Quick Reference Guide – Mail Matcher, Notes & Tasks

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Get your Mail Matcher e-mail address**  
From the **Main Menu**, click on the **Update profile** link located in the top right corner of the screen.  
Your **Mail Matcher e-mail address** will be displayed.  
Highlight and copy this e-mail address.  
**TIP:** Add this e-mail address to your email contact list, as you will be using it on a regular basis. | ![Update profile](image) |
| **STEP 2: Open e-mail**  
From your e-mail inbox, open an email that contains information about an applicant or job.  
For example, you might have an e-mail from a hiring manager containing their interview notes on an applicant.  
Click **Forward** and enter or paste your Mail Matcher e-mail address into the **To** field. | ![Forward email](image) |
| **STEP 3: Add tag**  
A tag instructs Mail Matcher where to add the information contained in the email.  
Tags can be added in the subject line or body of the email.  
There are three types of tags:  
> **Applicant** – use the word **applicant** and the applicant’s name, e-mail address, or applicant number  
e.g. [applicant jeremyb@hotmail.com]  
> **Job** – use the word **job** and the job number  
e.g. [job 123456]  
> **Task** – just use the word **task**  
e.g. [task]  
In the example below, where we are sending a hiring manager’s interview notes to an applicant card, we have used the applicant’s e-mail address and added the tag in the body of the email. | ![Tag example](image) |
| **STEP 4: Click Send**  
Once you have tagged your email, click **Send**  
Mail Matcher will now add this information to the applicant card, job card or tasks panel, depending on the tag that you have used.  
In the example used in step 3, the body of the e-mail would be added to the applicant card as a note and any attachments will be added as documents. | ![Send email](image) |