



Clio® New Global Search and Quick Search

What are we releasing?

Clio is improving the way in which you can find important information and case specifics from any page in Clio, by improving the usability of our Search tool. We are streamlining information discovery for Clio users by implementing a faster and user-friendly UI, as well as adding new functionality. Find the information you need without having to search deeper within the app for desired details.

How is this update different from our existing Search tool?

We listened to how users engage with Clio's Search tool in their day-to-day, and have improved both our Quick Search (located at the top right of every screen) by providing a dropdown of associated results, and Global Search (the full page overview of Search results from Quick Search).

Our existing Search tool is one of Clio's most-used features, so we've optimized the way in which results are collected and how information is presented, keeping in mind what the end goal of using Clio's Search might be. The entire information discovery process is now streamlined: from an intuitive presentation of information in fewer clicks to ensuring that Quick Search results are relevant and Global Search is comprehensive.

What key improvements have been made to Clio Quick Search?

Clio Quick Search now provides more information as you look for it, and intuitively presents information affiliated with search terms, eliminating the need to go deeper within the app for specifics.

- A wider search results box provides more information at a glance; including Matter descriptions, which provide important context to displayed results.
- Matter number, Matter name, and Matter description are now all available in Quick Search results so you can easily and accurately identify which search result is the one you wanted.
- Results are shown by category so you can quickly scan what's been found.
- When a Contact is the result of a search term, the email address of that contact is now provided at first glance, eliminating the need to navigate to a contact card or away from the current screen for this information.

Can I search for terms in Documents saved to Clio?

For now, unfortunately, you cannot. You can, however, search for titles of documents. This may change, however, as the foundations of the updated Search tool give us the ability to continue improving this functionality.

What key improvements have been made to Clio Quick Search?

Clio Global Search is now redesigned in line with Clio's overall look and feel improvements, with a focus on user experience and the presentation of accurate and desired information. Less scrolling, searching, and a more intuitive presentation of page results.

- More areas of Clio searched, more results provided. Global Search now includes Custom Fields and provides results found in Matter and Contact Custom Fields
- All categories are listed for the results, and number of results per category is clearly displayed
- Search results now show complete text snippets for context, with specific terms and exact matches highlighted

How does this make it easier for me to find information in Clio?

Search is one of the most-used features in Clio, and 85% of search queries revolve around finding a specific Matter or Contact. Certain details such as the associated Matter description or text snippets are shown to make it easier and faster to find the correct information, without distracting from the task at hand.

Is this available to all Clio users?

Updates to Clio Search will be available to all Clio users. These enhancements are the first in a series of ongoing improvements to the Search tool.

How do I access this feature?

Clio Quick Search is accessible at the top of every screen, and Global Search is shown when you see results from a Quick Search.



Where can I learn more about this update?

- [Clio Support site](#)