

CoCounsel Release Notes: 9/5/23

Released:

New skill: Draft correspondence

You will now have the ability to draft letters and emails through the “Draft correspondence” skill. “Draft correspondence” supports documents without strict formatting requirements, such as demand letters, preservation letters, and acknowledgement letters. This new skill aims to help provide a first draft of routine, frequent correspondence.

Step 1: Select “Draft correspondence” skill

To launch this application, select the “Draft correspondence” skill on the Skills modal under the “Universal” category, shown in the **green** boxes below:

The screenshot shows the CoCounsel Skills modal. At the top, under the heading "COCOUNSEL SKILLS", there are three buttons: "Search a Database", "Draft Correspondence", and "Summarize". A blue button labeled "View all skills" is highlighted with a green box. Below these buttons is a search input field with the placeholder text "Tell me what you want to do" and a right-pointing arrow. Underneath the search field, there is a section titled "UNIVERSAL (4)" containing two skill cards. The first card is "Search a Database" with a description: "Find the 'needle in a haystack' document addressing a particular topic or question, from a large set of documents." The second card is "Draft Correspondence" with a "BETA" badge and a description: "Get a first draft of common communications to clients, opposing counsel, judges, and others." This second card is highlighted with a green box.

Step 2: Fill in Type, Tone, & Recipient’s Name

After selecting the skill, a pop-up will appear for you to select the:

- **Type** of correspondence - Email or Letter (shown in the **blue** box in the screenshot below)

- **Tone** of correspondence - a dropdown option: Adversarial, Formal, Neutral, or Casual (shown the pink boxes).
 - *Note: Selecting the tone is optional. If you do not choose this option, CoCounsel will automatically use the “Neutral” option.*
 - *You also have the option to change the tone in the same letter or email (see Step 4.2 - Refine results).*

Tone

Adversarial

Select a tone (optional)

Adversarial

Formal

Neutral

Casual

- **Recipient** of the correspondence - a text-filled option of who you want the correspondence to be addressed to (shown in the orange box)

Draft Correspondence

Step 1 of 2

Correspondence Details

Select correspondence type

Email

Letter

Tone

Adversarial

Recipient name(s)

John Wick

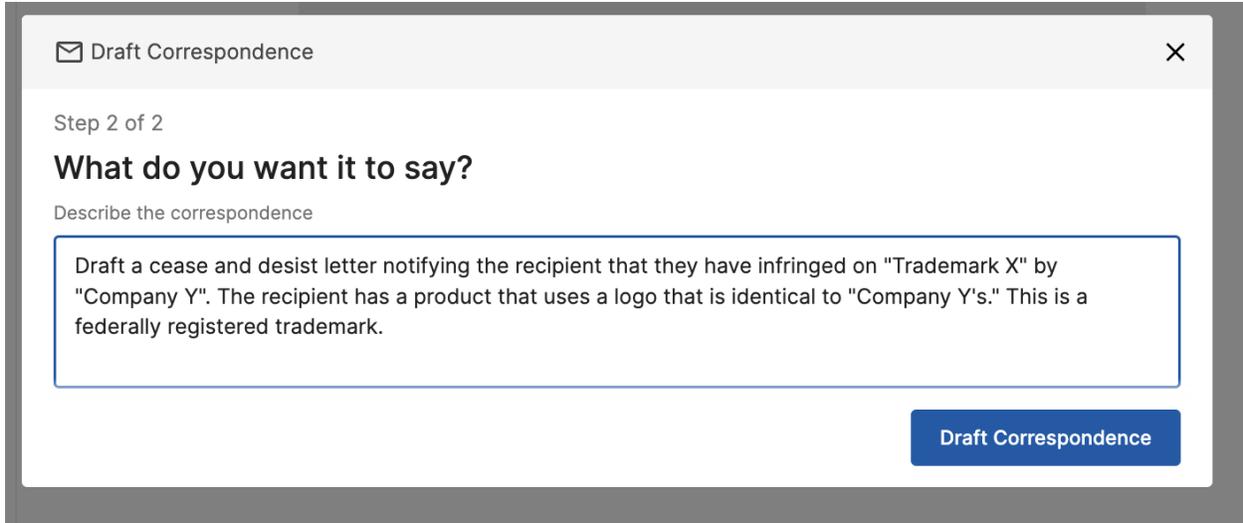
190 characters remaining

Draft Correspondence

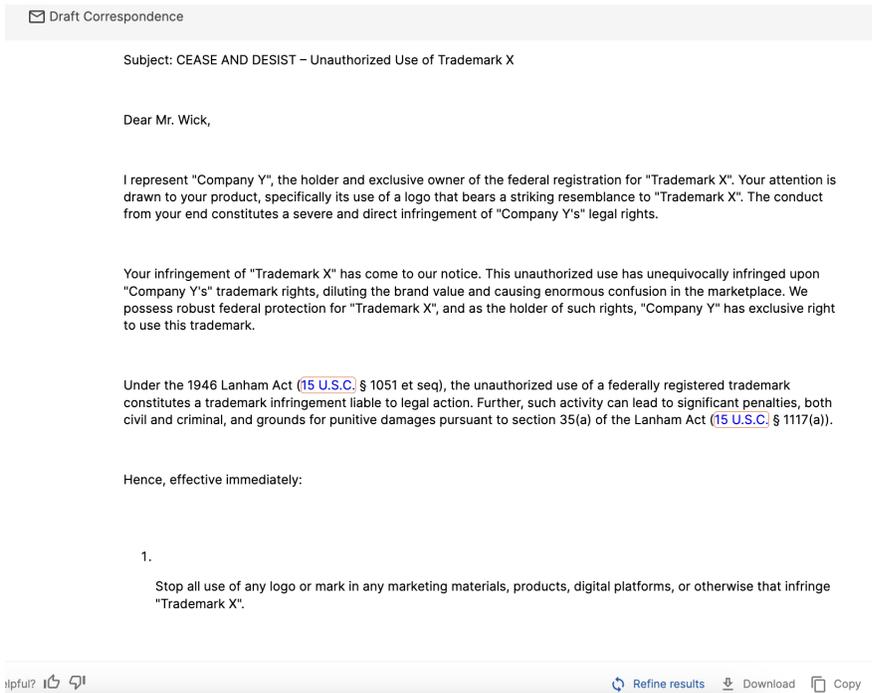
In this example, a cease and desist letter will be used. Therefore, an “Adversarial” tone was selected.

Step 3: Enter Correspondence prompt

Enter in your prompt with the conditions for your correspondence situation. In this example, we will be generating a trademark cease and desist letter to a party that is infringing upon a federally registered trademark:



Step 4: Review Legal Authorities Flag, then Download, Copy, or Refine Results
 CoCounsel’s output will generate a draft that you can use as a starting point for your correspondence:



Step 4.1: Review Legal Authorities Flags

Please make sure to review the “Legal Authorities Flags,” indicated in blue banners at the very top of CoCounsel’s output, shown below:

Reminder to view all legal references

This correspondence includes references to the 1946 Lanham Act (15 U.S.C. § 1051 et seq) and section 35(a) of the Lanham Act (15 U.S.C. § 1117(a)). Please ensure that any quotations, references, or paraphrases of legal authorities are accurate and up-to-date. CoCounsel does not have the ability to directly consult any external legal sources while drafting.

Draft Correspondence skill cannot access legal sources

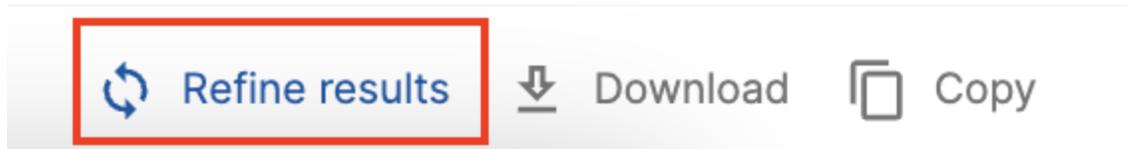
It looks like you may be asking CoCounsel to cite legal authorities in your correspondence. CoCounsel does not currently have access to any external legal sources while drafting. Please review the below correspondence to ensure accuracy.

While this skill **may** recommend legal references, it is important to **review all references to legal authorities for accuracy**. “Draft correspondence” does not cite legal authorities, and will not fetch case law in your results.

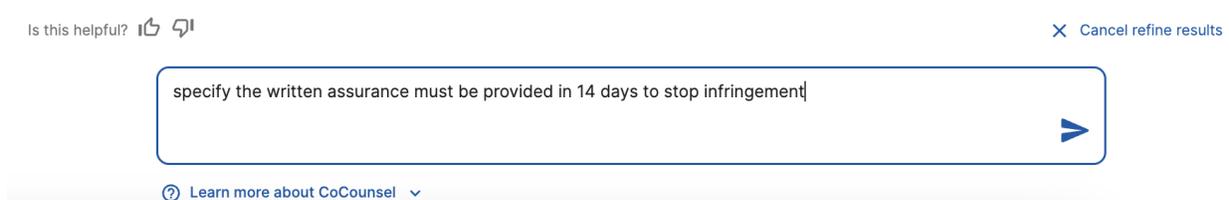
- *Tip: You can verify legal references and its applicability in CoCounsel by using the [“Legal research memo” skill](#).*

Step 4.2: Optional - Refine results

At the bottom of CoCounsel’s output, you have the option to refine your results, indicated in the **red** box in the screenshot below:



Clicking “Refine results” will allow you to iterate on your results. In this example, refinement was used to specify the number of days for the recipient to send a written confirmation to cease infringement activities:



Other Refinement Ideas:

Here are other examples of how you can refine your prompt. By refining the results, you can let CoCounsel do the editing for you:

- “Shorten to two paragraphs”

- *“Make the tone more formal”*
- *“Delete the first paragraph”*
- *“Reference attached contract in the last paragraph”*

Step 4.3: Download or Copy Results

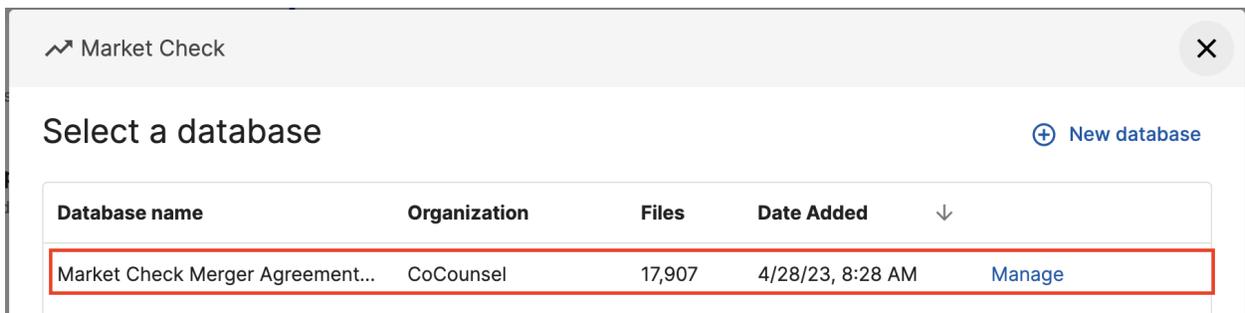
You can also either download your results in a Word document, or copy your results to paste the text.

Market check - EDGAR M&A Database includes 3/25/23-8/19/23

An option in “Market check” is to use publicly available mergers and acquisition agreements filed with the SEC. Once you log into CoCounsel and launch the “Market check” skill, you can select the EDGAR Database. The EDGAR database will be pre-populated in this skill.

When “Market check” first launched on 5/1, the EDGAR Merger Agreements Database had merger agreements from 2021-2023. Now this database includes merger agreements from 1/1/2009-8/19/2023.

When you launch the “Market check” skill in CoCounsel, you can select the “Market Check Merger Agreements” database from AllSearch (shown in the red boxes):



The screenshot shows a window titled "Market Check" with a close button (X) in the top right corner. Below the title bar, there is a section "Select a database" with a "+ New database" link. A table lists the available databases:

Database name	Organization	Files	Date Added	
Market Check Merger Agreement...	CoCounsel	17,907	4/28/23, 8:28 AM	Manage

The row containing the "Market Check Merger Agreement..." database is highlighted with a red border.

[Home](#) / [My AllSearch Databases](#) / [Market Check Merger Agreements 2009-2023](#)

Search **Market Check Merger Agreements 2009-2023** by CoCounsel

Search with keywords, booleans, or sentences

[View all files \(17907\)](#)