

Cloudmark Desktop

for Microsoft Outlook

User's Guide



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Cloudmark, Inc. 128 King Street, 2nd Floor, San Francisco, CA 94107 USA

Cloudmark Europe, Ltd. Carmelite, 50 Victoria Embankment, Blackfriars, London EC4Y 0DX UK

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Overview

Welcome to the *Cloudmark Desktop User's Guide*. In addition to this introductory chapter, the guide includes chapters that explain how to use Cloudmark Desktop and My Cloudmark:

- Chapter 2, “Getting started”, tells you how to install Cloudmark Desktop and, when you're ready, purchase a subscription.
- Chapter 3, “Using Cloudmark Desktop”, explains how to blocking spam and using the other features of Cloudmark Desktop.
- Chapter 4, “Using My Cloudmark”, provides instructions for managing your Cloudmark subscription, changing your account information, or unsubscribing.
- Chapter 5, “Statistics and your rating”, explains what the statistics mean, how your rating is calculated, and how to achieve the highest ratings.
- Chapter 6, “Troubleshooting”, provides solutions to common problems.
- Chapter 6, “Spreading the word about Cloudmark Desktop”, shows you how to help others block spam and fraudulent email in their own mailboxes.
- Chapter 7, “Finding more information”, provides a list of additional resources that are available to you as a Cloudmark Desktop user.

This chapter explains how Cloudmark Desktop works:

- “What is spam?” below
- “What is email fraud or “phishing?”” on page 3
- “What are email-borne viruses?” on page 4
- “What is not spam or phishing?” on page 4
- “What is Cloudmark Desktop?” on page 4
- “What is My Cloudmark?” on page 5

What is spam?

Spam is unsolicited bulk email, usually for a commercial purpose. A spam message may have some or all of these characteristics:

- the sender is someone you do not know
Spammers make up fake names and email addresses to avoid getting caught. This is called “spoofing”.

- the message contains an advertisement
Usually, the advertisement comes from a merchant from whom you have never purchased products or services.

- the message or its Subject contains jibberish
The following is an example of jibberish that appeared in a spam message:

```
Subject: Re: Zdenko Cushing Check this Offr
Hi
Do
AVE UP
% on
ons?
CIAXanAmbLevVALVIA
LIS Now $axienitraIUM Now $GRA Now $
```

- the message asks you to click on a Web address
Spam usually points to a commercial Web site where the advertised products or services are sold.
- the message was sent to an email address that does not appear to be yours
Spammers sometimes send messages to an “alias”, that is, an email address that actually points to a list of many email addresses.

Not all messages with these characteristics are spam. For example, a message that you receive from one of your favorite merchants may contain advertising and a Web address, sent from an email account that you may not immediately recognize. Because there is no rigid definition for spam, email users decide what is spam and what is not.

The Cloudmark network consists of many users like you, sending feedback to Cloudmark about which messages are spam and which ones are legitimate. Using your own judgment, you can contribute information about spam that will help everyone in the network.

! *Not all unwanted messages are spam. For example, a message from someone you dislike may be unpleasant, but it is not spam. Reporting such a message may lower your rating in the Cloudmark network.*

What is email fraud or “phishing”?

Fraudulent email, also known as “phishing”, is email that pretends to come from a legitimate commercial source and solicits personal information from the recipient. Whereas the purpose of spam is to sell a product or service, the purpose of phishing is to get information from you that can be used for identity theft.

! *Inspect all commercial email messages carefully before responding. Identity theft is a common and expensive form of crime.*

For example, a message may appear to come from an online merchant of which you are a regular customer. The message may ask you to update your account information, including your credit card, social security number, and other important information. If this message is not really from a legitimate merchant, this information could be used for identity theft.

A phishing message may have some or all of these characteristics:

- the message claims to originate from a merchant
- the message asks you to provide personal information
- the message includes a Web link to a domain that does not match the name of the merchant

For example, imagine the message claims to be from eBay, but the link points to <http://ebay423.detaliesbbl.com/>. The domain is “detaliesbbl”, not ebay.com. This message is probably phishing.

- the message promises financial rewards if you provide the requested information
- the message threatens action against you if you do not provide the requested information

Not all messages with these characteristics are phishing. Use your best judgment when deciding what is phishing and what is not.

What are email-borne viruses?

Email-borne viruses are malicious programs that are carried to your computer by email. They may arrive inside a spam or phishing message, or in messages from friends who do not realize that their own computers are infected. Viruses can inflict serious damage to your computer.

Cloudmark Desktop detects email-borne viruses. Infected email messages are treated just like spam and phishing messages.

What is *not* spam or phishing?

Not all unwanted messages are spam or phishing. Below are some examples of messages which, while undesirable, are neither spam nor phishing:

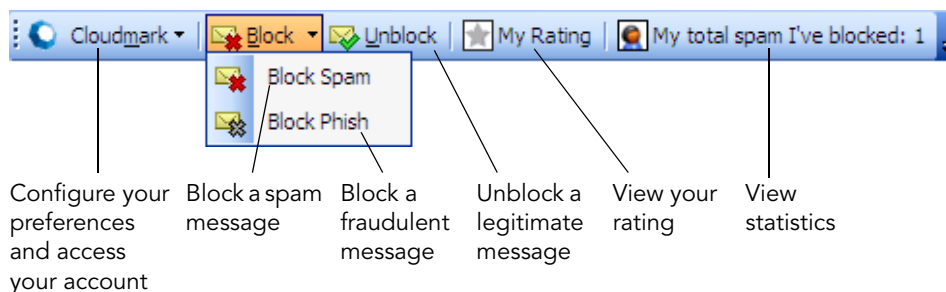
- messages from someone you dislike
- a newsletter you subscribed to but no longer wish to receive

If you report such messages as spam or phishing, your rating in the Cloudmark network may fall. In the case of the unwanted newsletter, consider unsubscribing instead; newsletters typically include instructions for doing this.

What is Cloudmark Desktop?

Cloudmark Desktop is a simple add-on module for Mozilla Thunderbird, Microsoft Outlook, and Outlook Express. It adds spam- and phishing-blocking features to your regular email, giving you the power to filter your email so that only legitimate messages arrive in your Inbox. It also filters email-borne viruses.

When you install Cloudmark Desktop, this toolbar is added to your Outlook window:



You can learn how to use this toolbar in Chapter 3, “Using Cloudmark Desktop”.

If, after trying Cloudmark Desktop, you decide to keep it, then you can subscribe to Cloudmark’s network. The network consists of other users like yourself, all filtering their email to reduce spam and phishing. Whenever a spam message is detected on its way to your mailbox, information about the message is sent to the Cloudmark network, where it is used to block similar messages. By participating in this network, you help prevent spam and phishing throughout the network.

For more information about subscribing, see “Your subscription to Cloudmark” on page 9 and “Subscribing to Cloudmark” on page 35.

What is My Cloudmark?

My Cloudmark is your interface to your Cloudmark account. Here you can view your statistics, modify your account information, or update your subscription. My Cloudmark is secure; your account information is received only by Cloudmark. For instructions, see Chapter 4, “Using My Cloudmark”.

Getting started

Once you have installed Cloudmark Desktop, it automatically blocks most spam and phishing without any special action by you. If you would like to learn to use Cloudmark Desktop's additional features, see Chapter 3, "Using Cloudmark Desktop" to learn how.

This chapter shows you how to get started using Cloudmark Desktop.

- "System requirements", below, tells you what you need to have before you begin installing Cloudmark Desktop.
- "Installing Cloudmark Desktop" on page 8 gives you instructions for downloading and installing the software.
- "Your subscription to Cloudmark" on page 9 explains how subscriptions work and which features are available with the different subscription levels.

System requirements

Your computer must have the following components in order to run Cloudmark Desktop:

Operating System 32-bit Microsoft Windows 2000/XP (2002)/Vista

Email Software Microsoft Outlook 2000/XP (2002)/2003/2007

Email Account Cloudmark Desktop works with any type of email account supported by Microsoft Outlook :

- IMAP
- POP3, including Yahoo! Mail Plus and MSN Hotmail Plus
- SSL POP3, including Gmail
- HTTP, including MSN Hotmail, Hotmail Plus, and Yahoo!

- Microsoft Exchange

Installing Cloudmark Desktop

TO INSTALL CLOUDMARK DESKTOP

- 1 If Microsoft Outlook Express is running, close it.
- 2 Use your Web browser to open this page:
`http://www.cloudmark.com/desktop/download/`
- 3 Click the Download Desktop button for Microsoft Outlook Express.
This downloads the program that installs Cloudmark Desktop. Your download will begin automatically. Your browser may ask you to choose a location in which to save the downloaded installer program.
- 4 When the download is complete, double-click the installer file.
The installer file is usually in your My Downloads folder, with this filename:
`CloudmarkDesktopOL5.1b1Eng.exe`
The Setup Wizard appears:



- 5 Click Next.
The License Agreement appears.

- 6 Select “I accept the terms in the License Agreement”.
- 7 Click Next.
- 8 Click Install.
The Setup Wizard installs Cloudmark Desktop.
- 9 Click Finish.

Desktop is now ready to use. See Chapter 3, “Using Cloudmark Desktop”. Initially, you have a free 15-day trial. See “Your subscription to Cloudmark” below.

Your subscription to Cloudmark

When you first install Cloudmark Desktop, you get a free 15-day trial. All features are fully functional during this trial period.

When the trial period ends, the software no longer automatically filters spam. However, phishing filtering and My Cloudmark remain available.

If you want the complete set of features, you must purchase a subscription to Cloudmark. When you activate your subscription, the complete feature set becomes available. You can find instructions for purchasing, renewing, or cancelling a subscription in “Subscribing to Cloudmark” on page 35.

Using Cloudmark Desktop

This chapter includes topics that explain how to use the features of Cloudmark Desktop:

- below “Blocking spam and phishing” on page 11
- “Unblocking legitimate messages” on page 14
- “Configuring your preferences” on page 19
- “Turning off spam blocking” on page 28
- “Updating Cloudmark Desktop” on page 29
- “Using Cloudmark Desktop on another computer” on page 30
- “Uninstalling Cloudmark Desktop” on page 30

below. The commands in this menu are explained throughout the remainder of this guide.

Blocking spam and phishing

Cloudmark Desktop provides several ways to block spam and phishing:

- automatically scanning messages before they are delivered
See “Automatically scanning folders for spam and phishing” on page 12.
- manually scanning a folder full of messages that have already been delivered
See “Manually scanning a folder for spam and phishing” on page 12.
- blocking a single message that appears in your mailbox
See “Blocking a single spam or phishing message” on page 14.

Whenever you block a message, or a message is automatically caught on its way to your Inbox, the message is moved to the Spam Folder in your mailbox. Cloudmark Desktop creates this folder automatically.

! *Look inside your Spam Folder periodically to check for any legitimate messages that may have been mistaken for spam or phishing.*

If a legitimate message is mistaken for spam or phishing, you can unblock that message to ensure that you receive similar messages in the future. See “Unblocking legitimate messages” on page 14.

Automatically scanning folders for spam and phishing

Cloudmark Desktop can automatically scan incoming email before it appears in your email folders. When it finds spam or phishing on its way to your mailbox, it sends those messages to your Spam Folder. Spam and phishing messages that are caught during automatic scanning will not appear in your regular email folders.

When you install Cloudmark Desktop, it is already configured to scan your Inbox folder automatically. If you have additional email folders, you can also select them for automatic scanning. You may also turn off automatic scanning by selecting no folders. See “Selecting folders for automatic scanning” on page 20.

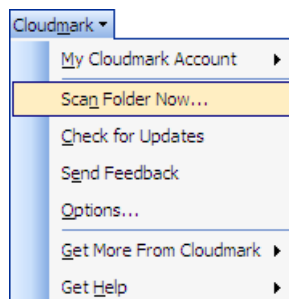
The list of folders to scan is in your Cloudmark Desktop preferences. See “Selecting folders for automatic scanning” on page 20.

Manually scanning a folder for spam and phishing

If you have an email folder that you prefer not to scan automatically (as explained in “Automatically scanning folders for spam and phishing” above), you can scan it manually whenever you like.

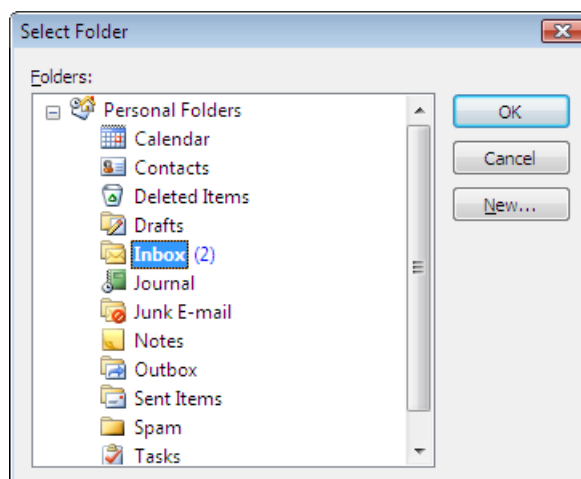
TO SCAN A FOLDER MANUALLY

- 1 Open the Cloudmark menu:



- 2 Select Scan Folder Now.

The Select Folder window appears, displaying the list of your email folders:



- 3 Select the email folder you want to scan.
- 4 Click OK.

Cloudmark Desktop scans the folder, searching for spam and phishing and moving those messages to your Spam Folder.

This may take some time, depending on the number of messages in the folder. A folder with only a few messages may take just a few seconds, while a folder with thousands of messages may require several minutes. When scanning is complete, the progress window closes automatically.

Blocking a single spam or phishing message

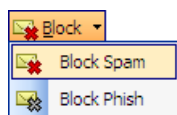
If a spam or phishing message appears in your mailbox, you can block it. Blocking a message sends it to your Spam Folder and reports it to the Cloudmark network, where it is used to prevent similar messages from appearing in the future, for all users in the network.

! *The messages that you block are sent to the Spam Folder regardless of the Detection Action that you've selected. See "Selecting the spam detection action" on page 23.*

Before blocking a message, check it carefully to be sure that it really is spam or phishing. See "What is spam?" on page 2 and "What is email fraud or "phishing"?" on page 3.

TO BLOCK A SINGLE SPAM OR PHISHING MESSAGE

- 1 In your message list, select one or more spam or phishing messages.
- 2 In the Cloudmark Desktop toolbar, click the Block button.



You can click the Block button alone, or you can click the arrow and select Block Spam or Block Phishing for more accurate reporting to Cloudmark. Alternatively, you can drag the message into your Spam Folder.

The message disappears from the message list. If you want to look at it again, you can find it in the Spam Folder. If you change your mind and want to unblock the message, see "Unblocking legitimate messages" on page 14.

Unblocking legitimate messages

Occasionally, a legitimate message may be mistaken for spam or phishing. This can happen for different reasons:

- the message may resemble a known form of spam or phishing
For explanations of some of the characteristics of spam and phishing, see “What is spam?” on page 2 and “What is email fraud or “phishing?”” on page 3.
- the message may have been blocked by you or other users in the network
Be sure to categorize your messages accurately. This affects your rating in the Cloudmark network. See “How your rating works” on page 48.

Look inside your Spam Folder periodically to check for any legitimate messages that may have been mistaken for spam or phishing. There are two ways to correct this:

- unblock a single message in your Spam Folder
Use this option for the occasional message that is mistakenly sent to your Spam Folder. See “Unblocking a single legitimate message” below.
- add a legitimate sender to your smartlist
Use this option if multiple messages from one sender are consistently mistaken for spam. See “Using the smartlist” on page 16.

Unblocking a single legitimate message

If you find a legitimate message in your Spam Folder, you can unblock it to ensure that you continue to receive similar messages in the future. Like blocking, unblocking is reported to the Cloudmark network, where it is used to correctly identify legitimate messages in the future, for all users in the network.

TO UNBLOCK A LEGITIMATE MESSAGE

- 1 Open your Spam email folder.
- 2 In the message list, select the message you want to unblock.
- 3 Click the Unblock button:



The message returns to your Inbox.

If messages from certain legitimate senders are consistently mistaken for spam, you can exclude them from filtering by adding them to your smartlist. See “Using the smartlist” below.

Using the smartlist

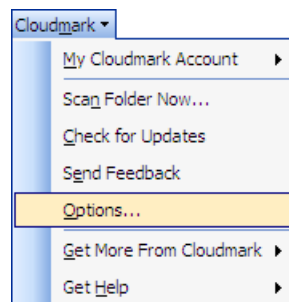
The smartlist is a list of senders whose messages to you are never filtered. All messages from these senders go straight to your regular email folders and will never be diverted to your Spam Folder. This option is useful for serial messages that could be mistaken for spam, such as electronic newsletters, or offers from merchants of whom you are a regular customer.

Keep in mind that spam messages can be “spoofed”, that is, they can be made to appear as if they originate from a different email address than the spammer’s true email address. The smartlist does not prevent spam, because a spammer may pretend to be sending messages from an address in your smartlist. Use the smartlist sparingly.

Adding a sender to the smartlist

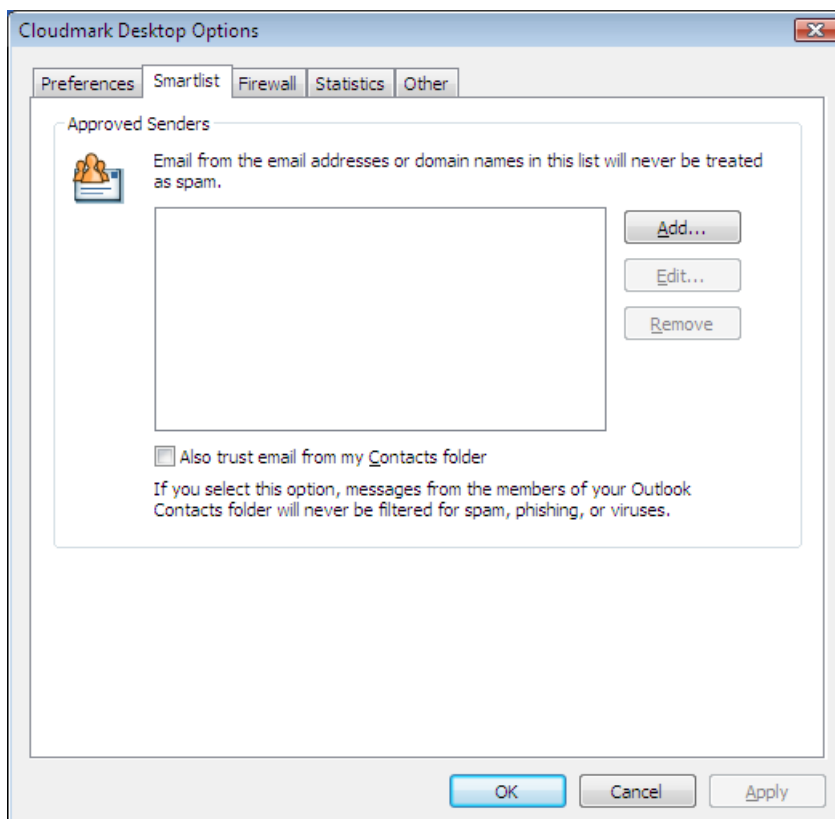
TO ADD A SENDER TO YOUR SMARTLIST

- 1 Open the Cloudmark menu:

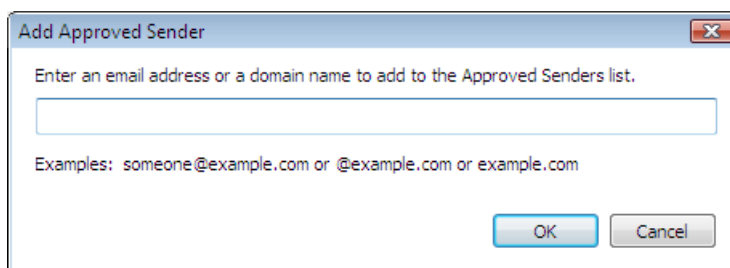


- 2 Select Options....

The Cloudmark Desktop Options window appears.

3 Click the Smartlist tab:**4** Click the Add button.

The Add Approved Sender window appears:

**5** Enter one of the following:

- an email address, like this:

jane@domain.com

All email from this sender will be whitelisted.

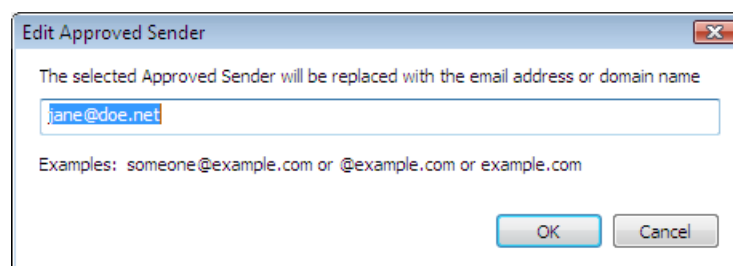
- a domain, like this:
`@domain.com`
All email from all senders in this domain will be whitelisted.
 - a domain and its subdomains, like this:
`domain.com`
All email from all senders in this domain and its subdomains (such as `host1.domain.com`, `host2.domain.com`, and so on) will be whitelisted.
- 6 Click OK.
The email address now appears in the smartlist window.
 - 7 Click OK to close the Options window.

Changing an entry in the smartlist

If you enter an email address incorrectly in your smartlist, or if a sender's email address changes, you can change the smartlist entry.

TO CHANGE A SMARTLIST ENTRY

- 1 Click the Cloudmark button to open the menu.
- 2 Select Options...
The Cloudmark Desktop Options window appears.
- 3 Click the Smartlist tab.
- 4 In the Approved Senders list, select the email address you want to change.
- 5 Click the Edit button.
The Edit Approved Sender window appears:



- 6 Edit the email address as desired.
- 7 Click OK.
The modified email address now appears in the smartlist window.
- 8 Click OK.

Removing a sender from the smartlist

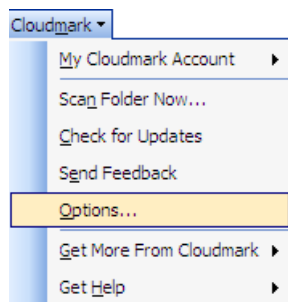
You can remove one sender from your smartlist, or you can empty your entire smartlist.

TO REMOVE AN ENTRY FROM THE SMARTLIST

- 1 Click the Cloudmark button to open the menu.
- 2 Select Options....
The Cloudmark Desktop Options window appears.
- 3 Click the Smartlist tab.
- 4 In the Approved Senders list, select the email address you want to remove.
- 5 Click the Remove button.
A prompt appears, asking you to confirm that you want to remove this entry.
- 6 Click Yes.
The email address disappears from the smartlist.

Configuring your preferences

For most users, the default settings that come with Cloudmark Desktop are sufficient. You can change these settings to suit your preferences. You access your preferences by selecting Options... from the Cloudmark menu in your toolbar:



Preferences are explained in the following topics:

- “Selecting folders for automatic scanning” below
- “Selecting the spam detection action” on page 23
- “Showing or hiding statistics and your rating in the toolbar” on page 25
- “Configuring general spam options” on page 25

- “Configuring your firewall settings” on page 27

Selecting folders for automatic scanning

Cloudmark Desktop can automatically scan incoming messages before they appear in your email folders, as explained in “Automatically scanning folders for spam and phishing” on page 12. You can control the list of folders for automatic scanning, as explained in these topics:

- “Adding a folder for automatic scanning” below
- “Removing a folder from automatic scanning” on page 22

Adding a folder for automatic scanning

By default, your Inbox folder is scanned for spam and fraud automatically. You can select additional folders for automatic scanning

TO SELECT FOLDERS FOR AUTOMATIC SCANNING

- 1 Click the Cloudmark button to open the menu.

2 Select Options....

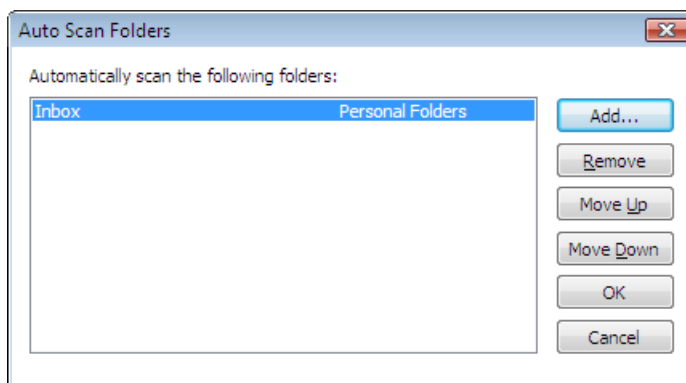
The Cloudmark Desktop Options window appears:



3 Make sure that Check All Inboxes Automatically is selected.

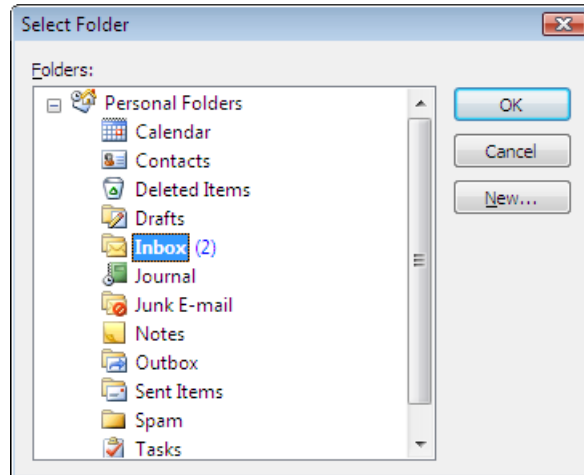
4 Click the Folders... button.

The Auto Scan Folders window appears:



- 5 Click the Add... button.

The Select Folder window appears:



- 6 In the Folders list, select the folder you want to add to the folders that are scanned automatically.
- 7 Click OK.
The selected folder now appears in the Auto Scan Folders window.
- 8 Click OK to close the Auto Scan Folders window.
- 9 Click OK to close the Cloudmark Desktop Options window.

Removing a folder from automatic scanning

If you do not want a folder to be scanned automatically, you can remove it from the list of folders to scan.

TO REMOVE A FOLDER FROM AUTOMATIC SCANNING

- 1 Click the Cloudmark button to open the menu.
- 2 Select Options....
The Cloudmark Desktop Options window appears.
- 3 Click the Folders... button.
The Auto Scan Folders window appears.
- 4 In the folders list, select the folder you want to exclude from automatic scanning.
- 5 Click the Remove button.
The folder disappears from the list of folders to scan.

- 6 Click OK to close the Auto Scan Folders window.
- 7 Click OK to close the Cloudmark Desktop Options window.

Selecting the spam detection action

You can choose the action that Cloudmark Desktop takes when it detects spam or phishing. The following actions are available:

- move to folder

The default option moves messages to the Spam Folder. If you prefer, you can select a different folder.

- move to Deleted Items folder

This option moves spam and phishing messages to the Deleted Items folder. Messages in this folder are deleted whenever your trash is emptied.

- delete instantly

This option deletes spam and phishing messages instantly upon detection, without first moving them to the Deleted Items folder.

! *This option deletes messages permanently. Use it with care.*

- move to Spam folder and delete permanently after one week

Spam and phishing are moves to the Spam Folder upon detection, then permanently deleted after one week.

- move to Spam folder and delete permanently after one month

Spam and phishing are moves to the Spam Folder upon detection, then permanently deleted after one month.

- tag as Spam

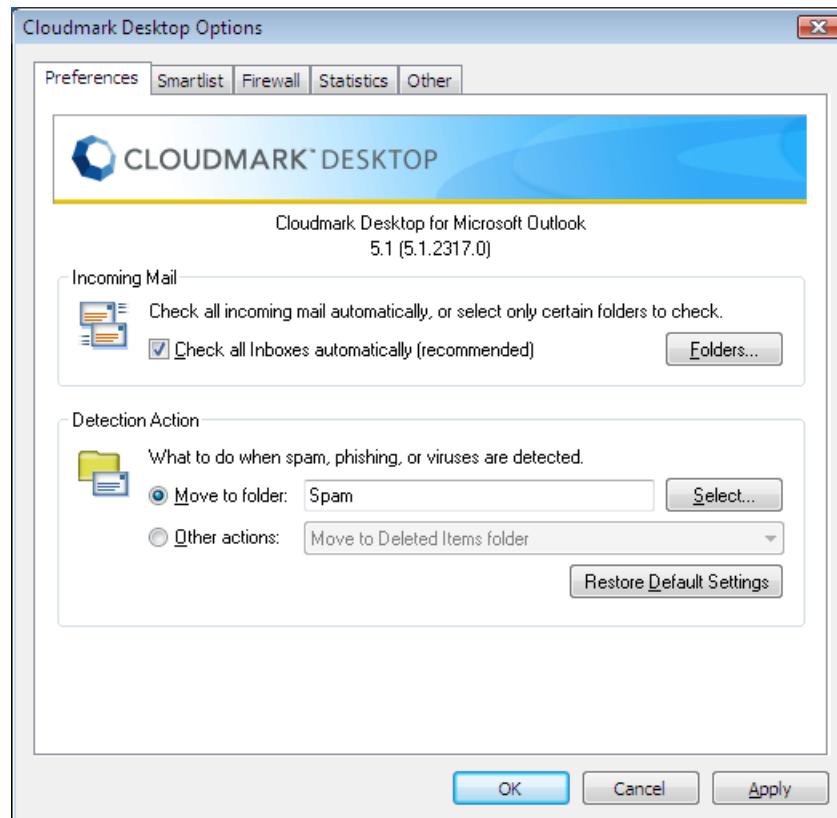
If you select this option, messages are not moved to another folder. Instead, Cloudmark Desktop clearly marks them as spam. If you want to perform further actions on these messages, such as deleting or moving them, you must do so manually.

TO SELECT THE SPAM DETECTION ACTION

- 1 Open the Cloudmark menu.

2 Select Options....

The Cloudmark Desktop Options window appears:



- 3 In the Detection Action area, select the action you want Cloudmark Desktop to take when it finds a spam or fraudulent message.

If you select Move to Folder and you want to use an email folder other than the Spam Folder, then click Select... to choose a different folder.

- 4 Click OK.

Cloudmark Desktop will apply the selected action to all spam and phishing that detects upon arrival.

! *The selected action does not apply to messages that you block by clicking the Block Spam or Block Phish buttons. Those messages are always moved to your Spam Folder in case you change your mind.*

Showing or hiding statistics and your rating in the toolbar

Statistics tell you how much spam and fraud has been processed by Cloudmark Desktop. You can view statistics at a glance in the toolbar. For more information about statistics, see Chapter 5, “Statistics and your rating”.

TO SHOW OR HIDE STATISTICS IN THE TOOLBAR

- 1 Click the Cloudmark button to open the menu.
- 2 Select Options...
The Cloudmark Desktop Options window appears.
- 3 Click the Other tab.
- 4 Select or deselect “Show statistics and My Rating on toolbar”.
- 5 Click OK.

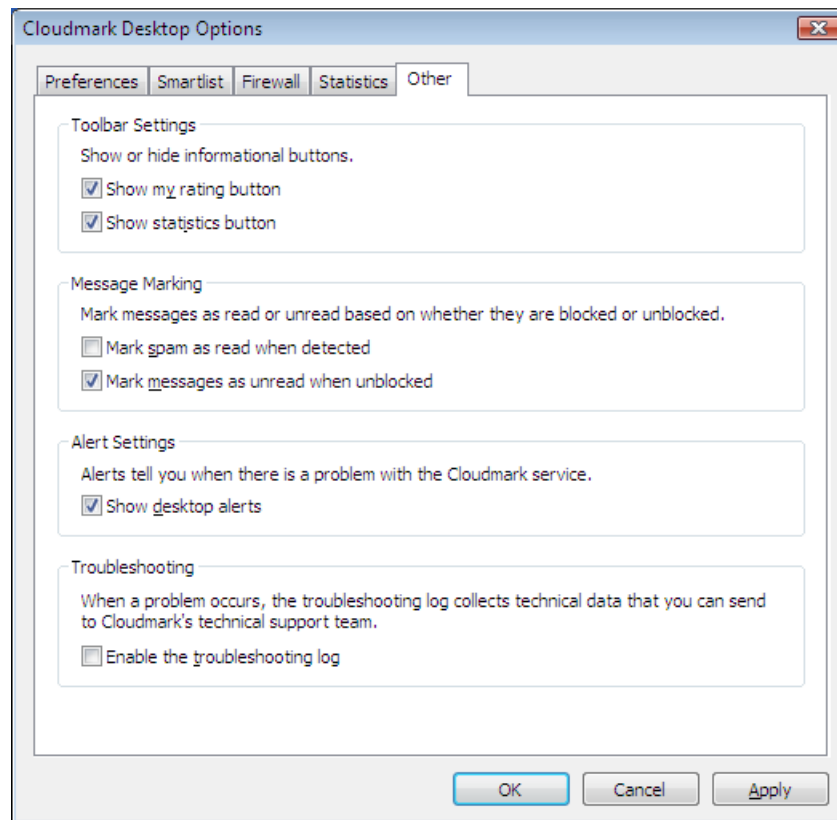
RELATED TOPICS

- “Statistics and your rating”

Configuring general spam options

TO CONFIGURE GENERAL SPAM OPTIONS

- 1 Click the Cloudmark button to open the menu.
- 2 Select Options...
The Cloudmark Desktop Options window appears.

3 Click the Other tab.**4** Select or deselect the options as desired:

- Mark Spam As Read When Detected

When this option is selected, spam and phishing messages are marked as read even if you haven't view them. This prevents them from contributing to your count of unread messages.

- Mark Messages As Unread When Unblocked

When this option is selected, any message to which you apply the Unblock button is automatically marked as unread, regardless of whether you've previously viewed it.

- Show Desktop alerts

When this option is selected, Cloudmark Desktop displays an alert message when there is a problem connecting to the network.

5 Click OK.

Configuring your firewall settings

If your computer is behind a firewall, you must enter your firewall settings in order to use Cloudmark Desktop. Your network administrator or internet service provider can give you the appropriate settings to enter.

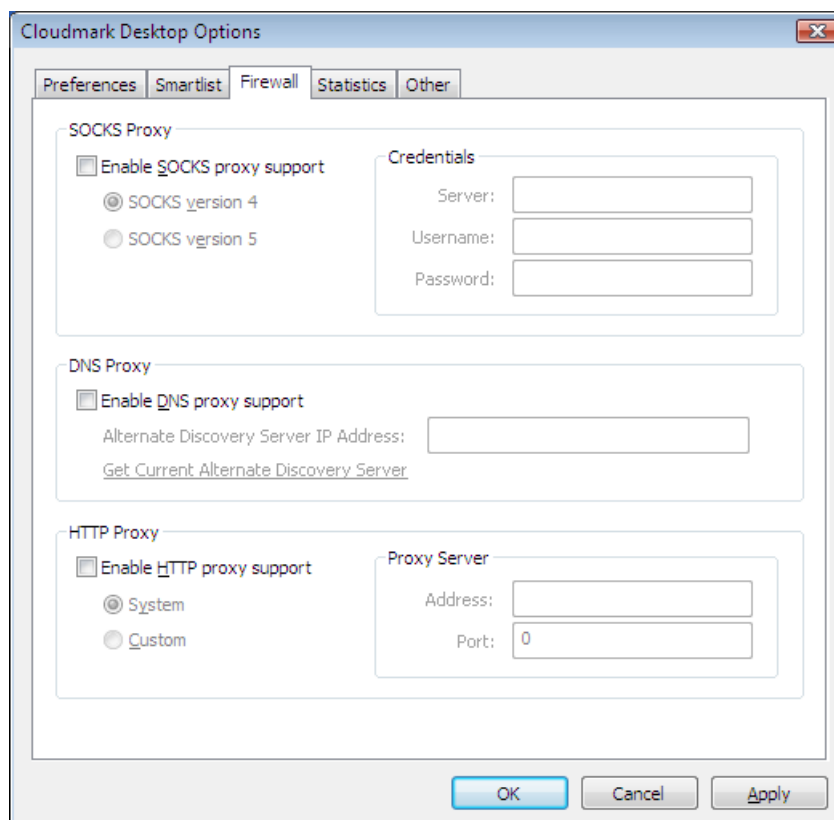
TO ENTER YOUR FIREWALL SETTINGS

1 Click the Cloudmark button to open the menu.

2 Select Options....

The Cloudmark Desktop Options window appears.

3 Click the Firewall tab:



4 If you are accessing the network through a SOCKS proxy, select Enable SOCKS Proxy Support.

If you select this option, enter your SOCKS settings in the Configuration area:

- Select the SOCKS version, either Version 1 or Version 5.
- Enter the hostname or IP address of the SOCKS server.

- Enter your SOCKS username.
 - Enter your SOCKS password.
- 5 If you are using a DNS proxy, select Enable DNS Proxy Support.
If you select this option, enter the IP address of the alternate discovery server. You can locate an alternate discovery server by clicking Get Current Alternate Discovery Server.
 - 6 If you are using an HTTP proxy, select Enable HTTP Proxy Support.
 - To use your default web browser's HTTP proxy settings, select System.
 - To enter settings that differ from those of your browser, select Custom.
 - 7 Click OK.

Turning off spam blocking

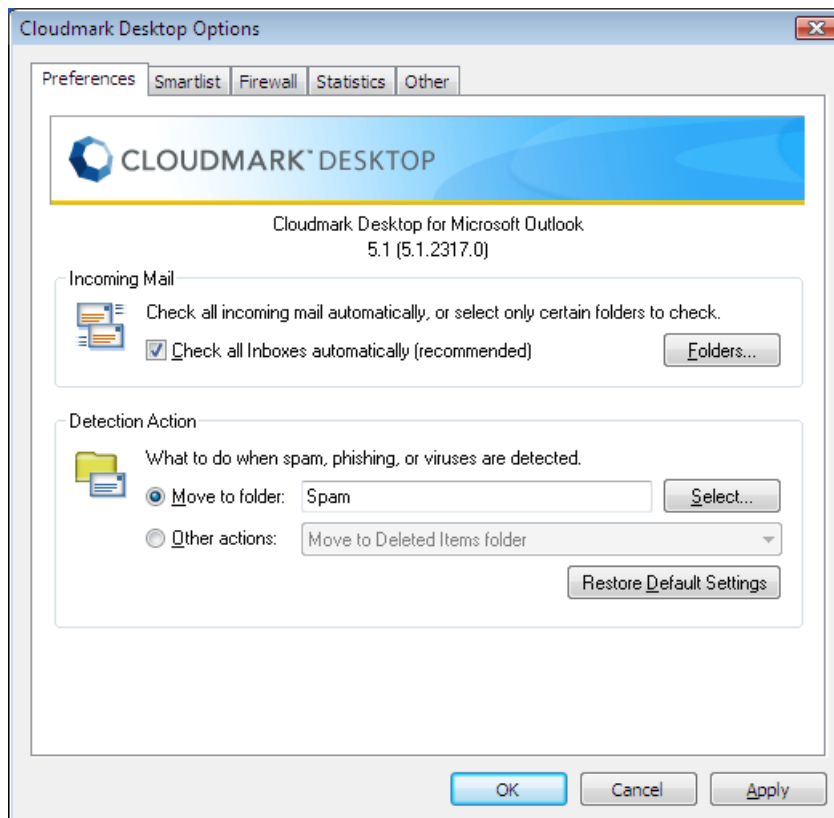
You can turn off spam blocking altogether.

TO TURN OFF SPAM BLOCKING

- 1 Click the Cloudmark button to open the menu.

2 Select Options....

The Cloudmark Desktop Options window appears:



3 Remove the check mark next to Check All Inboxes Automatically.

4 Click OK.

Cloudmark Desktop will no longer check your email for spam and phishing automatically. You can still scan messages manually whenever you like; see “Manually scanning a folder for spam and phishing” on page 12.

To re-enable automatic spam checking, return to the PropertiesOptions window and select Check All Inboxes Automatically.

Updating Cloudmark Desktop

You can check for new versions of Cloudmark Desktop to download and install.

TO CHECK FOR A NEW VERSION OF CLOUDMARK DESKTOP

- 1 Open the Cloudmark menu.
- 2 Select Check For Updates.

The InstallShield Wizard appears, checking for updates. When it finishes checking, the wizard tells you whether an update is available.

- If the wizard does not find updates, click Finish to exit.
- If the wizard finds updates, it guides you through the installation process.

Using Cloudmark Desktop on another computer

With any one subscription, you can install Cloudmark Desktop on as many computers as you like, though it will only run on two computers simultaneously. To use Cloudmark Desktop this way, install it on each computer and log in to My Cloudmark, or enter your activation code if you have one. Your login or activation code works with Mozilla Thunderbird, Microsoft Outlook, or Outlook Express. For instructions, see “Logging in to My Cloudmark” on page 33 or, if you have an activation code, see “Subscribing with an activation code” on page 38.

If you want to permanently stop using Cloudmark Desktop on one of your computers, you can uninstall it. For instructions on uninstalling, see “Uninstalling Cloudmark Desktop” below.

There is no limit to the number of email addresses that you can filter. Cloudmark Desktop filters all of your open mailboxes.

Uninstalling Cloudmark Desktop

If you wish, you can completely remove Cloudmark Desktop from your computer.

TO UNINSTALL CLOUDMARK DESKTOP

- 1 If your email application is running, close it.
- 2 Open the Start menu in Windows.

3 Select Control Panel.

The Control Panel window appears.

4 Double-click Add or Remove Programs.

The Add or Remove Programs window appears, displaying a list of programs that are currently installed on your computer.

5 In the program list, select Cloudmark Desktop.**6** Click the Remove button.

A prompt appears, asking you to confirm that you want to remove the program.

7 Click Yes.

The uninstaller appears, removing Cloudmark Desktop and related files from your computer.

Using My Cloudmark

My Cloudmark is a simple, self-service account management interface for Cloudmark subscribers. This chapter includes topics that explain how to use My Cloudmark:

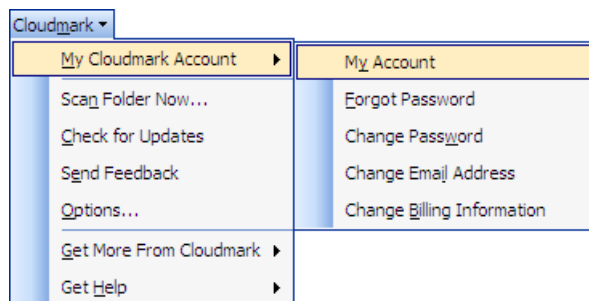
- “Logging in to My Cloudmark” below
- “Subscribing to Cloudmark” on page 35
- “Viewing your referral information” on page 40
- “Changing your email address or password” on page 42
- “Retrieving a lost password” on page 43
- “Changing your billing information” on page 44

Logging in to My Cloudmark

You access My Cloudmark through the Cloudmark menu in Cloudmark Desktop.

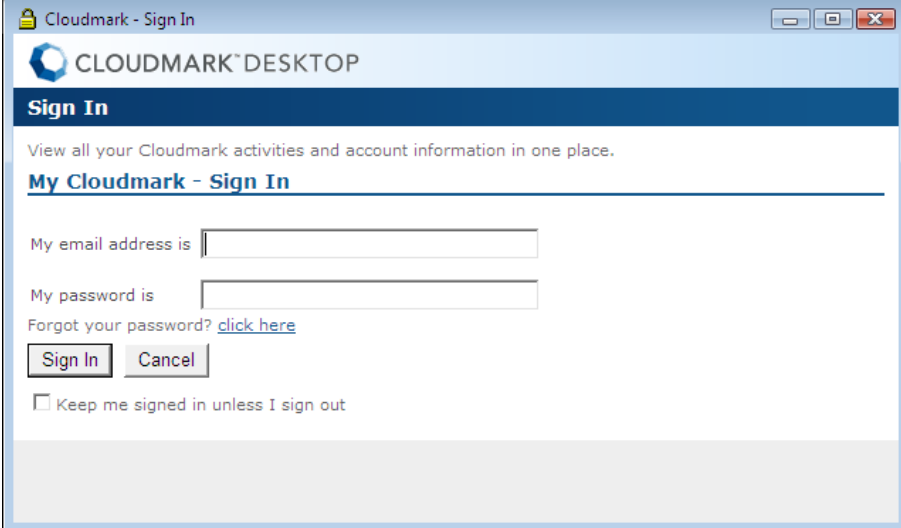
TO LOG IN TO MY CLOUDMARK

- 1 Open the Cloudmark menu:



- 2 Select My Cloudmark Account > My Account.

The My Cloudmark login window appears:



The screenshot shows a window titled "Cloudmark - Sign In". The window has a blue header with the Cloudmark logo and the text "CLOUDMARK™ DESKTOP". Below the header, there is a "Sign In" section with a sub-header "My Cloudmark - Sign In". The main content area contains the following elements:

- A text input field labeled "My email address is".
- A text input field labeled "My password is".
- A link labeled "Forgot your password? [click here](#)".
- Two buttons: "Sign In" and "Cancel".
- A checkbox labeled "Keep me signed in unless I sign out".

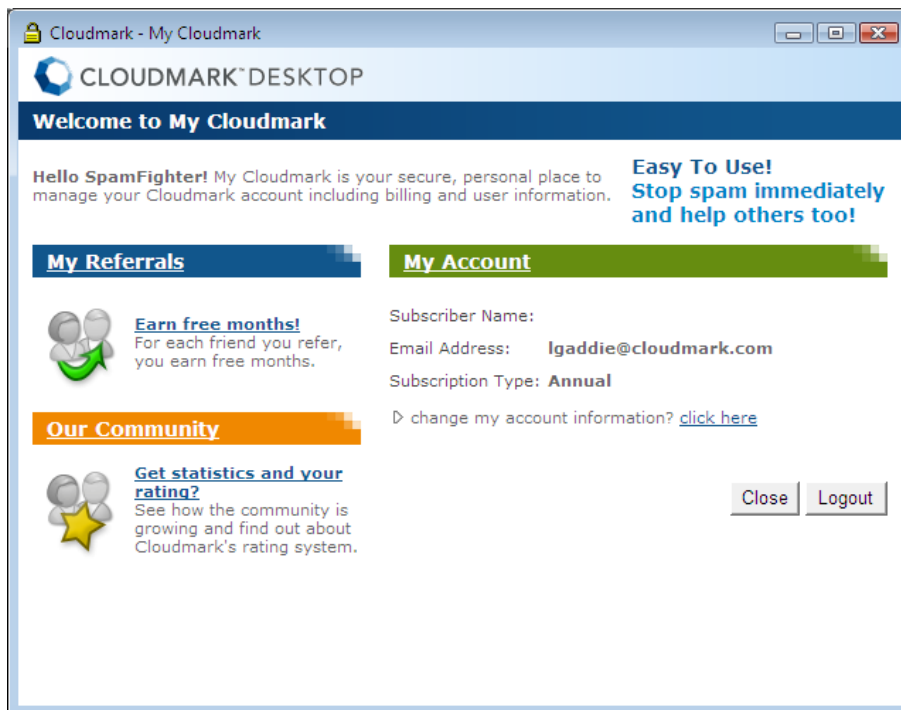
- 3 Enter your email address.

- 4 Enter your password.

If you have forgotten your password, click the “click here” link to retrieve it.

5 Click the Sign In button.

The My Cloudmark page appears:



From here, you can perform the following tasks:

- “Viewing your referral information” on page 40
- “Changing your email address or password” on page 42
- “Retrieving a lost password” on page 43
- “Changing your billing information” on page 44
- You can view statistics and your rating by clicking the Our Community link. See Chapter 5, “Statistics and your rating”

Subscribing to Cloudmark

Cloudmark Desktop runs in Trial Mode when you first install it. When the trial period ends, the software runs in a more limited Basic Mode. To restore the full set of features, you must purchase a subscription. See also “Your subscription to Cloudmark” on page 9.

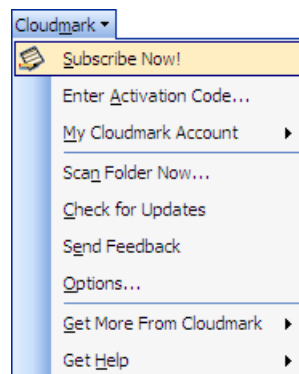
These topics explain how to buy, renew, or cancel your subscription:

- “Purchasing a new subscription” below
- “Subscribing with an activation code” on page 38
- “Renewing a subscription” on page 39
- “Cancelling your subscription” on page 40

Purchasing a new subscription

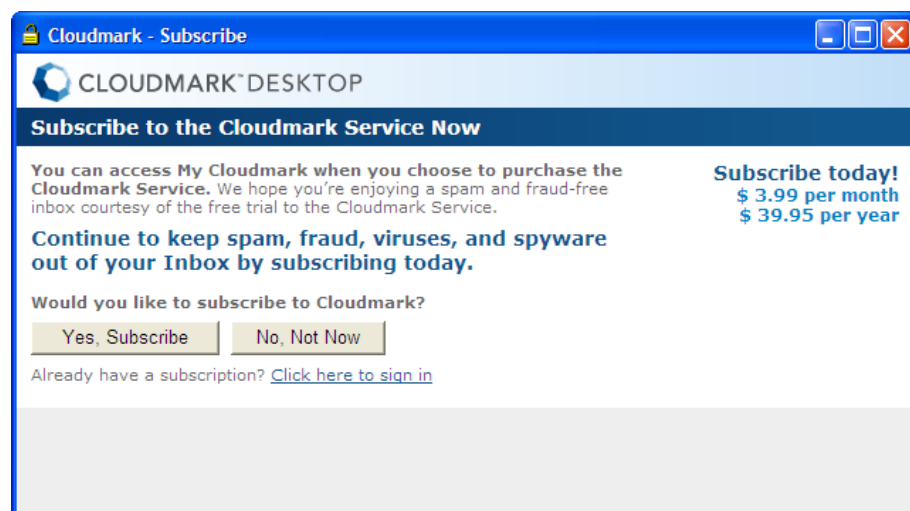
TO PURCHASE A SUBSCRIPTION

- 1 Open the Cloudmark menu:



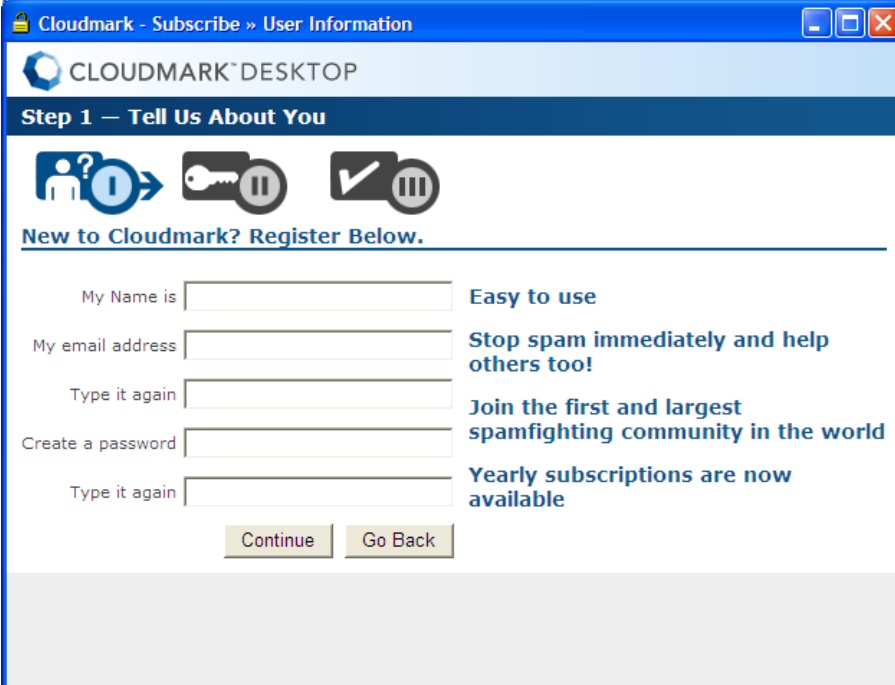
- 2 Select Subscribe Now.

The Subscribe window appears:



- 3 Click the Yes, Subscribe! button.

The User Information window appears:



The screenshot shows a web browser window titled "Cloudmark - Subscribe » User Information". The page header includes the Cloudmark logo and "CLOUDMARK™ DESKTOP". The main heading is "Step 1 — Tell Us About You". Below this, there are three icons: a person with a question mark, a key, and a checkmark. A sub-heading reads "New to Cloudmark? Register Below." The registration form consists of five input fields: "My Name is", "My email address", "Type it again", "Create a password", and "Type it again". To the right of the form, there are four lines of promotional text: "Easy to use", "Stop spam immediately and help others too!", "Join the first and largest spamfighting community in the world", and "Yearly subscriptions are now available". At the bottom of the form are two buttons: "Continue" and "Go Back".

- 4 Enter your name.
- 5 Enter your email address (twice).
- 6 Choose a password and enter it (twice).

Entering your email address twice ensures that you've entered it correctly.

Create a password that is at least five characters long. For the best security, use a password that combines upper- and lower-case letters with numbers or symbols. Do not use a password that is easily guessed by others, such as your birthday or a pet's name.

7 Click Continue.

The Billing Information window appears:

8 Select the Credit Card payment method.

9 Click Purchase.

An order confirmation appears.

Subscribing with an activation code

If the vendor from whom you purchased Cloudmark Desktop provided an activation code, you must enter it in order to activate your subscription. You only need to do this once.

TO ACTIVATE CLOUDMARK DESKTOP

1 Open the Cloudmark menu.

2 Select Enter Activation Code.

The Cloudmark Desktop Activation window appears:



Cloudmark Desktop Activation

CLOUDMARK™ DESKTOP

Thank you for purchasing Cloudmark Desktop.
To finish installation, please enter the following.

Activation Code

Enter the activation code you received at the time of purchase.

Activation Code:

(Code format is xxxxx-xxxxx-xxxxx-xxxxx-xxxxx)

Create Account

Email Address:

Password:

Confirm Password:

Password length should be at least 6 characters.

Click "Activate Now" to complete your subscription to Cloudmark

3 Paste your activation code into the Activation Code field.**4** Enter your email address in the Email Address field.**5** Enter your password, twice.**6** Click Activate Now.

Renewing a subscription

Your subscription is renewed automatically, and a receipt is sent to your email address. If your billing information changes, be sure to update it so that automatic renewal can continue; see “Changing your billing information” on page 44. If you wish to stop automatic renewal by cancelling your subscription, see “Cancelling your subscription” on page 40.

Switching from a monthly to annual subscription

If you have purchased a monthly subscription, you can convert to an annual subscription at any time.

TO CONVERT FROM A MONTHLY TO ANNUAL SUBSCRIPTION

- 1 Log in to My Cloudmark.
See “Logging in to My Cloudmark” on page 33.
- 2 Click My Account.
- 3 Click the “Change my payment plan” link.
- 4 Follow the online instructions.

Canceling your subscription

TO CANCEL YOUR CLOUDMARK SUBSCRIPTION

- 1 Log in to My Cloudmark.
See “Logging in to My Cloudmark” on page 33.
- 2 Click My Account.
The Change Information window appears.
- 3 Click the link next to “cancel your subscription”.
The Cancel Subscription window appears.
- 4 Enter a brief description of the reason for cancelling your subscription.
Your feedback helps Cloudmark improve its service.
- 5 If you are sure you want to cancel your subscription, click Yes.

Viewing your referral information

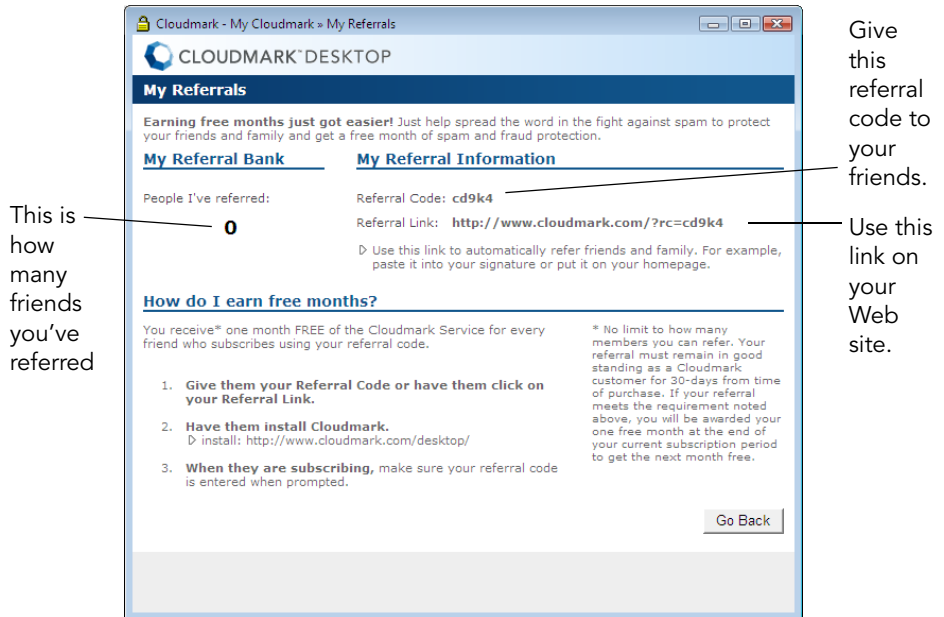
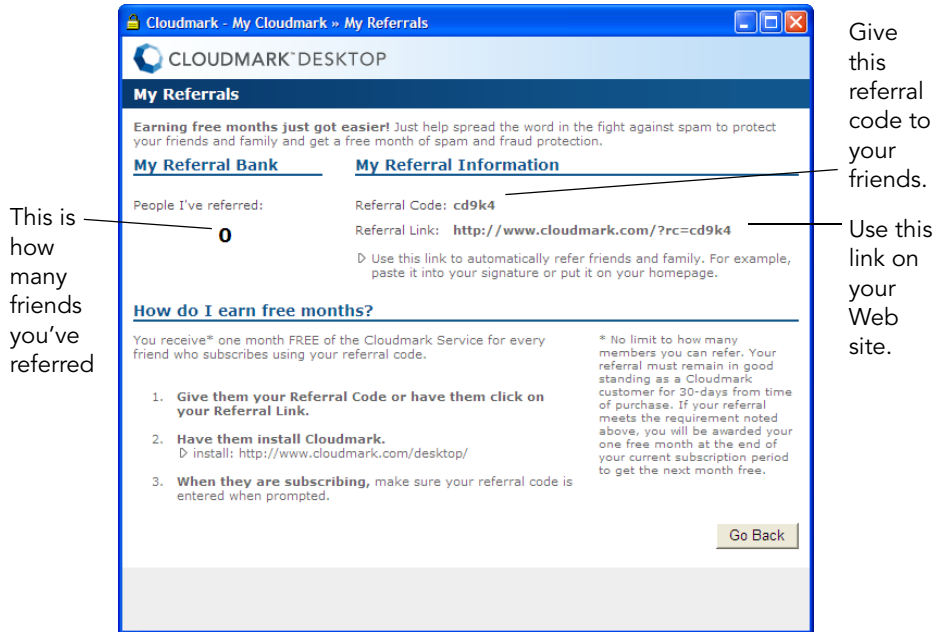
The My Referrals area of My Cloudmark shows you how many people you've referred to Cloudmark, along with information about how to refer people.

TO VIEW YOUR REFERRAL INFORMATION

- 1 Log in to My Cloudmark.
See “Logging in to My Cloudmark” on page 33.

2 Click the My Referrals link.

The My Referrals page appears.



Changing your email address or password

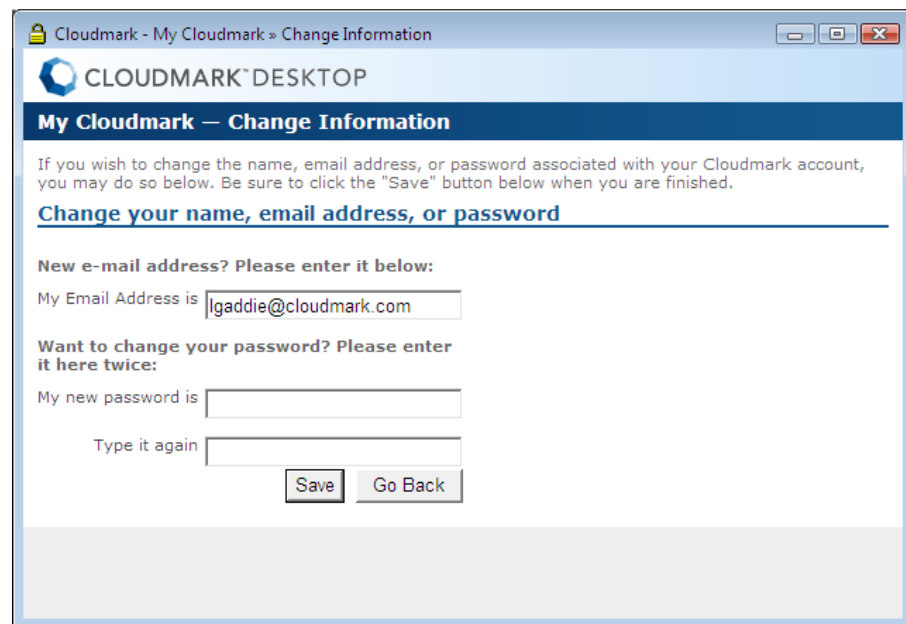
Each subscription is tied to exactly one email address. Your email address is also your login to My Cloudmark. If your email address changes, you must update it in My Cloudmark in order to use it with Cloudmark Desktop. When you do this, your subscription no longer applies to your previous email address.

You can also change your password at any time. For example, you may wish to change it to a more memorable password, or change it periodically for security reasons.

TO CHANGE YOUR EMAIL ADDRESS OR PASSWORD

- 1 Open the Cloudmark menu:
- 2 Select My Cloudmark Account > Change Password.

The Change Information window appears.



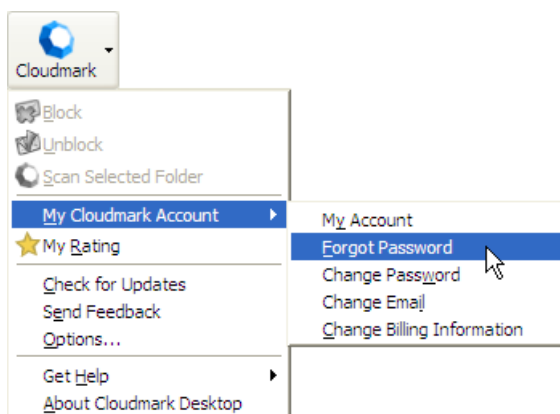
- 3 If your email address has changed, enter the new one.
- 4 Enter your new password, twice.
- 5 Click the Save button.

Retrieving a lost password

It is common to forget a password. If this happens, you can select a new password.

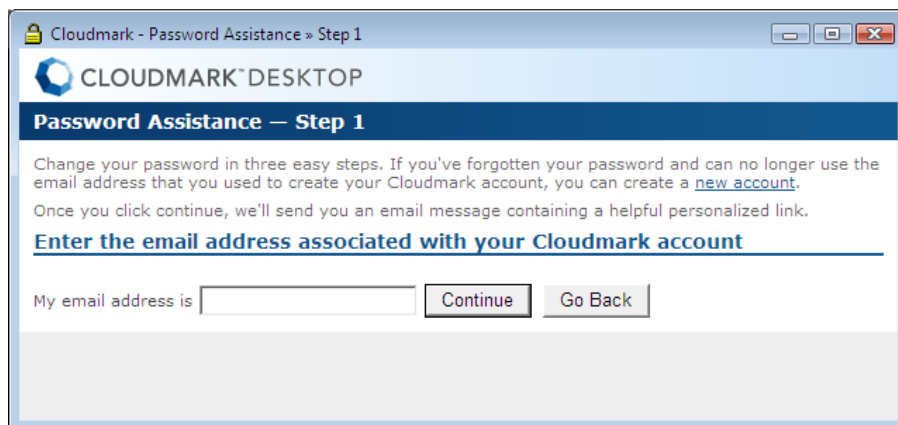
TO RETRIEVE A LOST PASSWORD

- 1 Open the Cloudmark menu.



- 2 Select My Cloudmark Account > Forgot Password.

The Password Assistance window appears:



- 3 Enter your email address.

This is the address with which you normally log in to My Cloudmark.

- 4 Click Continue.

The next Password Assistance window informs you that a message is being sent to your email address.

- 5 Close the Password Assistance window.

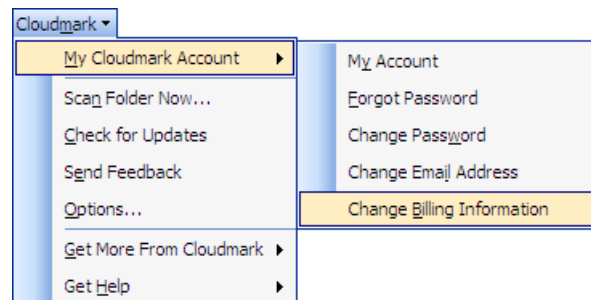
- 6 Check your Inbox for a message from Cloudmark Service.
- 7 Click the link that is provided in the message.
The Password Assistance window appears in your Web browser.
- 8 Choose a new password and enter it (twice).
When you lose your old password, a new password is necessary for security reasons.
- 9 Click Submit Changes.
A final page appears, informing you that your password has been changed.

You may now log in to My Cloudmark with your new password.

Changing your billing information

TO CHANGE YOUR BILLING INFORMATION

- 1 Open the Cloudmark menu:



- 2 Select My Cloudmark Account > Change Billing Information. You may be asked to log in.

The Billing page appears:

Cloudmark - My Cloudmark » Change Information » Billing

CLOUDMARK™ DESKTOP

Change Billing Information

Please enter your new information.

Credit Card Information

Name on the card

Type of card

Credit Card Number

Expiration

Billing Address

Address 1

Address 2 (optional)

City

State / Province

Zip / Postal

Country

- 3 Enter your new credit card information.
- 4 Enter your new billing address.
- 5 Click Save.

Statistics and your rating

Statistics tell you about anti-spam and anti-phishing activity through the Cloudmark network. Your rating tells you how effective you have been at preventing spam and phishing. This chapter explains these numbers and provides instructions for influencing them:

- “How statistics work” below
- “How your rating works” on page 48
- “Viewing statistics and your rating” on page 49
- “How to influence your rating” on page 50

How statistics work

Statistics summarize activity throughout the Cloudmark network. They show you how much spam and phishing activity is occurring, as well as how much of this activity is being blocked by Cloudmark. You can view this information graphically or in tables. Viewing statistics helps you visualize how much spam and phishing is being blocked.

You can display these statistics about the Cloudmark community:

- total number of spam fighters
- time saved today
- money saved today
- total messages processed today
- total spam caught today

See “Viewing statistics and your rating” on page 49.

How your rating works

Your rating reflects your effectiveness within the Cloudmark network. This called the Trust Evaluation System (TES). Whenever you click the Block or Unblock buttons, your rating affects and is affected by your vote, as follows:

- The more users agree with your vote, the more your rating rises.
Consensus with other Cloudmark users suggests that your vote is accurate. This increases your credibility within the network.
- The higher your rating, the more weight your votes carries.
Highly credible users have more influence over which messages get automatically blocked. Likewise, users who consistently vote inaccurately have less influence.

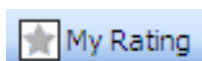
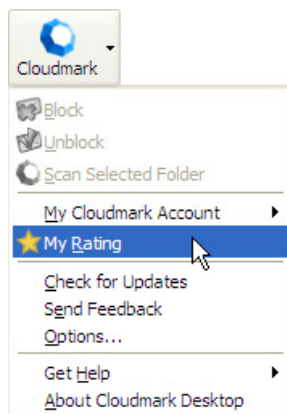
Ratings help keep users honest and ensure the effectiveness of Cloudmark's service.

For example, imagine that spammers sign up for the Cloudmark service, then use the Unblock button to unblock their own spam, reporting to Cloudmark that these messages are actually legitimate. Potentially, this could contaminate the network with false information.

However, their votes will not concur with those of the majority of users, who will apply the Block button to the same messages. Consequently, those spammers will quickly develop negative ratings. Their votes therefore become weaker when compared with those of highly-rated users, and Cloudmark will continue to regard their messages as spam. This is why your votes are so important.

Viewing statistics and your rating

TO VIEW STATISTICS AND YOUR RATING



The My Rating page appears:

 A screenshot of the Cloudmark Desktop application window showing the 'My Rating' page. The window title is 'Cloudmark - Cloudmark - My Rating'. The page has a blue header with the Cloudmark logo and 'CLOUDMARK DESKTOP'. The main content is divided into three sections:

- Your rating:** A section with a yellow arrow icon. It contains text explaining the user's role in the Cloudmark Collaborative Security Network and provides tips for increasing their rating.
 - Your rating began at the Normal Trust rating.** It can go up or down, including negative trust. Here are some tips for increasing your rating:
 - Block only the messages that are really spam or phishing.** For example, don't block newsletters to which you have subscribed.
 - Unblock only legitimate messages.** Don't unblock spam or phishing messages, even if you are interested in their content.
 - Block or unblock messages soon after you receive them.** Your feedback is most valuable immediately after a spam or phishing attack.
- Rating System:** A diagram showing a vertical scale of trust levels. At the top is a yellow star icon labeled 'Most Trusted'. Below it is a red star icon, then a blue star icon, then a green star icon, then a white star icon, and finally a purple star icon at the bottom labeled 'Least Trusted'. A large blue arrow points upwards from the 'Normal Trust' level (the white star icon) towards the 'Most Trusted' level.
- My Statistics:** A table showing the user's performance:

My Statistics	
My total messages checked	8,757
My total spam stopped	682
My total phish stopped	0
Spam I've blocked	25
Phishing I've blocked	0

On this page, you can view the following:

- your rating
- total number of spamfighters in the Cloudmark network
- estimated time saved, in days, throughout the network
- estimated money saved throughout the network
- email messages processed today
- spam and phishing messages caught today

How to influence your rating

Your rating is influenced by the way you use Cloudmark Desktop. The following are some tips for improving your rating:

- Be sure to use the Block button only for messages that really are spam.
See “What is spam?” on page 2.
- Be sure to use the Unblock button only for messages that are neither spam nor phishing.
Use this button only for messages from your friends, family, colleagues, or companies with whom you have a business relationship.
- Timeliness is important. If a message requires action, don't wait.
That is, click the Block button as soon as you find spam phishing, and the Unblock button as soon as you find a misclassified message in your Spam Folder. This keeps the network's data current.

Spreading the word about Cloudmark Desktop

Email users worldwide struggle with spam and fraud. If you find Cloudmark Desktop helpful, you can help other email users by telling them about it.

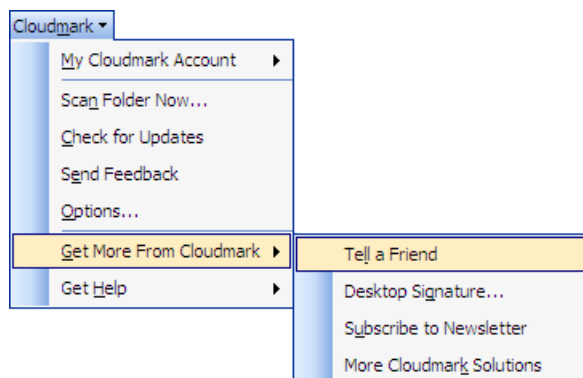
- “Telling a friend about Cloudmark Desktop” below
- “Adding a Cloudmark Desktop signature to your email” on page 52

Telling a friend about Cloudmark Desktop

If you have one specific friend, family member, or colleague whom you would like to tell about Cloudmark Desktop, you can use the Tell A Friend command to send a pre-formatted email message.

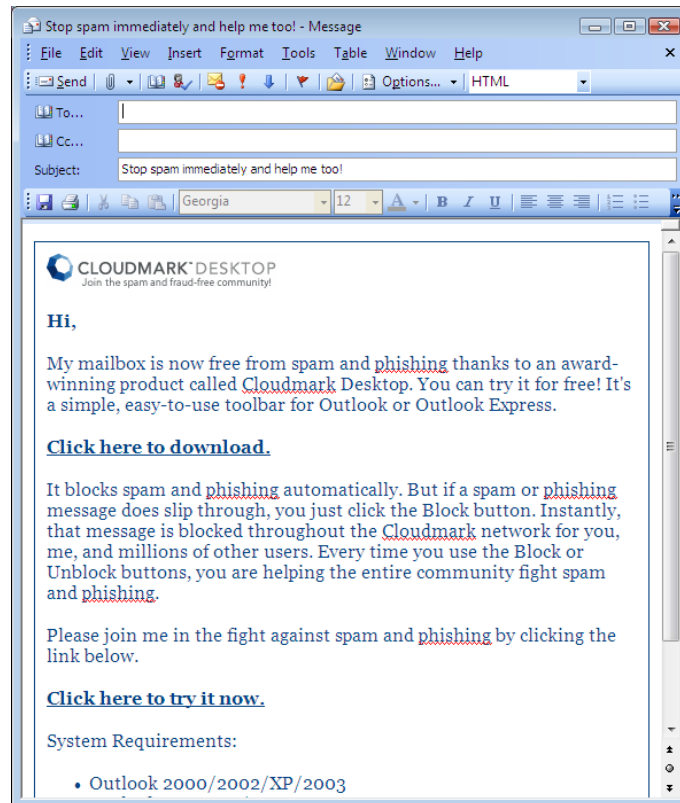
TO TELL A FRIEND

- 1 Open the Cloudmark menu:



2 Select Get More From Cloudmark > Tell a Friend.

A preformatted email message appears:

**3** In the To field, enter the email address or addresses to which you want to send the message.**4** Click Send.

The message is delivered to the specified address or addresses. The recipients can click the links in the message to download Cloudmark Desktop and try it.

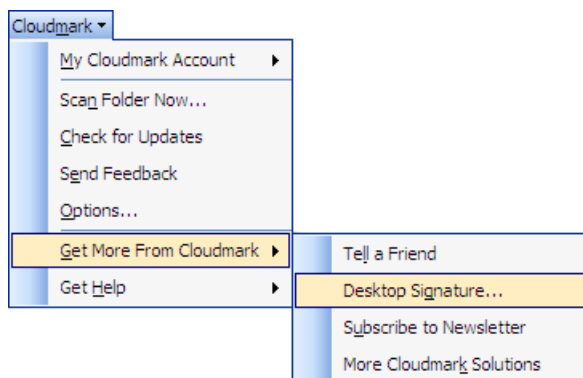
Adding a Cloudmark Desktop signature to your email

A signature is a bit of text or images that appears at the bottom of every email message you send. When you set up a signature, Outlook automatically appends it to each message without any special action on your part.

A Cloudmark Desktop signature is a way to automatically spread the word about spam-fighting technology. Cloudmark Desktop can help you create one.

TO CREATE A CLOUDMARK DESKTOP SIGNATURE

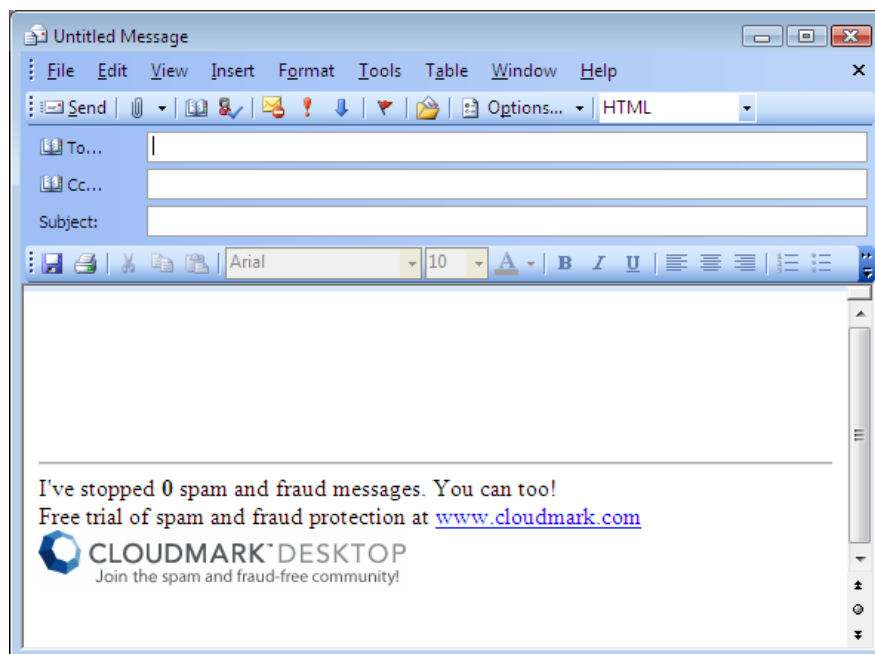
- 1 Open the Cloudmark menu:



- 2 Select Get More From Cloudmark > Desktop Signature.
The Add Cloudmark Desktop Signature window appears.
- 3 Click Yes.
A dialog box appears, informing you that you may need to restart Windows after creating the signature.
- 4 Click OK.
Cloudmark Desktop automatically configures the new signature.
- 5 From Outlook's Tools menu, select Options.
The Options window appears.
- 6 Click the Mail Format tab.
- 7 In the "Signature for new messages" field, select "Cloudmark SpamNet - Join The Fight! - New".
- 8 In the "Signature for replies and forwards" field, select "Cloudmark SpamNet - Join The Fight! - Reply".

9 Click OK.

Whenever you compose a message, the signature will appear at the bottom, like this:



The link in the signature includes your referral code. When someone follows the link and installs Cloudmark Desktop, you get credit for a referral. For each referral, you receive one free month with Cloudmark.

Finding more information

This guide is one of many resources available to you. If you need more information about Cloudmark Desktop or My Cloudmark, consult these resources:

- online help

From the Cloudmark Desktop menu, select “Get Help > Cloudmark Desktop Help”.

- Knowledge Base

The knowledge base contains information compiled by the technical support team. You can use your web browser to access the Knowledge Base here:

<http://www.cloudmark.com/desktop/kb/>

- release notes

Release notes contain a list of changes and new features for each new version of Cloudmark Desktop. You can find the latest release notes here:

<http://www.cloudmark.com/desktop/ol/releasenotes/>

- user forum

In the user forum, you can ask questions and discuss Cloudmark Desktop with other users and Cloudmark’s team of technical experts.

<http://www.cloudmark.com/desktop/forum/>

- Technical support

If you do not find the solutions you’re looking for in the resources listed above, you can contact Cloudmark’s team of technical support experts for personal assistance. Use your web browser to create a request for assistance here:

<http://www.cloudmark.com/desktop/contact/>

Glossary

activate You activate Cloudmark Desktop by first purchasing a subscription, then entering the activation code that you receive. This gives you access to the complete feature set, until your subscription expires.

See also: “Subscribing with an activation code” on page 38.

activation code You receive an activation code if you purchase Cloudmark Desktop from a Cloudmark partner. Your activation code unlocks all of Cloudmark Desktop’s features. You receive your activation code when you purchase a subscription.

See also: “Subscribing with an activation code” on page 38.

block When you block a message by clicking the Block button, you report it to Cloudmark as spam or phishing. Your vote against that message is compiled with the votes of other users and may result in permanently classifying that message as spam or phishing for all users throughout the network.

See also: “Blocking a single spam or phishing message” on page 14.

Cloudmark Global Threat Network The Cloudmark Global Threat Network consists of users like you, all providing feedback about which messages are spam or phishing and which ones are legitimate. When users reach consensus about a message, they influence how that message is classified for all users throughout the network.

email-borne virus Email-borne viruses are malicious programs that are carried to your computer by email. They may arrive inside a spam or phishing message, or in messages from friends who do not realize that their own computers are infected. Viruses can inflict serious damage to your computer.

fraud Email fraud, or phishing, is email designed for identity theft. It typically pretends to come from a legitimate commercial source and solicits personal information from the recipient. Cloudmark Desktop automatically sends new

fraud to your Spam Folder. If you find a fraudulent message in your Inbox, you can block it by clicking the Block Phish button.

See also: “What is email fraud or “phishing?”” on page 3, “Blocking spam and phishing” on page 11.

phishing Phishing, also known as email fraud, is email designed for identity theft. It typically pretends to come from a legitimate commercial source and solicits personal information from the recipient. Cloudmark Desktop automatically sends new phishing to your Spam Folder. If you find a fraudulent message in your Inbox, you can block it by clicking the Block Phish button.

See also: “What is email fraud or “phishing?”” on page 3, “Blocking spam and phishing” on page 11.

rating Cloudmark users are rated on their effectiveness as spam fighters. When you block spam and phishing in a timely and accurate manner, your rating increases, as does the weight of your vote.

See also: “How your rating works” on page 48, “Viewing statistics and your rating” on page 49, “How to influence your rating” on page 50.

referral You provide a referral by recommending Cloudmark Desktop to others. When someone installs and purchases Cloudmark Desktop based on your referral, you earn free months for your monthly subscription.

See also: Chapter 6, "Spreading the word about Cloudmark Desktop".

signature A signature is a short message that appears at the bottom of each email message you send. You can configure Outlook Express to insert your signature automatically in every message you send. A signature is a simple way to spread the word about Cloudmark Desktop's spam-fighting benefits.

See also: “Adding a Cloudmark Desktop signature to your email” on page 52.

smartlist A smartlist is an intelligent whitelist. Cloudmark Desktop's smartlist can automatically incorporate your personal address book, in addition to the whitelist entries that you create.

spam Spam is unsolicited, bulk email, usually for a commercial purpose. Cloudmark Desktop automatically sends most spam to your Spam Folder. If you find a spam message in your Inbox, you can block it by clicking the Block button.

See also: “What is spam?” on page 2, “Blocking spam and phishing” on page 11.

statistics Statistics tell you how much spam has been blocked by you and by the Cloudmark Global Threat Network. You can use statistics to find out how effective Cloudmark Desktop is.

See also: “How statistics work” on page 47, “Viewing statistics and your rating” on page 49.

subscription Your subscription is your ongoing membership in the Cloudmark Global Threat Network. When you purchase a monthly or yearly subscription, you receive a login or an activation code that unlocks all of Cloudmark Desktop’s features.

See also: “Subscribing to Cloudmark” on page 35.

unblock When you unblock a message by clicking the Unblock button, you indicate to Cloudmark that the message is neither spam nor phishing. Your vote is compared with the votes of other users and may result in reclassifying that message as legitimate.

See also: “Unblocking a single legitimate message” on page 15.

virus See “email-borne virus” on page 57.

whitelist A whitelist contains email address or domains from which you always want to receive messages. By adding an email address or domain to your whitelist, you prevent messages from those sources from being sent to your Spam Folder.

See also: “Using the smartlist” on page 16.

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