DIGIP◼RTAL
SOFTWARE
Creating Order From Chaos

The Unified Spam-Blocking System

Enterprise User Guide

September, 2003

Version 2.00

Table of Contents

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. 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 sends you an email message notifying you of the registration; you can choose to allow or block the sender from communicating with you.

Design Goals

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

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

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.
- Permission management.
- Works with all standard email applications.
- Supports secure password authentication (SPA) and SSL.
- Allows "approved" listing to be generated from most of today's contact management software – Outlook Express, Eudora, and Outlook 98, 2000, 2002.
- Safe previewing of messages without information being sent back to spammers
- Junk box – review automatically deleted mail.

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.
- The multi-user POP3-based server-based solution is perfect for small businesses.
- An Enterprise version that supports mail systems such as Microsoft Exchange for corporate environments is also available.
- Both the multi-user and Enterprise systems have all the features of the single-user solution but without the need to install a desktop client.
- Both the multi-user and Enterprise systems support web access for remote browsers and wireless PDAs.

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.

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

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 is POP3 based.
Sender registration	Anyone sending you email must submit a registration request for your approval.
Preapproval management	You can add permission rules to accept or reject senders
Safe message preview	You can preview messages before deciding whether you want to allow them into your email application. No information is sent back to a spammer when you do this.
Import existing contacts	ChoiceMail One can import email addresses from many email applications so that your existing contacts are preapproved.
Away responder	ChoiceMail One can reply automatically to people on your whitelist to let them know

ChoiceMail One — Key Features	
Feature	Benefit
	their message was received.
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.
Installation Wizards	Installation is quick, simple, and easy. ChoiceMail One provides automatic support for Outlook Express, Outlook 98, 2000, XP, 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 **Error! Bookmark not defined.**.) 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 Version	
Exchange support	The ChoiceMail One Enterprise system supports Outlook 98 and higher running in a Microsoft Exchange corporate environment.
Multi-user support	ChoiceMail One Enterprise supports multiple users (each of whom can have multiple email accounts) on a single server.
No desktop client necessary	ChoiceMail One Enterprise can be accessed through a web-based interface that provides the same functionality as the single-user client.
PDA support	ChoiceMail One Enterprise supports access from wireless Pocket PC and Palm devices for users on the go.
Macintosh and Linux support	The browser-based user interface finally makes ChoiceMail One accessible to users running on platforms other than Windows environments. (*Note: A Windows system is still needed for the server portion of ChoiceMail One Enterprise.*)

Getting Started with ChoiceMail One

Your network administrator has already installed ChoiceMail One on your corporate LAN and set up an account for you. ChoiceMail One will immediately start filtering out email from unknown senders, and forward emails from your approved whitelist directly to your default email application.

You don't need to do anything to begin using ChoiceMail One. However, you should import your address book so you add all your current contacts to your ChoiceMail One whitelist.

Ask your Network Administrator for the ChoiceMail One URL and for your ChoiceMail username and password, so you can log in and set your options.

How ChoiceMail One Works

- If the sender's email address is included in your whitelist (i.e., list of preapproved senders) or a permission rule, ChoiceMail passes the email directly through to your email application's inbox.

- If the sender's email address is included in your blacklist (i.e., list of rejected senders), ChoiceMail deletes the email.

- If the sender's email address is not included on any ChoiceMail lists or rules, ChoiceMail sends an automatic request that the sender register, and adds the email to the *Unknown Senders* list. The email message is not sent to your email application. The sender registers by going to a webpage and filling in a form explaining who they are and why they wish to contact you. The submitted form is then received by ChoiceMail One for processing.

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

- If the sender does register, ChoiceMail displays a notification message, adds the email to the *Senders Waiting for Your Approval* list, and the icon in the system tray flashes to alert you. 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.

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 their emails.

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

Domains

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

Registration Process

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

- Automatic Preapproval

  ChoiceMail 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 will automatically move that sender to your whitelist.

- Importing contacts

  You can preapprove known senders by importing email addresses from your email application's contact list or address book into ChoiceMail 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 accepting email messages coming from a list server where the sender is different every time.

With list server messages, it does not make sense to accept each sender manually because there could be thousands of senders. Instead, you can have ChoiceMail One look for some

identifying information in the header or body of list server messages to determine what to do with them.

ChoiceMail Enterprise Components

The Home Page

Once you log in to ChoiceMail One, the home page displays.
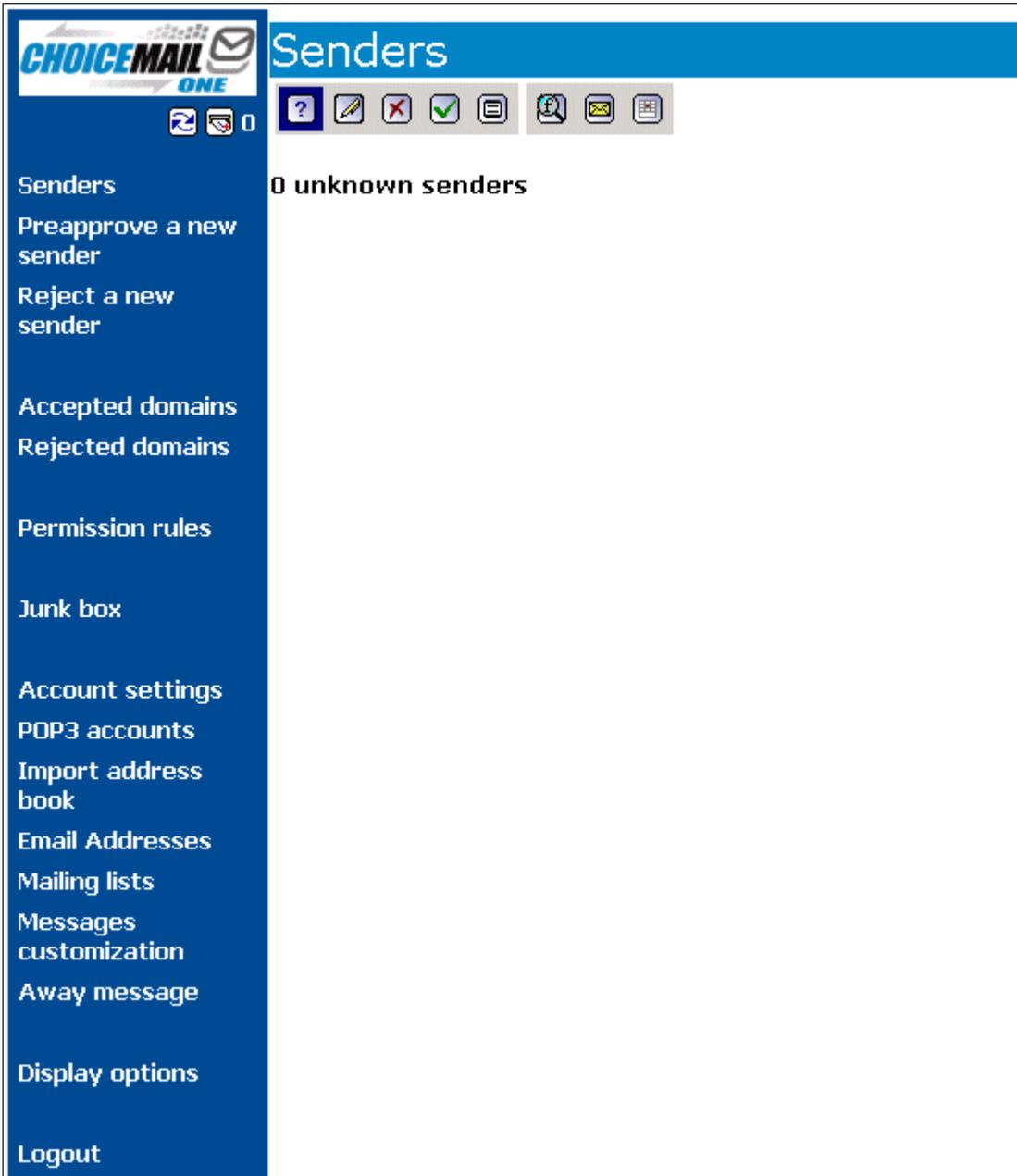
The menu on the left provides access to all the main features of ChoiceMail One.

Importing Existing Email Addresses

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

1. Open your email application and export your address book as a comma-separated file. (Consult your email application documentation for instructions on creating a csv file.)

2. Click **Import address book** in the ChoiceMail menu.

3. Click the **Browse** button and navigate to the folder containing the .csv file of your email addresses. Select the file and click the **Open** button.

4. Click the **Import** button to import all your email addresses into ChoiceMail.
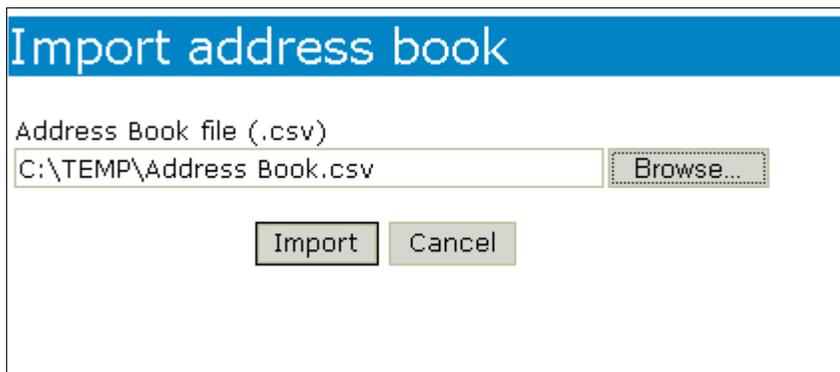
When you click **Import**, all the email addresses in the file become pre-approved in ChoiceMail One and are added to your whitelist of approved senders. (You can view this list by clicking the **Approved Senders** button on the **Senders** toolbar.)

Senders Page

The Senders page has a toolbar that provide views of different lists of senders. Click a toolbar button to open a view.

Unknown Senders – ChoiceMail One lists all emails received from unknown senders (i.e., email address that are not included in your whitelist). ChoiceMail has sent each email address a registration request and is waiting for a response. Normally you should just leave these message in the list – when the registration expiration time has expired, the message is moved to the Junk Box and will eventually be deleted. See page 10.

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 message. This button blinks red when there are senders waiting for your approval.

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 address from a contact list or email address book you imported, any senders you've manually approved, and any senders to whom you've sent a message.

All Senders – ChoiceMail One lists all senders.

Accepting and Rejecting Senders

You can manually accept or reject a sender using the **Senders Message** toolbar. This toolbar displays when you open a message in one of the Senders views.

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 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 lists. If this sender sends you another email, ChoiceMail will send an automated registration email as if it were the first time this sender has contacted you.

Approve Domain – Click this button to approve all email messages coming from this domain.

Reject Domain – Click this button to reject all email messages coming from this domain.

ChoiceMail One Indicators

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

Top of Menu   Middle Right

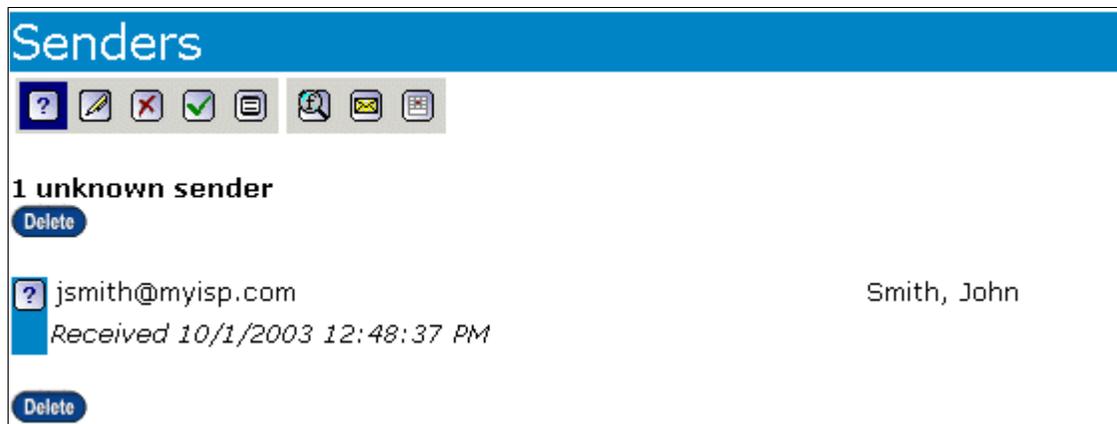|	
	Refresh Page – Click this button to refresh the Senders page.
	New Messages Indicator (Multi-User Version Only) – Indicates the number of unread messages on the server that have not yet been sent to your inbox. Click this button to open the *Message Viewer* window and see a list of the messages waiting for you in your email application's inbox. You can preview your new messages right from inside ChoiceMail One. See page 12.
	Show/Hide Sender Filter – Opens the sender filter. Click the button again to close the panel.
	Show/Hide Message Information – Expands a list of messages to show the subject of each message. Click the button again to hide the message information. (You can also click the email address of the sender to expand a message.) When you turn on this feature and select a message, two additional buttons are enabled that let you accept an individual message, and delete a message. Click the subject of the email to read the message.
	Show/Hide Recent Unknown Senders – Filters a list to show only unknown senders received within the past 24 hours.

Unknown Senders List

This page 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 with an email message from ChoiceMail. In other words, under normal circumstances, there is no need to explicitly reject or delete new senders that show up in this window. Leave them alone, and they will go away by themselves after a while.

Click the sender's email address or click the **Show/Hide Message Information** button to see details about the sender. Click the email's subject to read the message. See page 13 for details about previewing messages.

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

1. Wait until you receive an automated email in the *Unknown Senders* list. You can then select the sender of that email and click the **Approve Sender** button on the toolbar.

2. You can filter the list to show only those unknown senders received in the past 24 hours by clicking the **Show Recent Senders** button . You can then approve the sender as described above.

3. You can manually approve the sender by clicking the **Preapprove a New Sender** link on the ChoiceMail menu.

Approve another sender

Sender e-mail address or Sender name

Sender name or Sender description (Optional)

Submit   Cancel   Reset

Note: When the sender has no return e-mail address, you must provide a name instead of an e-mail address and optionally provide a sender description instead of the sender name

4. Enter the email address of the sender you want to approve, and optionally, enter the sender's name. Click the **Submit** button.

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 20 for details.

Note: If all your incoming email is displayed with BCC icons, it is most likely that the email address you specified is not the email address that people are actually using to reach you. In that case, you should tell ChoiceMail about your other email address(es) that are being forwarded to the address you specified by setting an alias feature. See page 29 for instructions.

The Junk Box

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, 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 as a safety measure. Some users like to be able to review the messages scheduled for permanent deletion, to make sure that nothing important is deleted by mistake (though this is a very unlikely occurrence). You can review the contents of the Junk Box at your convenience by clicking the **Junk box** link on the ChoiceMail menu. Messages are deleted from the Junk Box after 4 days – you can change this time period by setting a preference. See page 29.
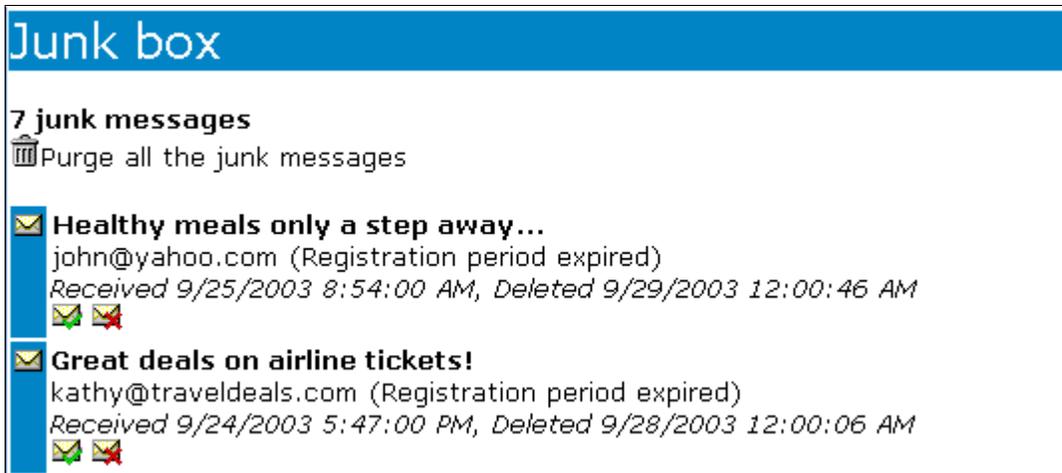
The Junk Box displays the kind of message, the date the message was received, the date the message was moved to the Junk Box, the sender's email address, the subject line, and the reason the message was deleted (i.e., moved to the Junk Box).

The Junk Box lets you perform several tasks:

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 message in the Junk Box.

The Safe Message Preview Window

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

In the Multi-User system, ChoiceMail One also 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. When you have messages waiting, the **New Messages** indicator ▣ⓞ above the menu indicates how many messages are waiting. Double-click this icon to see a list of the new messages waiting for you.

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

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

```
Message preview
        Accept this message    Delete this message
        Approve this sender
Back    Reject this sender    Reject this sender (Explanation)
        Delete this sender
        □ Show images  □ Enable links  □ Show headers

To:      jsmith@corporate.com
Date:    9/18/03 10:49:28 AM
From:    janderson@corporate.com
Subject: Planning Meeting

The next Planning meeting is scheduled for Tuesday at 10 AM.
```

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, "webbugs" – those invisible images that let a sender know that you are looking at a message – are blocked. Nor will the *Safe Message Preview* page let any attached executable be triggered, so you are not at risk of launching a virus. Previewing a message with the *Safe Message Preview* page means that you don't need to worry about your privacy being invaded without your knowledge, nor do you need to worry about letting lose a virus on your computer.

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

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

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

Delete Message – Click to delete the selected message.

Approve Sender – Click this button to approve a sender in the *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 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 lists. If this sender sends you another email, ChoiceMail will send an automated registration email as if it were the first time this sender has contacted you.

Show Images – Select the *Show images* checkbox to display the images in an email message.

Enable Live Links – Clicking URL links in the *Safe Message Preview* page is disabled by default, even though you can see the URL link in a message. Opening a webpage from an email message may send information back to a spammer that your email address is valid. If you really want to view the webpage, select the *Enable 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* page, the *Live links* feature is again disabled, to prevent you from accidentally opening a spammer's webpage.

Show Headers – Select the *Show headers* checkbox to view the header information for the message, to see where it came from.

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

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 it does not already have a rule about this sender and/or the contents of the message. It will therefore place that sender on the *Unknown Senders* list and send an automatic reply back to the sender, requesting him/her to register. The email is stored temporarily pending receipt of that registration. Your email system does not see the email at this time.

Because most junk email is sent using fake email addresses, the steps above are sufficient to eliminate all automated junk email messages. The registration requests will simply fail to go anywhere, and the sender's email is eventually deleted from ChoiceMail 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.) 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 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 sends you an email to let you know a sender is waiting for your approval. Log in to ChoiceMail One and click the **Senders Waiting for Your Approval** button on the Senders toolbar to approve or reject the sender. (This button flashes red when a sender has registered.)
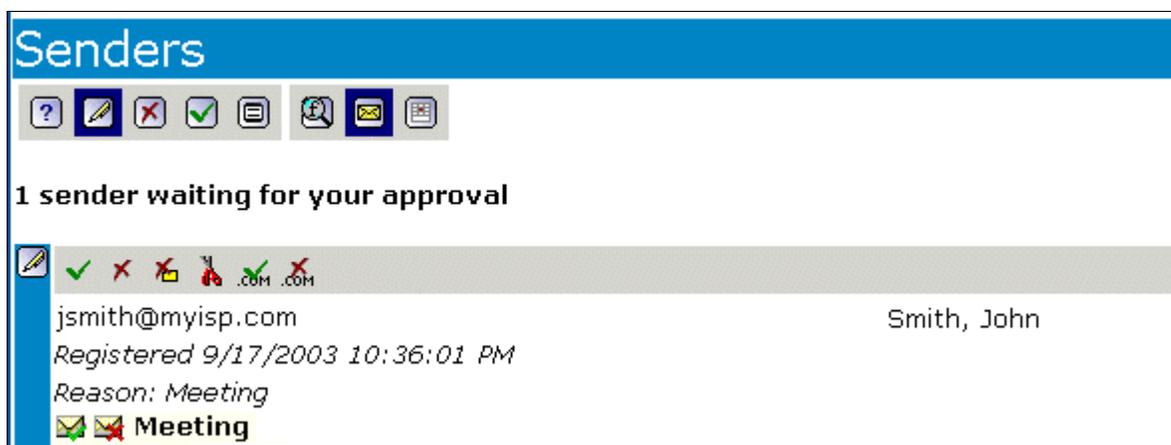
 Approve the sender – ChoiceMail One adds the sender to your *Approved Senders* list (the whitelist); all future messages from an approved sender are automatically passed through to your email application's inbox. You only have to accept a sender the first time you receive a message. Any other initial emails from that sender that were held up are also passed through to your email application.

 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 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 senders so that all the email messages get through, even if the sender is different each time. And of course you'll want to accept all email messages from your own company and companies with whom you do business.

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 **Preapprove a new sender** on the menu.)

Message Rules

ChoiceMail One lets you create rules that the program will use to make decisions about new emails automatically. Incoming email messages are processed against any email rules you've defined to determine their fate. When an incoming message (including the sender information) doesn't match any email rule, then ChoiceMail 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 in advance if you're expecting a message from someone new and don't want them to go through the registration process.

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

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

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

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

4. **Is this sender on the *Unknown Senders* list?**
   If so, is the message a registration? If it is, display a message stating that a sender has just registered. The user can then decide whether to accept messages from this person. If it's not a registration, then just hold it until the sender does register.

5. **Is the domain of the sender in the Rejected Domains list?**
   If it is, just delete the message.

6. **Is the domain of the sender in the Accepted Domains List?**
   If it is, pass the message through to the user's email application.

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

ChoiceMail 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.

Adding an Email Rule

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

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

- Type a name for this new rule. The name will display in the list on the *Permission rules* page.

- You can enter text for which you want ChoiceMail One to search in any part of a message. Click the *rule condition* down arrow and select the part of the message from the drop-down list: From, Subject, Body, To, Cc, or To or Cc.

- Type the desired text. For example, in the *From* field, enter a name or an email address (one name or address per line). In the *Subject* or *Body* field, enter a word or phrase (one word or phrase per line). You can enter text in multiple fields.

- You can create rules that look for specific headers in an incoming email. See page 21 for details.

- If you've entered text in more than one field, you must decide if you want the rule to trigger even if only one condition matches, or if you want the rule to trigger only when every condition matches. Click the appropriate radio button: *Match all the conditions* or *Match any of the conditions*.

- In the *Rule action* section, click the appropriate radio button to determine what ChoiceMail One should do with the email message when it matches the conditions you've set:

    - Accept the message
    - Delete the message
    - Approve the sender
    - Reject the sender
    - Delete the sender

Permission rule details

Automatically delete messages from unknown senders where the **From** line contains 'spam.com'

Rule name
Spammers

Rule condition
From ▼ Clear

From line contains people (One name or e-mail address per line)
spam.com

Add another header
Add

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

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

OK   Cancel

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

Mailing Lists and BCC Messages

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

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

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

Now all the messages from this mailing list will be automatically accepted and will not display in your *Unknown Senders* list. (See page 11.)

Other Headers

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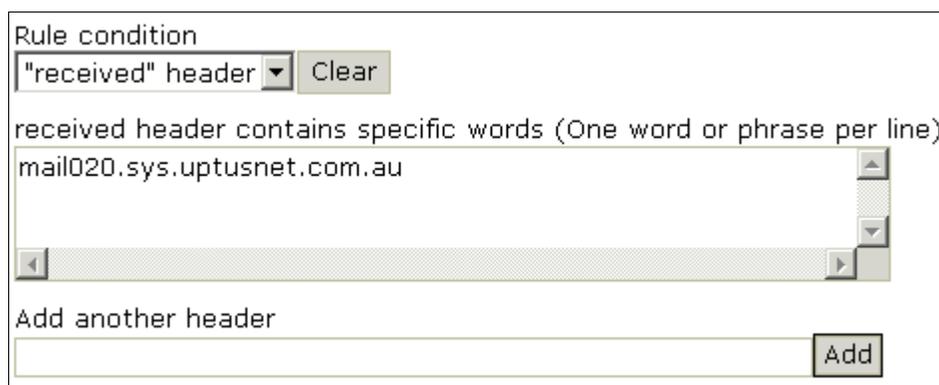
1. Type the name of the header type for which you want to define a filter in the *Add another header* field. Click the **Add** button.

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

```
Rule condition
"received" header ▾  Clear

received header contains specific words (One word or phrase per line)
mail020.sys.uptusnet.com.au                          ▲
                                                     ▼
◄                                                   ►

Add another header
                                              Add
```

3. Complete the rest of the window as explained in the previous section.

Although most headers can only appear once, the *Received* header can actually appear multiple times. If you use Received as your header name in an email rule, ChoiceMail 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.

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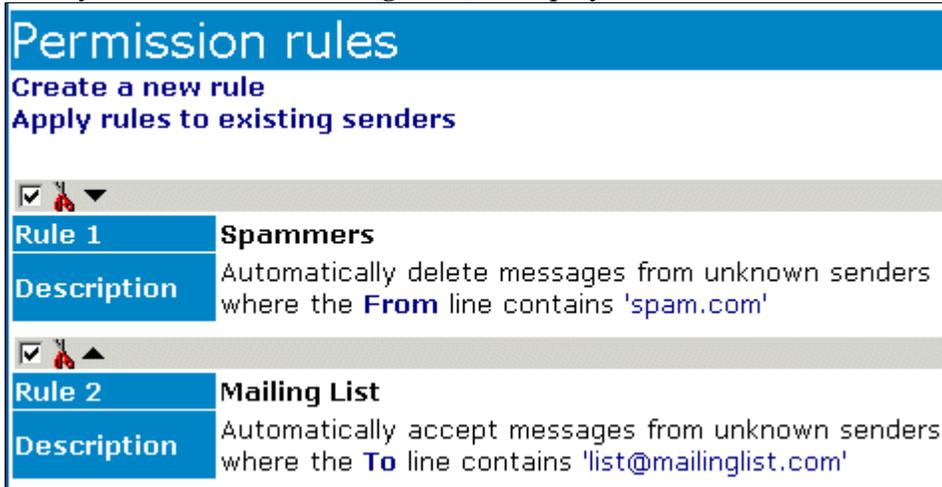
(me) – translates to mean any email address defined in POP3 or ALIASES. You can use this to keyword see if any of your own email addresses are in any of the fields of a message.

(email address in whitelist) and **(no email address in whitelist)** – you'll typically use these special keywords in the BODY section of a permission rule. Use them to check whether an email address in the body of the message is (or is not) in your whitelist. These are most often used in a permission rule where the FROM address contains 'postmaster@' or 'mailer-daemon@' so you can block spoofed system messages.

Note: A complete description of the Add another header *feature is beyond the scope of this document, and requires detailed knowledge about how email messages are constructed. DigiPortal Software cannot provide technical support on this topic. A few additional instructions regarding special keywords are included in the* Tips and Tricks *section on page 37. You can also check the ChoiceMail One online help for additional information – see Email Rules, Special Keywords, Regular Expressions, and Transform Rules.*

Managing Your Message Rules

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

- Click the **Create a new rule** link to add another rule.

- Click the name of a rule to open the *Permission rule details* page and edit the conditions of a rule.

- Select a rule and click the **Delete** button to delete it.

- Clear the checkmark next to a rule to disable it. Select the checkmark again to enable it.

- Click the **Apply rules to existing senders** link if you want ChoiceMail One to apply the rules you've defined to senders who've already sent you an email.

Setting Priorities

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

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** link on the ChoiceMail menu. Type the name of a domain in the field at the bottom and click **Add**.

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

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

Examples:

1) Suppose you receive an email from **foo@junk.email.com** and you want to block all emails coming from **junk.email.com** in the future. Just enter **junk.email.com** in the edit

field and click the **Add** button. ChoiceMail 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.

Account Settings

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

Account settings
You are presently logged in as "jsmith"

☑ Automatically check for e-mails
☑ Auto approve someone if I send them an email first
    ☑ Also approve my CC list
    ☑ Also approve my BCC list
☐ Change private message code
☑ Delete bounced back registration request e-mails
☑ Always accept mail system messages (Recommended)
    ☐ Verify mail system messages (Recommended)
☑ Auto-delete unknown senders after [4 ▼] day(s)
☑ Limit the number of e-mails from unknown senders to [5 ▼]
    ☑ Auto reject senders who exceed this limit
☑ Delete unverified messages from self (Recommended)
☐ Never send registration requests to unknown senders
☐ When sending of registration request fails, delete the sender (Recommended)
☑ Place e-mails in the Junk Box when deleted
☑ Delete message from the Junk Box after [4 ▼] day(s)
☑ Send a notification e-mail when a sender registers
☑ Ask for confirmation before deletions

[Save] [Cancel] [Reset]

Checking for New Email

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

Approving New Senders To Whom You Are Sending an Email

Your email application is configured such that your outgoing mail messages are processed through ChoiceMail 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 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.

Managing Emails With Your Own Email Address

When a group of people correspond using a CC list, it's sometimes the case that you will end up sending a message to yourself. Normally this is not a problem. Unfortunately, you may run into a situation where a spammer tries to get a junk email through to you by making it look like that message is coming from your own email address. To guard against this situation, ChoiceMail 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 will check that header to verify that the message was indeed sent by the real "you." In the extremely unlikely event that a spammer manages to discover that code, you can easily change it to a new random string by selecting the *Change private message code* checkbox. (See also Alias and Mail List Settings on page 29.)

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* 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 not known at the other end.

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

Always Accept Mail System Messages

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

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

Automatically Delete Unregistered Senders after x Days

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

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

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

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

Limit the Number of Emails from Unknown Senders

It's possible that a spammer will send you lots of messages, trying to fill up your mail box. You can configure ChoiceMail 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 senders* checkbox and type in a number or use the up/down arrows to specify the number of emails.

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

Delete Unverified Messages from Self

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 message 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!

Never Send 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 by selecting the *Never send*

registration requests to unknown senders checkbox. In this case, you can look through the *Unknown Senders* list at your convenience, accepting the ones you know are real, and then re-enable the registration process. When you re-enable registration, ChoiceMail One prompts you to see if you want registration requests sent to the remaining unknown senders.

When Sending Registration Request Fails, Delete the Sender

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

Place 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 12.). The Junk Box feature gets messages out of your way but still lets you review them if you so desire. Clear the *Place email message in the junk box when deleted* checkbox if you want to bypass the Junk Box and have ChoiceMail One permanently delete email immediately.

Delete Messages from the Junk Box after x Days

You can control how many days deleted email stays in the Junk Box 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 arrows to specify the number of days.

Send a Notification E-Mail When a Sender Registers

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

Ask for Confirmation Before Deletions

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

POP3 Accounts

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

Email Aliases

Your email administrator has set up your ChoiceMail One account to use your regular email address(es). If you send a message that includes your own email address as one of the recipients, ChoiceMail 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 they were added when the system was set up. 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 this email address already set up in ChoiceMail One. 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.

- Click the **Email Addresses** link on the ChoiceMail menu.

- Type your alternate email address in the edit box and click the **Add** button.

- Click **OK** when you're done.

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 defining each of your mailing lists, all the messages from the participants in the list will be automatically passed through to your email application.

- Click the **Mailing lists** link on the ChoiceMail menu.

- Type the email address of the mailing list to which you subscribe in the edit box and click the **Add** button.

- Click **OK** when you're done.

Message Customization

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

Messages customization

Registration request message ▼ Show preview Reset to default

> Hello, you recently sent a message to

[Recipient email address] or [Alternate From address]

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

☑ Include registration link
[Registration page url]

> When your browser opens, fill in your name and a short
> reason for wishing to send e-mail to me. Your message will be
> delivered to me after I review this information.
>
> There is no need to send your original message again.

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

☐ Use alternate From address

OK   Cancel

Registration Request Message

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

Clear the *Include registration link* checkbox only if you want to use your own authentication mechanism rather than the ChoiceMail One registration URL. 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. If you do decide to use your own authentication, make sure you edit the outgoing message accordingly.

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

Acceptance Message

Once you approve a sender who has registered, ChoiceMail 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

- prevent a potential spam trick where a spammer could recognize that a challenge were coming and simply respond with a new spam using a new fake From address, thereby attempting to fill up your POP3 inbox

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

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

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

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.

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

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

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

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

You can enable and disable the Away message by clicking the **Turn On Away Message** button. ChoiceMail One displays a flashing Away icon to remind you that you've turned on the Away message.

Display Options

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

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

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

Limit Number of Senders/Messages Per Page

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

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. Click the **Accepted domains** link on the ChoiceMail menu and add the domain here.

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

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

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 11),

List Servers

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

X-Mailer: Novell GroupWise Internet Agent 6.0.2 Beta

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

The body of the message

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

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

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.

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
http://www.digiportal.com/support/choicemail/index.html

FAQs
http://www.digiportal.com/support/choicemail/faq.html

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

Contacting DigiPortal Software

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

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

Glossary

Word	Meaning
	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 **Error! Bookmark not defined.**.
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.
IzyMail gateway	A special plugin that allows ChoiceMail One to access mail from several web-based email systems. See page **Error! Bookmark not defined.**.
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.
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

Glossary

Word	Meaning
	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.

Index