely to want to check it often in the beginning. As you become more comfortable with how ChoiceMail works, you will find that you check it less often. Many users quickly find that they do not need to check it at all.

Sender List Views

Unlike spam filters, which think mostly about **messages** (what's in them and where they came from) ChoiceMail thinks mostly about **senders**. When you log into ChoiceMail, you will normally see the Sender List view, which looks like this:



Each of the five tabs in this view provides a different list of senders. To choose a sender list, simply click the appropriate tab. When you first log in, ChoiceMail will display your Unknown Senders list. After that, it will open to the list that was open when you previously logged out.

The Unknown Sender List (Quarantine)

This is the view that you will use most of the time. People on this list sent you a message that ChoiceMail did not approve. Note that message information appears below the sender's name – if you receive multiple messages from the same sender, they will be grouped together. These senders are not on your whitelist, so ChoiceMail sent them a verification request message and is waiting for a response. Normally, you can leave messages on this list alone. If the sender replies to the verification request, ChoiceMail will approve the message and add the sender to your whitelist. If not, it will silently send the message to your “Junk Box.” You can tell ChoiceMail how long to leave messages on this list by clicking “Preferences”.

- **If you see a  icon next to the message, ChoiceMail did not send a verification message.** ChoiceMail did not find your address in the “To” or “CC” fields and thinks this might be a newsgroup message. ChoiceMail never sends a verification request in response to a message like this because the message would go to everyone on the mailing list. This is why it is important to let ChoiceMail know about any distribution lists or newsgroups you subscribe to.
- **If you see a message that you think might be legitimate, you can preview it safely by clicking on the subject line or sender's address.** ChoiceMail will open a text-only window that will let you see what's in the message without opening any images or activating any viruses, web bugs, etc. You can approve previewed messages if you wish (see “**Previewing Messages**” below).

Other List Views

Approved Senders – This is your “whitelist” of senders whom you recognize and approve. You created it by importing your address book earlier. ChoiceMail will keep it updated for you as you send and receive email. It is very rare for a sender whom you don't want to approve to wind up on your whitelist. But if that ever happens you can simply find them here and either delete or blacklist them.

Blacklist (rejected) – Mail from these senders goes straight to the Junk Box. Blacklisting is rarely needed since ChoiceMail automatically deletes messages from unknown senders unless they reply to the verification request.

Approval Pending – By default, ChoiceMail approves senders who respond to the verification message, so this list is usually empty. However, for extra security you can

have ChoiceMail simply notify you when a sender responds and then approve or reject the sender manually. If you choose that setting, this tab will blink whenever there is a sender waiting for your approval.

All Senders – This list compiles the four other views. It is useful mostly if you want to search for a sender and do not know which list they are on.

Next to the Sender View tabs you will see a smaller toolbar that helps you control how much information you see on the sender pages. It looks like this:



Show/Hide Sender Filter – Use this tool to search your sender lists. For example, if you want to see if you have a message from an unknown sender, bill@acme.com, search your Unknown Senders list for “bill” or “acme”.



Show/Hide Message Information – Shows/hides the subject of each message. Choosing “show” also displays two additional buttons  that let you accept or delete an individual message (*note: these buttons affect the individual message only; they do not add the sender to your whitelist or blacklist*)

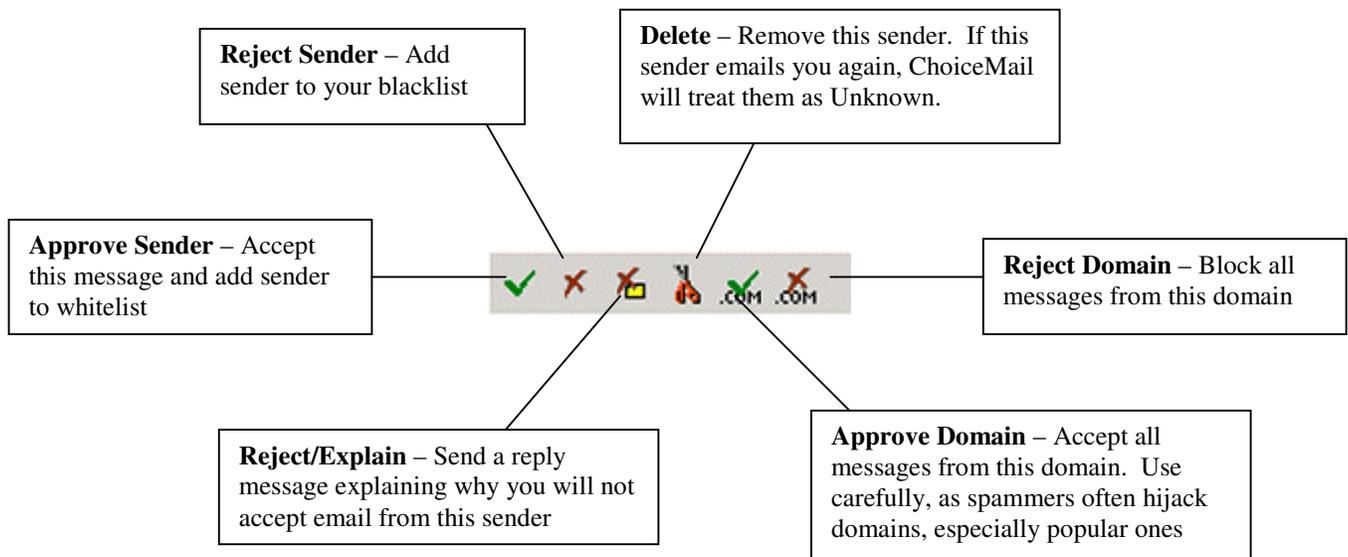


Show/Hide Recent Unknown Senders – Use this button to display all Unknown Senders, or only those from the past 24 hours

Previewing Messages

From the Unknown Sender list, you can click on the subject of a message or the sender’s address to preview a message. **Previewing a message in ChoiceMail is safe. No images or active content (including viruses) will be enabled.**

When you preview a message in ChoiceMail, you will see the following toolbar, which lets you decide what to do with the message right away:



Main Navigation

You have already seen several features from the main navigation, including Import Address Book and Approve A New Sender. Here are several other key features. For detailed explanations of these and other features, please consult the User Guide.



New Messages Indicator – In ChoiceMail Small Business, this button indicates the number of approved messages waiting to go to your inbox. In ChoiceMail Enterprise, it always shows 0 because approved messages are forwarded to your mailbox when approved.

Accepted and Rejected Domains

Allows you to approve or block all email from a specified domain. It is rarely necessary (or helpful) to blacklist a domain since ChoiceMail will silently delete unwanted messages for you and because spammers change domains all the time. You might want to accept an entire domain (from a client, for example), but be careful because spammers frequently “spoof” legitimate domains, so you risk letting some spam in. (Note: these settings affect your email only. However, your administrator can create a list of accepted/rejected domains that applies to all ChoiceMail users in your organization.)

Junk Box

This is where messages go if an unknown sender does not reply to the verification request. Messages from Rejected senders also go here (no verification message is sent). You can control how long messages stay in the junk box (see “Preferences”). If you are ever concerned that ChoiceMail may have deleted a message you want (highly unlikely) you can always go here and use the search tool to look for it.

Statistics

This graphical representation shows the total amount of spam ChoiceMail has stopped compared to the actual amount of good mail you received.

My Rules

ChoiceMail lets you create rules to accept (or block) messages from unknown senders based on criteria you set. For example, if you collect elephants, you can create a rule to accept any message that has the word “elephant” in the body, even if you don’t know the sender. Rules can help you tailor ChoiceMail to meet your specific needs and are especially useful in public contact functions such as Sales and Human Resources. Your administrator also can create rules that apply to all ChoiceMail users in your organization.

Preferences

Go here to set user preferences, including how long messages stay on the Unknown Sender list and in the Junk Box, whether to automatically approve unknown senders who verify, and more. You can even turn off the verification message if you wish.

Customize System Messages

You can modify the verification request message and other automatic messages sent by ChoiceMail (or create your own). Your administrator has determined whether you have access to this feature.

Display Options

Gives you the ability to change the number of Unknown Senders that ChoiceMail will display per page.

New Email

This menu item opens a “compose new email” window that lets you write and send a message directly from ChoiceMail without using your regular email program.

Smart Auto Responder™

Use this feature to activate ChoiceMail’s away message feature. It sends your away message only to approved senders. Also, senders will only receive your away message once during an absence, rather than in response to every message they send you.