Filtering Messages in Eudora

Introduction

(Note: Most of this material comes straight from the Eudora user’s manual.)

Many of the email management functions in Eudora can be done automatically using filters. For example, you can automatically reply to a request for information, transfer all the messages from your children into a personal mailbox, and label all the messages from your customers as “Hot.”

A filter can be thought of as a personal “valet” or “butler” that takes your mail and does certain things to it that you specify. One kind of valet might watch for particular mail from a mailing list and move it into a mailbox, open the message, and play a sound. Another might look for other kinds of mail and give it a label color, a high priority, and a new subject line. You can create as many of these “valets” or “butlers” as you like, and you can give each of them from one to five instructions on what to do with your mail that fits a certain set of criteria, based on information in the header of the message and the message body.

Quick and Simple Filters with the Make Filter Command

The simplest filters are those that transfer incoming messages to a particular mailbox based on the sender of the message or one or more of the recipients. For example, each time you check your mail, you may want to have Eudora take all of the incoming messages it receives from your friend Joe and automatically transfer them into a mailbox you’ve called “Mail from Joe.” To get Eudora to do this, you set up a simple filter.

For new users, the Make Filter dialog box provides an easy way to learn how to use filters.

Once you are comfortable with the simple filters created this way, you can go on to make more complex, powerful filters using the Filters window. Experienced users will find that the Make Filter dialog box provides a rapid, convenient method for making a simple transfer filter.

To open and use the Make Filter dialog box

1. Open an incoming or outgoing message containing the information you want in your filter, or select one or more message summaries in a mailbox.

2. From the Special menu, choose Make Filter. Or, you may right-click in the body of the open message, or in the selection of message summaries, or in the preview pane for a single-selected message, and choose Make Filter from the drop-down menu.

The Make Filter dialog box appears.

Make Filter dialog box with sample filter
Match Conditions

The Match Conditions area of the dialog box helps you set up the criteria that will determine whether a particular message will be acted on by this filter.

You can specify that the type of messages you are interested in should be Incoming and/or Outgoing. You can also specify that this should be a Manual filter (described below). You can check and uncheck any combination of the three boxes: Incoming, Outgoing, and Manual.

**NOTE:** If the messages you selected when you chose Make Filter were in any mailbox other than your Out mailbox, the Incoming and Manual check boxes are checked automatically. If the messages you selected were in your Out mailbox, the Outgoing and Manual check boxes are checked automatically.

- **Incoming**—If this box is selected, then any incoming message that satisfies the content match condition you specify will be acted on according to the action you’ve specified in this filter.

- **Outgoing**—If this box is selected, then any outgoing message that satisfies the content match condition you specify will be acted on according to the action you’ve specified in this filter. The matching and action occurs after the message has been sent.

- **Manual**—If this box is selected, then when you select one or more message summaries in a mailbox window and choose Filter Messages from the Special menu, the incoming and/or outgoing messages selected that satisfy the content match condition you specify will be acted on according to the action you’ve specified in this filter. This option is useful when testing your filter or manually filtering messages that you have already received or sent.

**NOTE:** If Incoming or Outgoing is selected (or both), the filter is automatic; that is, Eudora performs the filter operation behind the scenes, automatically, when you send or check mail.

If you now also select Manual, the filter becomes both automatic and manual, meaning, you can now manually perform the filter operation by selecting Filter Messages from the Special menu while message summaries are selected in a mailbox window—but Eudora still filters the messages automatically during mail sends and checks. In short, checking Manual does not “turn off” Eudora’s automatic filtering for that filter.

Also, making a filter manual also gives you a good way to test the filter to your needs as soon as you set it up, rather than having to wait until the next time you send or check mail. After creating a manual filter with the Make Filter dialog box, check to see that it does what you want by selecting Filter Messages from the Special menu. Your open message or selected message summaries are immediately filtered according to the new filter.

You can choose one of three content matches: From, Any Recipient, or Subject.

**From** (selected by default)—Select to match the message against the From: field—the sender—of the messages you selected. You can then edit the field. The From: field of a
target message must contain the information in this box but does not have to exactly equal it. Note that if you selected multiple messages and they do not have a common sender, the From: field is unselectable and is left blank.

Any Recipient—Select to match the message against any of the recipients in the messages you selected (recipients are contained in the To: and Cc: fields and, in an outgoing message, the Bcc: field). Choose one recipient from the drop-down menu (accessed from the menu button next to the field), or edit the text in the field. Note that the information you enter in the field must be contained in any of the recipient fields of the target message but does not have to exactly equal any recipient field.

Subject—Select to match the message against the Subject: field of the messages you selected. If you have selected multiple messages and they do not have a common subject, this field is left blank. In either case you can edit the field. The subject line of a target message must contain the information in this box but does not have to exactly equal it.

Action Area—The Action area of the window lets you determine the one action that will be performed on messages that satisfy the Match Conditions you’ve specified for this filter. The three action choices are all message-transfer actions; they transfer the filtered message to a mailbox. For messages that satisfy your match conditions, your simple filter will transfer the messages to either a new mailbox, an existing mailbox, or your Trash mailbox.

Transfer to New Mailbox—Select to transfer the filtered message to a new mailbox that you will specify. The text field is filled in with a suggested new-mailbox name based on your selected content match condition (From, Any Recipient, or Subject). You can change this name if you like. The In Folder field is a label showing you the folder in which your new mailbox will be created. By default, this is the same folder that holds the mailbox containing the messages you’ve selected. The new mailbox is created as soon as you create this filter.

You can set the value of the “In Folder” field to your own desired default folders based on the chosen match condition: From, Any Recipient, or Subject. Use the three Eudora.ini file entries FilterFromFolder, FilterRecipFolder, and FilterSubjectFolder, respectively. Enter the path as it appears on the mailbox window. For example: FilterFromFolder=mail-lists\entertainment.

Transfer to Existing Mailbox—Select to transfer the filtered message into one of your existing mailboxes. Select the mailbox from the button next to the field. The default mailbox is the In box. When you click the button, a version of the Transfer menu appears, letting you choose the mailbox from the Transfer menu.

NOTE: Also, you can create a new mailbox in the Filters window by choosing New from the drop-down mailbox menu. This is handy for creating a new mailbox within another folder.

Delete Message (Transfer to Trash)—Select to delete the message that satisfies the filter match conditions, transferring it to your Trash mailbox. This feature is useful for deleting junk email, or “spam” as it is called in the Internet world. Test this filter to make sure messages you really want to keep don’t go to the Trash mailbox.
Buttons

• **Create Filter**—When you have set up your match conditions and filter action, click Create Filter to create the filter. The filter is added to the bottom of your filters list in the Filters window (discussed below). The filter is available immediately and will act on messages that satisfy the conditions at the next mail check, mail send, or selection of the “Filter Messages” command, as appropriate. Filters are processed from top to bottom of the filters list.

• **Add Details**—Alternately, after setting up the filter information, click Add Details to both create your filter and also open the Filters window. You can add additional information to your new filter and make it more powerful or just change it. The filter is added to the bottom of your filters list and is immediately available in the form in which it was set up in the Make Filter dialog box. Any changes you make in the Filters window must be saved before they become effective. Following is more information on the Filters window.

• **Cancel**—Click Cancel to cancel the filter if you change your mind. The filter is cancelled and your changes are not saved.

Detailed Filters with the Filters Window

The Make Filter dialog box, discussed previously, lets you create quick, simple filters that perform one operation—a mail transfer—based on one match condition—a piece of header information. The Filters window lets you create more complex, powerful filters that use multiple match conditions and perform multiple filter actions. You can also use the Filters window to create simple filters such as those created by the Make Filter dialog box.

**To open the Filters window to create or modify a filter**

1. From the Tools menu, choose Filters, or click on the Filters window’s tab if it is part of a visible tabbed window group. The Filters window appears, and any filters you have created are listed on the left.

2. To add a new filter, click **New** or to modify a filter, click an existing filter to select it.

3. Select the options for how you want the filter to be used: as an automatic filter to be invoked on any Incoming and/or Outgoing mail and as a Manual filter that can be invoked when you choose **Filter Messages** from the Special menu. Any combination of these options works.

4. Define the criteria for the filter by using the header item drop-down menus and the text fields to specify which header items should include a particular string of text. You can define two related terms for the criteria so that your filter is as specific as possible.
5. Define the action or actions to be taken on messages that fit the criteria and save the filters. Eudora places a small icon to the left of the filter in the list for some action you have selected for that filter—up to five icons/actions per filter.

**NOTE:** Filters are automatically named based on the first term of the criteria for the filter. You can reorder them by dragging a filter up or down in the list. You should reorder your filters to indicate what order you want your messages filtered, and grouping your filters will make them easier to find. When the filters are invoked (automatically or manually), each message is matched against each filter in order from top to bottom. If the message meets a filter’s criteria, the actions are done as specified until there are no more actions. Then the message is matched against the next filter. If at any point a “Skip Rest” action is done, the remaining actions for that filter (if there are any) are performed on that message, the rest of the filters in the filters list are skipped for that message. The next message is filtered, again going from top to bottom down the filters list.

Filter order matters when a message addressed to you is also sent to a mailing list you’re on. If you have a filter that always places messages addressed to you into a personal mailbox, then you want Eudora to perform the filter for your personal mailbox before any other filtering. You can change the width of the filters list to create more or less space for your list. To do this, put the arrow over the vertical “splitter” bar to the right of the list and drag the line to the left or right.

**Filter Criteria (Match Area)**

Each filter in the Filters window can use one or two “terms” as its criteria, connecting them as appropriate with the conjunction drop-down menu.

**Header**—Use this field to specify which message header items you want the filter to search. You can choose an option from the drop-down menu or enter one yourself. This is helpful if you want to use a header item that does not appear on the menu, such as X-Priority. The selections are as follows:

- To:
- From:
- Subject:
- Cc:
- Reply-To:
- «Any Header»
- «Body»
- «Any Recipient»
- «Personality»
- «Junk Score»

The «Any Header» option searches all message headers (including hidden headers that are shown with the BLAH BLAH BLAH option). The «Body» option searches the message body. The «Any Recipient» option searches all possible recipient items (To:, Cc:, Bcc:). The «Personality» option searches the name of the personality (email account) associated with the message. You will most likely want to search for both the To: and Cc: fields when receiving mail. If so, you should use «<<Any Recipient>>» instead of To: or Cc:. Use the match type (“contains” is the default) drop-down menu to control
how the header item is matched with the text string in the text field. The match options
are as follows: **contains** or **doesn't contain**—If the specified header item contains or
does not contain the text string, filter the message. It allows other text to surround the
text string. **is** or **is not**—If the specified header item is or is not an exact match of the
text string, filter the message.

**starts with** or **ends with**—If the specified header item starts with or ends with the text
string, filter the message. The **starts with** item refers to the first non-whitespace
character after the colon, so any spaces after the colon are ignored.

**appears** or **doesn't appear**—If the header item appears or does not appear in the
message, filter the message (the text field is ignored). This is useful for filtering
messages based only on the types of fields they contain. For example, some messages
contain a Reply-To: header, some don’t.

**intersects nickname**—If the text string is included in a nickname, whether it is a full
address or a nickname within the nickname, filter the message. In other words, the filter
looks in all of your address books for the nickname that appears in the header of the
message. If it finds it, it filters the message accordingly.

**doesn't intersect nickname**—If the text string is not included in a nickname, whether it
is a full address or a nickname within the nickname, filter the message.

**intersects address book**—If the text string or nickname is included in any one of your
address books, whether it is a full address or a nickname within the nickname, filter the
message. In other words, the filter looks in all of your address books for all nicknames. If
the nickname that appears in the header of the message is in the address book, Eudora
filters the message accordingly. This match criterion is good to use if you wish all
messages that are not from the entries in your address book to go in other mailboxes.
This is an alternate method to control SPAM.

**doesn't intersect address book**—If the text string or nickname is not included in an
address book, whether it is a full address or a nickname within the nickname, filter the
message.

**matches regexp (case insensitive)** —If the specific item matches the regular
expressions characters with case insensitivity, filter those messages. Regular
Expressions is an advanced and complex method of searching for text.

Regular Expression is a search string that uses special characters to match text
characters. For example, if you are filtering messages sent to you by two people, choose
**From** in the first drop-down options list, then choose **matches regexp**. Then type their
usernames between parentheses separated by a vertical slash, for example
(bobclark)|(janedoe) in the text box. Eudora searches and displays all messages
from these two people.

**matches regexp** —If the specific item matches the regular expressions characters, filter
those messages.

**is greater than**—If **Junk Score** is selected in the Header field, filter the message if the
junk score is greater than the score you enter in the following field.
**is less than**—If *Junk Score* is selected in the Header field, filter the message if the junk score is less than the score you enter in the following field. Enter text in the text field boxes to specify the text strings that the filter is searching for. It is recommended that the contents of the text boxes be kept as specific and brief as possible. The greater the complexity, the less likelihood there is of a match. Be sure not to enter a header label in the text box as part of the text string. For example, to filter all messages from Justine, do not enter “From: Justine” in the text box. Rather, select “From:” in the Header field, and enter simply “Justine” in the text box. Use the conjunction drop-down menu ("ignore" is the default) to link the two terms. The conjunction options are as follows:

- **ignore**—Ignore the second term. If the message matches the first term, filter the message.
- **and**—If the message matches *both* the first and second terms (but not just one alone), filter it.
- **or**—If the message matches either term (or both), filter it.
- **unless**—If the message matches the first term, filter it *unless* the message also matches the second term, in which case *do not* filter it. (This lets you exclude certain variations of the first term.)

**Filter Actions**

Filter Actions allow you to specify what to do with messages that match the filter criteria. For a filter you’re creating or modifying in the Filters window, all messages that match the filter criteria are acted on as specified with the Actions drop down menus. Each filter can do up to five things to a message that matches the criteria. You can use the same action twice if it does not directly affect the original message. For example, “Copy To” can be used twice, but not “Transfer To.”

Some filter actions have an associated icon. For these actions, Eudora places the action icon next to the filter in the filters list. Up to five icons can appear per filter. The Action options are as follows:

- **None**—No action.
- **Make Status**—Assigns the selected status to message summaries.
- **Make Priority**—Assigns the selected priority level to messages. If you select a set level from the drop-down menu, messages are set to that priority. If you select Raise or Lower, messages are raised or lowered one priority level based on their pre-filter level.
- **Make Label**—Assigns the selected label to messages. Label colors and names are set in the Labels options window.
- **Make Personality**—Assigns the selected personality to messages. For outgoing messages, the message is *not* sent from the assigned personality. For incoming messages, all your responses to the message will be from the assigned personality until you change the personality associated with the incoming message or your response.
**Make Subject**—Assigns the new subject to message summaries (does not affect the subject in the message itself). If you choose this option, the entire subject of the message is replaced with the new subject. Use the “&” symbol to stand for the old subject if you want to add the new subject to the old subject. For example, entering New Subject [was &] results in New Subject [was Old Subject].

**Play Sound**—Plays the selected sound when messages are filtered.

**Speak**—Plays a voice to alert you of a message being filtered. **Who** and **Subject** fields display as well as a drop-down list where you can choose a voice type. Check **Who** to hear the voice read the sender’s name and **Subject** to hear the voice read the subject line.

**NOTE:** After you select Speak, the **Who** and Subject fields and a drop-down voice list appear. If these fields are grayed out, you must install Microsoft’s Speech Engine applications.

**Open**—Opens the mailbox and/or message when a message is received. If you set a previous action to filter messages into a mailbox, then that mailbox is opened.

**Print**—Prints one copy of each message.

**Notify User**—Notifies you “As Normal” and/or “In Report” when messages are received. The “As Normal” option notifies you based on the options you have selected in the Getting Attention options. The “In Report” option notifies you by opening the Filter Report window and displaying in that window a filter report that details what filter actions have been done.

**Notify Application**—Notifies the selected application when messages are received, and provides information from the message. Specify the application to use and the part of the message to be included.

Use the Browse button to select an application, or enter the command line yourself. The command line should include the path to the executable, any options, and the following substitution variables, all separated by blank spaces:

%1 Date
%2 To
%3 From
%4 Subject
%5 Cc
%6 The entire message

For example, the command line to send the subject of a message to a pager might look like this:

C:\apps\pager.exe -c %4

**Forward To**—Forwards messages to the email address given. Forwarded messages are placed in the queue in the Out mailbox and sent the next time you send queued messages.
Redirect To —Redirects messages to the email address given. Redirected messages are placed in the queue in the Out mailbox and sent the next time you send queued messages.

Reply with—Replies to messages with the selected stationery message. Replies are placed in the queue in the Out mailbox and sent the next time you send queued messages. One typical use of this action is to reply to specific senders with stationery telling them that you’re on vacation: “I’m out till the 10th. I’ll reply to your message when I get back.”

Server Options —Sets the message’s server status to Fetch and/or Delete. Use this only if POP is your incoming server type.

Copy To—Copies messages to the selected mailbox.

Transfer To—Transfers messages to the selected mailbox.

Skip Rest— Stops filtering for the message. The message is not matched to the rest of the filters in the filter list.

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Regular Expressions

When searching for messages or defining a filter in Eudora, an option you can use is regular expressions. Following is a description of regular expressions and how they are used in Eudora.

There are two functions in Eudora where you can use regular expressions:

- **Filters window**—Located in the drop-down list where you indicate the relationship between a mail header and a piece of text (for example, the “Subject” contains Eudora, “Any Recipient” is joe@xyz.com, and so on). There are two regular expression criteria in that list, namely "matches RegEx" and "matches RegEx (case insensitive)."

- **Find Messages window**—Located in the center drop-down list. The option "matches regexp" appears. In the Find Messages window, regexp is not case sensitive.

There are various standard implementations of regular expressions, but Eudora uses the POSIX implementation. Following are symbols that are supported in Eudora:

. (period) represents any one character.

[ ] (brackets) contain a set of characters from which a match can be made. It corresponds to one character in the search string.

\ (backslash) is an escape character which means that the next character will not have a special meaning.

* (asterisk) is a multiplier. It will match zero or more of the previous character. (Note that it's not a wildcard character as in file names.)
? (question mark) is a multiplier. It will match zero or one of the previous character. (Note that it's not a wildcard character as in file names.)

+ (plus) is a multiplier. It will match one or more of the previous character.

{ } (squiggly brackets) contain a number which specifies an exact number of the previous character.

[^] (brackets containing caret and other characters) means any characters except the character(s) after the caret symbol in the brackets.

^ (caret) is the start of the line.

$ (dollar) is the end of the line.

\< represents the start of a word.

\> represents the end of a word.

[:alpha:] represents any alphabetic letter.

[:digit:] represents any single-digit number.

[:blank:] represents a space or tab.

| (pipe) is OR. It requires that the joined expressions have parentheses around them.