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Evening thoughts

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+ Chat Cwork

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Career chat



Claude's choice

Table 5 ⓘ Requires usage credits

For your toughest challenges

Opus 5

For complex tasks

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Most efficient for everyday tasks ✓

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Fastest for quick answers

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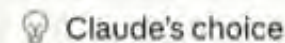
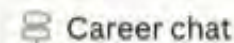
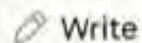
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Evening thoughts

Let's create a skill together. I'm a lawyer and I want this skill to help me organize my tasks in a way that progresses my business processes, allows me to quickly retrieve and review relevant information, and places a priority on the most urgent tasks with the strictest deadlines.

I'm often inundated with papers and emails from clients, opposing counsel, my staff, and everyone else with information that is relevant to the case, and going through it, much less organizing it, can be challenging.

I want you to ask me clarifying questions, take my feedback and responses, spitball ideas, and land on a plan for a skill to implement in collaboration with me, don't make decisions or progress without my say-so.

Send message

+ Chat Cowork

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If the skill only did one of these really well, which matters most? Drag to rank.

1 of 3 > x

1 Triage incoming material into structured, findable records

2 Tell me what to work on now, ranked by deadline risk

3 Fast retrieval: 'what do we have on X issue in Y matter'

4 Draft the next action (response, letter, task list) once triaged

Drag to re-order your priorities

Skip



Or reply directly...



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Deadline calculation needs a hard line. Computing a response date under a specific jurisdiction's rules is something I can get wrong in ways that are genuinely damaging. My instinct is that the skill should *extract and surface* dates — "this pleading was served 8/4, triggers a response deadline, verify under [rule]" — and flag anything date-triggering loudly, but never present a computed deadline as authoritative. You verify, then it gets locked into the record. Tell me if you want that line drawn somewhere else.

Three questions to start:

Where should the organized output actually live?

< 2 of 3 > x

- 1 ClickUp (tasks/deadlines) — you're already connected
- 2 Files in Google Drive, one per matter
- 3 A single running markdown file I maintain and re-upload
- 4 Not sure — walk me through the tradeoffs

Something else

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ility of life features to make it easy for me to wrap my head around a matter and the related deadlines



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Files in Google Drive, one per matter

A single running markdown file I maintain and re-upload

Not sure — walk me through the tradeoffs

I'd like it to be an artifact that you create for the specific run. It should have embedded links to source



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Three questions to start:

What's your practice mix? This drives how deadline logic works.

< 3 of 3 x

- 1 Mostly litigation — court rules and service dates
- 2 Mostly transactional — closing dates and negotiated terms
- 3 **Roughly both**
- 4 Something else / I'll explain
- ✎ Something else

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RECORD: TELLING YOU WHAT THE HIGHEST QUALITY GUIDANCE IS

Three questions to start:

If the skill only did one of these really well, which matters most? Drag to rank.

Ranked: 1. Tell me what to work on now, ranked by deadline risk, 2. Triage incoming material into structured, findable records, 3. Fast retrieval: 'what do we have on X issue in Y matter', 4. Draft the next action (response, letter, task list) once triaged

Where should the organized output actually live?

I'd like it to be an artifact that you create for the specific run. It should have embedded links to source materials for quick verification, a table of contents, and other quality of life features to make it easy for me to wrap my head around a matter and the related deadlines.

What's your practice mix? This drives how deadline logic works.

Roughly both

Quick answer

Write a message...



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because one takes four working days and the other takes twenty minutes. So each task carries an effort estimate and a dependency flag (needs client signature, waiting on expert, opposing counsel's consent), and the ranking is:

$\text{latest safe start} = \text{deadline} - \text{estimated work} - \text{dependency lead time} - \text{buffer}$

Anything whose latest safe start is in the past is in a red band at the top. That single change is the difference between a list that's technically correct and one that actually protects you.

What does a typical run produce?

1 of 3 > x

1 Cross-matter daily triage — everything, ranked by risk

2 Single-matter deep briefing — one case, top to bottom

3 Both, as two artifact modes in one skill

4 Both, but build the daily triage first

Something else

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How does incoming material actually reach me?

< 2 of 3 > x

1 Gmail + Drive via connectors — go read it yourself

2 I upload files into the chat each time

3 Mix: connectors for email, uploads for scanned paper

4 I'd paste/summarize the important bits myself

Something else

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Buy the ledger + artifact split?

< 3 of 3 > x

1 Yes — ledger in Drive, artifact rendered from it

2 Yes, but keep the ledger inside ClickUp instead

3 No — re-derive fresh every run, keep it simple

4 Explain the ledger tradeoff more before I decide

Something else

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can open it and fix it yourself when it's wrong. Non-technical enough to correct by hand, structured enough for me to read reliably. The staleness problem gets mitigated three ways: every briefing opens with a short "confirm these are still true" block for anything the ledger asserts but hasn't seen fresh evidence for in 30 days; unverified dates render in a visually distinct band; and the artifact header always carries "working aid — not the docket of record."

One flag before you answer: you ranked cross-↓.er deadline triage as your top priority but chose single-matter briefing as the run mode. Those aren't incompatible — if each matter has

Which persistence model?

1 of 2 > x

- 1 Markdown ledger per matter, artifact rendered from it
- 2 Artifact is the ledger — one file, embedded data
- 3 No persistence — re-derive each run, accept the cost
- 4 Still deciding — push back on your recommendation

Something else

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☒ I don't want a ledger of active matters as an ongoing thing. This skill should just help me get oriented to



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One flag before you answer: you ranked cross-matter deadline triage as your top priority but chose single-matter briefing as the run mode. Those aren't incompatible — if each matter has

Cross-matter rollup view — in scope?

2 of 2

- Yes — design for it now, build it second
- Yes eventually, don't let it shape the design
- No — single-matter is all I need**
- Actually, flip it: build cross-matter first
- Something else

Skip

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Which persistence model?

I don't want a ledger of active matters as an ongoing thing. This skill should just help me get oriented to a matter that has lots of files from lots of sources. In terms of making a todo list, tracking dates and deadlines, drafting materials or emails and the like, I will do that separately. This skill is about orienting me to a matter.

Cross-matter rollup view — in scope?

No — single-matter is all I need



Thinking about defining scope and requirements for a matter-oriented tool

Quick answer

Write a message...

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How big is a typical pile you'd point this at?

1 of 3 > x

1 Small — under 25 documents

2 Medium — 25 to 100



3 Large — 100 to 500

4 Huge — 500+, think document productions

Something else

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Which sections earn their place? Rank them.

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1 Chronology of events

2 Cast of characters

3 Source inventory with summaries

4 Gaps and missing documents

Drag to re-order your priorities

Skip



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1 Cast of characters



2 Chronology of events



3 Source inventory with summaries



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Drag to re-order your priorities

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isn't in the plie. An email says "per our call Tuesday" and there's no call memo. A production is Bates-numbered with a break in the range. Surfacing that list is often more valuable than summarizing what's there — those are the things you don't know you don't know.

And one rule I'd bake in hard: **every assertion in the artifact carries a source pointer** — document name, date, page or line. Nothing appears in the chronology that you can't click or flip to and verify in five seconds. Orientation you can't check is worse than none.

Three practical questions before I draft:

Your scanned paper — searchable text or image-only?

< 3 of 3 > x

1 Searchable — my scanner adds a text layer

2 Image-only — they need OCR

3 Mixed bag, honestly

4 Not sure how to tell

Something else

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How big is a typical pile you'd point this at?

Medium — 25 to 100

Which sections earn their place? Rank them.

Ranked: 1. Cast of characters, 2. Chronology of events, 3. Source inventory with summaries, 4. Gaps and missing documents

Your scanned paper — searchable text or image-only?

Not sure how to tell



Thinking about interpreting Q&A responses about document organization and scanning

Quick answer

Write a message...



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At run time, how do the files reach me?

1 of 3 > x

- 1 Drive folder — I dump everything there, you read it
- 2 Upload into chat each run
- 3 Drive folder for docs, Gmail connector for email
- 4 Whatever's least work for me — recommend one

Something else

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- Whatever's least work for me — I recommend one

I can upload things, but I can also set up connectors. Email, file management, etc.



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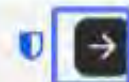


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What should the artifact feel like?

< 2 of 3 > ✕

1 Interactive HTML — collapsible, searchable, clickable →

2 Clean document I can print and mark up

3 HTML now, exportable to Word if I want

4 Something else — I'll describe it

📝 Something else

Skip

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Neutral orientation, or steerable toward a concern?

< 3 of 3



1 Always neutral — just orient me, no agenda



2 Let me state a focus and slant it that way

3 Neutral by default, focus optional

4 Ask me what I'm worried about before you start

✎ Something else

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At run time, how do the files reach me?
I can upload things, but I can also set up connectors. Email, file management, etc.
What should the artifact feel like?
Interactive HTML — collapsible, searchable, clickable
Neutral orientation, or steerable toward a concern?
Always neutral — just orient me, no agenda

🌟 Pondering

Quick answer

Write a message...



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Buy the Drive-primary recommendation?

1 of 2

- 1 Yes — Drive primary, zip as fallback
- 2 Zip uploads only, skip the connector complexity
- 3 Connectors only, don't bother with the zip path
- 4 Let's talk about this more

Something else

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- ☐ Zip uploads only, skip the connector complexity
- ☐ Connectors only, don't bother with the zip path
- ☐ Let's talk about this more

Let's focus around connectors, but sometimes I'll have files and zips for you



Or reply directly...



Opus 5 High



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Alex · Promise Legal Tech

- **Sections, in order:** orientation paragraph → cast of characters → chronology → source inventory → gaps and missing documents
- **Rules:** every assertion carries a source pointer; OCR-derived text flagged as such; dates surfaced with their trigger, never calculated as authoritative; uncertain identity resolutions flagged, not guessed; coverage ^{not} enclosed so you know what got skimmed
- **Explicitly out of scope:** persistence, task management, deadline calculation, drafting, cross-matter views

Buy the Drive-primary recommendation?

1 of 2

- ☐ Yes — Drive primary, zip as fallback
- ☐ Zip uploads only, skip the connector complexity
- ☐ Connectors only, don't bother with the zip path
- ☐ Let's talk about this more

☒ Let's focus around connectors, but sometimes I'll have files and zips for you



Or reply directly...



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- **Explicitly out of scope:** persistence, task management, deadline calculation, drafting, cross-matter views

What next?

< 2 of 2 > X

- 1 Draft the skill now
- 2 Show me a wireframe of the artifact first
- 3 I have more to add to the spec
- 4 Something in the spec is wrong — let me correct it

Something else

Skip

Or reply directly...

+

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🎤

🔊

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- **Explicitly out of scope:** persistence, task management, deadline calculation, drafting, cross-matter views

What next?

< 2 of 2 > X

- ☐ Draft the skill now
- ☐ Show me a wireframe of the artifact first
- ☐ I have more to add to the spec
- ☐ Something in the spec is wrong — let me correct it

☒ Draft the skill, then show me how to add connectors



Or reply directly...



1

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2

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Buy the Drive-primary recommendation?

Let's focus around connectors, but sometimes I'll have files and zips for you

What next?

Draft the skill, then show me how to add connectors



Thinking about clarifying Drive recommendations and connector implementation steps

Quick answer

Write a message...

Opus 5 High 

on one real thread before you build a habit around it. If attachments don't come through, the workaround is routing them to a Drive matter folder, which the skill already handles.

Where I'd go next: write two or three test cases and run the skill against real material from a closed matter, so we can see where the cast resolution and gap detection actually break. Want me to draft those, or would you rather look at the example briefing first and tell me what's wrong with it?



matter-orientation

Skill



Save skill



Example briefing

Code · HTML

Download

Download all

Write a message...



Opus 5 High ▾



Expand

ORIENTATION AID — NOT A DOCKET, NOT LEGAL ADVICE — EVERY DATE UNVERIFIED

Smith v. Acme Co.

Robert Smith v. Acme Co., No. 3:26-cv-01234 (N.D. Tex.)

LITIGATION Client: Robert Smith (plaintiff) Prepared 2026-08-12

Search everything — names, dates, docu

Expand all

Collapse all

Print

Orientation

What was read

Cast of characters ▾

Chronology ▾

Source invento

- ORIENTATION

Commission dispute between Robert Smith, Acme's former CFO, and Acme Co. Smith is represented by Vance Law; Marcus Vance appears for Acme. The material runs from a February 2026 demand letter [D-007](#) through a March 20 extension request [D-003](#), and centers on unpaid Q4 commissions. A complaint was served on March 4, 2026, though the complaint itself is not in this material [D-002](#). A separate transactional thread concerns a memorandum of understanding between Acme and Bridgeport Holdings with a June 30 closing date [D-004](#); its relationship to the commission dispute is not explained anywhere in the record.

Example briefing HTML

Copy

ORIENTATION AID — NOT A DOCKET, NOT LEGAL ADVICE — EVERY DATE UNVERIFIED

Smith v. Acme Co.

Robert Smith v. Acme Co., No. 3:26-cv-01234 (N.D. Tex.)

LITIGATION Client: Robert Smith (plaintiff) Prepared 2026-08-12

Search everything — names, dates, documents

Expand all

Collapse all

Print

Orientation

What was read

Cast of characters

Chronology

Source inventory

Gaps & open questions

• ORIENTATION

Commission dispute between Robert Smith, Acme's former CFO, and Acme Co. Smith is represented by Vance Law; Marcus Vance appears for Acme. The material runs from a February 2026 demand letter [D-007](#) through a March 20 extension request [D-003](#), and centers on unpaid Q4 commissions. A complaint was served on March 4, 2026, though the complaint itself is not in this material [D-002](#). A separate transactional thread concerns a memorandum of understanding between Acme and Bridgeport Holdings with a June 30 closing date [D-004](#); its relationship to the commission dispute is not explained anywhere in the record.

• WHAT WAS READ

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closed matter, so we can see where the cast resolution and gap detection actually break. Want me to draft those, or would you rather look at the example briefing first and tell me what's wrong with it?



matter-orientation

Skill



Save skill



Example briefing

Code HTML

Download



Download all



2 minutes ago



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- Recent construction law appellate
- Privacy law digest: national, California
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- Alex · Promise Legal Tech

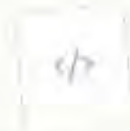
closed matter, so we can see where the cast resolution and gap detection actually break. Want me to draft those, or would you rather look at the example briefing first and tell me what's wrong with it?



matter-orientation
Skill



Update skill



Example briefing
Code · HTML

Download



Download all



Write a message...



Onus 5. High

Skill saved. Manage

Search

Skills



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← Skills



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matter-orientation ⓘ

by You

Share



Orients a lawyer to a single legal matter by turning an unsorted pile of case material — emails, PDFs, scanned paper, pleadings, correspondence — into one interactive HTML briefing covering the cast of characters, a sourced chronology, a... [See more](#)

SKILL.md ▾ 6 files



Matter Orientation

Turn an unsorted pile of material about one legal matter into a single interactive HTML briefing that a lawyer can read in fifteen minutes and trust.

The user is a practicing attorney. They will act on what this artifact says. That single fact drives every rule below.

What this is not

This skill does one thing: it orients. It has no memory between runs, tracks no tasks, calculates no deadlines, drafts nothing, and never spans multiple matters. If the user asks for those things, produce the orientation artifact and tell them plainly that the rest is out of scope for this skill.

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SKILL.md ▾ 5 files



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Adding connectors

In Claude.ai, go to **Customize → Connectors**, find Gmail and Google Drive, and click **Connect** on each — you'll sign in through Google and approve permissions. You can also toggle them per-conversation from the plus sign in the chat input. Gmail requires a Pro, Max, Team, or Enterprise plan, and if you're on Team or Enterprise, an Owner has to enable it for the organization before it shows up in your list. If your firm uses Google Workspace and the connection fails, your admin likely needs to trust Claude in the Google admin console.

One limitation you should test before relying on this. The official docs confirm Claude cannot create, send, or modify emails, and embedded images in emails are not visible — which matters, because a scan pasted inline into an email body may be invisible even though the OCR pipeline would handle the same scan fine as a file. Separately, third-party reporting claims the Gmail connector exposes attachment *filenames* but not attachment *contents*, and the official docs neither confirm nor deny it. If that's right it's significant for you, since most of what opposing counsel sends arrives as an attachment. Worth testing on one real thread before you build a habit around it. If attachments don't come through, the workaround is routing them to a Drive matter folder, which the skill already handles.

Where I'd go next: write two or three test cases ↓, run the skill against real material from a closed matter, so we can see where the cast resolution and gap detection actually break. Want

Write a message...



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Privacy law digest: national, Call

Design

AS Alex - Promise Legal Tech

Adding connectors

In [claude.ai](#), go to **Customize** → **Connectors**, find Gmail and Google Drive, and click **Connect** on each — you'll sign in through Google and approve permissions. You can also toggle them per-conversation from the plus sign in the chat input. Gmail requires a Pro, Max, Team, or Enterprise plan, and if you're on Team or Enterprise, an Owner has to enable it for the organization before it shows up in your list. If your firm uses Google Workspace and the connection fails, your admin likely needs to trust Claude in the Google admin console.

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All Connected Not connected

Connector

Type

Status

ClickUp

Web

Connect

Gmail

Web

Connect

Google Drive

Web

Connect

 Sign in with Google



Choose an account

to continue to [Claude for Gmail](#)



Alex Shahrestani

[Redacted email address]



Alex Shahrestani

[Redacted email address]

Signed out



[Redacted email address]

Signed out



[Redacted email address]

Signed out



Alex

[Redacted email address]

Signed out



Alex Shahrestani

[Redacted email address]

Signed out



[Redacted email address]

Signed out

 Sign in with Google



Sign in to Claude for Gmail



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 Alex.Shahrestani@gmail.com
Email address

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Claude for Gmail wants access to your Google Account



[Redacted name]

Select what **Claude for Gmail** can
access

☐

Select all



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settings. [See access details](#)

☐

Manage drafts and send emails. [See
access details](#)

☐

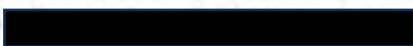
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 Manage drafts and send emails. [See access details](#) 

 Read, compose, and send emails from your Gmail account. [See access details](#) 

Make sure you trust Claude for Gmail

Review Claude for Gmail's [Privacy Policy](#) and [Terms of Service](#) to understand how Claude for Gmail will process and protect your data.

To make changes at any time, go to your [Google Account](#).

Learn how Google helps you [share data safely](#).

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All Connected Not connected

Connector	Type	Status
 Gmail	Web	✓
 ClickUp	Web	Connect
 Google Drive	Web	Connect

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Needs approval

Apply sensitive label (Trash or Spam) to message



Apply sensitive label (Trash or Spam) to thread



Create draft email



Create label



Delete label



Add labels to message



Add labels to thread



Marks a message as Spam.



Marks a thread as Spam.



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Apply sensitive label (Trash or Spam) to message

Apply sensitive label (Trash or Spam) to thread

Create draft email

Create label

Delete label

Add labels to message

Add labels to thread

Marks a message as Spam.

Marks a thread as Spam.

Needs approval

Needs approval ✓

Blocked

Custom



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Blocked

Apply sensitive label (Trash or Spam) to message



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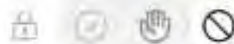


Needs approval

Create draft email



Create label



Delete label



Add labels to message



Add labels to thread



Marks a message as Spam



Marks a thread as Spam



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← Connectors



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Gmail

Disconnect



Connect Gmail to Claude to quickly find important emails and understand long conversations. Claude can search through your messages, read entire email threads to give you context, and help you stay on top of your inbox. Perfect for finding that message you remember sending, catching up on email chains you missed, or preparing for meetings.

Prompt suggestions

[Find replies I owe ↗](#) [Morning inbox brief ↗](#) [Visualize my inbox ↗](#)

Tool permissions

Choose when Claude is allowed to use these tools. You'll only see tools your organization has given you access to.

Read-only tools 5

Always allow

Get email message



Get email thread



List draft emails



Search

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closed matter, so we can see where the cast resolution and gap detection actually break. Want me to draft those, or would you rather look at the example briefing first and tell me what's wrong with it?



matter-orientation
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Update skill



Example briefing
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-  Add files or photos Ctrl+U
-  Take a screenshot
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-  Add plugins...
-  Ask Promise Legal
-  Research
-  Web search

+

Chat Cowork:

Opus 5 High ▾



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💬 Legal task organization system

🎨 Design

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- 📷 Take a screenshot
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- 📄 Skills ↗
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- ⚙️ Add plugins...
- 🔗 Ask Promise Legal
- 🔍 Research
- 🌐 Web search ✓

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⌵

⬇

Evening thoughts



PDF

Run the matter orientation skill on this file.

+

Chat

Cowork

Opus 5 High ⌵




There's also a one-day conflict on the DWI arrest date between the timeline and the APD summary.

Worth flagging separately: the file identifies itself on every page as a fictional conference training pattern, and both consult transcripts are labeled AI-generated rather than transcribed. No dates are calculated anywhere in the artifact — date-triggering events are marked with their trigger and nothing more.



Archer matter orientation

Code HTML

Download



Write a message...



Opus 5 High



Archer matter orientation HTML

Copy



ORIENTATION AID — NOT A DOCKET, NOT LEGAL ADVICE — EVERY DATE UNVERIFIED

In re Marriage of Archer

In the Matter of the Marriage of Evelyn Marisol Archer and Bennett Cole Archer, and in the Interest of S.R.A., L.G.A., and A.G.A., Children — No. D-1-FM-25-004411, 345th District Court, Travis County, Texas

LITIGATION

Client: Not identified in the material — no attorney signature blocks or engagement records are present; the packet contains intake and pleading material for both sides [D-002][D-005]

Prepared 2026-08-12

Search everything — names, dates, docu

Expand all

Collapse all

Print

Orientation

What was read

Cast of characters 14

Chronology 28

Source inven

ORIENTATION

TRAINING MATERIAL — the file states on every page that it is a fictional educational fact pattern prepared for the Advanced Family Law Conference AI Track, and that all facts, persons, entities, records, and account numbers are invented [D-001 p.1]. Substantively: Evelyn Archer (41, former RN, out of

ORIENTATION AID — NOT A DOCKET, NOT LEGAL ADVICE — EVERY DATE UNVERIFIED

In re Marriage of Archer

In the Matter of the Marriage of Evelyn Marisol Archer and Bennett Cole Archer, and in the Interest of S.R.A., L.G.A., and A.G.A., Children — No. D-1-FM-25-004411, 345th District Court, Travis County, Texas

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Prepared 2026-08-12

 Search everything — names, dates, documents

Expand all

Collapse all

Print

Orientation

What was read	
Cast of characters	14
Chronology	28
Source inventory	15
Gaps & open questions	18

• ORIENTATION

TRAINING MATERIAL — the file states on every page that it is a fictional educational fact pattern prepared for the Advanced Family Law Conference AI Track, and that all facts, persons, entities, records, and account numbers are invented [D-001 p.1](#). Substantively: Evelyn Archer (41, former RN, out of the paid workforce since 2013) filed for divorce and a SAPCR on February 14, 2025 after a February 1, 2025 separation from Bennett Archer (44, founder/CEO of Asterion CloudWorks, roughly \$1,000,000 in 2025 gross compensation) [D-001 p.2](#) [D-004 p.4](#).

Search everything — names, dates, documents

Expand all

Collapse all

Print

All events

Operative facts

Procedural

Date-triggering

Orientation

What was read

Cast of characters

14

Chronology

28

Source inventory

15

Gaps & open questions

18

June 19, 2018

Evelyn and Bennett marry in Austin, Texas. No premarital or marital agreement has been produced D-001 p.2 -

operative D-010 p.8 D-004 p.4

May 3, 2011

Sofia Rose Archer born.

operative D-010 p.8

Sources conflict: The packet elsewhere lists Sofia as age 14, which does not match a May 2011 birth date as of the March 2025 setting D-001 p.1 -

August 2012 (month only)

Bennett incorporates Asterion CloudWorks during the marriage. No day of month is given.

operative D-010 p.8 inferred date

2013 (year only)

Evelyn stops working for wages; she has been a full-time homemaker and parent since. The record gives only the year.

operative D-002 p.3 D-001 p.2 inferred date

Download as HTML

Share artifact

Search everything — names, dates, documents

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[operative](#) [D-002 p.3](#) [D-001 p.2](#) [inferred date](#)