

Using Your Claude with Trial Commander

Once connected, Claude becomes a second set of hands on your practice. This is what to actually ask it — for your cases, deadlines, drafting, research, billing, and trial — with the plain-English requests that get each thing done.

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How to talk to it

You don't learn commands. You ask in plain English, and name the matter or the task. Claude picks the right Trial Commander tool for you. Two habits make it reliable:

- **Name the matter** when it matters: *"On the Gonzalez matter, ..."* — Claude finds it and works there.
- **It reads freely; it writes on your say-so.** Asking for information (deadlines, balances, health) just happens. Anything that writes needs the working connector. Adding something (logging time, creating a deadline, a note, a draft) is done as you asked and written to the audit log under your connection.

WHICH CONNECTOR YOUR PLAN INCLUDES

Every Trial Commander plan includes the connector, at one of two levels, and the level follows the firm's plan on every request. One exception: a connection approved on the read-only level can only read. After moving up to Gold, disconnect Trial Commander in Claude's Connectors list, connect again and approve; until then anything that writes or generates (a deadline, a note, time, a draft, the morning brief) is refused.

Read-only — Starter (free), Bronze and Silver. Five requests: find a matter, and read its deadlines, contacts, matter health and trial status. Up to 200 calls a calendar month for the whole firm. It cannot change anything.

Working — Gold, Platinum, Enterprise, and any trial. Everything in this tutorial. The **Plan** column in each table below says which requests need it. On the read-only level, Claude answers a request it cannot make with a plain sentence saying it is not part of the firm's plan; your firm administrator can change the plan inside Trial Commander.

THIS TUTORIAL'S FIVE PARTS

Four short companion videos in Q&A & Self Help cover these parts — Parts IV and V share the last one. Watch the one you need, or read straight through.

I. Your cases & the morning brief · II. Deadlines & scheduling · III. Drafting & research · IV. Billing, time & trust · V. Trial, PI & insights

Part I · Your cases & the morning brief

Start your day here. Claude can survey the whole practice, then take you into any one matter.

ASK SOMETHING LIKE...	WHAT CLAUDE DOES	PLAN
"Give me my morning brief."	Generates the AI action list across <i>all</i> your active matters — what needs you today, prioritized. The same brief the dashboard shows, on demand.	Gold and up
"Find the Gonzalez matter." / "Search my matters for SunMart."	Searches by name, number, case number, or party and pulls up the match.	Every plan
"How healthy is this matter?"	Returns the red / amber / green health signal and why — the same indicator as the matter page.	Every plan
"Who are the contacts on this case?"	Client, court, judge, plaintiff, defendant, opposing counsel — the caption at a glance.	Every plan
"What are the recent communications here?"	The latest emails, calls, meetings, and letters logged on the matter.	Gold and up
"Note that opposing counsel agreed to a two-week extension." / "Log that I called the client for 15 minutes about the demand."	Adds a matter note, or logs the communication — captured to the file the moment you say it.	Gold and up

THE MOVE THAT SAVES THE MOST TIME

Open Claude with your coffee and say **"morning brief, then take me into whatever's most urgent."** It surfaces the day and walks you straight into the matter that needs you — ninety seconds instead of ten minutes of clicking.

Part II • Deadlines & scheduling

The malpractice-sensitive part of the day, made conversational. Claude reads the docket and sets what you tell it — and checking every date stays with you.

ASK SOMETHING LIKE...	WHAT CLAUDE DOES	PLAN
"What deadlines are coming up on this matter?"	Lists them with severity — overdue, this week, this month — the same ledger as the Deadlines page.	Every plan
"Add a deadline: response to the motion to dismiss, due March 14, high priority."	Creates the deadline on the matter, at the priority you name (low, medium, high or critical). Ask for critical on a limitations or jurisdictional date: it gets the red CRITICAL badge on the Deadlines page, turns the matter's health dot amber and reaches the Morning Brief inside seven days, is marked △ on a synced calendar, and its team reminders go out at the highest urgency. There is no acknowledgment step.	Gold and up
"Mark the discovery-response deadline complete." / "Push the mediation date to April 2."	Updates an existing deadline — complete it, move it, change its priority.	Gold and up
"Remind me to follow up with the expert on Friday."	Schedules a reminder for you, with optional notes — a personal nudge, not a matter deadline.	Gold and up

A SECOND SET OF EYES, NOT THE DOCKET CLERK

Claude is excellent at capturing a deadline the instant you say it, so nothing waits for you to get back to your desk. It does not replace your docketing discipline — you still verify every date it sets against the rule or the order yourself. Marking a deadline CRITICAL makes it stand out; it does not add a sign-off step, and nobody but you confirms the date Claude entered. Treat Claude as the colleague who writes it down before you both forget.

Part III • Drafting & research

Where the connection earns its keep for most attorneys. Claude drafts against the matter's own record and searches the firm's accumulated work.

ASK SOMETHING LIKE...	WHAT CLAUDE DOES	PLAN
"What can I draft for this matter?"	Lists the Drafting Studio document types available for this matter's practice area.	Gold and up
"Draft a demand letter for this case." / "Draft a motion to compel."	Generates a first draft in Drafting Studio, built from the matter's own facts — then you review, cite-check, and sign.	Gold and up
"Search the brief bank for a summary-judgment argument on comparative fault."	Searches the firm's saved drafts by keyword — and by concept, not just the keyword, once Trial Commander has connected its search-by-meaning service — so this quarter's motion starts from last quarter's best work.	Gold and up
"Add this citation to the drafting pool: [case]."	Pools a case, statute, or rule for the matter's drafts to pull from.	Gold and up
"Are my drafts on this matter filing-ready?"	Runs the readiness check on each draft — what's done, what still needs a human.	Gold and up
"List the drafts saved on this matter." / "What documents are on this case?"	The draft list, or all documents — templates, generated docs, uploads.	Gold and up

THE LAWYER SIGNS WHAT THE LAWYER HAS READ

Claude produces the first draft and can pull citations and prior work into it. Cite-check, the red-team pass, and your judgment still stand between the draft and anything that leaves the firm. The tool accelerates the blank page; it does not replace the review.

Part IV • Billing, time & trust

The money questions, answered without opening the Bill tab — and time captured the moment the work happens.

ASK SOMETHING LIKE...	WHAT CLAUDE DOES	PLAN
"Log 0.4 hours on this matter for the call with opposing counsel."	Creates the billable time entry — the entry you'd otherwise reconstruct on Friday, captured now.	Gold and up
"What time have I logged on this case lately?"	The recent entries, newest first.	Gold and up
"What's the billing picture on this matter?"	Invoiced, collected, and outstanding — the snapshot, on demand.	Gold and up
"What's the trust balance here?"	The IOTA net balance for the matter (deposits minus disbursements).	Gold and up

READING TRUST IS FINE; MOVING IT IS NOT

Claude can *read* a trust balance so you always know where a client stands. It has no tool to disburse, void, or reconcile trust — those stay firmly in the app, with the roles and approvals the Bar expects. The connection makes trust *visible*, never moveable by chat.

Part V • Trial, PI & insights

The specialist tools — for the courtroom, personal-injury matters, and the AI reflections that make you sharper over time.

ASK SOMETHING LIKE...	WHAT CLAUDE DOES	PLAN
"What's the trial status on this matter?"	The witness queue, exhibit list, and where the case stands for trial.	Every plan
"Mark Dr. Reyes as called." / "Admit exhibit 14."	Updates the live trial record — witness called, exhibit admitted — hands-free while you're on your feet.	Gold and up
"Run the PI risk checks on this matter."	Spoilation, preservation, and the other personal-injury risk signals for the case.	Gold and up
"What does the Judicial Twin say about our judge?"	Pulls the past AI analyses of how the assigned judge tends to rule.	Gold and up
"Generate my practice mirror for the week."	An AI reflection on your own time entries — what you did, what it signals, where to focus.	Gold and up
"Send the client an intake link."	Creates a tokenized questionnaire link to send the client — they fill it in, it flows back to the matter.	Gold and up

Three things worth remembering

- **It works from anywhere Claude does.** The same connected tools are there in [claude.ai](#) in your browser and in Claude Desktop — so a question about a case can be answered from your phone between hearings.
- **Everything is scoped and logged.** Claude reaches only the matters you can, and every action lands in the audit trail. You can always see, in the app, exactly what was done through the connection.

- **Changes wait for you.** Closing or reopening a matter, moving or completing a deadline, changing the caption, marking an exhibit admitted or a witness called, and creating a client intake link are proposed, not done: Claude gives you a summary and a link, and the change happens only when you approve it in Trial Commander (the Approvals page) within 30 minutes. Claude cannot approve it for you.

HAVEN'T CONNECTED YET?

See the companion tutorial, *Connect Your Claude to Trial Commander*, for the one-time setup — Settings → Customize → Connectors in claude.ai, the URL, and the first-time sign-in.

Trial Commander · trialcommander.com — Available in the app under Q&A & Self Help. Every capability shown is a live Trial Commander tool, on the plan named beside it. This tutorial is guidance, not legal advice.