



ThereforeTM | v.36
o n l i n e

Release Overview

New Features in v.36 and Core Feature Highlights





Therefore[™] Online v.36

Building a More Intelligent and Engaging Information Management Experience

At its core, Therefore[™] is designed to help organizations work smarter by combining great user experiences, intelligent content processing, and modern digital workflows in a single platform. Users benefit from intuitive user interfaces and guided digital forms that make interacting with business processes simple and efficient.

Behind the scenes, intelligent capture and automation technologies reduce manual effort and improve information quality, while workflow capabilities ensure processes move seamlessly from initiation to completion. Together, these capabilities enable organizations to deliver digital experiences that are easier for people and more effective for the business.

Therefore[™] Online v36 continues this evolution with enhancements that make Therefore[™] it easier to use, more intelligent, and a stronger platform for modern digital processes.

Better user experiences
Intelligent content processing
Modern digital processes

Better User Experiences

Therefore™ is becoming **easier to use** by helping organizations create intuitive digital experiences for employees, customers, suppliers, and partners. From information capture to process completion, users can interact with business processes through modern, engaging interfaces that improve adoption and satisfaction.

Therefore™ provides great user experiences through:



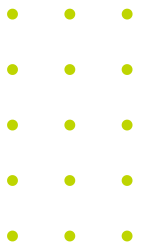
Customizable user interfaces for viewing key index data



An updated Portal for external collaborators



Digital eForms

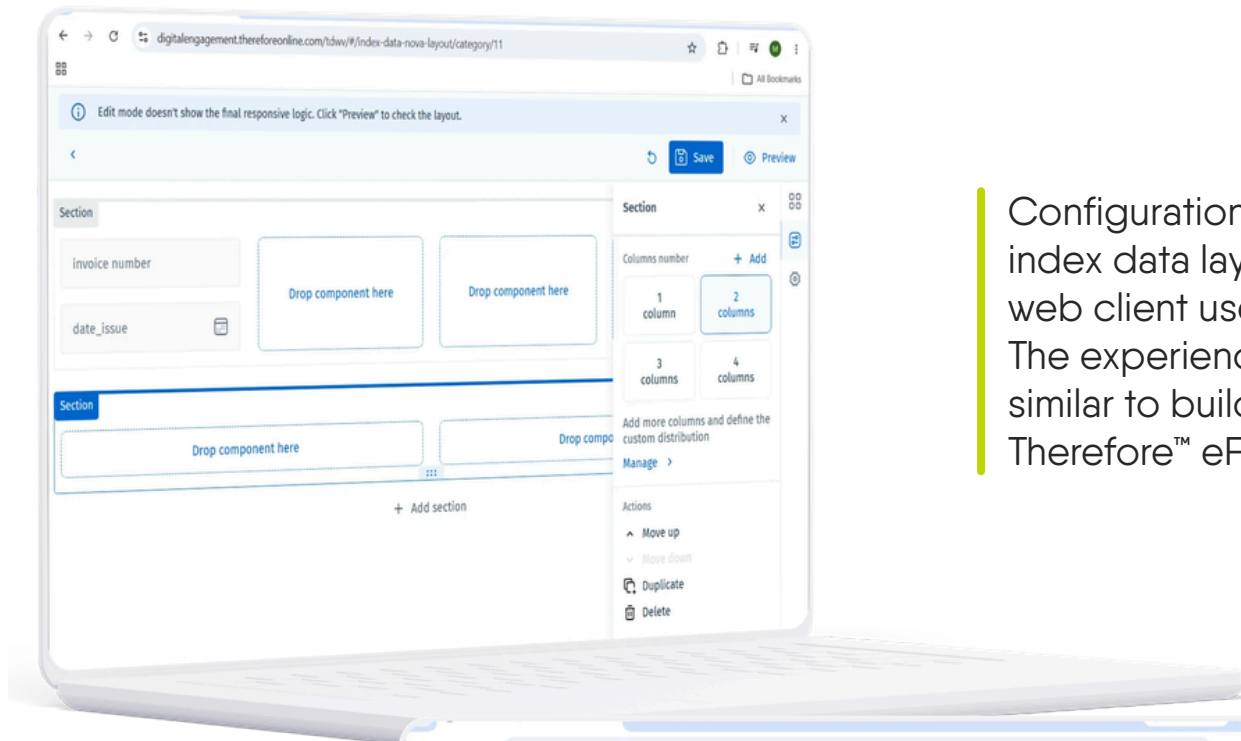


Better User Experiences in the Web Client

What's New in v.36

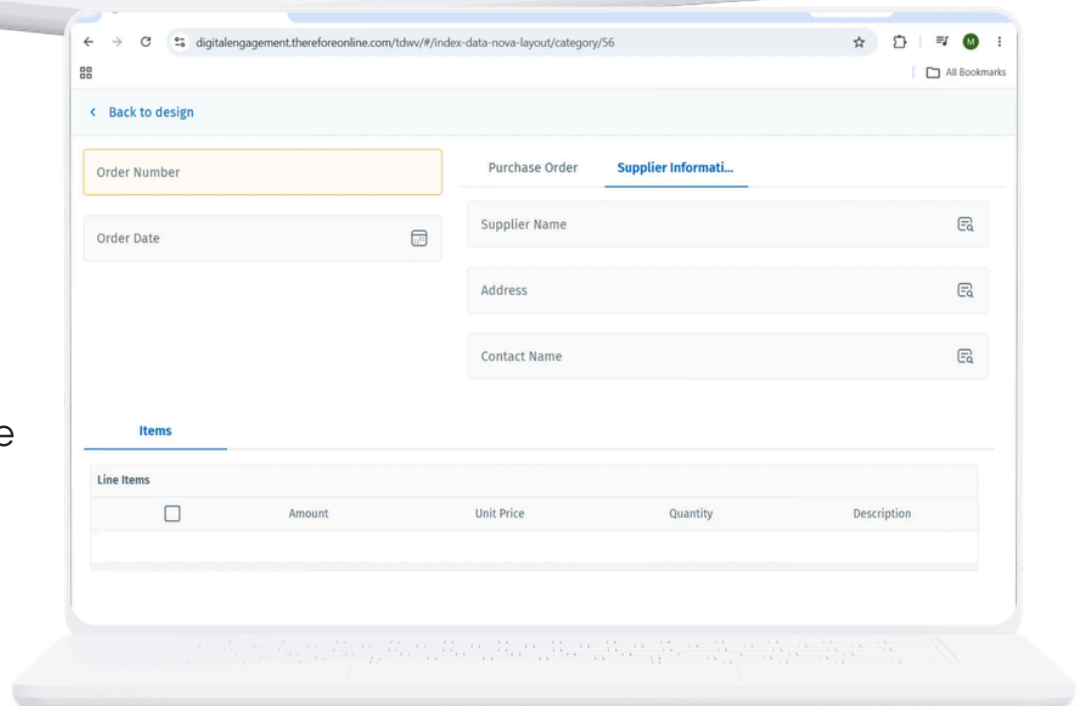
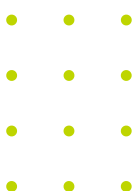


Create category layouts specifically for the web client in a similar way to eForms.



Configuration of an index data layout for web client users. The experience is similar to building a Therefore™ eForm.

Index data dialog as seen by a user. This layout is configured specifically for the web client.



Better User Experiences in the Web Client

Use Cases

Use Case:

Simplify HR Employee Records

Make complex information easier to work with

Scenario:

An employee record contains dozens of fields, but HR staff regularly work with only a subset of them.

Use category layouts to:

Present the information in a layout designed around how HR users work.

Value:

- Easier navigation of complex records
- Important information is easier to find
- A cleaner day-to-day user experience



Use Case:

Create a task-focused invoice experience

Put the right information front and center

Scenario

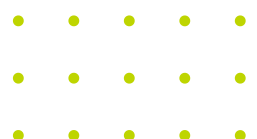
An accounts payable user reviewing an invoice needs supplier, amount, invoice date and approval information readily accessible.

Use category layouts to:

Organize the web experience around the information most relevant to the task.

Value:

- Less time spent scanning through unnecessary information
- Faster access to relevant fields
- A more focused working experience



Better User Experiences in the Web Client

Use Cases

Use Case:

Make customer files easier to navigate

Design the experience around the user

Scenario:

Customer service teams work with records containing contact, account and document information.

Use category layouts to:

Create a web layout that presents this information in a more intuitive way for the users working with those records.

Value:

- Users can orient themselves more quickly
- Frequently needed information is easier to access
- Complex categories feel simpler to use



[Back to design](#)

Order Number

Purchase Order

Supplier Informati...

Order Date

Supplier Name

Address

Contact Name

Items

Line Items

	Amount	Unit Price	Quantity	Description
☐				



Core Feature Highlight: Portal

Modern processes don't stop at the company boundary. Therefore™ Portal helps organizations create secure, branded digital experiences that connect customers, suppliers, partners, and other external users directly to business processes.

Therefore™ Portal extends business processes beyond your organization.



Create modern, branded experiences that reflect your organization's values



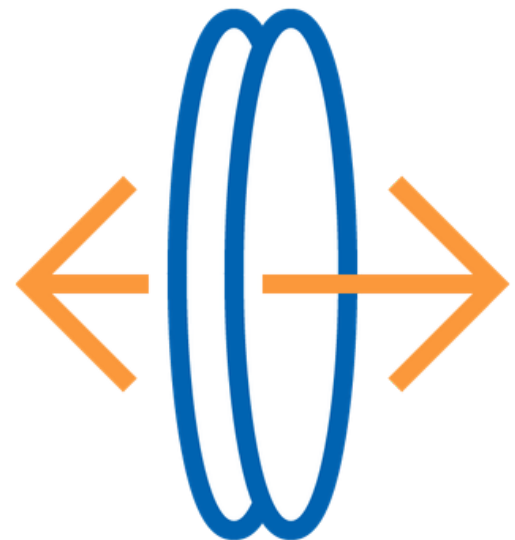
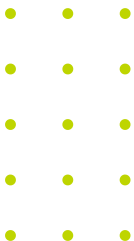
Give users visibility into their information through self-service



Enable secure external collaboration



Ease the administrative burden on your staff



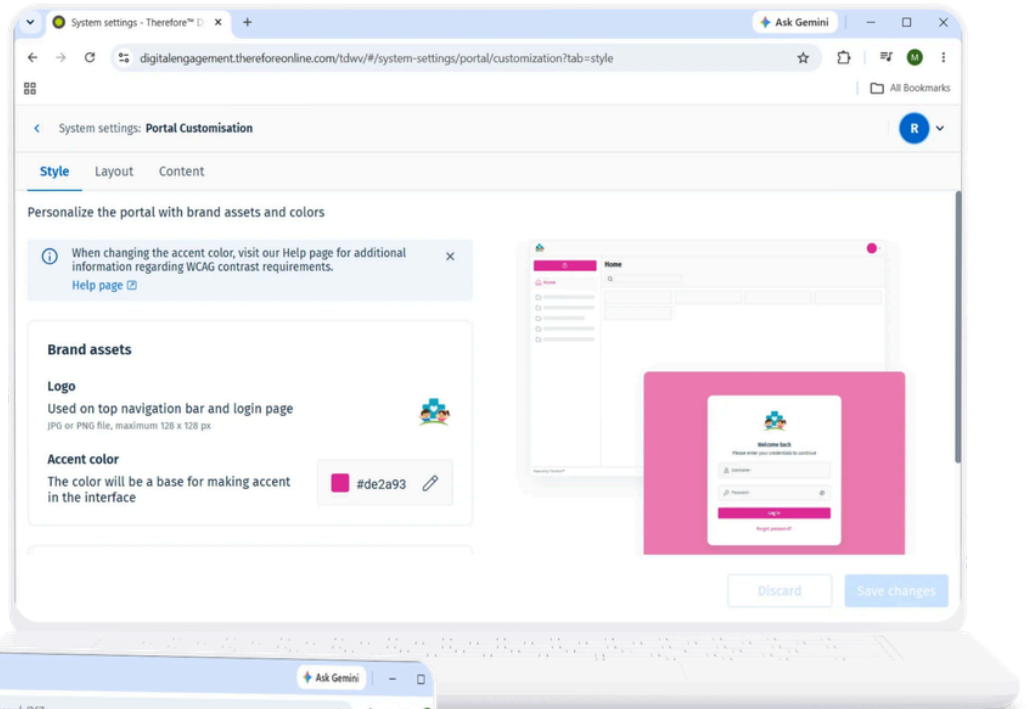
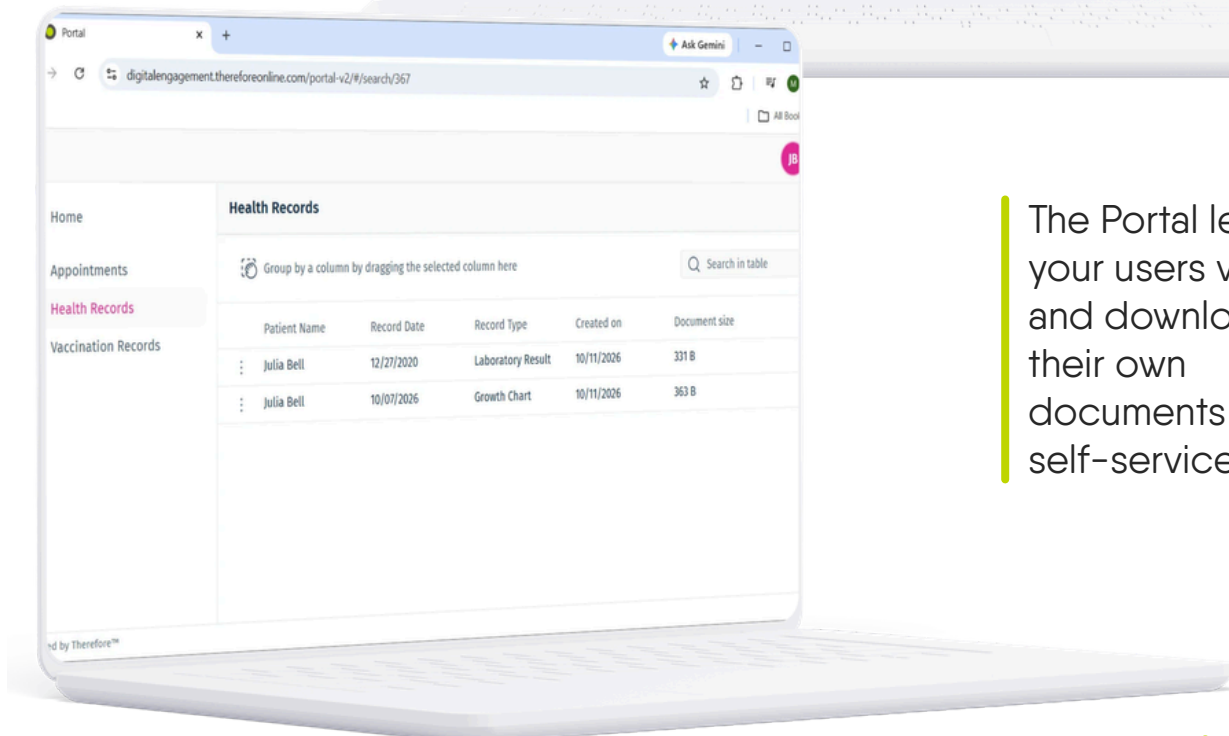
Better User Experiences in the Portal

What's New in v.36

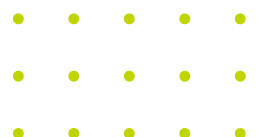


Customize the look and feel of the new Therefore™ Portal and make it your own.

The new Portal supports many customization options to align with organization branding.



The Portal lets your users view and download their own documents via self-service.



Better User Experiences in the Portal

Use Cases

Use Case:

Customer self-service portal

Give customers access without adding work for your team

Scenario

Customers regularly contact staff asking for copies of documents already held by the organization.

Use portal to:

Give customers a branded environment where they can securely view and download their own documents.

Value:

- Convenient customer self-service
- Fewer routine requests for staff to handle
- Better visibility for customers



Use Case:

Supplier Document Portal

Bring suppliers into your digital processes

Scenario

An organization needs a professional digital environment for sharing information with suppliers outside the business.

Use portal to:

Create a secure external experience with branding aligned to the organization.

Value:

- Easier external collaboration
- A more consistent experience for suppliers
- Business processes can extend beyond internal users

Better User Experiences in the Portal

Use Cases

Use Case:

Property Management

Make every digital interaction feel like your brand.

Scenario

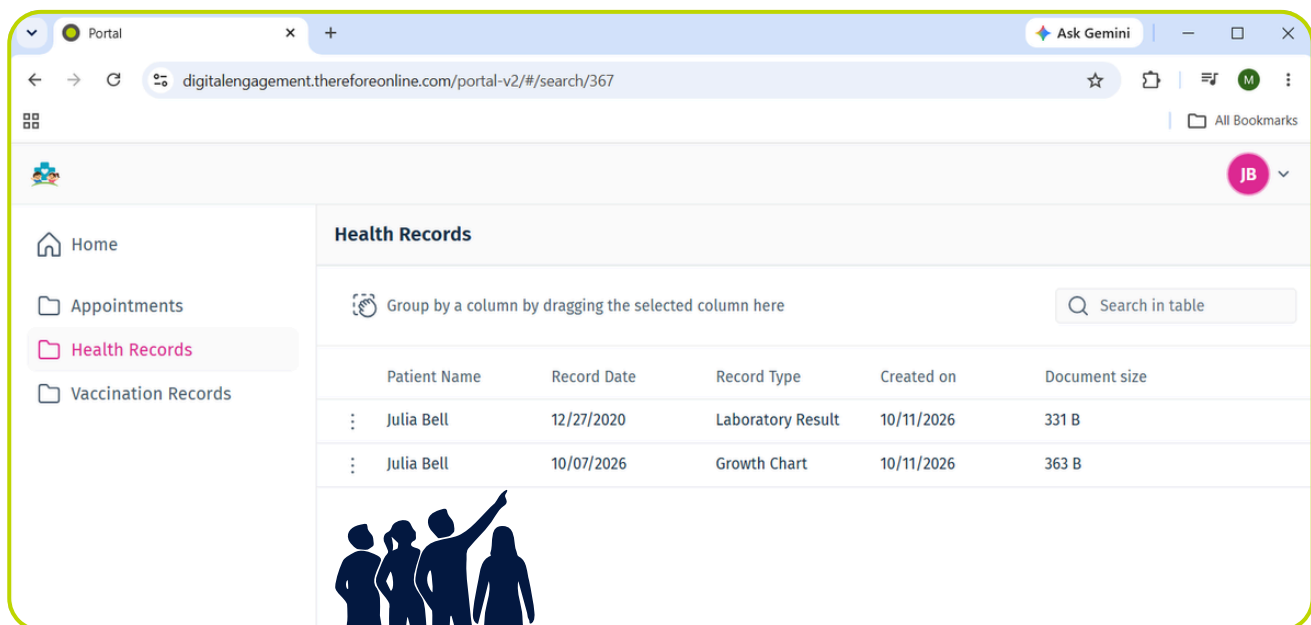
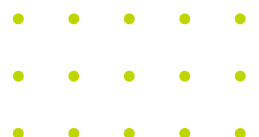
Property managers need to give each of their tenants access to documents such as contracts, work orders, and utility bills.

Use portal to:

Give each tenant access only to their documents while the manager maintains a single repository for the whole property.

Value:

- Useful, quick, 24/7 self-service for tenants
- Fewer administrative tasks for managers
- Securely share information without emails, phone calls, or forms



Core Feature Highlight: eForms

Savvy customers judge business solutions by the quality of the user experience. Therefore™ helps organizations create intuitive digital interactions without sacrificing process control or compliance.



eForms replace manual interactions with guided digital experiences.

Instead of:

- PDF forms
- Email requests
- Duplicate data entry
- Chasing users for missing information

You can:

- Capture information digitally from the start
- Standardize processes
- Trigger workflows and approvals
- Ensure complete and accurate submissions

The Benefits:



Easier submission experience



Better data quality

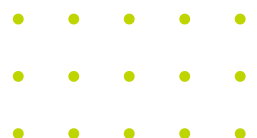


Less back-and-forth communication



Faster process completion

The screenshot shows a web browser window displaying a form titled "Therefore™". Below the title, it says "PEOPLE PROCESS INFORMATION". The form is for "Therefore Corporation GmbH" and includes contact details: "Wiener Strasse 2/2, 2340 Mödling, Austria, Phone: +43 2236 865 300". A green message says "Questions or comments? We look forward to hearing from you!". The form fields include: "Company" (text), "Country" (dropdown), "First Name" (text), "Last Name" (text), "E-mail" (text), and "I have a question about..." (dropdown). At the bottom, there is a question "Are you already a Therefore™ customer?" with radio buttons for "Yes" and "No".



Better User Experiences



Intelligent Content Processing

Therefore[™] is becoming **more intelligent** by helping organizations capture, understand, classify, and process information with less manual effort. AI-powered capabilities and intelligent automation help transform content into actionable business information faster than ever before.

Therefore[™] provides intelligent content processing through:



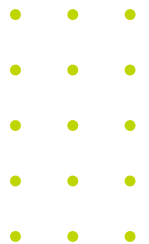
Instant understanding and context-building with help from your AI document assistant



Insights and intelligence for users through integration with Microsoft Copilot



AI-powered document classification and data extraction with Smart Capture



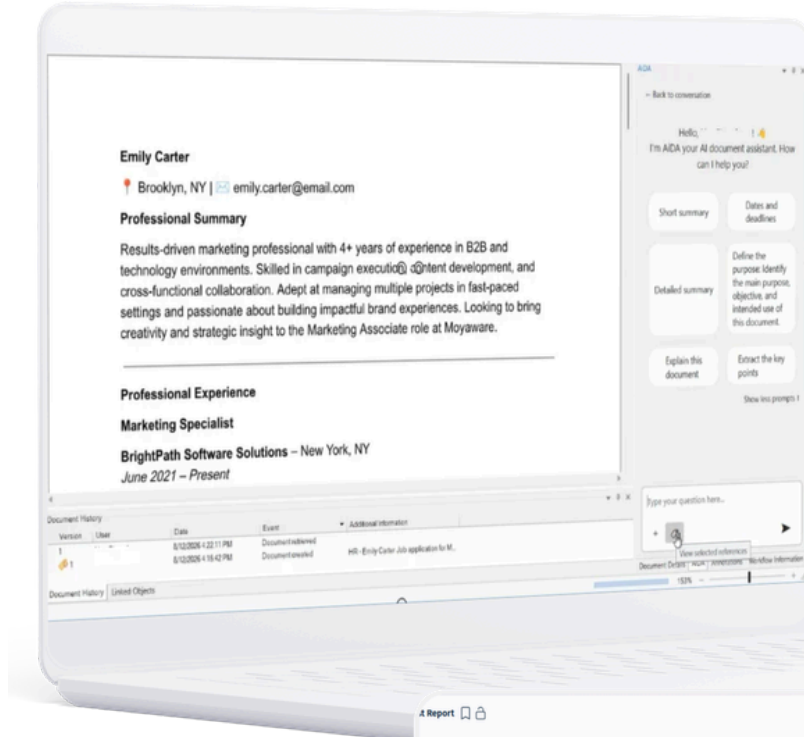
Intelligent Content Processing

with your AI Document Assistant

What's New in v.36

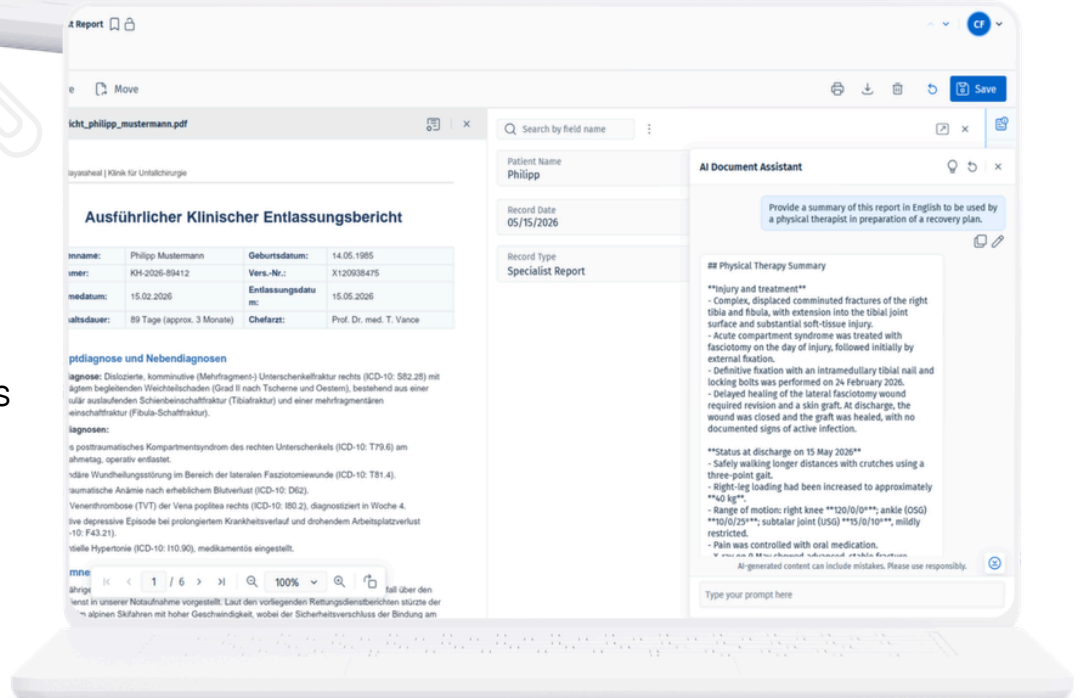


Ask your AI Document Assistant questions about the documents you work with



Chat with your AI Document Assistant about the document you're currently viewing. Start with pre-defined prompts or create your own.

Use free-form prompts to ask specific questions and drill down into detail. You can add reference documents ad-hoc to give your AI assistant more context.



Intelligent Content Processing

with your AI Document Assistant

Use Case:

Contract reviews

Find critical terms without reading every page

Scenario

A procurement manager receives a lengthy supplier contract and needs to quickly understand the terms that matter.

Use AI Document Assistant to:

Ask targeted questions to get essential information about termination conditions, renewal clauses, and supplier obligations.

Value:

- Get to relevant information faster
- Reduce time spent manually searching long documents
- Make complex contracts easier to understand



Use Case:

Customer Service

Get answers from a complete customer file

Scenario

A customer contacts a service representative with a question about an existing case. The information needed may be spread across correspondence, forms, agreements, and supporting documents.

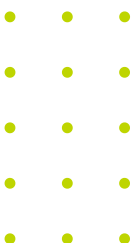
Use AI Document Assistant to:

Bring relevant documents into the conversation and ask questions such as:

- “What has already been agreed with this customer?”
- “What documents have they provided?”
- “Summarize the key information relevant to this request.”

Value:

- Understand a case without manually reviewing every document
- Bring information from multiple related documents together
- Respond to customer questions with better context



Intelligent Content Processing

with your AI Document Assistant

Use Case:

Policies and procedures

Turn reference material into practical answers

Scenario

An employee needs to know what to do in a particular situation, but the answer is buried in a lengthy policy, procedure, or manual.

Use AI Document Assistant to:

Ask questions about how to submit a request, what approvals are required, and find out if there are any exceptions or special conditions.

Value:

- Find answers without searching through lengthy documentation
- Make organizational knowledge easier to access
- Help employees use existing information more effectively

The screenshot displays a web application interface. On the left, a document titled "SERVICES AGREEMENT 2024.docx" is open, showing the following text:

SERVICES AGREEMENT

This Services Agreement ("Agreement") is made and entered into as of January 1st, 2024, by and between MOYAWARE, a United States corporation with offices located at 123 Main Street, New York, NY ("Client"), and TRUSTUS IT, a United States corporation with offices located at 987 First Street, Los Angeles, CA ("Service Provider").

- 1. Scope of Services**
Service Provider shall provide outsourced data management services to Client, including but not limited to data storage, backup, retrieval, maintenance, and security monitoring, as described in Exhibit A ("Services").
- 2. Term and Termination**
This Agreement shall commence on the Effective Date and continue for an initial term of [e.g., one year], unless earlier terminated in accordance with this Section. Either party may terminate this Agreement for convenience with 30 days written notice, or immediately for cause if the other party materially breaches any provision and fails to cure such breach within 15 days of receiving notice.
- 3. Fees and Payment**
Client shall pay Service Provider the fees set forth in Exhibit B. Invoices shall be submitted monthly in arrears, and payments are due within 30 days of the invoice date. Late payments may incur interest 1.5% per month.
- 4. Confidentiality**
Each party agrees to protect the other's Confidential Information using at least the same care it uses to protect its own, and not disclose or use it for any purpose other than performance of this Agreement. This obligation survives termination of the Agreement.

On the right, the "AI Document Assistant" chat window is open. It contains the following text:

What areas of the contract can we as Moyaware renegotiate at renewal for more favorable conditions?

Based on the agreement, Moyaware could consider renegotiating these areas at renewal:

- ****Fees and payment terms:**** Set specific fees in Exhibit B, negotiate longer payment periods than 30 days, and reduce or remove the 1.5% monthly late-payment interest.
- ****Service levels and credits:**** Seek higher uptime than 99.5%, shorter maintenance-notice requirements, and defined, meaningful service credits in Exhibit C. Clarify the 1-hour acknowledgment and 8-hour resolution/workaround targets, including how they are measured and what happens if they are missed.
- ****Termination and term:**** Negotiate a shorter notice period for termination for convenience than 30 days, and review the 15-day cure period for material breaches. The initial term is still shown as a placeholder and should be made specific.
- ****Liability cap:**** Review the cap of fees paid in the preceding 12 months and whether it should be increased or adjusted for particular risks. The agreement excludes confidentiality data-protection and

AI-generated content can include mistakes. Please use responsibly.

Type your prompt here

Core Feature Highlight: Copilot Integration

Information has little value if users cannot quickly find, understand, and act on it. Therefore's Copilot integration helps users access relevant information and insights through natural language interactions.

Therefore's Copilot integration puts knowledge at your users' fingertips.

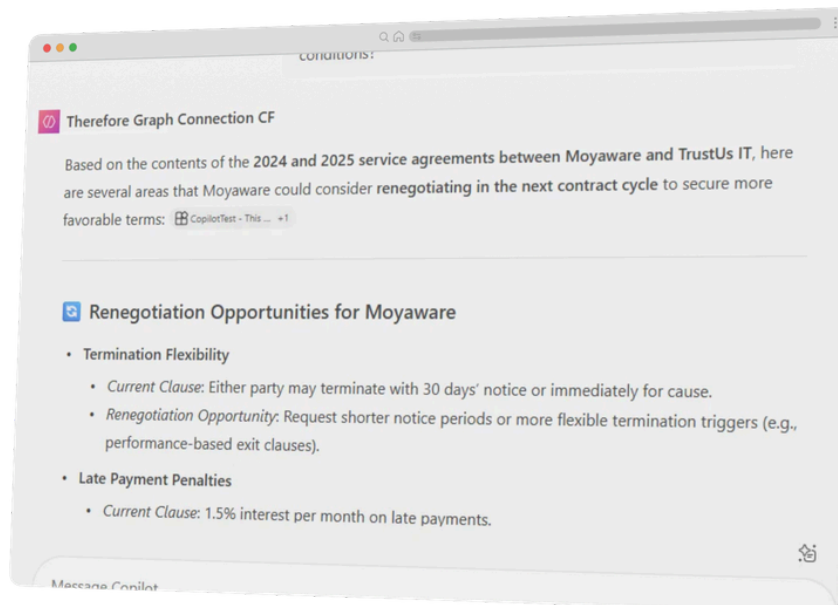


Instead of:

- Manually searching through repositories
- Reading lengthy documents for answers
- Switching between multiple systems
- Relying on tribal knowledge and subject matter experts

You can:

- Ask questions in natural language
- Surface relevant information faster
- Gain institutional knowledge
- Help users make better informed decisions



Copilot x Therefore[™] integration

Core Feature Highlight: Smart Capture

Organizations receive documents through email, scans, uploads, and other channels every day. Smart Capture transforms incoming content into structured information that drives business processes.



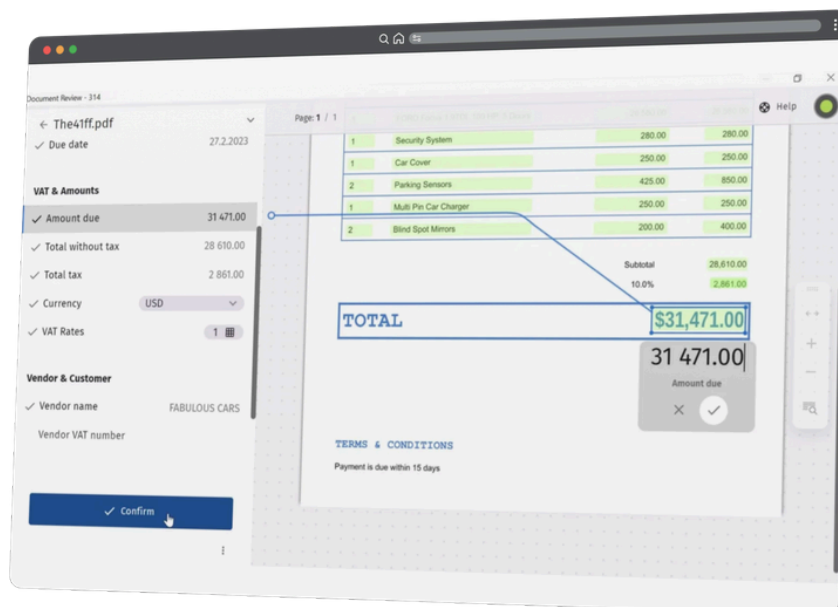
Smart Capture turns incoming documents into business-ready information.

Instead of:

- Manually sorting
- Keying data into business systems
- Searching for the right destination process
- Waiting for staff to process backlogs

You can:

- Automatically identify and classify documents
- Extract key business information
- Route content directly into processes
- Accelerate document handling from day one



Therefore[™] Smart Capture

Modern Digital Processes



Therefore[™] is becoming a **stronger platform** that acts as a cornerstone of customer-facing and business-critical processes. By connecting information, workflows, forms, and automation, organizations can create complete digital experiences that span departments, systems, and external stakeholders.

What's New in v.36:



Workflow instance variables



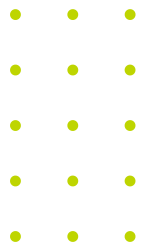
Direct workflow actions from emails



Custom tooltips



And more!



Core Feature Highlight: Workflow

Managing documents is only part of the challenge. Organizations also need to coordinate reviews, approvals, escalations, and business tasks.

Workflows turn information into action through automated business processes.



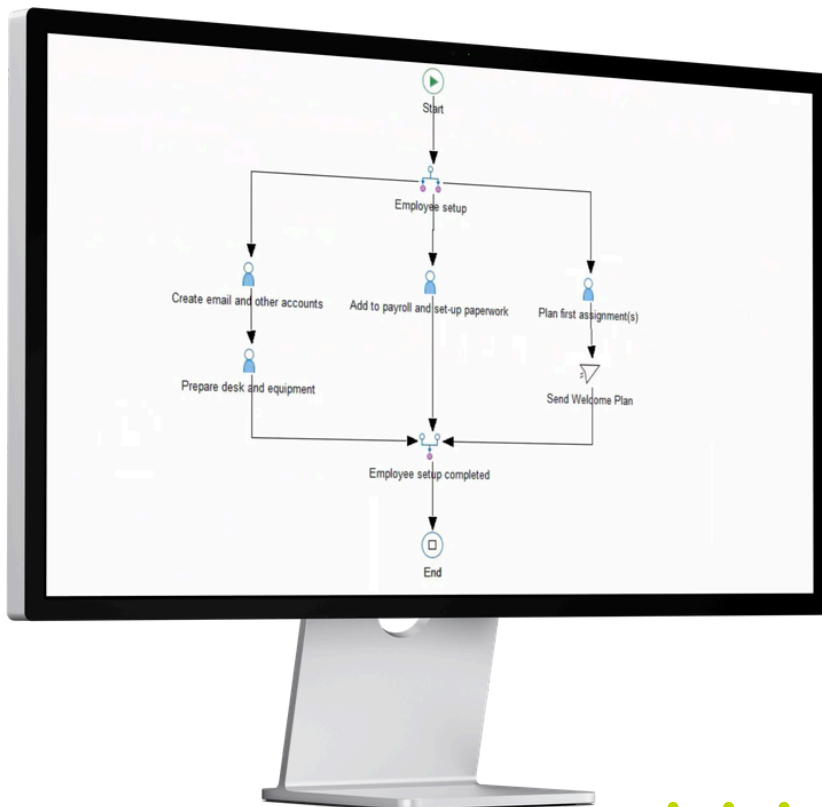
Instead of:

- Emails for approvals
- Manual task assignments
- Unclear process ownership
- Limited status visibility

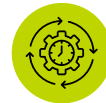
You can:

- Automate process steps
- Route work to the right people
- Track progress in real time
- Standardize decision-making

The Benefits:



Faster approvals



Greater process consistency



Improved accountability



Complete process visibility

Therefore™ Workflow



Better **user experiences**
Intelligent **content processing**
Modern **digital processes**

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2026



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Therefore Corporation