

Connect Your Claude to Trial Commander

A one-time setup that lets the Claude subscription you already pay for work directly with your matters — reading deadlines, drafting against the record, logging time, all from a normal Claude chat.

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What this is, in one paragraph

Trial Commander speaks a standard language called **MCP** that lets an outside AI assistant use its tools securely. Connecting your Claude means: you open claude.ai (or Claude Desktop) as you always do, and Claude gains a set of Trial Commander tools — it can search your matters, pull a trust balance, draft a motion, schedule a reminder. Nothing about how you use Claude changes; it simply gains the ability to reach into your practice, *scoped to exactly what you can already see*. A trust balance, for example, comes back only if you can see trust in Trial Commander itself.

WHAT YOU NEED BEFORE YOU START

A Claude account that can add a custom connector, your Trial Commander sign-in, and about three minutes. Anthropic’s help pages (read 25 September 2026) offer custom connectors on the Free, Pro, Max, Team and Enterprise plans; a **Free** plan can add only one custom connector, and on **Team or Enterprise** an owner of the Claude organization adds it first (see Part II). The connector comes with every Trial Commander plan, at one of two levels — see the table below. On a trial you have the working connector.

Which connector your plan includes

PLAN	CONNECTOR	WHAT YOUR CLAUDE CAN DO
Starter (free) · Bronze · Silver	Read-only	Find a matter, and read its deadlines, contacts, matter health and trial status. Five tools, up to 200 calls a month. It cannot change anything.
Gold · Platinum · Enterprise, and any trial	Working	Everything above, plus notes, communications, documents, time and billing — and, where you allow it, writing: adding deadlines and notes, logging time, drafting documents.

The level follows your firm's plan automatically. If the firm moves to Gold, the connection you already made gains the rest of the tools on its next use — there is nothing to reconnect. If a tool is not part of your plan, Claude will say so in plain words.

Part I · Turn it on inside Trial Commander

1. There is nothing to switch on in Billing: the connector is part of your plan. Open **Settings** → **Connect your AI** — every member of the firm’s staff has this card. It says which connector your plan includes, shows the connector address with a **Copy** button, and has a **Claude** tab with these steps in short.
2. **Settings** → **MCP Access** is the list of every active connection, with a one-click revoke for each. A firm administrator sees its card in Settings; everyone else opens it from the link at the foot of

Connect your AI (“Every connection is listed — and can be revoked — under Settings → MCP Access”), and sees their own connections there.

3. If you are not a firm administrator, the firm’s **Member connections** switch on the MCP Access page must be on for you to connect (it is on unless an administrator turned it off). A firm administrator can always connect. Turning the switch off stops new member connections; ones already made keep working until they are revoked.
4. Every firm administrator is e-mailed whenever anyone in the firm approves a connection — who connected, which tool, the access granted and when (never a code or token) — so they can review or revoke it under Settings → MCP Access.
5. Leave *Connect your AI* open — you will come back to it at the end to confirm the connection landed.

Part II • Add the connector in Claude

This is the part people hunt for, because Claude recently moved it. Follow this exactly.

1. Go to **claude.ai** and sign in to your Claude account.
2. Open **Settings** (click your name, bottom-left), then choose **Customize** — the last item in the settings list. *Connectors used to be its own menu; it now lives inside Customize*. The page’s own address is **claude.ai/customize/connectors**, if you would rather go straight there.
3. Inside Customize, the left rail has a few icons. Click the **Connectors** icon (the second one, a small puzzle/blocks shape). You will see a list of connectors — Gmail, Google Drive, and any you have already added.
4. Click the + (Add) button, choose **Add custom connector**, name it *Trial Commander*, and paste this exact URL:

THE CONNECTOR URL — PASTE EXACTLY

`https://app.trialcommander.com/api/mcp`

5. Click **Add / Connect**. A Trial Commander sign-in window opens.

ON A CLAUDE TEAM OR ENTERPRISE PLAN

An **owner** of your Claude organization adds the connector once, under **Organization settings** → **Connectors**, with the same URL. Each member then opens **Customize** → **Connectors**, finds Trial Commander in the list, and clicks **Connect** — which leads to the same sign-in below, as that member.

Part III • The first-time sign-in & approval

This is the "what do I do when I log in for the first time" moment. Two screens, then you're done.

SCREEN YOU SEE	WHAT TO DO
Trial Commander sign-in	Sign in with your normal Trial Commander login (the same email and password you use for the app). Claude never sees your password — Trial Commander handles the sign-in itself.
An Approve / consent screen	It states what Claude is being granted: read and write access to your matters, scoped to your account. Read it, then click Approve . This one click is what ties the connection to <i>you</i> specifically.

IF A WINDOW DOESN'T APPEAR

The sign-in sometimes opens as a **pop-up** that a browser can block — look for a blocked-popup icon at the right end of the address bar and allow it, then click Add again. On Claude Desktop the same flow opens in your default browser and returns you to the app.

Part IV • Confirm it worked

1. Back in Claude's Connectors list, **Trial Commander** now shows a green check (✓) instead of a warning or a "Connect" button. That is the connection live.
2. Back in Trial Commander at **Settings** → **Connect your AI**, press **Test connection** — the Claude tab then reads *Connected* ✓ with the date. The same connection is on the list at **Settings** → **MCP Access**.
3. The real proof is a working tool call. Open any Claude chat and ask: *"Using Trial Commander, what are my upcoming deadlines?"* If it returns your deadlines, you are fully connected. (Every such call is written to the app's audit log, so you can see it land there too.)

TURN THE CONNECTOR ON PER CHAT

In a Claude conversation, the connector has to be **enabled for that chat** to be used — click the + at the lower left of the message box, choose **Connectors**, and make sure Trial Commander is switched on. A fresh chat may start with it off; one click turns it on.

The governance you should know

- **Scoped to your access.** Claude can reach exactly the matters you can, and no others. For staff who connect later, their matter-assignment walls apply identically.
- **Every call is logged.** Who, which matter, when — in the same append-only audit trail as everything else.

- **Runs on your Claude plan.** Tool calls use your Claude subscription, not the firm's in-app AI allowance — the two are separate budgets.
- **Revocable from both ends.** Settings → MCP Access revokes it on the Trial Commander side; Claude's Connectors page disconnects from its side. Disabling a user kills their connection with them.
- **Confidentiality is your judgment, per client.** A connection moves matter content — client confidences — into an AI context the firm doesn't operate. Every call is scoped and logged, but whether that's consistent with your obligations on a given engagement is your call. The Administrator's Manual (Part VII) covers this in full.

Trouble? Three quick answers

SYMPTOM	CAUSE & FIX
No Connectors option anywhere, or no way to add one	You are looking in the old menu: it is now Settings → Customize → Connectors (claude.ai/customize/connectors). On a Free Claude plan you can add only one custom connector, so remove another first. On Team or Enterprise, an owner adds it under Organization settings → Connectors before members can connect.
"Couldn't register" error on Connect	A transient server issue. Wait a minute and click Connect again. If it persists, send Trial Commander support the reference code the error shows.
Connected, but Claude says it can't see your matters	The connector isn't switched on for that chat. Enable it under + → Connectors by the message box, then ask again.
Claude says a tool is not part of the firm's plan, or that the firm has used its calls	You are on the read-only connector and asked for something only the working connector does, or the firm has used its 200 read-only calls for the calendar month (they come back on the first). The table at the top says which is which.

Next: now that it's connected, see the companion tutorial — *Using Your Claude with Trial Commander* — for what to actually do with it, day to day.

Trial Commander · trialcommander.com — Available in the app under Q&A & Self Help. This tutorial is guidance, not legal advice.