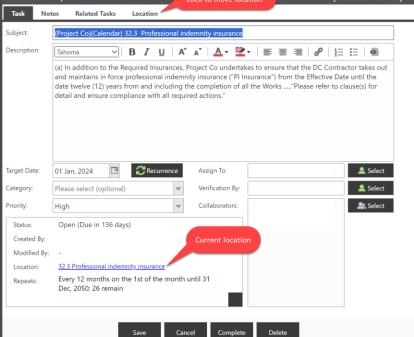


Relocating Tasks

Contractual obligations may be managed through Affinitext using the Task Manager function whereby Tasks are 'pinned' at the clause which sets out the obligation. You may wish to adjust where a Task is pinned, for instance if you wish to pin it at a particular sub-clause. You may also need to move Tasks in the event that a book containing Tasks has been restated. This guide shows you how to move Tasks.

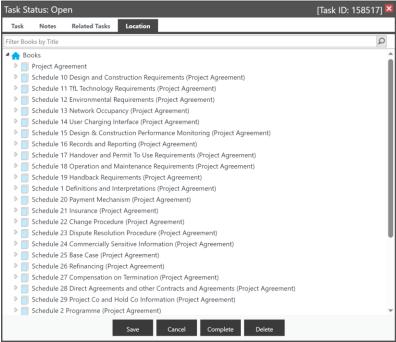
Relocating Tasks:

At the Task, open the Task editor and click on the Location tab. Task Status: Open [Task ID: 158517] X Task Notes Related Tasks Location Subject:

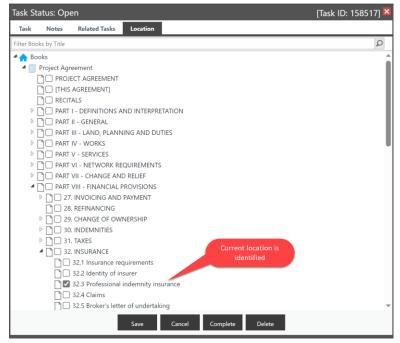




The location tab will show you all the books where the Task may be moved to:

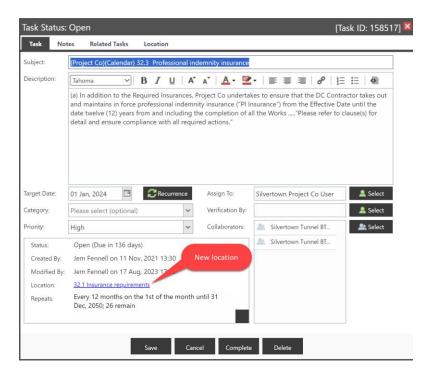


The current location is identified as so:



Tick the box next to the clause or subclause that the Task is to be move to and then press 'save'. Upon saving the Task will be moved to its new location and the Task editor will close.





Special Case: Restated Agreements

If you have an agreement in the library which contains Tasks, and that agreement is subsequently amended by way of a restatement, then the Tasks from the previous version of the agreement are unpinned from their previous clause locations and migrated to the top of the restated version. This allows you to review each Task to see if the obligation is still relevant, and/or if it needs amending to align with the restated obligation and then relocate the Task at the restated clause. Tasks made obsolete by the restatement can simply be deleted.

For more information on how to relocate Tasks, please contact support@affinitext.com.

For a printable version of this article, please download the document attached at the foot of this article.



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