# FAQ – How do I access Tasks on my Mobile Device?

Julep is mobile optimized, allowing you to access your favorite features on the go. Mobile optimization includes small changes to the Tasks features in **My Tasks** and **Tasks/Calls** feature to make accessing and utilizing this tool easier than ever from a mobile device.

To start, log onto Julep on your mobile browser, using your secure login credentials. You can also save the browser to your phone as a Mobile Shortcut, read the How to Setup Julep Mobile Shortcut guide.

My Tasks

To utilize **My Tasks**, go to the **My Tasks** list on your **Home** dashboard. Similar to desktop view, you have the option to either select one of the visible tasks or click the ••• icon to the full list of tasks assigned to you.
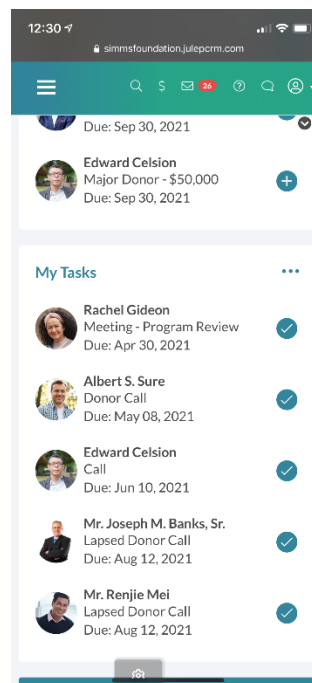

Viewing Task List

If you click the **Show More** icon, there are several options to manage the tasks. To see the individual task options, tap on the task entry. You will see the following two icons appear:

- Will open the task to Edit, see **Editing a Task** section more information on this.

- Will open a new message asking if you want to mark the task as completed, click Yes to complete and No to return.
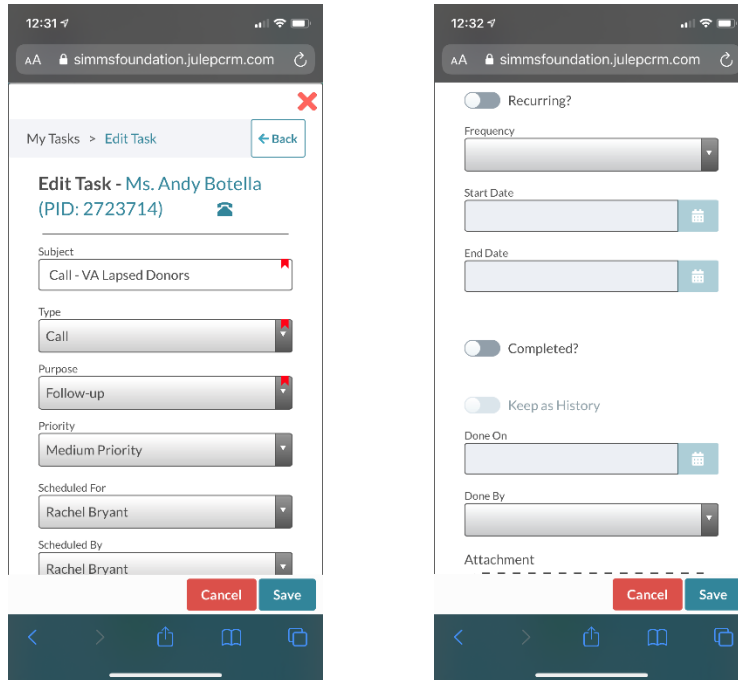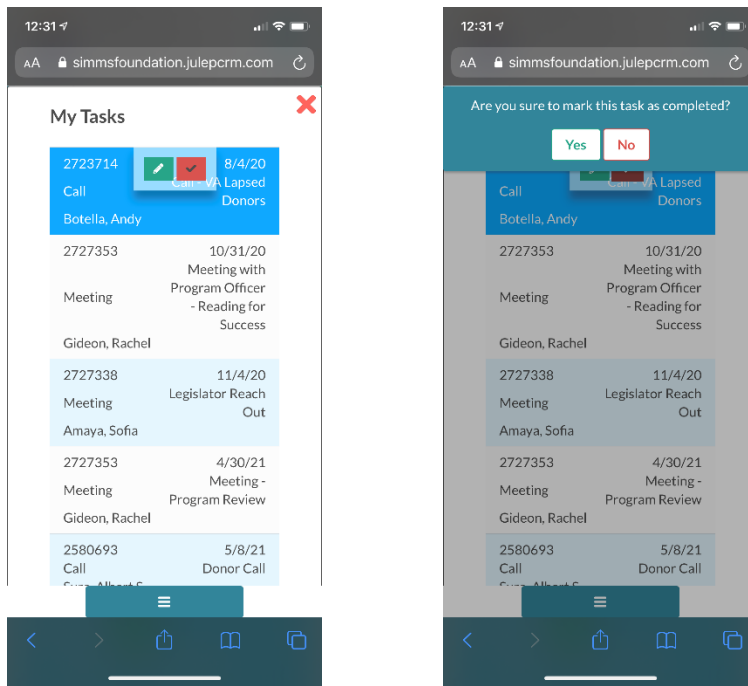

You can also click the icon at the bottom of the screen. This will give you export options, including Call Sheets. The Call Sheet options will open a new tab in your browser with the respective sheet(s) and the Export option will ask if you want to view or download the Excel file of your tasks.
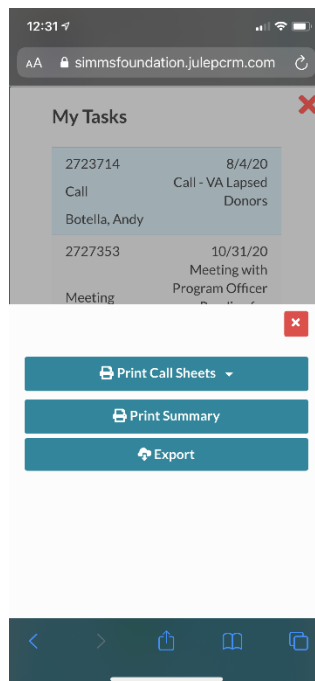
Editing a Task

To open a task to edit, either tap on the task from the **My Tasks** list or use the icon from the full list. When you do the task edit window will appear.


From the task, you can scroll and change the fields, including the completion fields. When done, click to update and/or complete the task. In addition to adding information, click the icon to quickly see a list of contact information available for the People Record.
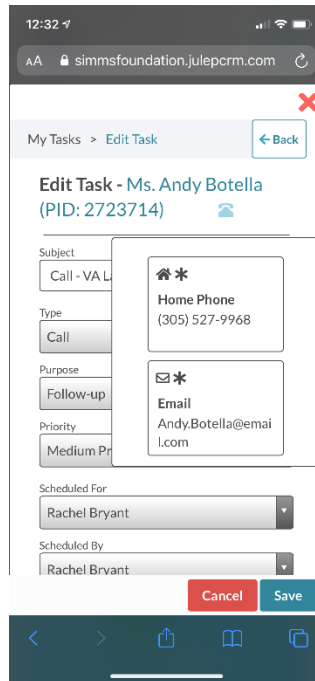
Tasks/Calls Feature

To utilize the **Task/Calls** feature on your mobile device, navigate to the **People Dashboard** and scroll down to **Tasks/Calls** action button. When you open this feature, it functions the same as the feature does on your computer browser. For more information check out the About Tasks

guide. To access all of the available steps, tap on the [Step 1 - Scheduled by] icon. This will open a

drop-down list of the available steps. You can also use the [Next] icon in the bottom right corner to advance to the next step. The final step, 6, creates your search results and presents the list of tasks.
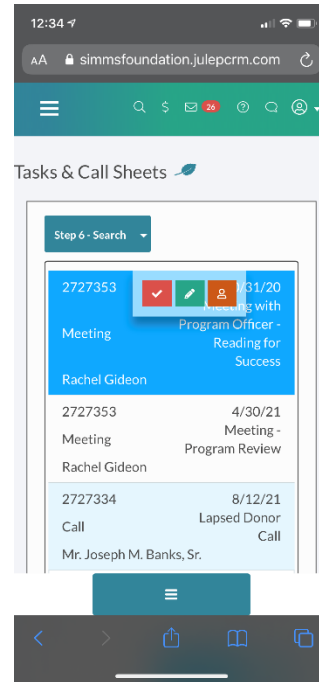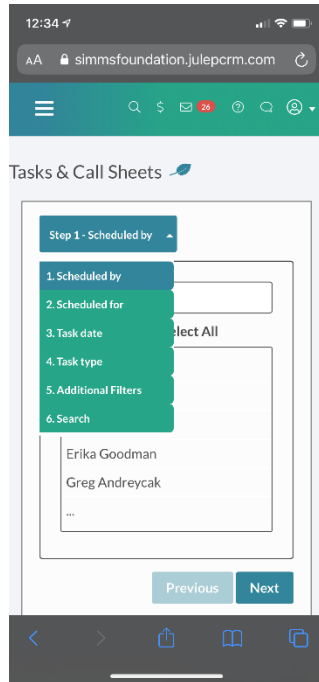
Tap on any of the tasks in the results page to get a series of options:

- Will open a new message asking if you want to mark the task as completed, click Yes to complete and No to return.

- Will open the task to Edit, see **Editing a Task** section for more information.

- Will open the **People Profile** of the Record.

You can also use the icon at the bottom of the screen. This will give you export options, including Call Sheets. The Call Sheet options will open a new tab in your browser with the respective sheet(s) and the Export option will ask if you want to view or download the Excel file of your tasks.