

Clio SmartSearch Connector

How to get started

Clio SmartSearch Integration Installation Guide



Who Benefits: This solution is ideal for legal professionals, including attorneys, paralegals and Client/Matter intake teams who use Clio Manage for case management and need to efficiently locate and validate client identity information.

What does it do: Clio SmartSearch streamlines risk management by reducing time spent on Client/Matter onboarding activities. It enables Clio users to run checks directly from contacts page in Manage, eliminating redundant data entry to other systems and consolidating compliance requirements into one platform.

Follow these simple steps to integrate SmartSearch into your Clio Manage.

Step 1 - Add to Clio (Free sandbox access)

Clio SmartSearch Connector

Streamline your firm's client on-boarding and KYC/AML checks by using Clio Manage. Run ID checks directly from your Clio contacts, eliminate redundant data entry and consolidate all your compliance requirements into one platform!

Add to Clio

Add the SmartSearch integration to your Clio account for instant access to SmartSearch integration. Enjoy free SmartSearch sandbox environment to explore its features before committing.

Try it: Install Clio integration from:

- IDS SmartSearch page [IDS • SmartSearch Integration Services](#).
- From Clio App Marketplace [Europe Integrations for Clio | Clio App Directory](#).
- [Add to Clio](#) to add to Clio Manage

Step 2 – Subscribe to SmartSearch



Get in touch today!

First Name*

Last Name*

Company Name*

Whether you're a new or existing subscriber, you will need to fill out the form on SmartSearch get in touch page. This step is required to notify SmartSearch that you wish to enable API access and/or to integrate with Clio.

SmartSearch will create necessary data contract for programmatic access to Live system.

Try it: [Click here](#) to visit SmartSearch data contract page and fill out the form.

Step 3 – Subscribe to IDS

☐ Clio Connector (1 year) £99.99

☐ Clio Connector (1 Month) £9.99

Clio Connector is an advanced KYC/AML, identity check and entity search integration designed for SmartSearch subscribers. This solution is ideal for legal professionals, including attorneys, paralegals and support staff who use Clio for case management and need to efficiently locate and validate critical information.

Firm size (Required)
1 to 99 user(s)

Approximate number of business application users

Firm website / domain (Required)
www.myfirm.xyz

Email (Administrator) (Required)
Jane.Doe@myfirm.xyz

Choose your subscription plan:

- Annual for £99.99.
- Monthly for £9.99.

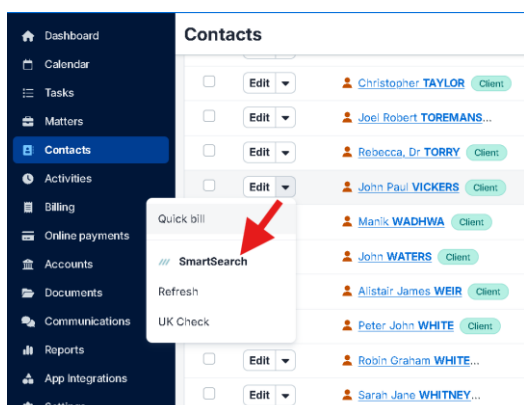
Select the option that best suits your needs to gain **full access to SmartSearch** features and ongoing support from IDS.



Try it: [Select the option](#) from IDS website and complete the subscription workflow.



Step 4 – Enjoy enhanced Clio



Once your subscriptions with SmartSearch and IDS are active, you can start using SmartSearch Live System to streamline your client/matter intake and compliance processes within Clio!

Experience faster and more accurate searches without switching between applications. Save time and improve efficiency in your risk and compliance workflows.

Try it: Visit [Clio Manage](#)

Step 5 – Get in touch (Bugs & Improvements)



Whether you encounter bugs, need improvements, or require bespoke application development, our team is here to help. [Reach out to IDS anytime](#) for assistance and we'll ensure your Clio & SmartSearch experiences remain effortless and tailored to your evolving technology needs.

Try it: contact us via:

- [WhatsApp](#)
- [Email](#)
- [Customer portal](#)

Technology Transformation

IDS supplies tailored business application analysis and bespoke system development leadership capabilities to professional services firms. In partnership with legal technology vendors, we accelerate product implementation, decommission and business change adoption processes.

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Bespoke Integration

We are a curated network of veteran and junior technologists, focusing on business of law applications. Our deliverables include solution discovery, data modelling, system architecture, custom development, code review and quality (re)assurance services.

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Speak to your systems: use natural language to execute all business application tasks from your

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