Creating Engagement Letter Templates

Templates · https://seamlss.com.au/help/creating-engagement-templates-with-seamlss/

Seamlss sends your engagement letter for clients to sign as part of a request or a Client Link. Set the letter up once as a document template, and Seamlss fills in each client's details when it goes out.

In Seamlss: **Templates** in the left menu, then the **Documents** tab.

Open Templates

Create an engagement letter template

1

Open the Documents tab

Go to **Templates**, then **Documents**. The **Templates** list holds your letters, starting with **Engagement Letter (Default)**.

2

Name the new template

Click **Add new document template**, type a name and click **Save new template**.

3

Reload the page

Seamlss says **Template saved**. Click **Reload page to select** (or press F5), then open the **Documents** tab again.

4

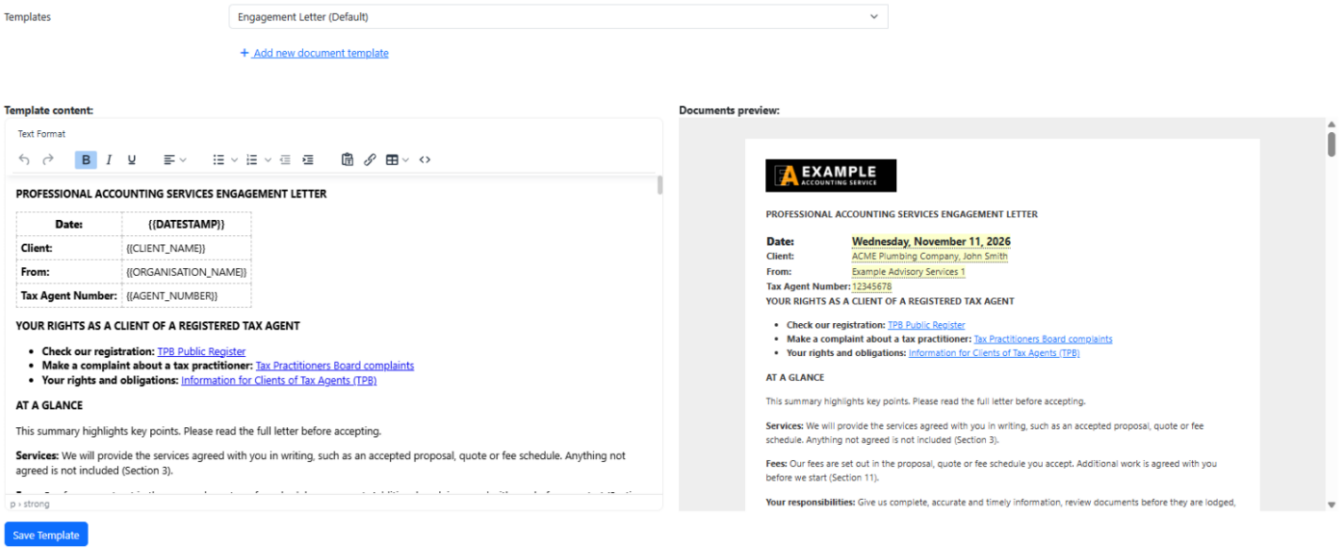
Choose it and write the letter

Pick your template from the list. Type or paste your letter into **Template content**. The toolbar has headings, lists, tables and links.

5

Save

Click **Save Template**.



The editor on the left. The preview on the right fills the tokens in with sample client details.

Fill in client details with tokens

A token is a placeholder in double curly brackets. When the letter goes out, Seamlss swaps it for the real detail: {{CLIENT_NAME}} becomes the client's name and {{DATESTAMP}} the date it's sent. The **Token Help** tab lists every token.

Check the preview. It fills each token in as you type. A token that stays as plain text in the preview is misspelt, so fix it before you save.

Using AI to convert your existing letter

Already have an engagement letter in Word or PDF? You can use an AI tool like ChatGPT, Claude or Copilot to convert it into a Seamlss template. Copy the quick conversion prompt, paste it into your AI tool, then attach or paste your letter.

When the AI gives you the result, use the copy button on the code block (don't highlight the text by hand). In **Template content**, click the **Source code** button (`<>`) at the end of the toolbar, paste the result in and click **Save**, then **Save Template**. Preview it with a test client before you use it.

> **Before you upload anything:** use a blank template, not a letter signed by a client. Remove any client names, TFNs or personal details, and check your firm's AI policy. The TPB's guidance on AI use (**TPB(GS) 55/2026**) applies to how you use these tools.

The AI will convert your letter, not check it for compliance. You're still responsible for the content, and we recommend having your letter reviewed by a lawyer.

Quick conversion prompt

See the full review prompt

```
I need to convert my firm's engagement letter into a template for Seamlss, our
client onboarding platform. My letter is attached or pasted below.

Please convert it using these rules:

1. Keep my wording. Don't add, remove or rewrite clauses unless a rule below
says to.
2. Replace client and firm details with these Seamlss tokens, exactly as
written:
   - {{CLIENT_NAME}} for the client being engaged (for example after
"Client:")
   - {{CONTACT_NAME}} for the first name in the greeting, for example "Dear
{{CONTACT_NAME}}"
   - {{DATESTAMP}} for the date of the letter
   - {{ORGANISATION_NAME}} for our firm's name
   - {{AGENT_NUMBER}} for our tax agent number
```

```
   Don't create any other tokens.
3. Format the template as simple HTML: a <p> for each paragraph,
<p><strong>Heading</strong></p> for headings, and <ul> or <ol> with <li> for
lists. Use only these tags: p, strong, em, u, a, br, ul, ol, li, table, thead,
tbody, tr, th and td. No markdown, # headings, styles, classes or fonts.
4. Keep any tables as simple HTML tables.
5. Remove signature blocks, signature lines and "please sign and return"
instructions. Seamlss collects acceptance online and adds the accept button
automatically.
6. Remove any list of entities from the body. Seamlss lists the entities at
the bottom of the letter.
7. If there are letterhead or footer details (ABN, address, phone, "liability
limited by a scheme approved under Professional Standards Legislation"), move
them to the end of the letter body.
8. Give me the finished template as HTML in a single code block so I can copy
it exactly.

After the code block, list in a few short lines anything you removed or
weren't sure about.
```

Want a deeper check? The full review prompt converts your letter and also gives you a review report: possible missing or outdated items to confirm, and questions to answer.

Open the full review prompt

Send the letter

In a client request, add a **Document Sign** section and choose your template (**Send a client request**). In a Client Link, choose it under **Engagement Letter** (**Client Links**).

One signer per letter. Each letter is signed by one person. For a couple or two directors, send each person their own request. Both requests can include the same entity.

What your letter should cover

Seamlss includes a sample letter, but your letter should suit how your firm works. The Tax Practitioners Board explains what to include in **letters of engagement**, and suggests getting legal advice on the letter you use. Your professional body may have a template or guidance:

Body	What they have
CPA Australia	**Engagement letter FAQs** and a **sample letter (Word)**
CA ANZ	**Engagement letter tool (Australia)**
IPA	**Templates and checklists** (member login)
NTAA	**Engagement letter templates and seminar** (members)
ABN (bookkeepers)	**Bookkeeping engagement letter templates**
ACCA	**Engagement letters**

Something not working?

My new template isn't in the list

Reload the page after saving it, then open the **Documents** tab again.

A token shows as text in the preview

Check the spelling and both pairs of curly brackets against the **Token Help** tab.

I can't delete Engagement Letter (Default)

The default template can't be deleted. Edit it, or create your own and choose that one when you send.

There's a date beside each entity on the signed letter

It's the date that entity's details were last updated in Seamlss, so you can see how current they are.

Still stuck? **Contact support** and tell us what you see.