LAWLINK.AI · MCP SERVER

Use Cases for *Legal Tech Providers*

Eight workflows for legal technology platforms using automated, server-side MCP calls to pull matter data, contacts, notes, and documents directly into their own systems — no Claude interface required.

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Use cases

These use cases are designed for legal technology companies integrating with law firms at scale. All workflows are fully automated and server-side — the legal tech platform's own systems make the MCP or REST API calls to LawLink, pull the data they need, and process it internally. No attorney needs to interact with Claude, and no data passes through a Claude interface. The attorney's only action is a one-time authorization during firm onboarding.

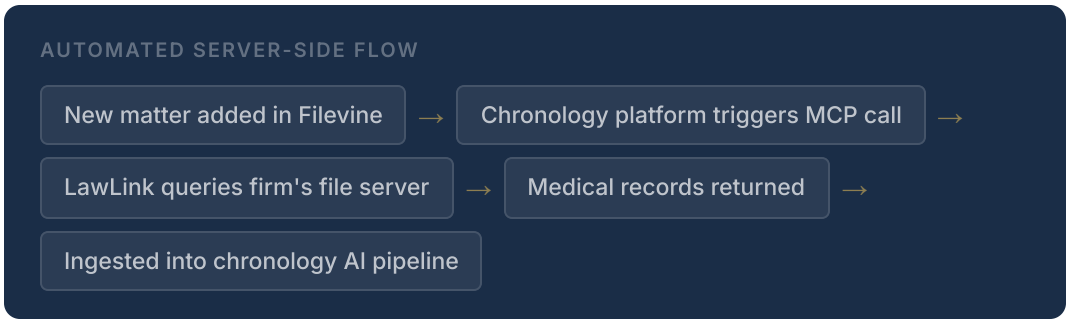
The integration pattern across all use cases is identical: one long-lived LawLink API token per firm, with all calls made server-side. This makes it straightforward to connect additional firms and expand coverage as your platform grows.

T1 Automated Medical Record Ingestion into Chronology and Case Analysis Platforms

FILE SERVER

Medical chronology platforms, litigation support companies, and case valuation tools need access to plaintiff medical records — bills, treatment notes, imaging reports, and provider correspondence — that live in the law firm's file server. Today this requires manual attorney uploads or custom per-file-server integrations that must be rebuilt for every firm. With LawLink's MCP server, a chronology platform can make automated server-side calls to retrieve all documents associated with a specific matter, filtered by document type and date range, and pipe them directly into its own AI processing pipeline.

> **Core value:** One LawLink integration replaces per-firm, per-file-server custom connectors. The chronology platform queries LawLink on a schedule or event trigger, retrieves the documents it needs, and feeds them into its pipeline — entirely without attorney intervention after initial authorization.



WHAT THE PLATFORM GETS

- Automated document retrieval from any connected file server — no manual attorney uploads required
- Filter by document type, provider name, date range, or matter metadata from the CMS
- One LawLink API key covers all firm file servers — ShareFile, NetDocuments, iManage, Box, and more
- Structured document references returned for downstream AI processing or storage

INTEGRATION ARCHITECTURE

- Platform authenticates server-side using a long-lived LawLink API token per connected firm
- MCP or REST calls made programmatically — no Claude interface involved
- Matter metadata from Filevine or Clio used to scope and filter document queries accurately
- Attorney authorization is one-time during firm onboarding — fully automated thereafter

LAWLINK TOOLS: `matters → get` `contacts → get` `file server API`

T2

Live Matter Data Sync into Litigation Analytics and Case Valuation Tools

PRODUCTION READY

Litigation analytics platforms, settlement calculators, and case valuation tools need structured matter data — phase, damages amounts, liability assessments, treatment status — to run their models accurately. Most platforms today rely on CSV exports or one-off integrations that go stale between syncs. With LawLink's API, an analytics platform can pull live, structured matter data from Filevine or Clio on demand or on a scheduled sync, using custom field definitions to extract the exact data points its models require.

> **Core value:** The analytics platform calls LawLink's API server-side to retrieve live matter data — including custom fields specific to the firm's practice area — and feeds it directly into its valuation or analytics engine. No CSV exports, no manual data entry, no stale data.

AUTOMATED SERVER-SIDE FLOW

Analytics platform triggers scheduled sync →

LawLink: matters → list (by phase) → Custom fields pulled per matter →

Data written to analytics database → Valuation model refreshed

WHAT THE PLATFORM GETS

- Live matter phase, status, and custom field data from Filevine or Clio on demand
- Custom field schema via `list_field_definitions` — know exactly what data each firm tracks
- Normalized data structure across different firms regardless of which CMS they use
- Eliminates manual export steps and keeps models current with actual case status in real time

INTEGRATION ARCHITECTURE

- Use `connections → list_field_definitions`
- Scheduled `matters → list` calls filter or date up efficient c
- `contacts → get_custom_fields` for per-pla damages data
- Long-lived API tokens per firm, server-side — no attorney actio

after setup

LAWLINK TOOLS: `matters → list` `matters → get` `contacts → get_custom_fields` `connections → list_field_definitions`

T3 Automated Document Population for Demand Letter and Legal Document Generators

ENHANCED BY FILE SERVER

Demand letter generators, legal document automation tools, and settlement package platforms require accurate, current client and matter data to produce usable output. Instead of attorneys re-entering data into the document tool, the platform calls LawLink's API server-side to pull the contact record, matter details, case notes, and the actual supporting documents needed to populate a complete demand package. The attorney's only action is selecting the matter; the platform handles retrieval automatically.

> **Core value:** The document platform fetches all required data from the firm's system of record via LawLink before generating any document — eliminating manual data entry and ensuring the output reflects current matter status, not stale imported data.

AUTOMATED SERVER-SIDE FLOW

Attorney selects matter in doc platform →
Platform calls LawLink: contact + matter data →
Notes and custom fields retrieved → File server: supporting docs pulled →
Demand package auto-populated

WHAT THE PLATFORM GETS

- Live client and matter data pre-populating every document — no attorney re-entry

INTEGRATION ARCHITECTURE

- Server-side call to `contacts → get` and `matters → get` when generation is triggered

- Case notes providing injury narrative, treatment history, and liability context for AI drafting
- Custom fields supplying damages figures, policy limits, and liability assessments from the CMS
- Supporting documents from the file server (medical bills, records) attached automatically at generation

- `notes → list` on the matter returns injury narrative and treatment notes for drafting context
- `contacts → get_custom_fields` retrieves damages and liability data for demand figures
- File server call returns medical bills and records as structured attachments to the package

LAWLINK TOOLS: `contacts → get` `matters → get` `notes → list` `contacts → get_custom_fields` `file server API`

T4 Intake and Lead Routing Automation for Legal Intake Platforms

PRODUCTION READY

Legal intake and lead management platforms — including call centers and web intake services — need to know whether an inbound prospect is already in the law firm's system before routing them. A duplicate lead, former client, or conflicted contact must be handled differently than a brand-new prospect. With LawLink's API, an intake platform can run an automated real-time check against the firm's system of record at the moment a new lead arrives, and use that data to intelligently route, flag, or pre-populate the intake record before any agent touches it.

> **Core value:** At the moment a new lead is received, the intake platform calls LawLink's API to check the firm's CMS for any existing contact, matter, or flag associated with that individual — routing decisions happen automatically before any agent time is spent.

AUTOMATED SERVER-SIDE FLOW

WHAT THE PLATFORM GETS

- Real-time duplicate and conflict detection at lead ingestion — before agent time is spent
- Existing client records surfaced automatically so agents don't re-collect known information
- Matter history on matched contacts enables intelligent routing (prior PI client → senior attorney queue)
- Custom field data — case type, referral source, prior settlement — enriches the intake record immediately

INTEGRATION ARCHITECTURE

- Intake platform makes a synchronous `contacts → search` call on each new lead record
- On a match, follow up with `contacts → get` and `matters → list` for full context
- `contacts → get_custom_fields` retrieves flags, case type preferences, or conflict markers
- All calls are server-side — no attorney action required; runs automatically on every new lead

LAWLINK TOOLS: `contacts → search` `contacts → get` `contacts → get_custom_fields` `matters → list`

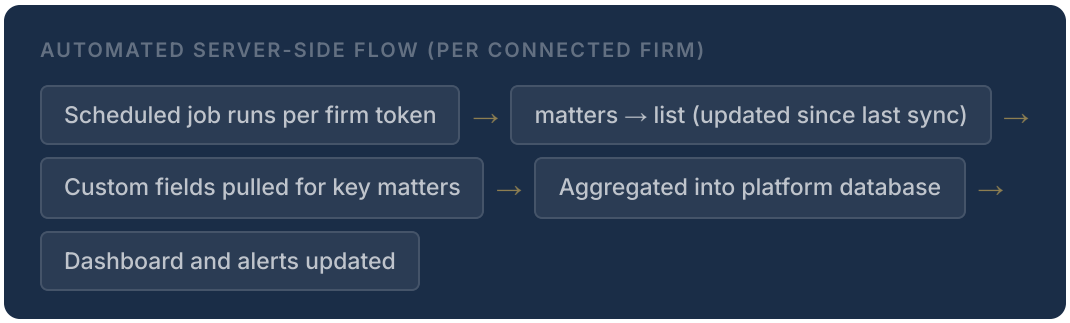
T5 Multi-Firm Case Monitoring and Reporting Dashboards

PRODUCTION READY

Legal technology platforms serving multiple law firms — referral networks, insurance partners, lien management companies, or litigation funding providers — need visibility into matter status across many firms simultaneously. LawLink's multi-tenant architecture and long-lived API tokens per firm allow these platforms to make automated, scheduled calls across all connected firms, aggregate current matter status and custom field data, and surface it in their

own dashboards and reporting tools — without any firm needing to export or share data manually.

> **Core value:** A legal tech platform maintains a live, normalized view of matter status across every connected law firm by running scheduled LawLink API calls per firm — aggregating data in its own database for reporting, alerts, and partner-facing dashboards. One integration pattern, many firms.



WHAT THE PLATFORM GETS

- Live matter status across all connected firms in a normalized schema — regardless of which CMS each firm uses
- Custom field data (settlement amounts, lien figures, funding status) pulled per matter for partner reporting
- Automated alerts when matters reach a specific phase (e.g., "Demand Sent," "Settlement Reached")
- One API integration pattern per firm covering Clio, Filevine, Lawmatics, and Lead Docket

INTEGRATION ARCHITECTURE

- One long-lived LawLink API token stored securely per connected firm
- Scheduled `matters → list` calls with date-updated filters for efficient delta syncs
- `connections → list_field_definitions` called at onboarding to map each firm's custom schema
- Notes queried on high-value matters to provide narrative context for partner-facing reports

LAWLINK TOOLS: `matters → list` `matters → get` `connections → list_field_definitions` `contacts → get_custom_fields` `notes → list`

T6

Lien Management and Medical Provider Billing Reconciliation

ENHANCED BY FILE SERVER

Medical lien management companies and healthcare billing reconciliation platforms need to track which treatment providers have outstanding liens on a matter, what amounts are claimed, and when case milestones (settlement, distribution) occur that trigger lien resolution. With LawLink's API, a lien management platform can automatically pull matter status updates, monitor for settlement-phase transitions, and retrieve the medical bills and lien documents directly from the firm's file server to reconcile amounts without waiting for the attorney to send them manually.

> **Core value:** The lien management platform monitors matter phases and custom field updates across all connected firms automatically, triggering workflows when settlement milestones are reached — and pulling the underlying billing documents from the file server to reconcile lien amounts without any attorney action.

AUTOMATED SERVER-SIDE FLOW

Scheduled matter phase sync → Settlement phase detected →
Custom fields: lien amounts pulled → File server: billing docs retrieved →
Lien reconciliation workflow triggered

WHAT THE PLATFORM GETS

- Automated settlement phase detection across all monitored matters — no manual attorney notification needed
- Lien amounts and provider details from custom fields in the firm's CMS, pulled on each sync
- Medical billing documents retrieved from the file server to reconcile lien claims against actual bills
- Reduced cycle time from settlement to lien resolution —

INTEGRATION ARCHITECTURE

- Scheduled `matters → list` calls filtered by phase to detect settlement transitions
- `contacts → get_custom_fields` retrieves lien amounts, provider names, and claim status
- `notes →` for settlement notes and distribution details from

the platform acts on data as soon as it appears

`list` the attorney

› File server query by matter ID for billing records and lien documents for reconciliation

LAWLINK TOOLS: `matters → list` `contacts → get_custom_fields` `notes → list` `file server API`

T7 AI-Powered E-Discovery Document Review and Classification

FILE SERVER

E-discovery platforms and document review tools currently require law firms to upload or export document sets before any review can begin — a time-consuming, error-prone manual step that delays the start of every engagement. With LawLink's file server integration an e-discovery platform can programmatically retrieve all documents for a specified matter or date range directly from the firm's file server, begin automated classification and privilege review immediately, and report back to the attorney with a structured review set — without any file transfer initiated by the firm.

> **Core value:** The e-discovery platform retrieves the full document set for a matter directly from the firm's file server via LawLink, eliminating the upload step that today delays the start of every review engagement and introduces the risk of incomplete production.

AUTOMATED SERVER-SIDE FLOW

Review request initiated in platform → LawLink queries file server by matter ID → Full document set retrieved → AI classification and privilege screening runs → Structured review set returned to attorney

WHAT THE PLATFORM GETS

› Full, complete document sets retrieved from the file server — no risk of incomplete attorney uploads

INTEGRATION ARCHITECTURE

› Platform initiates file server query via LawLink using matter ID and date range parameters

- Matter metadata from the CMS (parties, date range, case type) used to scope and filter the document pull
- Immediate start of AI classification once documents are retrieved — no waiting for file transfers
- One LawLink integration covers all firm file servers — no per-firm, per-platform custom work required

- `matters → get` and `contacts → get` provide party names and matter timeline for document scoping
- File server returns structured document references; platform downloads and processes in its own environment
- Access is scoped to the attorney's permissions — no over-production risk from broad file server access

LAWLINK TOOLS: `matters → get` `contacts → get` `file server API`

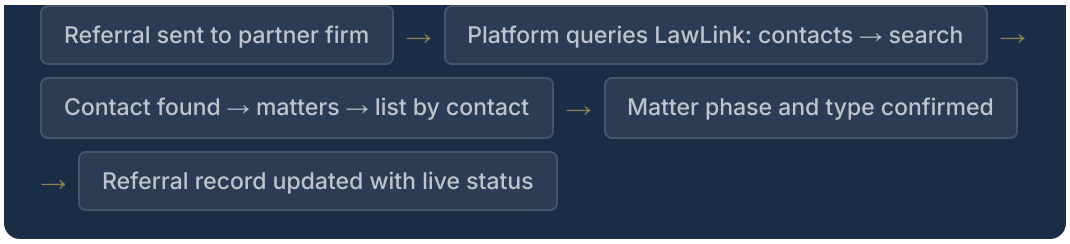
T8 Referral Network Contact Verification and Matter Tracking Across Partner Firms

PRODUCTION READY

Law firm referral networks, co-counsel platforms, and legal marketing organizations need to track what happens to referred matters after they land at a firm — whether the lead was accepted, what case type was opened, and where the matter currently stands. With LawLink's API, a referral network platform can make automated server-side calls to each connected firm's system of record to verify that referred contacts were created, confirm matter type and status, and pull milestone updates — closing the referral feedback loop without relying on attorneys to manually report back.

> **Core value:** The referral platform verifies that referred leads became active matters, tracks case milestones automatically across all connected firms, and surfaces status updates without requiring any attorney to file a manual report — transforming a manual follow-up process into an automated data feed.

AUTOMATED SERVER-SIDE FLOW



WHAT THE PLATFORM GETS

- Automated confirmation that a referred contact was accepted and a matter opened at the partner firm
- Live matter phase and type updates pulled on a schedule — no attorney reporting required
- Custom field data surfacing referral fee eligibility, case value estimates, or co-counsel status
- Closed-loop referral tracking across every connected firm from a single integration

INTEGRATION ARCHITECTURE

- `contacts → search` by referred contact name or email to confirm intake and record creation
- `matters → list` filtered by matched contact ID to verify matter type and opening date
- `matters → get` on scheduled intervals to pull phase updates and milestone changes
- `contacts → get_custom_fields` retrieves referral-source flags and fee arrangement metadata

LAWLINK TOOLS: `contacts → search` `contacts → get_custom_fields` `matters → list` `matters → get`