ChoiceMail Anti-Spam
Quick Start Guide

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Version 2.54

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. Senders whom you do not know will receive an automatic "registration request" message asking them to verify their identity and reason for contacting you. When someone replies to this message (spammer's don't, by the way), ChoiceMail will approve their message and send it to your inbox.

This means that 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.

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.

Before You Begin

1. 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 contact list so that ChoiceMail doesn't block messages from people you know.

2. Before logging into ChoiceMail for the first time, export your contact list from your email program (i.e., Outlook, Outlook Express, etc.) into a Comma Separated Values (.csv) file and save it to an easy-to-find location (i.e., your desktop). If you don't know how to do this, check the documentation for your email program.

Log Into ChoiceMail

1. Open your web browser and navigate to the address given to you by your network administrator. Enter your username and password.

   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.

2. You will see a page that looks like this:
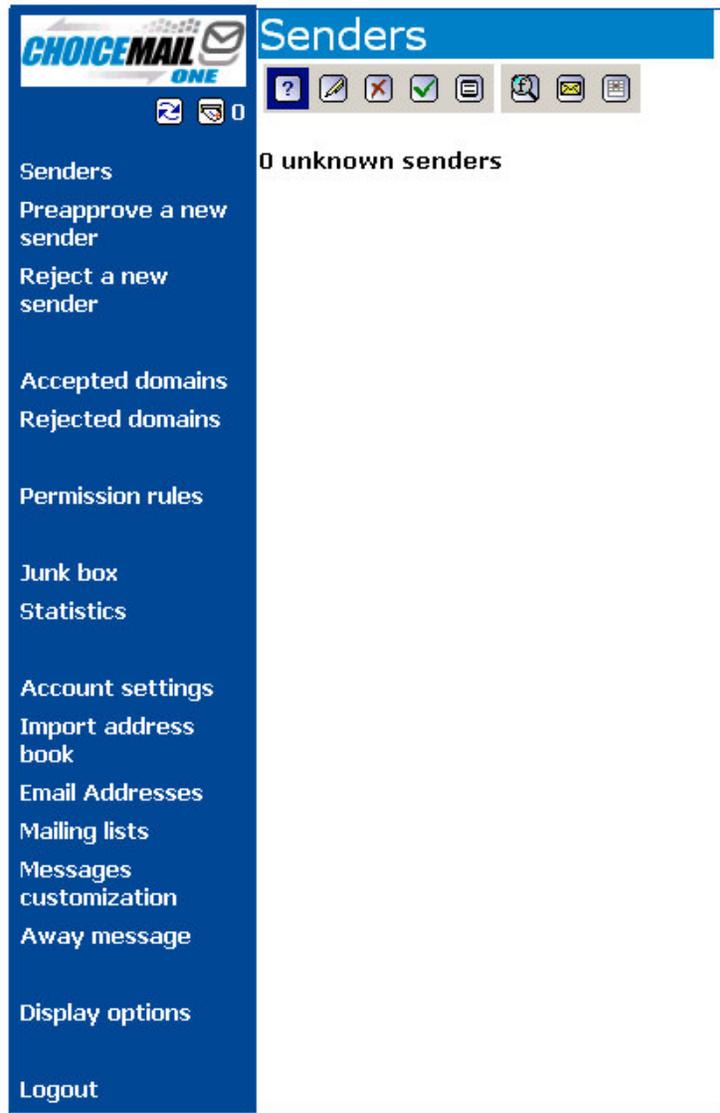
Import Your Existing Email Addresses

Now you need to create your "whitelist" of approved senders. You do this by importing your contacts into ChoiceMail. 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. To import your contacts:

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

Import address book

Address Book file (.csv)

C:\TEMP\Address Book.csv   [Browse...]

[Import] [Cancel]
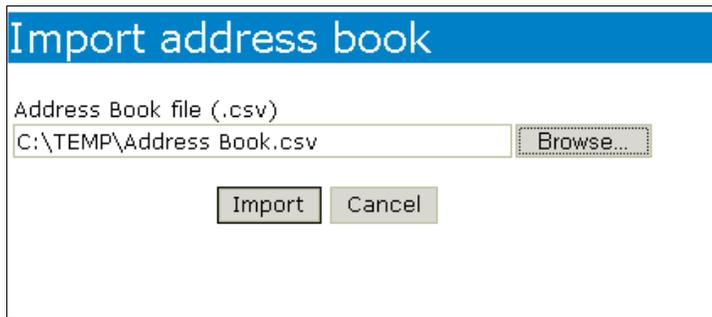
2. Click the **Browse** button and navigate to the .csv file that contains your email addresses. Select the file and click the **Open** button.

3. 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.

4. Click on **Senders** in the main navigation and then click on the ☑ button to view your imported addresses. This is your "whitelist." ChoiceMail will automatically approve messages from any email address on this list.

Hint: ***If you send a message to someone who is not on the list, ChoiceMail will add his or her address automatically. If you add contacts to your email program, you can repeat this import process at any time. ChoiceMail will add the new addresses to this list but will not overwrite or delete any addresses you have added yourself.***

Verify Your Email Addresses

Next, ChoiceMail needs to know about all of the email addresses you want it to protect. This includes any 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 **Email addresses**.

2. All email addresses that deliver messages to this 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. (Your network administrator may have restricted access to this feature. In that case, ask your administrator to add any missing addresses for you.)

Approve Other Senders Manually

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

1. For all senders except mailing lists, choose **Preapprove 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.*

   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 subscirbe to any mailing lists, choose **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 a newsletter or mailing list, it is probably a mailing list, and you should follow directions 1 and 2 above. A mailing is a service in which messages typically come from more than one sender – often 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.*
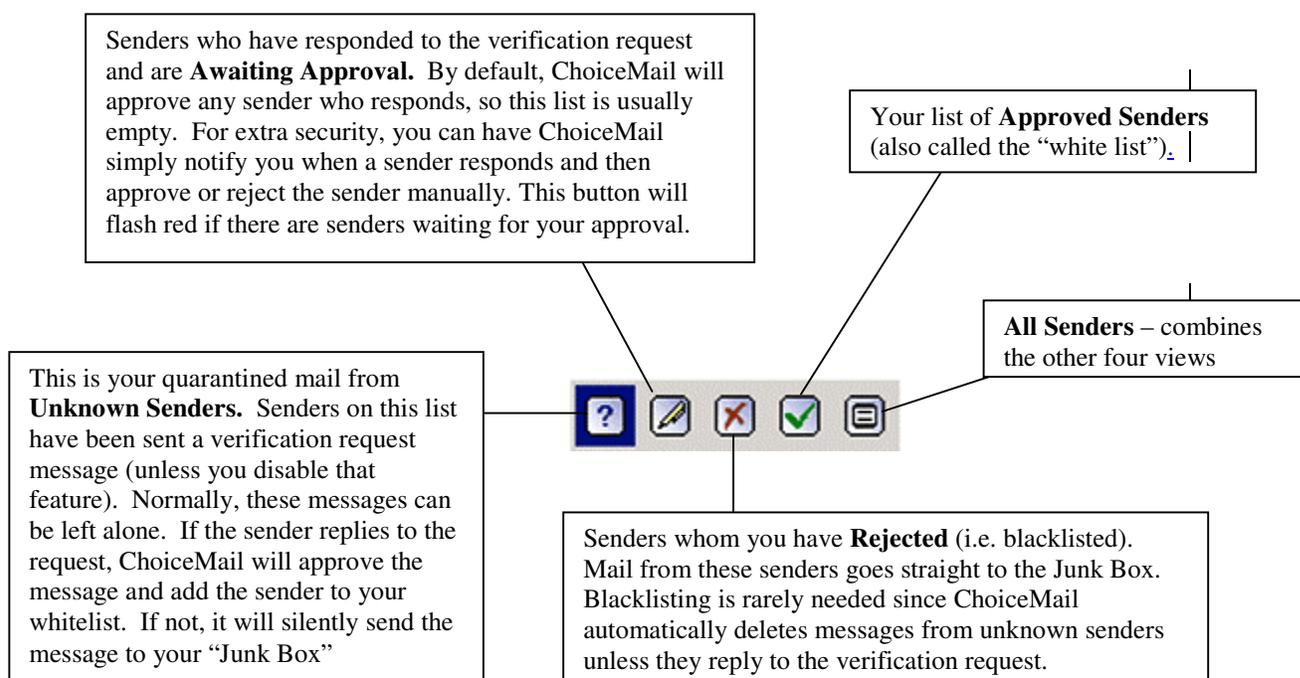
This is all most users ever have to do. However, if you want to take advantage of ChoiceMail's many other email management features, the following instructions will get you started.

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 Views
ChoiceMail provides five different Sender Views, described below. Select a view by clicking the appropriate toolbar button. When you first log in, it will display your Unknown Senders list. After that, it will open to the view you were in when you previously logged out (normally Unknown Senders).

Senders who have responded to the verification request and are **Awaiting Approval.** By default, ChoiceMail will approve any sender who responds, so this list is usually empty. For extra security, you can have ChoiceMail simply notify you when a sender responds and then approve or reject the sender manually. This button will flash red if there are senders waiting for your approval.

Your list of **Approved Senders** (also called the "white list").

All Senders – combines the other four views

This is your quarantined mail from **Unknown Senders.** Senders on this list have been sent a verification request message (unless you disable that feature). Normally, these messages can be left alone. If the sender replies to the 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"

Senders whom you have **Rejected** (i.e. blacklisted). 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.

Next to the Sender View toolbar 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. This feature 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 white- or blacklist)

Show/Hide Recent Unknown Senders – Use this button to display *all* Unknown Senders, or *only those from the past 24 hours*.
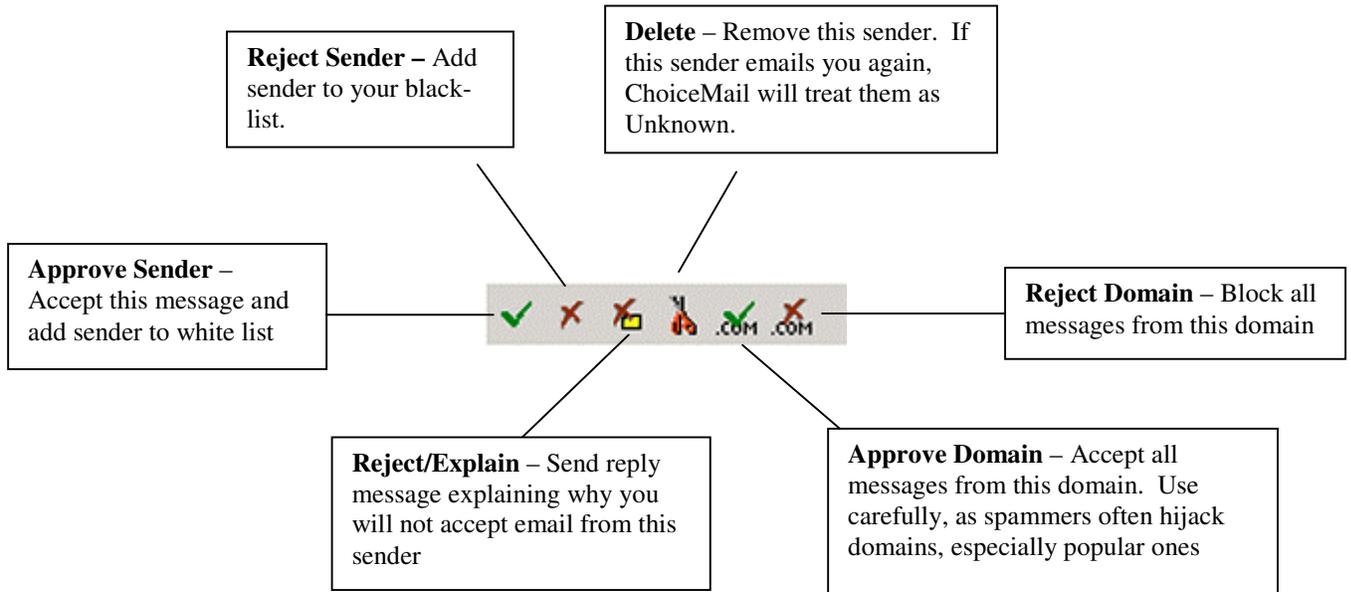
Hint: If you see a ⬚ icon next to a message, ChoiceMail could not find your address in the To: or CC: field. This usually means a message is spam, but might mean it is from a mailing list.. ChoiceMail never sends verification request in response to a message like this because the registration message would go to everyone on the mailing list. This is why you want to be sure to approve any mailing lists you are on.

Previewing Messages

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

Accepting and Rejecting Senders Manually

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:

Reject Sender – Add sender to your black-list.

Delete – Remove this sender. If this sender emails you again, ChoiceMail will treat them as Unknown.

Approve Sender – Accept this message and add sender to white list

Reject Domain – Block all messages from this domain

Reject/Explain – Send reply message explaining why you will not accept email from this sender

Approve Domain – Accept all messages from this domain. Use carefully, as spammers often hijack domains, especially popular ones

Main Navigation – Preference and Rules

You have already used several features from the main navigation, including Import Address Book and Approve Another Sender. Here are several other key features:

Refresh Button – Click this button to refresh the current Sender view.

	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 normally shows 0 because approved messages are forwarded to your mailbox when approved. Clicking this button displays a "Send new message" option, which lets you write and send a message without leaving ChoiceMail.
Accepted and Rejected Domains	We recommend using this feature little if at all. It is rarely necessary or helpful to blacklist a domain since ChoiceMail will silently delete unwanted messages for you, and spammers change domains all the time. In a business situation, you might want to accept a client's entire domain. However, spammers frequently "spoof" legitimate domains, so you risk letting some spam in.
Permission 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.
Junk Box	This is where messages go if the unknown sender does not reply to the registration request. Messages from Rejected senders also go here (no registration message is sent). You control how long messages stay in the junk box. If you are ever concerned that ChoiceMail may have deleted a message you want (highly unlikely) you can always go here and look.
Statistics	This graphical representation shows the total amount of spam ChoiceMail has stopped compared to the actual amount of good mail you received.
Account Settings	Go here to set user preferences, including how long messages wait for senders to respond to the registration request and in the Junk Box, whether to automatically approve anyone who responds, and more. You can even turn off the registration message if you wish.
Import Address Book	This gives you the option to import your contact list or address book that is already in a comma separated values format (.csv) file.
Message Customization	You can modify the registration request message and other automatic messages sent by ChoiceMail (or create your own). Your Administrator has determined whether you have access to this feature.
Away Message	Use this feature to activate ChoiceMail's SmartAway[tm] Responder. This feature sends an away message only to approved senders. Also, a sender will only receive your away message once during an absence, rather than in response to every message.
Display Options	Gives you the ability to change the number of Unknown Senders that ChoiceMail will display per page