



About Tasks

The **Tasks** function in Julep allows users to assign fundraising calls, correspondence assignments, or other related tasks to one another as well as to a candidate.

Creating and Editing Tasks within People Records

1. To create or edit a task, first open the **People** record the task is to be assigned to.

NOTE: For information on how to find and open a People record, please see [Julep: People Search](#) on the Helpdesk.

2. Within a People record, you will see a menu of **panels**. The **Tasks** panel will display the total number of outstanding tasks and tasks with upcoming due dates.

The screenshot shows a user profile for Mr. Joseph M. Banks, Sr. with various panels. The **Tasks** panel is highlighted, showing 2 outstanding tasks. One task is due on 04/30/20 (Call) with a 'Call' action.

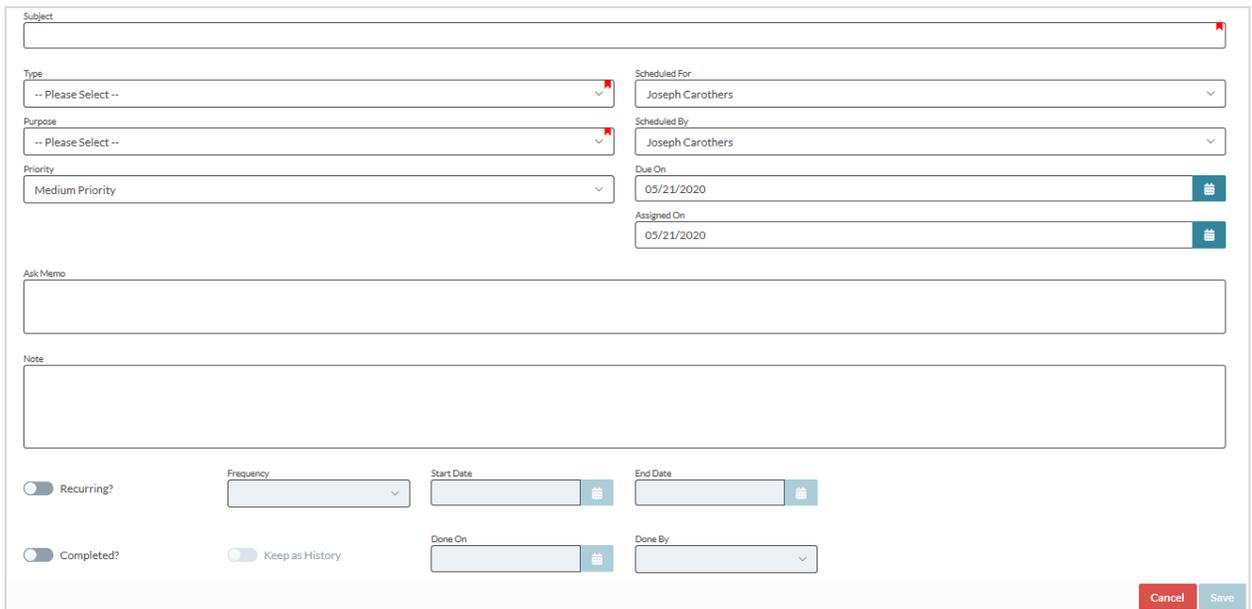
3. Click the **Tasks** panel to view a list of tasks for the record, and options to create or edit tasks.

Done	Due	For	By	Type	Purpose	Priority	Subject	Note	<input type="checkbox"/> Include Completed
	4/30/20	Junho Bae	Junho Bae	Call	Follow-up	Med	Call		
	4/17/20	Junho Bae	Junho Bae	Call	Initial Contact	Med	Call		

Items per page: 10 (dropdown), 1-2 of 2 items

- To see a full list of tasks, including completed tasks, click the checkbox marked **Include Completed**.
- To edit a task in the list, click the button. The Task window with that task's information will appear. After you have finished editing, click **Save** or **Cancel**.
- To delete a task in the list, click the button.

4. To create a new task, click the  button. In the new window, you can input information about the task.



The screenshot shows a form for adding a task. It has several sections: a 'Subject' text field at the top; a row with 'Type' and 'Scheduled For' dropdowns; a row with 'Purpose' and 'Scheduled By' dropdowns; a 'Priority' dropdown set to 'Medium Priority'; a 'Due On' date field with a calendar icon, set to '05/21/2020'; an 'Assigned On' date field with a calendar icon, also set to '05/21/2020'; an 'Ask Memo' text area; a 'Note' text area; a 'Recurring?' toggle (unchecked) with 'Frequency', 'Start Date', and 'End Date' fields; a 'Completed?' toggle (unchecked) with a 'Keep as History' toggle, 'Done On' date field, and 'Done By' dropdown; and 'Cancel' and 'Save' buttons at the bottom right.

5. Enter a **Subject** for the task and select the task type from the **Type** drop-down menu, a purpose for the task from the **Purpose** drop-down menu, and a priority level from low to high from the **Priority** drop-down menu.
6. Assign the task to yourself or another Julep user in the **Scheduled For** drop-down menu. The task will automatically assign you as the **Scheduled By** user, but you can select another user in the drop-down menu to update who assigned the task.
7. Set the due date of the task by entering a date into the **Due On** field or by clicking the calendar icon. The **Assigned On** field will automatically use today's date, but you can update that if needed.
8. You may input additional descriptive or background information in the **Notes** or **Ask Memo** section.
9. To make the task recurring, select the **Recurring** toggle and update the **Frequency**, **Start Date**, and **End Date**.
10. Click the **Save** button to save the task or the **Cancel** button to cancel the entry.
11. To mark the task as completed, open the task for editing and click the **Completed?** toggle. Julep will automatically fill the **Done On** with the current date and your name for the **Done By** field. You can update the **Done On** date and/or the **Done By** field if needed. Disable the **Keep as History** toggle if you do not wish to save a record of the task in the record's history after it has been completed.

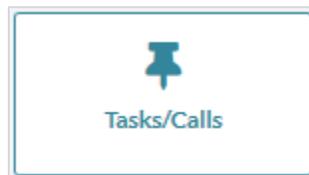
***Please note: You can also use the Mass Append function to assign tasks to multiple records at once.*

Using My Tasks

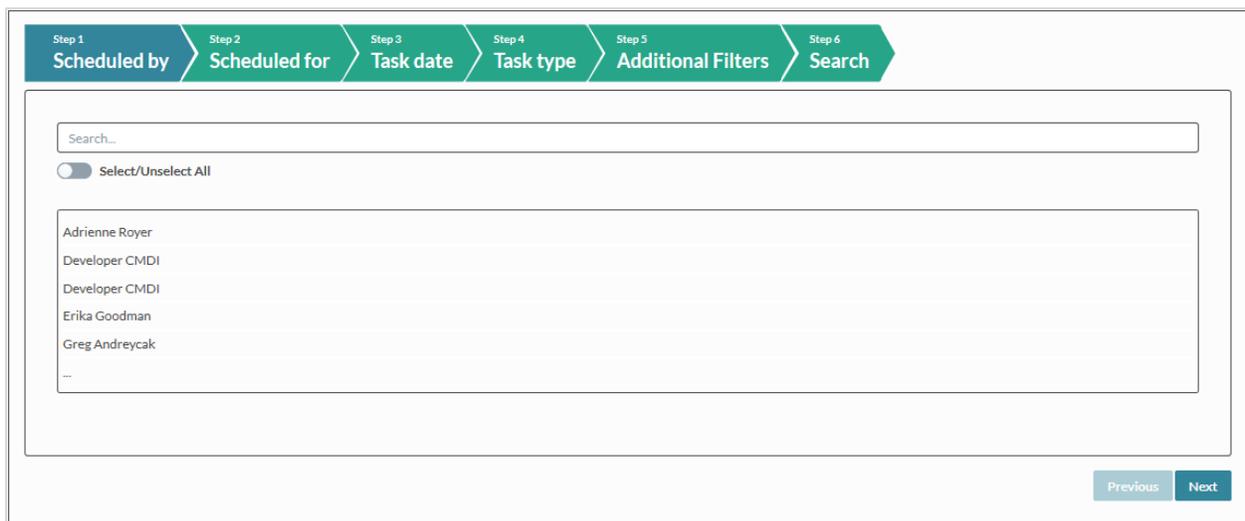
- Under **My Tasks** on the **Home** Dashboard, a **Subject** and **Due Date** will be displayed for all tasks not yet completed that have upcoming due dates.
- Click the  button in the top right corner to show all tasks assigned to you.
- Click on the **Subject** of the task in the list to open the Task window. From there, you can see all the task information, make edits, enter notes, and add information on the completion of the task. See the directions above for instructions on editing a task.
- Marking a task as completed in the Task window will clear it from your **My Tasks** list.

Pulling Lists of Tasks/Creating Call Sheets

On the **People Dashboard**, click on **Tasks/Calls** action button. Here you can generate lists of tasks based on who created them, who they are assigned to, due date, types of tasks, and completion status.



1. Under **Step 1 Scheduled by**, a list of users will display. Select users who assigned tasks by clicking the checkboxes next to their names or select all users by clicking **Check/Uncheck All**. You can search for users with the **Search** bar.

A screenshot of a web application interface showing a multi-step filter process. At the top, a horizontal navigation bar contains six steps: "Step 1 Scheduled by", "Step 2 Scheduled for", "Step 3 Task date", "Step 4 Task type", "Step 5 Additional Filters", and "Step 6 Search". The "Step 1 Scheduled by" step is currently active and highlighted in a darker green. Below the navigation bar, there is a search bar with the placeholder text "Search...". Underneath the search bar is a toggle switch labeled "Select/Unselect All". The main content area displays a list of user names: "Adrienne Royer", "Developer CMDI", "Developer CMDI", "Erika Goodman", "Greg Andreyca", and "...". At the bottom right of the interface, there are two buttons: "Previous" and "Next".

- Under **Step 2 Scheduled for**, another list of users will display. To select tasks assigned to certain users, click the checkboxes next to their names, or select all users by clicking **Check/Uncheck All**.
- In **Step 3 Task Date**, enable the first toggle to **Select tasks by Due Date** then use the **From** and **To** fields to select the time frame. Use the second toggle to search or **Include all Due Dates**.

Step 1 Scheduled by | Step 2 Scheduled for | Step 3 Task date | Step 4 Task type | Step 5 Additional Filters | Step 6 Search

Selects tasks by Due Date

Include all Due Dates

From:

To:

Previous Next

- In **Step 4 Task Type**, select to **Include all Open Tasks**, **Include all Completed Tasks**, or both.
- In **Step 5 Additional Filters**, use flags, keywords, or a state to filter the list further if needed.
- In **Step 6 Search**, run the search based on the criteria entered in **Steps 1-5** by clicking **Search Now**.

Tasks & Call Sheets

Step 1 Scheduled by | Step 2 Scheduled for | Step 3 Task date | Step 4 Task type | Step 5 Additional Filters | Step 6 Search

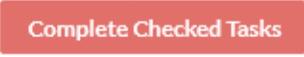
Select user to reassign task:

Complete Checked Tasks | Print Call Sheets | Print Summary | Export

	Date	For	Type	Subject	Id	Name	City	State
<input type="checkbox"/>	3/26/20	Test Account	Meeting	aaa	1473171	University of Marilyn	Norwood	PA
<input type="checkbox"/>		Sofia Amaya	Meeting	test	2118339	Albert E. Smith	Johnson City	NY
<input type="checkbox"/>	8/6/19	Kayla Toth	Meeting	Test	2426166	Andrea Barona Band of Mission Indians	Cresskill	NJ
<input type="checkbox"/>	4/30/20	Sofia Amaya	To Do	Invite to next 5K	2727339	Frank Amaya	Groveland	FL
<input type="checkbox"/>	6/1/15	Erika Goodman	To Do	Reconnect with Company to find out if making grants	2587285	John L. Exelixis, Inc.	Brookline	MA

Previous Next

7. The Results will appear on the screen with additional options for review:

- Click the  button to mark a task as completed.
- Click the  button to open the task's details and view/edit the task.
- Click the  button to reassign the task to another user.
- Click the  button to open and edit the **People** record associated to the task.
- When reassigning a task to another user, you must use the **Select user to reassign task** drop-down menu before pressing the  button.
- Click multiple check boxes on the left to select tasks, then  to mark the tasks as completed in mass.
- Click **Export** to export and view an excel file of the task summary or **Print Summary** to view a printable version of the list of tasks.
- Click **Print Call Sheets** to create call sheets for each of the tasks. Choose one of the four call sheet style options to open a printable document.
 - **Full Profile** will generate call sheets including comprehensive summary information about each record, including contact information, giving history, previous task assignments, event participation, flags, keywords, and notes.
 - **Brief Profile** will generate call sheets emphasizing the task note and including summary information about the record, such as contact information and giving history.
 - **Pocket Profile** will generate short call sheets with basic information on each task and the associated contact in a convenient pocket sized page.
 - **Org Profile** will generate a call sheet geared for making PAC calls. Contact information from the contacts tab will be included.