

Cliniko AI Assistant

Quickstart Guide

Chat with your Cliniko practice data using natural language. Search patients, view appointments, check invoices, and manage clinical records — all from a conversation with Claude.

What You Need	
Claude Desktop	Free download from claude.ai/download
Claude Pro subscription	\$20/month from claude.ai
Cliniko account	With API access enabled
macOS computer	macOS 12 or later

Setup time: approximately 5 minutes

Step 1: Get Your Cliniko API Key

The API key lets the AI assistant access your Cliniko account securely. It never leaves your computer.

1

Log in to Cliniko

Go to **app.cliniko.com** and sign in with your usual credentials.

2

Open Settings

Click the **gear icon** (Settings) in the bottom-left corner of the sidebar.

3

Navigate to API Keys

In the Settings menu, scroll down and click **API Keys**.

4

Create a new API key

Click **Add API Key**. Give it a name like "**Claude AI**" so you remember what it's for.

5

Copy the key

Your key will look something like:

MSxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx-**au1**

Copy it and keep it handy — you'll need it in the next step. The ending (e.g. **-au1**) indicates your region.

Important: Your API key is like a password. Do not share it or post it online. It gives full access to your Cliniko account.

Step 2: Install the AI Assistant

1

Open Terminal

Press **Cmd + Space** to open Spotlight, type "**Terminal**", and press Enter.

2

Paste the install command

Copy and paste the following command into Terminal, then press Enter:

```
bash install.sh
```

(Use the install.sh file included in your download.)

3

Follow the prompts

The installer will ask for your Cliniko API key. Paste it when prompted (right-click and Paste, or Cmd+V). It will automatically configure Claude Desktop for you.

4

Restart Claude Desktop

Quit Claude Desktop completely (**Cmd+Q**), then reopen it. You should see a small hammer icon at the bottom of the chat — that means the Cliniko tools are loaded.

Troubleshooting

Problem	Solution
No hammer icon in Claude	Quit Claude Desktop fully (Cmd+Q), reopen it
"Command not found" error	Close Terminal, open a new one, run the installer again
API key not accepted	Check you copied the full key including the -au1 suffix
Permission denied	Make sure you have admin access on your Mac

Step 3: Start Using It

Open a new conversation in Claude Desktop and try any of these prompts:

Patient Management

"Search for patient Sarah Johnson"

"Show me all patients who haven't had an appointment since January"

"Create a new patient record for John Smith, DOB 15 March 1985, email john@email.com"

Appointments

"What does my appointment schedule look like for next week?"

"Show all appointments for Dr Williams on Monday"

"How many appointments did each practitioner have last month?"

Billing & Invoices

"Show me all unpaid invoices over 14 days old"

"What is the total outstanding balance across all open invoices?"

"Find all invoices for patient ID 12345"

Clinical Records

"Show treatment notes for patient Sarah Johnson from the last 3 months"

"List all medical alerts for patient ID 6789"

"Add a medical alert for patient 123: Latex allergy"

Practice Overview

"List all active practitioners in the practice"

"Show me all business locations"

"What appointment types are available?"

Available Tools Reference

The AI assistant has 40 tools across these categories. You don't need to remember tool names — just describe what you want in plain English.

Category	Tools	What You Can Do
Patients	7	Search, view, create, update, archive patients
Appointments	6	Search, book, reschedule, cancel, check conflicts
Invoices	4	Search invoices, view details, review line items
Contacts	5	Manage GPs, referrers, emergency contacts
Practitioners	3	Search active and inactive practitioners
Treatment Notes	4	Search, view, create, update clinical notes
Medical Alerts	4	Manage allergies, warnings, contraindications
Products	4	Search products, manage stock levels
Bookings	2	Search and view group appointment bookings
Generic API	1	Access any other Cliniko endpoint

Data & Security

Your Cliniko API key is stored locally on your computer in the Claude Desktop configuration file. It is never uploaded to any external server. When you ask Claude about your practice data, the requests go directly from your machine to Cliniko's API.

To revoke access at any time, delete the API key from Cliniko (Settings > API Keys) or run the uninstall script included in your download.

Need help? Contact support@jarrydhennequin.com