

DOCUMENT INTELLIGENCE

# Document intelligence with Lex, the AI inside Twala

Everything Lex can do: answers that name their sources, Philippine legal research, AI drafting, document explanation, data extraction, smart tags, and search, with privacy and human control built in.

---

PUBLISHED  
October 2026

PREPARED FOR  
Investors and strategic partners

ISSUED BY  
Twala (Ohelio Inc.)  
Supreme Court-accredited ENF

CONTENTS

# Document intelligence with Lex

|    |                                                    |    |
|----|----------------------------------------------------|----|
| 01 | Executive summary                                  | 3  |
| 02 | Design principles                                  | 3  |
| 03 | How Lex answers                                    | 4  |
| 04 | Capabilities                                       | 5  |
| 05 | A legal research workflow                          | 8  |
| 06 | Privacy, security, and governance                  | 9  |
| 07 | AI allowances by plan                              | 10 |
| 08 | How teams use Lex                                  | 10 |
| 09 | Why document intelligence strengthens the business | 11 |

ABOUT THIS PAPER

This paper describes Lex, the AI inside Twala, in full: the principles it is built on, how it finds and grounds its answers, each of its capabilities, a legal research workflow, the privacy and governance controls around it, AI allowances by plan, and how teams across functions use it. It closes with why document intelligence strengthens Twala’s business.

THE TWALA WHITEPAPER SERIES

|                           |                                               |                       |
|---------------------------|-----------------------------------------------|-----------------------|
| No. 01<br>Company profile | No. 02<br>Use cases: context-aware workspaces | No. 03<br>eNotary     |
| No. 04<br>eSignature      | No. 05<br>Document intelligence with Lex      | No. 06<br>HashOrigin™ |

01

# Executive summary

Lex is the AI inside Twala. It reads the documents a customer chooses, answers questions about them and names the files it used, drafts and revises documents with edits a person approves, explains contracts to signers, extracts structured data, suggests tags, and searches Philippine law when a customer’s own files leave a gap.

Lex is also Twala’s mascot: a small purple page with a folded corner, two eyes, and two legs that never speaks and answers in 8-bit chirps and pixel moves. Twala is the product, and Lex is the AI persona inside it, available in every chat, every workspace, and the document editor, on every plan.

Lex is built for professional work where accuracy and confidentiality matter more than novelty. Every answer names its sources, every drafted change waits for a person to apply it, AI search is switched on file by file, and no customer data is ever used to train AI models.

|                                                                                           |                                                           |                                                            |                                                                                        |
|-------------------------------------------------------------------------------------------|-----------------------------------------------------------|------------------------------------------------------------|----------------------------------------------------------------------------------------|
| <div>200,000+</div> <div>Documents in the Philippine Laws and Jurisprudence library</div> | <div>30</div> <div>Typed fields per data extraction</div> | <div>2</div> <div>Reasoning modes: Fast and Thinking</div> | <div>5 of 5</div> <div>Plans that include Lex, the free Personal plan among them</div> |
|-------------------------------------------------------------------------------------------|-----------------------------------------------------------|------------------------------------------------------------|----------------------------------------------------------------------------------------|

02

# Design principles

|                                                                                                                                                                                                                            |                                                                                                                                                                                       |                                                                                                                                                                                                                            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div> <b>Grounded in your documents</b> <p>Lex answers from the files, folders, boards, and workspaces you point it at, and every answer lists the files it drew on.</p> </div>                                            | <div> <b>People decide</b> <p>Drafting arrives as proposals that show exactly what will change. Nothing enters a document until someone clicks Apply.</p> </div>                      | <div> <b>Private by design</b> <p>Lex runs privately within Twala’s own secured environment. AI search is opt-in for each file, answers respect each person’s access, and customer data never trains AI models.</p> </div> |
| <div> <b>Built for Philippine law</b> <p>Lex searches a curated library of Republic Acts, case law, Supreme Court decisions, legal opinions, and regulatory materials that Twala prepares and keeps up to date.</p> </div> | <div> <b>Transparent</b> <p>Libraries are named while Lex searches them, Thinking mode shows its reasoning above the answer, and every document keeps its version history.</p> </div> | <div> <b>Everywhere in the workflow</b> <p>Lex works in chat, beside the document viewer, and inside the editor, on the same files that are signed, notarized, and stored on Twala.</p> </div>                             |

## 03

## How Lex answers

## FOUR STATES OF EVERY ANSWER

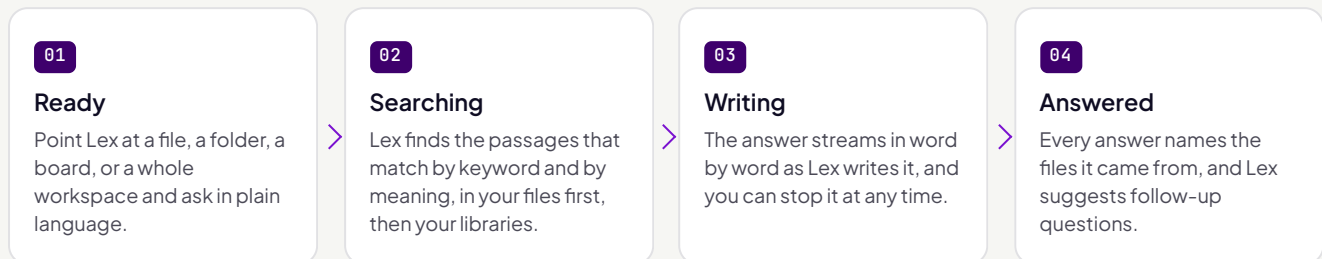


**FIGURE 1** How Lex answers: it reads, searches, writes, and names the files its answer came from.

When a file is uploaded with AI search on, Twala divides it into passages and indexes them so they can be found by exact keyword and by meaning. When a question comes in, Lex retrieves the passages that best match, and writes its answer from them. This approach, Retrieval-Augmented Generation (RAG), grounds the answer in the customer's own documents and curated libraries rather than in general knowledge, which keeps answers specific and checkable.

## A FIXED ORDER OF SOURCES

| ORDER | SOURCE              | WHEN LEX USES IT                                                                                    |
|-------|---------------------|-----------------------------------------------------------------------------------------------------|
| 1     | The files in scope  | Always, for files with AI search turned on                                                          |
| 2     | Knowledge libraries | When the files leave a gap; the library is shown while Lex reads it and cited by name in the answer |
| 3     | The web             | Only when the user turns on web search for that message                                             |

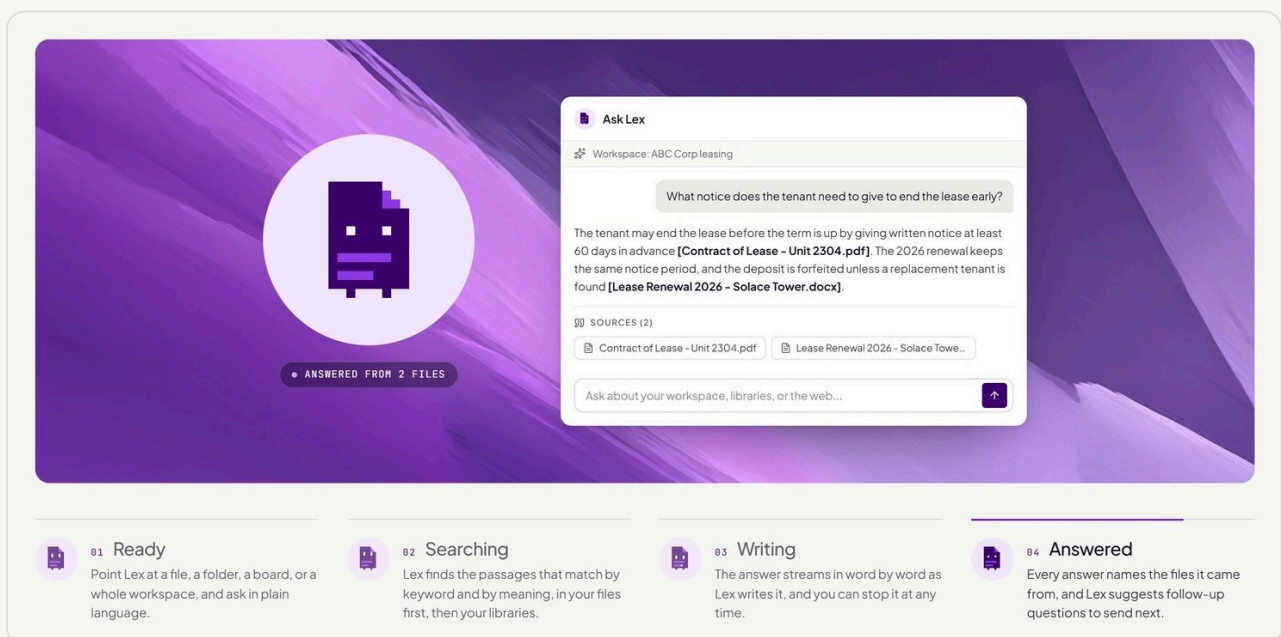


**FIGURE 2** Lex answers a question about a lease from two workspace files and names both.

■ 04

# Capabilities

## Ask Lex: conversational AI over your documents

- **Answers from your files.** Lex answers from the files, folders, boards, and workspaces you point it at, and lists the files it drew on.
- **Scoped chats.** Chat about one file, a folder, a board, or a whole workspace, or pick your sources on the Ask Lex page.
- **Fast or Thinking.** Fast for everyday answers; Thinking for slower, deeper reasoning that can be expanded above the answer.
- **Streaming answers.** Answers appear word by word and can be stopped at any time.
- **Suggested follow-ups.** After each answer, Lex suggests follow-up questions to send with one click.
- **Every chat kept.** Chats stay in one list on the Ask Lex page, so research can be picked up later.

## Knowledge libraries: Philippine Laws and Jurisprudence

Lex can draw on knowledge libraries that Twala prepares and keeps up to date, starting with Philippine Laws and Jurisprudence: Republic Acts, case law, Supreme Court decisions, legal opinions, and regulatory materials, more than 200,000 documents including statutes, memorandums, and circulars. Each account switches libraries on or off. A library that is on is available in every chat, in every workspace, and in the editor's assistant, and libraries come with every plan at no extra charge.

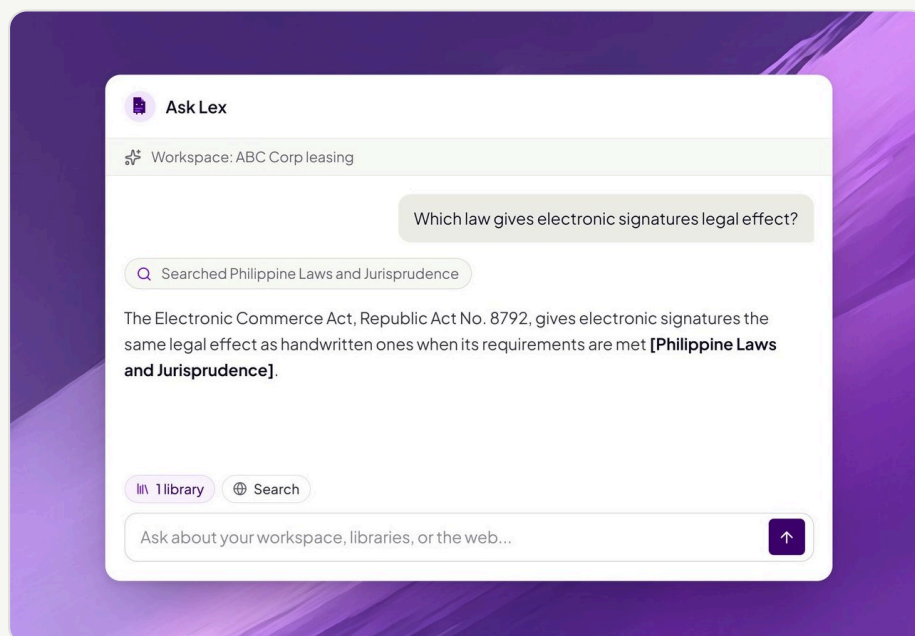


FIGURE 3 Ask Lex searches Philippine Laws and Jurisprudence and cites the library by name.

## AI drafting and document generation

- **Template gallery.** Templates for contracts, legal, compliance, corporate, finance, HR, marketing, and reports, or a blank page.

- **Ask Lex to draft.** Describe what you need; Lex drafts from the document and the workspace’s files.
- **Apply or dismiss.** Each proposal shows exactly what will change. Apply puts it in; Dismiss drops it.
- **Rich text editor and comment threads.** Format the document, comment on selected text, reply in threads, and resolve comments when settled.
- **PDF and Word export.** Download as PDF or DOCX, or save a PDF copy to the workspace to send for signature.

Explain before signing

The person receiving a contract often has the least time and the least help: a tenant reading a lease on a phone, a new hire with an employment contract, a supplier between deliveries. Before they sign, recipients can have Twala explain the document with **flags to review**, a **summary**, and the **key points**. A signer who understands the document is less likely to dispute it later.

Example: a lease explained before signing

- **Summary.** A 24–month lease of Unit 2304 from ABC Corp to John Doe; you are asked to sign as the lessee.
- **Flags to review.** Section 7 releases the lessor from liability for any loss to your property, whatever the cause. Section 9 sets no deadline for returning the security deposit.
- **Key points.** Rent of ₱45,000.00 a month, paid in advance; a deposit of two months’ rent due on signing; 60 days’ written notice to end the lease early.

Data extraction

Name the fields you want, or pick a saved template, and Twala reads the file and returns each value with how confident the reading is. Extraction runs in three steps, Fields, Files, and Results, and every extraction stays with its file.

| FEATURE                    | DETAIL                                                                                             |
|----------------------------|----------------------------------------------------------------------------------------------------|
| Fields you define          | Up to 30 fields, each typed as text, number, date, currency, yes or no, or a list                  |
| Saved templates            | Save a set of fields as a template and reuse it on the next file                                   |
| Hints and rules            | Tell the AI where to find a value, and add rules for the whole file, such as how dates are written |
| Confidence for every value | High, Medium, or Low, with the exact percentage on hover                                           |
| Inline corrections         | Fix any value in the results before downloading                                                    |
| CSV and JSON               | Download for a spreadsheet or for another system                                                   |

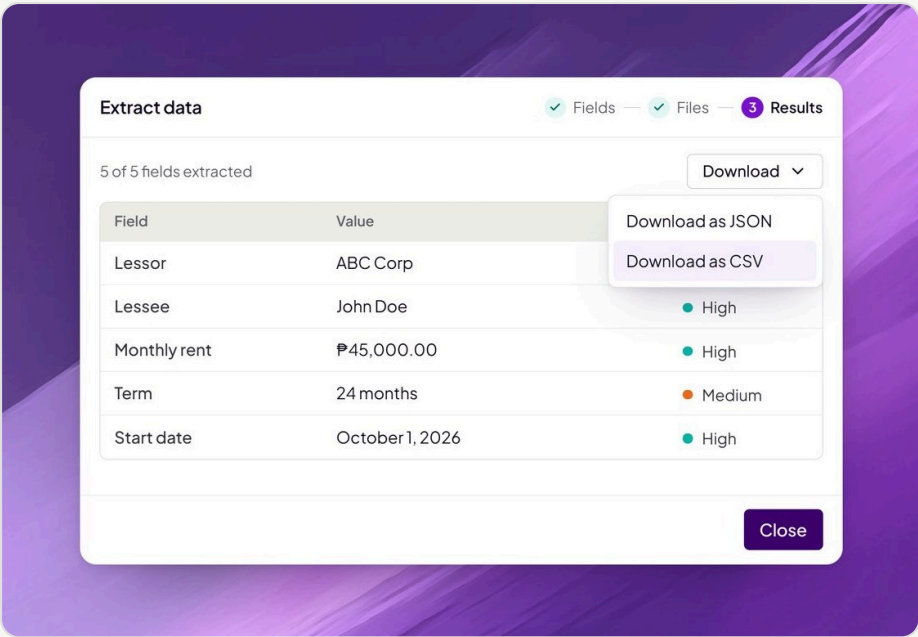


FIGURE 4 Five fields extracted from a lease, each with its confidence, ready to download as CSV or JSON.

Smart tags

Workspaces have their own color-coded tags for files and board tasks. Once Lex has read a file, Smart tags suggests tags from what the file says. One click adds a suggested tag, and a suggestion for a tag that does not exist yet creates it.

Search, by name and by meaning

One search, opened from anywhere with a keyboard shortcut, finds workspaces, boards, tasks, folders, files, tags, envelopes, notarizations, templates, and contacts by name, grouped by type and narrowed with filters. To find a passage by what it says, users ask Lex, which matches the question against indexed files by keyword and by meaning.

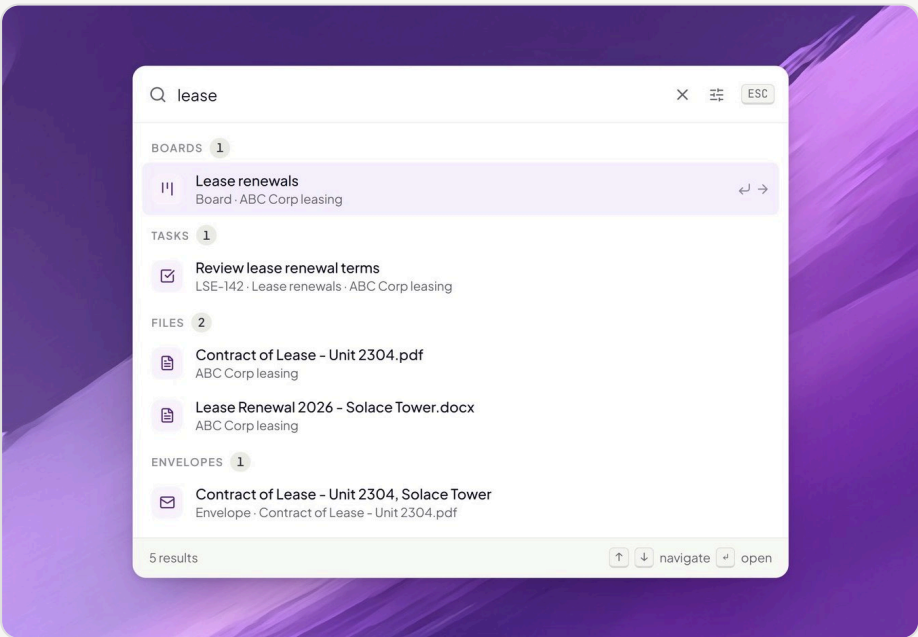


FIGURE 5 One search across boards, tasks, files, and envelopes.

## Review alongside Lex

PDF, Word, Excel, CSV, text, and Markdown files open in the browser. PDFs can be highlighted, struck through, underlined, annotated, drawn on, and date-stamped, with each saved change kept as a version, and versions compared side by side. Ask Lex opens beside the document to answer questions about the file being viewed.

---

■ 05

# A legal research workflow

A two-lawyer office receives a demand letter at five in the evening with a reply due the next morning. This is the kind of evening Lex is built for.

---

### 01 Keep the matter in its own workspace

Put the matter's documents in one workspace and turn on AI search for the files Lex should read. Each client workspace is private and kept apart from the others.

---

### 02 Scope the chat

Open Ask Lex on that workspace, or on one folder or file in it, with the Philippine Laws and Jurisprudence library on.

---

### 03 Ask as you would ask a senior associate

For example: what does the client's supply contract say about delays caused by typhoons, and how have Philippine courts treated similar force majeure clauses?

---

### 04 Choose the mode

Fast for quick lookups; Thinking for deeper reasoning with its steps shown.

---

### 05 Follow the thread

Send the suggested follow-ups. The chat is saved for when the partner asks next week.

---

### 06 Go to the sources

Open the cited files and read the full text of every decision or provision before relying on it.

---

### 07 Draft in the same place

Start the reply in the editor and have Lex draft from the workspace files, with every edit applied by the lawyer, then export to Word or PDF.

---

## ■ 06

# Privacy, security, and governance

| CONTROL                             | DETAIL                                                                                                                                                          |
|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Private processing</b>           | Lex runs privately within Twala's own secured environment. Files and their search indexes are kept together, and every search is filtered by workspace.         |
| <b>No training on customer data</b> | No user data is ever used to train AI models.                                                                                                                   |
| <b>Opt-in indexing</b>              | AI search is enabled file by file. A file uploaded with it off is stored like any other, and Lex cannot answer from it. A marker on each file shows its status. |
| <b>Permission-aware answers</b>     | Lex answers only from files the person asking is allowed to open.                                                                                               |
| <b>Administrative control</b>       | Team owners and admins switch AI features on or off for each member.                                                                                            |
| <b>Web search on request</b>        | Lex goes to the web only when the user turns web search on for a message.                                                                                       |
| <b>Data protection</b>              | Personal data is handled under the Data Privacy Act of 2012, with a formal Privacy Manual and a designated Data Protection Officer.                             |

## Five habits of responsible AI in professional work

- 01 Know where the files go.** Before any AI reads a client's file, a professional should be able to say where it goes, who else can reach it, and whether it trains anything. On Twala, the answers are short.
- 02 Demand sources.** An answer without a source is a rumor. Lex names every file and library it used.
- 03 Keep a human hand on every change.** The draft can come from a machine; the decision to adopt each line stays with a person.
- 04 Keep matters apart.** Workspaces are private until shared, and Lex follows the same rule.
- 05 Use AI where it is strong.** First drafts, summaries, finding passages, and extracting data; judgment, advice, and the notary's assessment of a signer remain with the professional.

07

AI allowances by plan

| PLAN            | AI TOKENS                             | DATA EXTRACTIONS           | KNOWLEDGE LIBRARIES |
|-----------------|---------------------------------------|----------------------------|---------------------|
| Personal (free) | 50,000 a month                        | —                          | Included            |
| Professional    | 500,000 a month (6,000,000 a year)    | 50 a month (600 a year)    | Included            |
| Business        | 1,000,000 a month (12,000,000 a year) | 200 a month (2,000 a year) | Included            |
| Business Plus   | 2,000,000 a month (24,000,000 a year) | 400 a month (4,800 a year) | Included            |
| Enterprise      | Custom                                | Custom                     | Included            |

Answers from libraries use the plan’s AI allowance; the libraries themselves carry no extra charge.

08

How teams use Lex

| FUNCTION                   | TYPICAL USES                                                                                                                                                              |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Legal                      | Answers across case files with named sources; Philippine legal research; drafting contracts, memos, and pleadings; extracting parties, dates, and terms across agreements |
| Electronic Notaries Public | Looking up the rule a client asked about between sessions; drafting documents clients bring for notarization                                                              |
| Finance and lending        | Finding figures in long reports; drafting memos; extracting principal, rate, term, and maturity from loan agreements                                                      |
| Property management        | Rent schedules and renewal dates from lease portfolios; drafting renewals from prior leases                                                                               |
| Human resources            | Explaining documents to employees before they sign; extracting separation data for payroll                                                                                |
| Education and research     | Questions across a research library; drafting proposals and reviews; tagging papers by topic and method                                                                   |
| Healthcare and quality     | Finding guidance in long protocols; producing compliance summaries                                                                                                        |
| Consulting                 | Pulling insight from client materials; drafting proposals and reports from templates                                                                                      |

■ 09

# Why document intelligence strengthens the business

- **Differentiation.** A curated Philippine legal library, grounded answers with named sources, and integration with signing and notarization set Lex apart from general-purpose AI tools.
- **Expansion revenue.** AI tokens and data extractions scale with each plan, giving customers a clear reason to move from Personal to Professional, Business, and Business Plus.
- **Retention.** A workspace holds a team's documents, history, tags, extraction templates, and saved chats. The more a team uses Lex, the more valuable its workspace becomes.
- **A larger share of each document's life.** Lex brings Twala into drafting and analysis, before and after the signature and notarization steps it already owns.
- **Trust as a feature.** Privacy by design and human approval of every change make Lex suitable for the regulated, confidential work Twala's customers do.

"We built Twala so a document never has to leave the platform to be trusted. It's drafted, signed, notarized, and sealed in one place."

Alexander Paul Quinit, Co-founder and Chief Technology Officer

Lex is a reading, drafting, and research aid. Twala is a technology provider and does not give legal advice; Lex shows its sources and waits for a person to apply its edits so that professional judgment stays where it belongs.

## ■ ABOUT TWALA

Twala is a Philippine legal technology company and a Supreme Court-accredited Electronic Notarization Facility (ENF). Its platform brings AI contract generation and review, eSignature, electronic notarization, and secure storage together, with every document sealed and independently verifiable through HashOrigin™ technology. Founded in 2020 and operated by Ohelio Inc., Twala serves more than 600 companies and 1.3 million individual users. Twala is backed by DOST-PCIEERD through its Startup Grant Fund Program and is a member of the Cloud Signature Consortium.

## ■ CONTACT

For investor relations, partnerships, and enterprise inquiries, email [info@twala.ai](mailto:info@twala.ai) or visit [twala.ai](https://twala.ai).

Book a demo, explore pricing, or verify a Twala document at [twala.ai](https://twala.ai). Technical details of HashOrigin™ are at [hashorigin.io](https://hashorigin.io).

This whitepaper is provided for information purposes only and does not constitute an offer of securities or legal, financial, or investment advice. Figures are as published by Twala as of October 2026. Statements about plans, products in development, and expected outcomes are forward-looking and may change. Twala is a technology provider and does not give legal advice. Notarial acts are performed by commissioned Electronic Notaries Public. HashOrigin™ is a trademark of Ohelio Inc. Other names are the property of their respective owners. © 2026 Ohelio Inc.