

AffiniTask and Defined Dates

1 Introduction

Some contractual obligations are tied to dates you won't know at contract signature—like "Service Commencement Date", "Handover Date", or "Early Termination Date."

We call these **Defined Dates**.

AffiniTask captures the obligation immediately, but waits to create the task until you provide the actual date. This article explains how it works.

2 How It Works: The Process

2.1 Initial setup:

- (i) **We extract obligations** from your contracts
- (ii) **We create your Defined Dates User Interface** – where you'll enter dates as they become known
- (iii) **You validate** – review captured obligations and provide any known dates
- (iv) **We upload initial tasks** – for all obligations with known dates

2.2 After go-live:

- (i) New tasks are created automatically when you add Defined Dates
- (ii) Tasks update automatically if Defined Dates, Expiry Dates, or recurrence dates change

3 Obligation Extraction

We identify every date-driven obligation in your contracts:

- (i) **Known dates** → uploaded as tasks immediately
- (ii) **Defined Dates** → captured as obligations, but tasks aren't created until you provide the date

Once you provide the date, we create the task automatically with the correct deadline.

Examples

Example 1:

The contract requires an action "no later than 5 days before Handover Date."

You identify Handover Date as 31 May 2027.

*→ AffiniTask creates a task with target date **26 May 2027**.*

Example 2:

The contract requires an action "on the 5th anniversary of Actual Completion Date, and every 5 years thereafter."

You identify Actual Completion Date as 10 September 2028.

*→ AffiniTask creates a recurring task with first target date **10 September 2033**, then every 5 years.*

4 Defined Date User Interface (DDUI)

We create your DDUI during obligation extraction and grant access on a permissions basis.

Recommendation: Give 2–3 users access to ensure coverage.

How to access the DDUI:

- (i) From the homepage, click the **Tasks** icon (top-right menu bar)
- (ii) Select **Obligation Finder**
- (iii) Choose your project
- (iv) Click the **Go to Defined Dates** button in the Manage Defined Dates box

You'll see a list of Defined Dates linked to captured obligations. Enter the actual dates as they become known.

We know you won't have all dates at launch—that's expected. Return to the DDUI as dates become clear. We'll send periodic email reminders if any Defined Dates remain unidentified.

5 Validation and Defined Dates Period

Before we upload tasks, you'll have a window to:

- (i) Review captured obligations
- (ii) Provide any Defined Dates you already know

Validation is a one-time review before tasks go live. Access is permission-based and time-limited.

Recommendation: Grant access to 2–3 users to ensure thorough review.

How to access validation:

- (i) From the homepage, click the **Tasks** icon (top-right menu bar)
- (ii) Select **Obligation Finder**
- (iii) Choose your project
- (iv) Click **Open List** in the Obligations List box

6 Initial Task Upload

After validation, we upload tasks for:

- (i) All obligations with **known dates**
- (ii) All obligations with **Defined Dates** you've provided

Obligations tied to Defined Dates you haven't provided yet remain captured—tasks will be created automatically when you enter the date.

7 Adding Tasks Later

When a Defined Date becomes known, update the DDUI. We'll create the related task automatically and notify you.

8 Changing Defined Dates

If a Defined Date changes, update it in the DDUI. We'll adjust the affected tasks automatically and notify you.

9 Recurrence End Date

Recurring tasks need an end date—when should we stop generating them?

- (i) **Fixed-term contracts:** We use the contract Expiry Date (unless you tell us otherwise)

- (ii) **Open-ended contracts:** We default to 20 years from task creation (you can change this anytime in the DDUI)

10 Changing Recurrence End Dates

Change the Expiry Date or Recurrence End Date in the DDUI. All affected recurring tasks will update automatically—extended or shortened to match the new end date.

Examples

Example 1:

An annual task set to end 31 August 2037 will have its final recurrence in 2037.

If you change the end date to 31 August 2035, the final recurrence moves to 2035.

Note for Expiry Date tasks:

If you change the Expiry Date, any tasks tied to it (e.g., "3 months before Expiry Date") will update automatically.

Example 2:

Task: "Submit report 3 months before Expiry Date"

Original Expiry Date: 5 May 2040 → Target date: 5 February 2040

New Expiry Date: 5 May 2045 → Target date: 5 February 2045

11 Need Help?

Contact our support team: **support@affinitextgroup.com**

For a printable version of this guide, download the PDF attached at the end of this article.

Document Version Control

Article Number:	AFHC01033
Authors:	Jem Fennell
Creation Date:	1 March 2026
Document Owner:	Jem Fennell
Approved by:	Affinitext Board of Directors
Date of last review:	27 March 2026
Reviewed by:	Jem Fennell
Date of next review:	1 March 2027