

AffiniTask: How It Works

1 WHAT IS AFFINITASK?

AffiniTask turns contractual obligations into managed, tracked actions — expert-reviewed, clause-level, and fully traceable to the source. Every obligation becomes a task. Every task links back to where it lives in the contract. No more manual trawls. No more missed deadlines.

The result? Complete visibility, effortless compliance, and time back in your day.

2 WHAT YOU'LL SEE

- **Task icons at clause level:** Every managed obligation is marked with a Task icon in the contract. Click the Task tab in your Table of Contents to see all tasks for that document.
- **Task Manager Report:** Your personal view of every task you're responsible for—active, upcoming, or completed. Full audit trail included.
- **Dashboard intelligence:** At-a-glance compliance status, upcoming tasks, and efficiency metrics. Notice Tasks are also visible here.
- **Smart email summaries:** Weekly reminders for any task due within 30 days. Just-in-time. No noise.

3 How We Decide What Becomes a Task

AffiniTask is built on a simple principle: **surface what matters, eliminate the noise.**

We focus on obligations and entitlements that are:

- **Date-sensitive** – actions tied to a specific date or recurring schedule (**Calendar Tasks**)
- **Event-triggered** – notices required when something happens (**Notice Tasks**)

We don't task boilerplate or generic clauses. You see only what's significant—obligations or entitlements that would otherwise be missed.

Our role? Make you aware of what needs action. Your role? Decide how to manage it.

4 **Calendar Tasks**

We create a Calendar Task when an obligation or entitlement is tied to time:

- **Specific dates** – must be actioned on or by a known date
- **Defined dates** – triggered by a contractual milestone (e.g., "Handover Date")
- **Recurring obligations** – actions required monthly, annually, or on another schedule
- **Time-limited entitlements** – optional actions that must be taken within a set timeframe
- **Event-conditional obligations** – triggered by an event, but must be completed by a date once triggered

5 **Notice Tasks**

We create a Notice Task when a contract requires formal notification:

- **Mandatory notices** – a party must notify, provide notice, or send a defined type of notice
- **Entitlement notices** – formal notification unlocks an entitlement (triggered by event, date, or at a party's discretion)
- **Use-it-or-lose-it notices** – time-limited entitlements that expire without notification

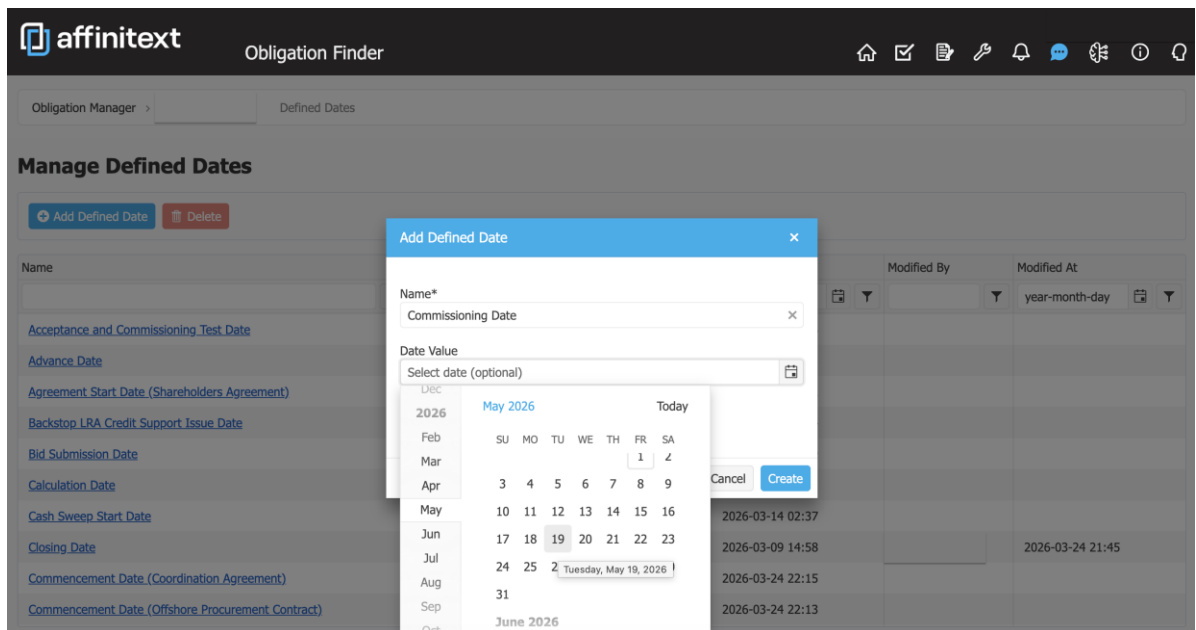
Most Notice Tasks are event-triggered, but some are date-triggered.

6 **Defined Dates**

Some obligations are tied to dates you can't identify at contract signature—like "Service Commencement Date" or "Handover Date."

We still capture the obligation, but we won't create the task until you provide the actual date.

How it works:



Use the **Defined Date User Interface** on the Affinix platform to enter dates as they become known. Once entered, the task is created automatically with the correct deadline.

7 What's in a Task?

Every task includes:

- **Task title** – shows the responsible party and task type

Example: "(Project Co)(Calendar) 14 Insurance" means Project Co must complete a Calendar Task related to Insurance

- **AI-generated action instruction** – clear guidance on what needs to be done, based on the contract clause
- **Target date** – when the task is due (plus recurrence dates if it's a recurring obligation)
- **People:**
 - **Assignee** – the person responsible for completing the task
 - **Verifier** – optional reviewer who confirms completion
 - **Collaborators** – anyone who can view the task

8 Delegated Tasks

Sometimes one party is contractually responsible, but delegates the work to another party (e.g., Project Co delegates to an FM Provider).

When this happens, the task title shows both:

Example: "(Project Co (by FM Provider))(Calendar) 14 Insurance"

This means the obligation sits with Project Co, but the FM Provider does the work.

9 Single Licensee Projects

By default, we review agreements relevant to the licensee—but you can request a wider or narrower scope.

We extract obligations for all parties, then apply the AffiniTask philosophy to decide what gets tasked.

10 Collaborative AffiniTask

When multiple parties license Affinix on a project, collaborative tasking brings everyone onto the same page—literally.

Why it works:

- **One set of tasks** – no duplication, no clutter
- **Shared understanding** – consensus on what's being managed
- **Right assignees** – tasks go to the party who owns the obligation
- **Full visibility** – all parties see relevant tasks. No surprises.
- **Stronger partnerships** – transparency builds trust
- Collaborative tasking reflects our belief: **successful projects are built on transparency and trust.**

We still review agreements relevant to the party who initiates AffiniTask. But in collaborative mode, tasks are assigned directly to whoever owns the obligation.

Example: If Party 1 owes an obligation, the task goes to a Party 1 user. If Party 2 owns it, it goes to a Party 2 user.

11 Oversight Options

You can track obligations owed to you in two ways:

- **Task Manager Report and Dashboard** – see what's done and what's pending
- **Email notifications** – get notified when specific tasks are completed (add your organization as "Verifier" on the task)

Pro tip: Combine both. Use email alerts for high-risk or time-sensitive tasks, and the Dashboard for everything else.

The party who initiates AffiniTask retains ultimate ownership of all tasks.

12 What to Expect: AffiniTask Timeline

Phase	Duration	What Happens
Obligation extraction	2–4 weeks	We identify all significant obligations from your contracts
Provide Defined Dates	Concurrent	You provide known dates (e.g., "Handover Date")
Validation	~2 weeks	You review captured obligations before upload
Task upload	2 working days	Tasks go live on the platform
Refine	~2 weeks	Fine-tune before first tasks come due
Live management	Ongoing	Obligations tracked, deadlines managed

Contact our support team: support@affinixtextgroup.com

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

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