

GUIDE

Clio Integration Guide v1.5.6

April. 2026

TIMEKEEPING IS THE LIFEBLOOD. BILLING IS THE PULSE.

MIRA | WWW.MIRANOW.AI

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This guide walks Clio administrators through the steps required to request API credentials from Clio, configure them in the MIRA Admin Portal, and complete the authorization process.

1. Create a new app in Clio

The new app will be used to obtain authentication information.

🕒 **Step 1: Log in to Clio Developer Portal** <https://developers.clio.com/>

🕒 **Step 2: Click [New App](#)**

🕒 **Step 3: Fill in the required data and click the [Accept Agreements](#) button**

- Name: MIRALink
- Website URL: <https://admin.miranow.ai>
- Redirect URIs: <https://admin.miranow.ai/oauth/callback>

🕒 **Step 4: Select the permissions required for MIRALink**

- Activities: Read&Write
- Api: Read&Write
- Billing: Read
- Contacts: Read
- Matters: Read
- Users: Read
- Client share permissions: Read

🔍 Clio Developer Portal Back to Manage →

📄 Developer Apps New App

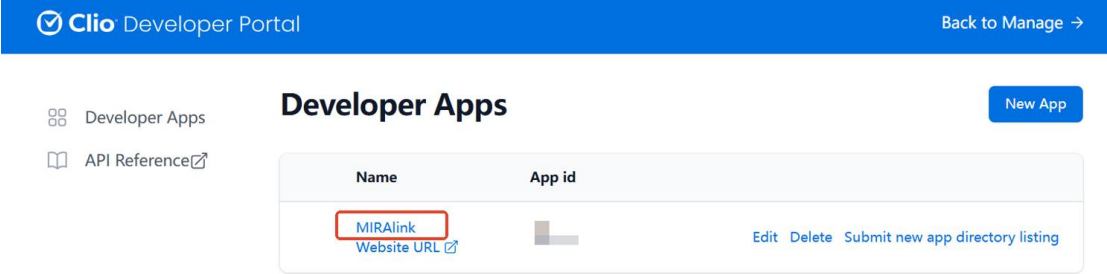
📖 API Reference

| Name | App id | |
|---|--------|--|
| MIRALink Website URL | | Edit Delete Submit new app directory listing |

2. Get Client ID and Client Secret

Once the app is created, you can get Client ID and Client Secret in the detail page.

Step 1: Click MIRAlink



The screenshot shows the Clío Developer Portal interface. At the top, there is a blue header with the Clío logo and 'Developer Portal' on the left, and a 'Back to Manage' link with a right arrow on the right. Below the header, there are two navigation items: 'Developer Apps' with a grid icon and 'API Reference' with a document icon and an external link symbol. The main content area is titled 'Developer Apps' and features a 'New App' button in the top right corner. A table with two columns, 'Name' and 'App id', is displayed. The 'Name' column contains 'MIRAlink' with a 'Website URL' link below it. The 'App id' column contains a greyed-out placeholder. To the right of the table, there are three links: 'Edit', 'Delete', and 'Submit new app directory listing'.

Step 2: Copy and securely store

- Client ID
- Client Secret

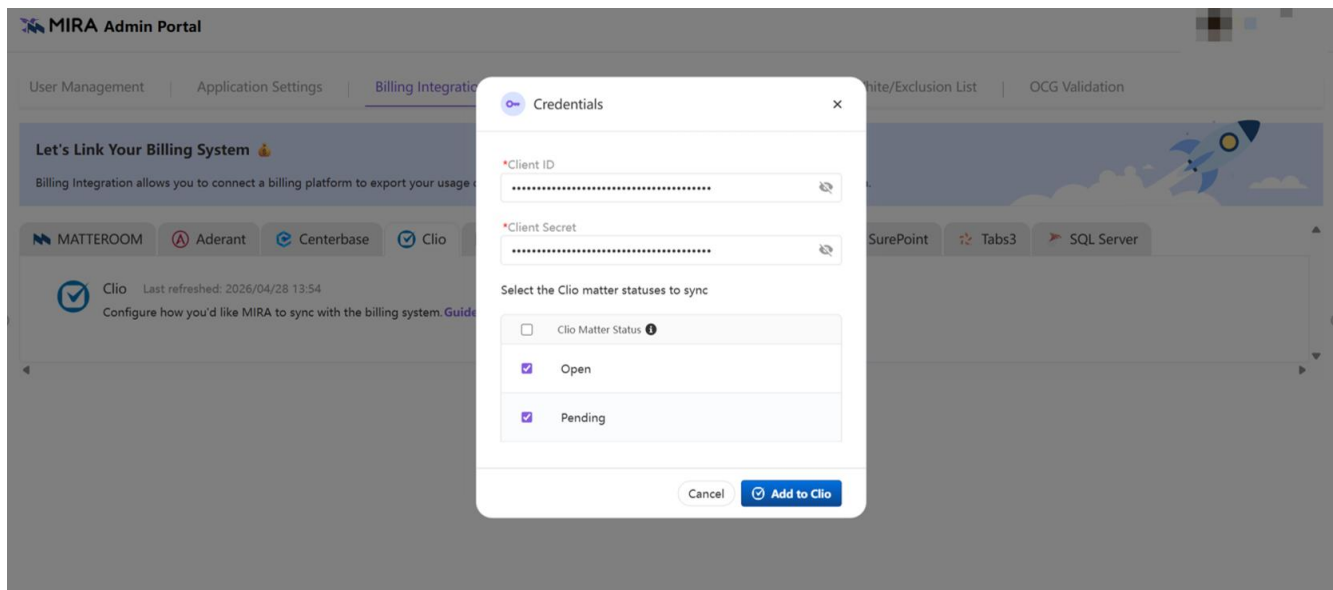


The screenshot shows two input fields. The first field is labeled 'Client id' and contains the value '7EuJbQdv' followed by a series of colored squares representing a visual representation of the ID. The second field is labeled 'Client secret' and contains the value 'J72rCgDO0yl' followed by a series of colored squares representing a visual representation of the secret. A red rectangular box highlights both the text and the visual representations of the Client ID and Client Secret.

3. Configure Clio Credentials in MIRA Admin Portal

- ④ Step 1: Open the MIRA Admin Portal <https://admin.miranow.ai/>
- ④ Step 2: Navigate to the **Destination** tab
- ④ Step 3: Select the **Clio** module
- ④ Step 4: Paste the following values obtained from Clio Application:
 - Client ID
 - Client Secret
- ④ Step 5: Select the Clio matter statuses to sync
- ④ Step 6: Click **Add to Clio**

(Refer to the provided screenshot for the exact field locations.)

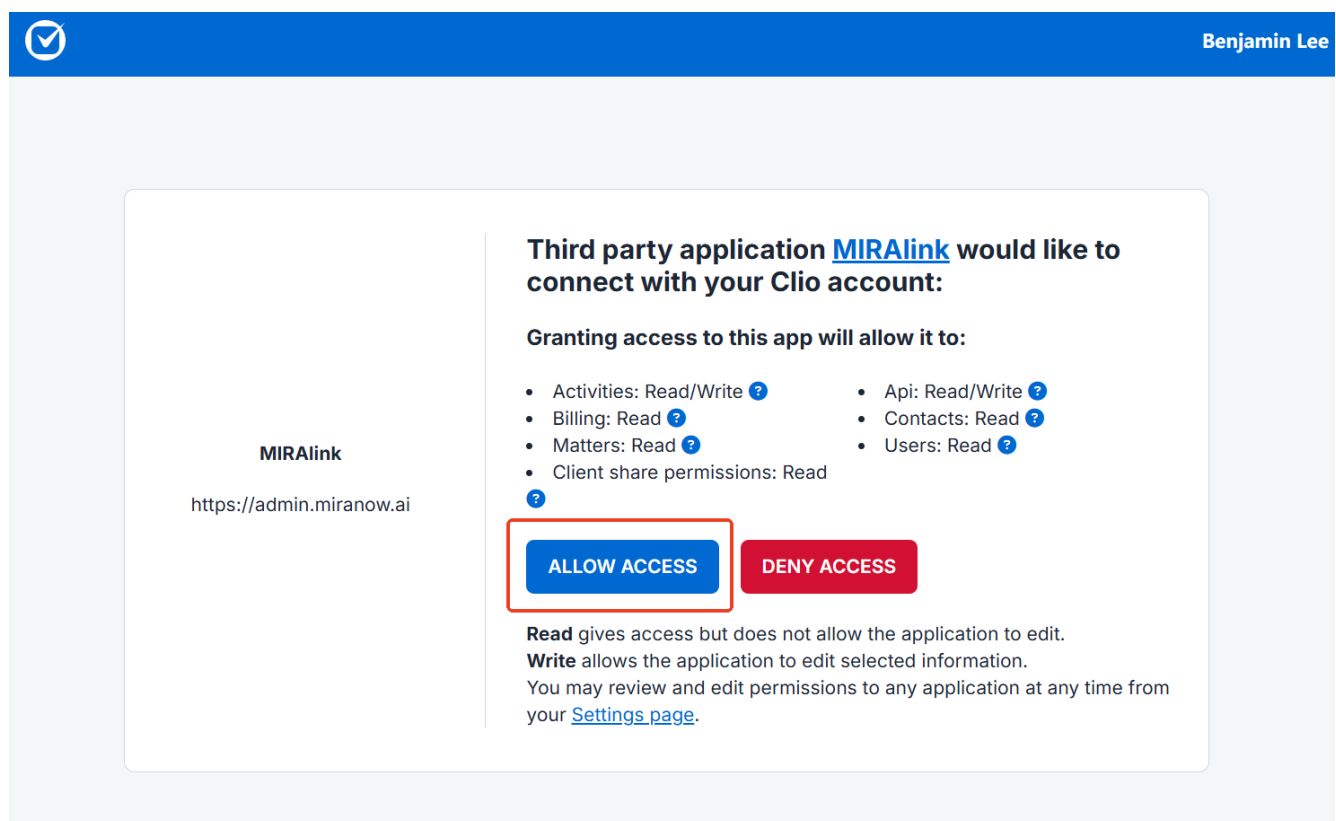


4. Authorize Clio Access

After clicking **Add to Clio**:

- A new browser window will pop up requesting Clio login and authorization.
- Log in using your Clio admin account.
- Grant the requested permissions.

This step completes the OAuth authorization process.



The screenshot shows a Clio authorization interface. At the top, there is a blue header with a checkmark icon on the left and the name "Benjamin Lee" on the right. The main content area is white and contains the following information:

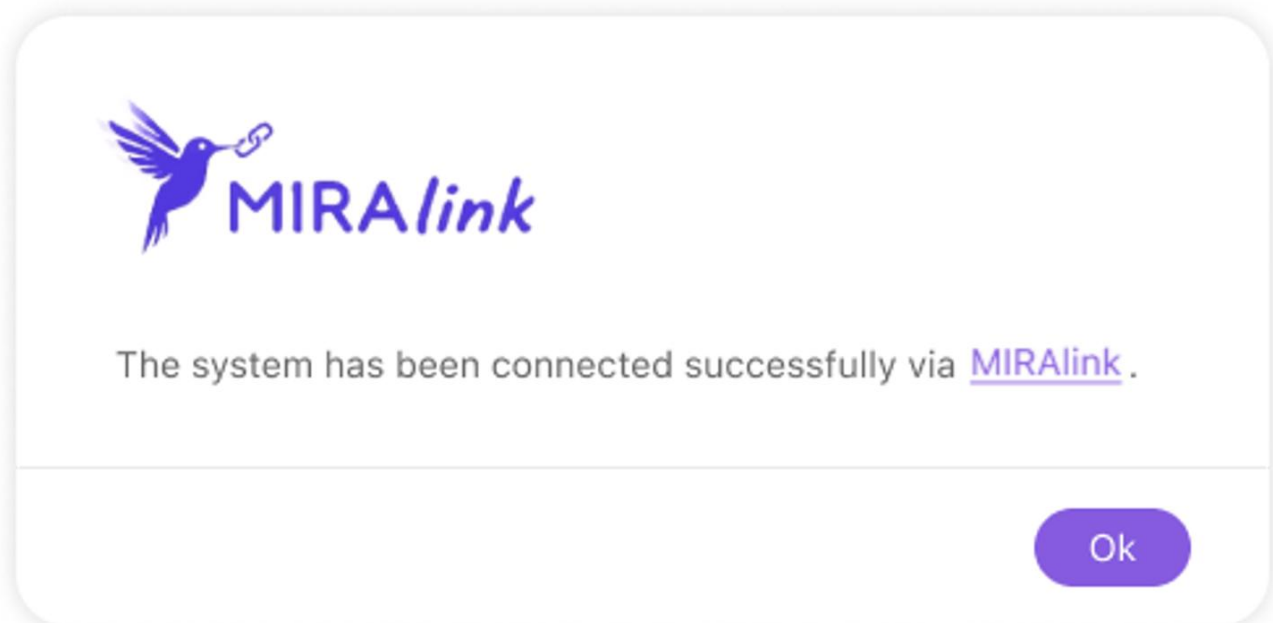
- MIRAlink**
https://admin.miranow.ai
- Third party application [MIRAlink](#) would like to connect with your Clio account:**
- Granting access to this app will allow it to:**
 - Activities: Read/Write ?
 - Billing: Read ?
 - Matters: Read ?
 - Client share permissions: Read ?
 - Api: Read/Write ?
 - Contacts: Read ?
 - Users: Read ?
- Two buttons: **ALLOW ACCESS** (blue) and **DENY ACCESS** (red). The "ALLOW ACCESS" button is highlighted with a red border.
- Read** gives access but does not allow the application to edit.
Write allows the application to edit selected information.
You may review and edit permissions to any application at any time from your [Settings page](#).

5. Confirm Successful Clio Connection

Once authorization is successful:

- A pop-up message will confirm that the connection was successful (e.g., "Connection successful")
- Click **Close** to exit the pop-up window.

At this point, Clio is successfully connected to MIRA.



6. Notify MATTEROOM Customer Success to Go Live

After all steps above are completed, please notify the MATTEROOM Customer Success Team so the integration can be activated.

Send the following email to customer.success@matteroom.com

📧 Email Template

MIRA Team,

Our Account ID is: (Insert Account ID xxx) & App Name for the Clio integration is (Insert App name xxx). We have completed the Clio connection and configuration in the MIRA Admin Portal.

Please proceed with enabling the MIRA functionality for our environment.

Thank you.

7. Completion Checklist

| | |
|-------------------------------------|---|
| <input checked="" type="checkbox"/> | Clio APP created |
| <input checked="" type="checkbox"/> | Client ID and Client Secret recorded |
| <input checked="" type="checkbox"/> | Credentials configured in the MIRA Admin Portal |
| <input checked="" type="checkbox"/> | Clio authorization completed |
| <input checked="" type="checkbox"/> | MATTEROOM Customer Success notified |