

Use Cases for *Attorneys*

Eight practical workflows for attorneys using LawLink's MCP server within a single system of record and connected file server — with Claude as an intelligent working assistant during active matters.

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Use cases

These use cases are built around how attorneys actually work: one primary case management system (Clio, Filevine, Lawmatics, or Lead Docket) serves as the system of record for matters and contacts, while a separate digital file server (ShareFile, NetDocuments, iManage, Box, or similar) holds the firm's documents. Claude, connected to LawLink's MCP server, acts as an intelligent assistant — querying live data and documents on demand, directly in conversation, without requiring the attorney to switch applications or run manual searches.

AI

Instant Matter Briefing Before a Call or Hearing

DAILY WORKFLOW

An attorney has a client call in ten minutes. Rather than hunting through their case management system, they ask Claude to pull everything relevant to the matter in a single prompt — current status, open tasks, recent notes, and key

documents — and get a concise briefing they can scan before picking up the phone.

Core value: Claude queries the attorney's system of record for live matter status, notes, and task data and returns a unified briefing without the attorney leaving the conversation or opening a second application.

EXAMPLE PROMPTS IN CLAUDE.AI

- " Bring me up to speed on the Sandoval matter in Clio — current phase, open tasks, and the most recent note on file.
- " What are the last three notes added to matter #4821 and what has changed in the last two weeks?
- " I have a call with Johnson in 10 minutes — pull the matter summary and flag anything marked urgent.

WHAT THE ATTORNEY GETS

- › Live matter status and current phase pulled directly from the system of record
- › Recent notes surfaced in order without manual searching
- › Open tasks and upcoming deadlines visible before any client interaction
- › A single-session briefing that replaces opening, searching, and reading across multiple screens

MCP TOOLS USED

- › matters → get for full matter record and current phase
- › notes → list filtered by matter ID, sorted by date
- › notes → get to retrieve full text of recent notes
- › connections → list_platforms to confirm which system holds the matter

PLATFORMS:

Clio Manage

Filevine

Lawmatics

Lead Docket

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Rapid Document Search Across the File Server During Active Matters

FILE SERVER

Attorneys spend a disproportionate amount of time hunting for specific documents — a particular version of a demand letter, a treatment record from a specific provider, a prior deposition transcript buried in a folder structure. Natural-language search replaces manual folder navigation entirely. The

attorney describes what they're looking for; Claude queries the file server scoped to the matter or searched broadly across the firm and surfaces the right file.

Core value: Natural-language document search across the firm's connected file server — scoped to a specific matter or searched firm-wide — without opening a separate application or navigating folder trees manually.

EXAMPLE PROMPTS IN CLAUDE.AI

- " Find the demand letter we sent in the Chen matter and show me when it was last modified.
- " Search for all documents from Dr. Patel's office in the Rivera case — I need the billing records specifically.
- " Pull the most recent version of our retainer agreement template from the firm's shared folder.

WHAT THE ATTORNEY GETS

- › Document search scoped to a matter ID or broad across the entire file server, in plain language
- › Filter by document type, provider name, date range, or keyword without any special syntax
- › Immediate identification of the right file without navigating folder hierarchies manually
- › One consistent search experience regardless of which file server the firm uses

WHY THIS MATTERS

- › Document retrieval consumes significant non-billable time for most attorneys every day
- › LawLink's single integration covers all major file servers — no per-platform training needed
- › Search results are scoped to the attorney's permissioned access only — no over-exposure
- › Pairs with matter data from the CMS for context-aware searches (e.g., "show me docs filed after the deposition date")

PLATFORMS: [ShareFile](#) [NetDocuments](#) [iManage](#) [Box](#) [+ CMS of record](#)

A3

New Client Conflict Check Using the System of Record

INTAKE WORKFLOW

Before accepting a new matter, attorneys must confirm there are no conflicts of interest. For firms using a single system of record, this means searching for existing contacts, matters, and relationships tied to the prospective client and any adverse parties. With LawLink's MCP connected to Claude, a conflict check becomes a natural-language query that returns a complete picture — not just a name match, but related matters, custom fields, and historical notes that might reveal a prior representation.

Core value: Claude searches the firm's system of record for the prospective client, affiliated entities, and adverse parties — surfacing every existing contact, matter, note, and custom field that could indicate a conflict. The conversation itself becomes a documented, timestamped diligence record.

EXAMPLE PROMPTS IN CLAUDE.AI

- " Search Filevine for any contact named Marcus Webb or affiliated with Webb Transport LLC before I take an intake call.
- " Do we have any existing matters in Clio involving Riverside General Hospital as a party — on either side?
- " Check for any notes or flags in our system related to the Chen family — I'm about to take a referral from a relative of a prior client.

WHAT THE ATTORNEY GETS

- > Full contact search across the system of record — by name, company, phone, or email
- > Custom fields surfaced per contact — relationship type, prior representation flags, referral source
- > All matters associated with any matched contact, including prior and closed cases
- > A timestamped conversation log serving as evidence of conflict check diligence

MCP TOOLS USED

- > `contacts` by name, email,
→ `search` phone, or company name
- > `contacts` → `get_custom_fields` for conflict-relevant metadata
- > `matters` → `list` filtered by matched contact ID
- > `notes` on matched matters to
→ `list` reveal prior representation context

SYSTEM OF RECORD:

Clio Manage

Filevine

Lawmatics

Lead Docket

AI-Assisted Document Review and Summarization for Trial or Mediation Prep

Preparing for a deposition, mediation, or trial means reviewing hundreds of pages of medical records, prior deposition transcripts, expert reports, and correspondence — almost entirely manually. With LawLink connected to the firm's file server, an attorney can ask Claude to pull all documents for a specific matter, summarize the medical timeline, flag inconsistencies across records, and draft a prep outline — entirely within Claude, with no manual file uploading required.

Core value: Claude pulls matter documents directly from the firm's file server via LawLink, then applies AI reasoning to summarize, cross-reference, and generate prep materials — eliminating the manual upload step and compressing hours of review into a single conversation.

EXAMPLE PROMPTS IN CLAUDE.AI

- " Pull all medical records from the Torres matter folder and build me a chronological treatment timeline.
- " Review the deposition transcript for matter #PI-2024-441 and flag anything that contradicts the police report in the same folder.
- " Summarize the key liability and damages documents for the Nguyen case — I have mediation in three days and need a one-page brief.

WHAT THE ATTORNEY GETS

- › Automated document retrieval from the file server — no manual uploading into Claude
- › AI-generated medical chronologies, deposition summaries, and inconsistency flags
- › Prep outlines and mediation briefs drafted from actual case documents, not generic templates

HOW THE WORKFLOW CHANGES

- › Today: attorney downloads files individually, uploads to AI tool, prompts each one separately
- › With LawLink: one prompt pulls all matter documents from the file server into the session
- › Matter context from the CMS (phase, notes, custom fields) enriches the document analysis
- › Access is scoped to the attorney's permissions — no risk of pulling wrong-matter documents

- › Hours of manual review time compressed into a single focused conversation

PLATFORMS: `File server of record` `Clio / Filevine` `matters → get`
`notes → list`

A5

Lead Pipeline Review and Intake Prioritization

BUSINESS DEVELOPMENT

Attorneys using Lead Docket or Lawmatics to manage incoming prospects often lose visibility into their pipeline without running manual reports or logging into a separate dashboard. With LawLink's MCP server, an attorney can ask Claude to surface their current pipeline by status, flag leads that have gone cold, identify high-priority prospects, and pull the full record on any individual lead — conversationally, in the same session where they're doing their other legal work.

Core value: Claude surfaces the attorney's live lead pipeline directly from Lead Docket or Lawmatics — by status, age, or case type — giving a dynamic, conversational alternative to static CRM reports without any dashboard toggling.

EXAMPLE PROMPTS IN CLAUDE.AI

- " *List all my pending leads in Lead Docket that haven't had a note added in the last two weeks.*
- " *Show me every Lawmatics prospect currently in the Consultation Scheduled status — pull the full record for anyone with a PI case type.*
- " *Which leads in my pipeline are marked high value and what's the last activity on each?*

WHAT THE ATTORNEY GETS

- › Full pipeline view by status — pending, scheduled, signed, declined — from Lead Docket or Lawmatics
- › Stale lead identification: prospects with no recent note or

MCP TOOLS USED

- › `matters` with platform filter and `→ list` status parameters
- › `matters → get` for full lead or prospect records
- › `notes` filtered by matter ID to `→ list` assess recency of

status update

- › Full lead records on demand — contact info, case type, referral source, notes, custom fields
- › A conversational CRM experience without logging into a separate dashboard

activity

- › contacts → for lead scoring or practice-area metadata
- › get_custom_fields

PLATFORMS: [Lead Docket](#) [Lawmatics](#)

A6

Cross-Matter Research: Finding Precedents and Prior Work in Your Own Files

FILE SERVER

An attorney working a complex personal injury case wants to know how the firm has handled similar liability arguments in prior matters — what arguments were made in demand letters, how past mediations were framed, what expert witnesses have been used. This institutional knowledge lives scattered across dozens of closed-matter folders in the file server. The attorney can search across matters by topic, document type, or keywords — treating the firm's entire case history as a searchable knowledge base.

Core value: The firm's own file server becomes a searchable precedent library. Claude retrieves relevant documents from prior matters by topic or keyword, letting attorneys leverage their own institutional knowledge without manually opening old case folders.

EXAMPLE PROMPTS IN CLAUDE.AI

- " Search our closed matter folders for any demand letters involving rear-end collisions where we argued aggravation of a prior condition.
- " Find prior deposition outlines we've used for orthopedic surgeon expert witnesses in PI cases.
- " Have we ever filed a motion to exclude a biomechanical expert? Pull any brief or motion that addresses that argument from our file server.

WHAT THE ATTORNEY GETS

- › Cross-matter document search across the entire firm file server

WHY ATTORNEYS FIND THIS TRANSFORMATIVE

by topic, argument, or document type

- › Prior work product surfaced instantly — demand letter language, motion arguments, expert outlines
- › Matter context from the CMS used to filter by case type, outcome, or practice area
- › The firm's accumulated case history treated as a living, searchable knowledge base

- › Institutional knowledge typically walks out the door with departing attorneys — searchable files retain it
- › Reusing strong prior arguments and templates reduces drafting time significantly
- › No need to remember which matter contained the relevant document — describe it and Claude finds it
- › Works across closed matters as well as active ones — the whole history is searchable

PLATFORMS:

File server (all matters)

matters → list

contacts → get

A7

Settlement and Case Status Summary for Client Communication

CLIENT MANAGEMENT

Clients regularly ask for status updates — what has happened on their case, where things stand, and what the next steps are. Drafting these updates from scratch means re-reading notes, reviewing the matter timeline, and writing a clear summary from scratch. With LawLink's MCP server connected to Claude, the attorney can pull all relevant matter activity in seconds and ask Claude to draft a plain-language client update — grounded in the actual notes and matter data from the system of record.

Core value: Claude pulls live matter notes, status, and timeline from the system of record and drafts a plain-language client update in seconds — saving the attorney the time of re-reading the file before every client communication.

EXAMPLE PROMPTS IN CLAUDE.AI

" Pull all notes on the Reyes matter from the last 60 days and draft a plain-language status update I can send to the client.

" Summarize where the Nakamura case stands — current phase, what we're waiting on, and the next three anticipated steps — so I can call the client this afternoon.

" Draft a brief settlement update for the Torres matter based on the most recent negotiation notes in Filevine.

WHAT THE ATTORNEY GETS

- › Live matter notes and current status pulled from the system of record in seconds
- › A plain-language client update draft grounded in actual case activity — not generic language
- › Matter phase and pending milestones surfaced so the attorney can answer "what's next" confidently
- › Drafts that reflect the most recent negotiation notes, offers, or developments without manual re-reading

MCP TOOLS USED

- › matters for current phase,
 - get status, and key matter details
- › notes → filtered by matter ID
 - list and date range
- › notes for full text of the most
 - get recent and relevant notes
- › contacts for client details to
 - get personalize the communication

SYSTEM OF RECORD:

Clio Manage

Filevine

Lawmatics

A8

Deposition and Discovery Preparation Using Linked Case Notes and Documents

FILE SERVER

Before taking a deposition, an attorney needs to synthesize everything they know about a witness or opposing party — their prior statements in case notes, documents they authored or are referenced in, and their role in the matter timeline. With LawLink's MCP server, an attorney can ask Claude to pull all case notes referencing a specific witness, surface related documents from the file server, and generate a focused deposition outline — combining data from the CMS and file server in a single prep session.

Core value: Claude combines live matter notes from the system of record with documents from the file server to build a witness-specific deposition outline — replacing a multi-hour manual research process with a targeted conversation.

" Pull all notes from the Alvarez matter that reference Dr. Martinez and find any documents in the file server authored by or referencing her.

" Build a deposition outline for the defendant in the Chen matter — pull his prior statements from case notes and flag any inconsistencies with documents in the file server.

" I'm taking the adjuster's deposition next week. Summarize every note in Clio where we documented their communications and pull the corresponding correspondence from our file server.

WHAT THE ATTORNEY GETS

- › All case notes referencing a specific witness or party, surfaced from the system of record
- › Related documents from the file server identified and retrieved by witness name or role
- › An AI-generated deposition outline grounded in actual case materials, not generic templates
- › Inconsistencies between prior statements (in notes) and documents flagged automatically

MCP TOOLS USED

- › `notes` with matter ID filter,
→ searched for witness
`list` references
- › `notes` → for full text of relevant
`get` notes
- › File server search by witness name and matter ID for related documents
- › `contacts` for witness contact
→ `get` details and role in the matter

PLATFORMS:

Clio Manage

Filevine

File server of record

LawLink.ai

Attorney use cases · MCP Connector setup: app.lawlink.ai/doc/mcp_connector_setup.html

Platform documentation: app.lawlink.ai/doc/proj_doc.html · March 2026