Managing Contacts

Clients · https://seamlss.com.au/help/managing-contacts/

Contacts are the people your firm communicates with. Each contact has a name, email address, and phone number, and can be linked to one or more clients (entities) in Seamlss.

Viewing Your Contacts

To view all contacts, go to **Client Management > Contacts**. The contact list shows:

- **Name**: the contact's full name
- **Contact Details**: email address and phone number, with quick links to email, call, or copy
- **Clients**: the client entities this contact is linked to
- **Added**: the date the contact was created
- **Status**: Active or Archived

Click on a contact's name to open their full contact record.

Adding a Contact

1. Go to **Client Management > Contacts**
2. Select the **Add** tab
3. Enter the contact's **First Name**, **Last Name**, **Email Address**, and **Mobile Phone Number**
4. Select the correct country code for their phone number (defaults to Australia)
5. Click **Add Contact**

> **Note:** You can also add contacts when creating a new client. The first contact added to a client automatically becomes the Primary Contact.

Contact Details Page

Clicking on a contact's name opens their detail page. From here you can access several tabs:

- **Contact Details**: view and edit the contact's name, email, and phone number
- **Identity Verification**: request and manage identity verification for this contact
- **Forms**: view any forms completed by or assigned to this contact
- **Documents**: view uploaded documents
- **Requests**: view all requests sent to this contact
- **Internal Notes**: add private notes visible only to your firm
- **History**: view the full audit trail for this contact

Client Relationships

The Contact Details tab shows a **Client Relationships** section, which lists all clients (entities) this contact is linked to. You can add new client-contact connections from here.

Requesting Identity Verification

Identity verification is managed at the contact level. From a contact's detail page, you can request verification using one of the following methods:

- **Manual Identity**: firm verifies manually, nothing sent to the contact
- **Visual Identity + ATO Source**: contact uploads identity documents (e.g. licence) plus one ATO source document
- **DVS via Stripe Identity + ATO Source**: Document Verification Service through Stripe Identity, plus one ATO source document (+$5 per verification)
- **Visual Identity + 2 ATO Source**: contact uploads identity documents plus two ATO source documents

You can also choose to send an email request to the contact and include an optional personalised message.

Importing Contacts

To import contacts in bulk, use the **Data Centre**. From the Contacts page, select the **Import** tab, which will direct you to the Data Centre import tools.

Archiving Contacts

To view archived contacts, tick the **Show archived contacts** checkbox on the contact list. You can archive or delete a contact from their detail page.

Related Guides

- Understanding Contacts, Clients and Groups
- Adding Clients to Seamlss
- Client Verification Step-by-Step Guide

Need help? Visit our support page or email support@seamlss.com.au.