Onboard your first client

Clients · https://seamlss.com.au/help/onboard-your-first-client/

Everything for a brand new client, start to finish: one request that collects their details, checks their ID and gets your engagement letter signed, then the follow-up once it comes back.

> **In Seamlss: + Request**, in the blue bar at the top right of every screen, then **Client Request**.
>
> **Open Seamlss**

> **Try it on yourself first. Add yourself as a client** and send yourself a request first, so you see exactly what your client will.

Before you start

- Your branding and engagement letter are set up. See **Start with the Setup page**.
- You've chosen which client details are required. See **General settings**.
- Notifications go to a shared inbox, so someone acts on what comes back. See **Notification settings**.
- If you deploy jobs, XPM is connected. See **Connect XPM with Seamlss**.

Send the request

1

Select + Request, then Client Request

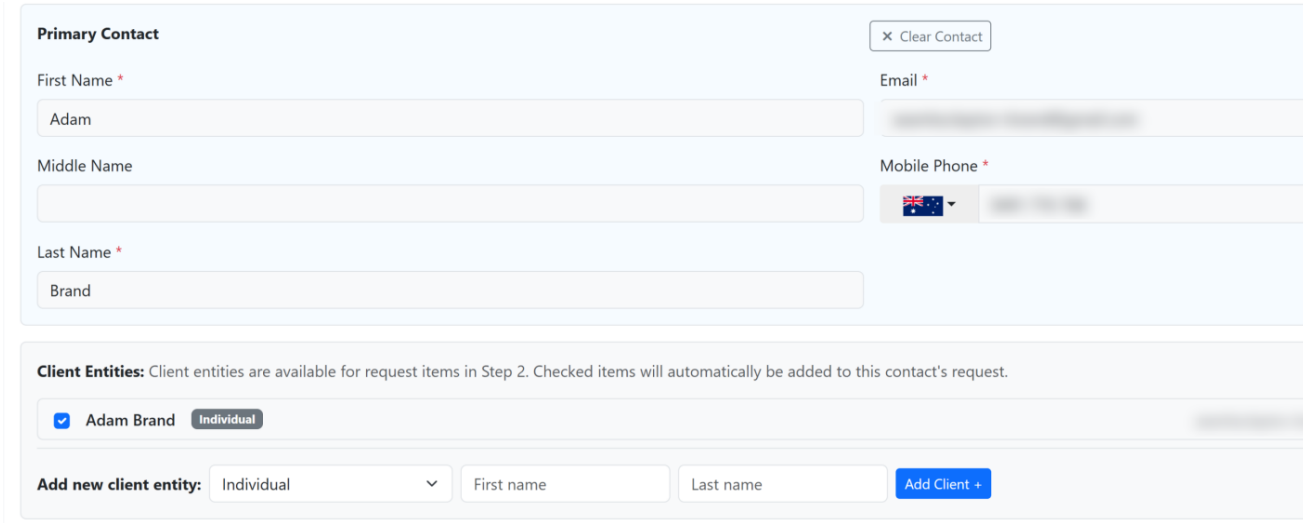
+ Request is in the blue bar at the top right of every screen.



2

Type in the client's details

First name, last name, email and mobile. They're added as an Individual, already ticked. Each person needs their own email and mobile: two people on one address can't each log in or verify their ID. See **when two people share an email**.



3

Add only the entities they have

Use **Add new client entity** for their company, trust or SMSF. Asking about entities the client doesn't have puts extra steps in front of them and stalls onboarding. Not sure? Send the individual now, and they can add a missed entity at the end. See **choosing who a request is for**.

4

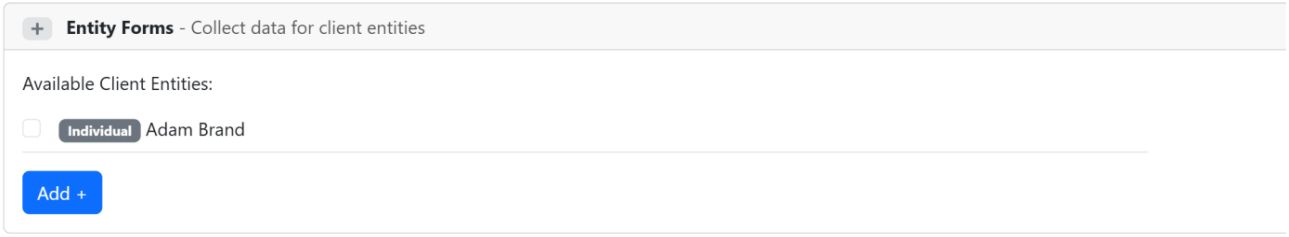
Name the request, then select Next

Select **Edit** next to the request name so you can find it later.

5

Add Entity Forms

On the Sections screen, tick each entity under Entity Forms and select **Add +**. This collects their details, such as TFN, ABN, address and bank details, with every TFN, BSB and director ID checked. See **Entity Forms**.



6

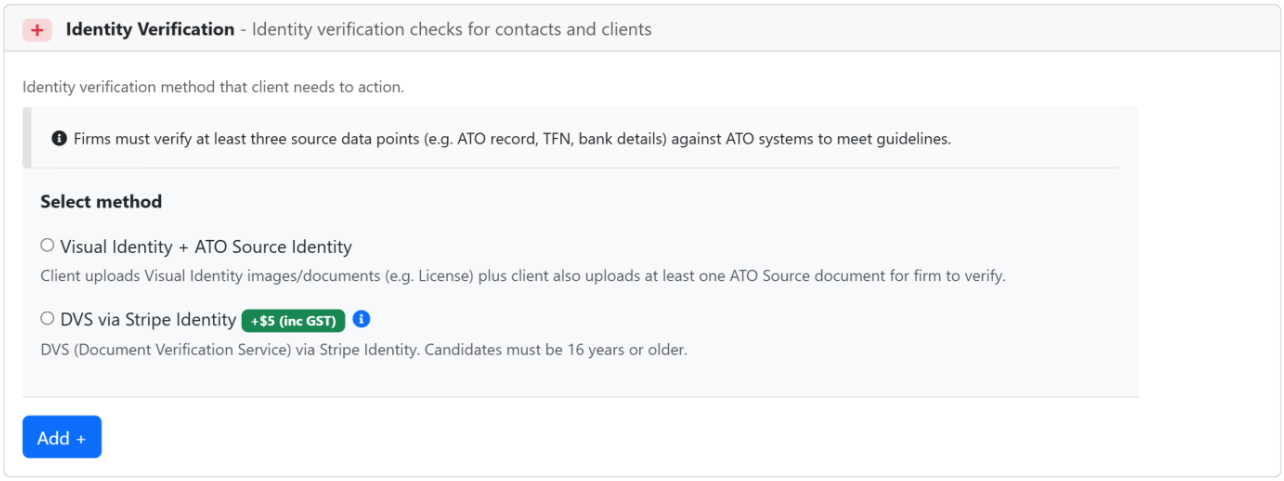
Add any forms you need

A **Custom Form** for a checklist or questionnaire, or the **ITR Form** for an individual tax return. Give each one a name the client will understand.

7

Add the ID check

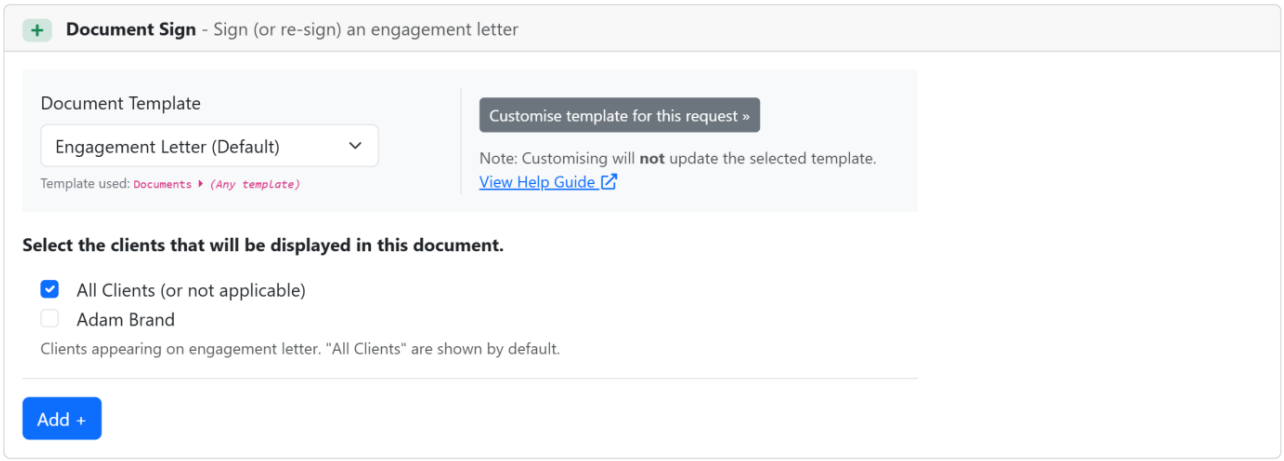
Choose **DVS via Stripe Identity** and select **Add +**. See **Choose an ID check method** for the two options and what your firm checks afterwards.



8

Add your engagement letter

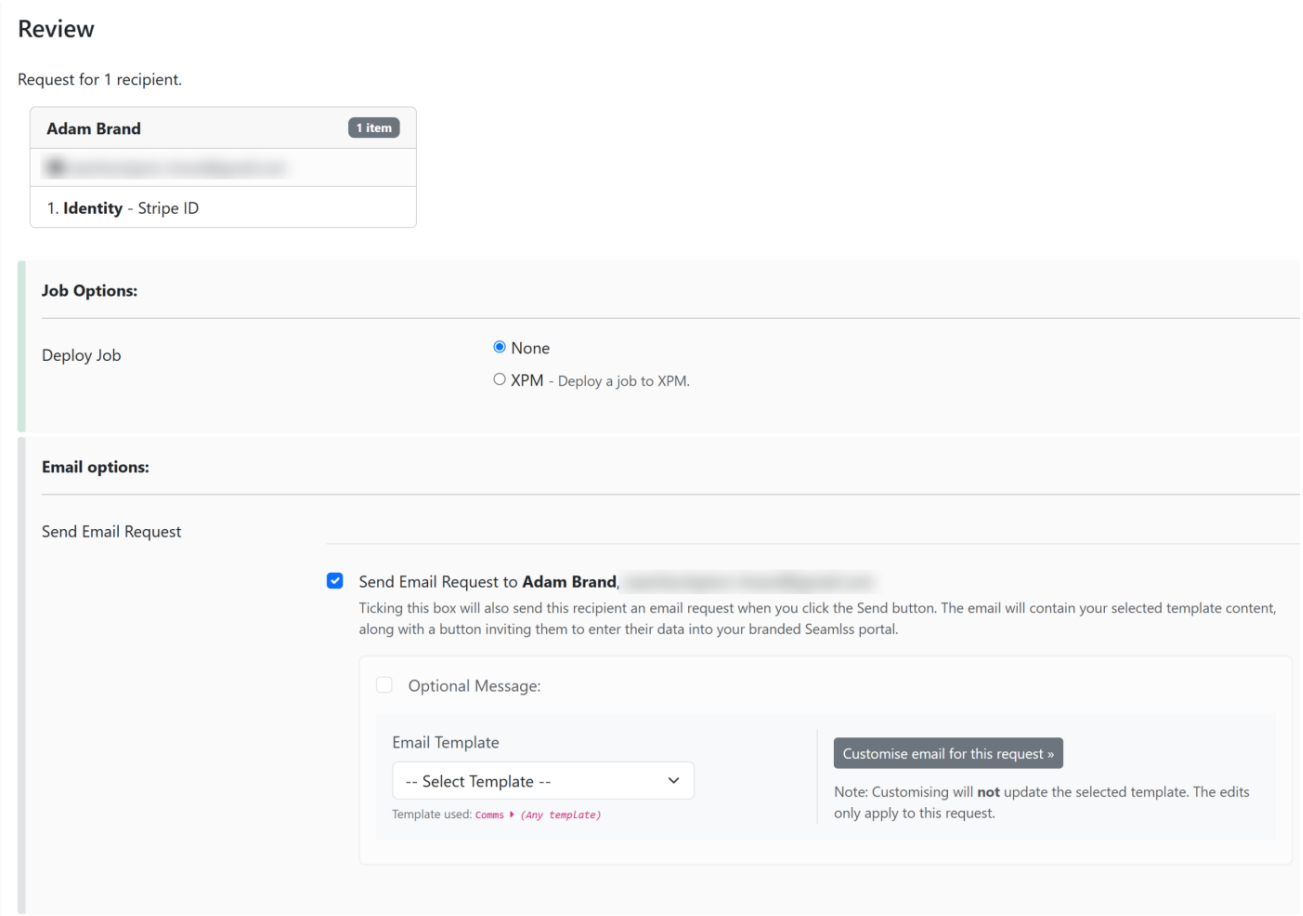
Choose the template. Use **Customise template for this request** to change it for this client, and leave **All Clients** ticked so everyone and their entities appear on one letter. Select **Add +**, then **Next**. See **the engagement letter section**, and **Creating engagement letter templates** to set up your letters.



9

Deploy a job, choose Welcome, and send

On Review, deploy a job to XPM if you use Jobs. Keep Send Email Request ticked, choose the **Welcome** template, add an Optional Message if they've only spoken to you on the phone, and select **Send Request**. See **Review and send**.



Every section is explained in **Send a client request**.

What your client does

- They get one email from your firm with a button.
- They log in with a code sent to their mobile. There's no password to set up.
- They work through it on a phone or a computer: entity details, your forms, then the ID check. They can upload documents or take photos.
- They can add an entity you missed, then sign the engagement letter at the end.
- If the request included an entity and agent linking instructions are on, they're shown how to link your firm as their tax agent.

When it comes back

10

Review the ID check within 14 days

Open the contact's Identity Verification tab, review what came back and mark them verified. Seamlss deletes ID documents after 14 days. See **Verify a client, step by step**.

11

Push the client to XPM

Open the client and push them to XPM. Seamlss matches on TFN, ABN, email and address, and you choose to push, pull or leave each field, so you don't create duplicates.

12

Check agent linking

You're notified when the client links your firm as their tax agent. If they haven't, a reminder takes them straight to the instructions.

13

Run the AML risk assessment, if it applies

If you're providing an AML designated service, run the risk assessment now the client is onboarded. See **Using the AML Risk Assessment tool** and **when you need one**.

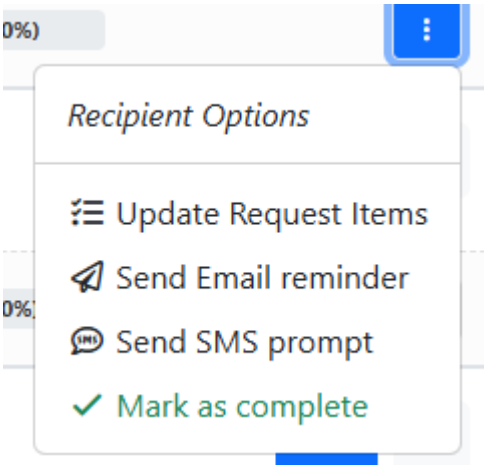
14

Mark it done

Mark the request done on the dashboard, so it leaves your list.

Chasing and changing a request

Each person's row on the dashboard has a **Recipient Options** menu. The request itself has its own menu with **Edit Request**, **Duplicate Request**, **Cancel Request** and **Delete Request**.



- **Send Email reminder** and **Send SMS prompt** chase one person. The SMS gets read.
- **Update Request Items** ticks off something they gave you another way, such as ID checked in person, so they skip it.
- **Edit Request** adds something you forgot.
- **Mark as complete** closes one person off when you have what you need.

Prefer video?

Embedded media: https://www.youtube.com/embed/jsR1uRyOPB8?feature=oembed&enablejsapi=1

How to create and send a client request. Some screens may have changed since it was recorded.

Something not working?

The client says they got nothing

Check whether Send Email Request was ticked. If not, copy the link from the dashboard and send it yourself.

The client is stuck on entity details

They were asked about an entity they don't have or don't know. Use Update Request Items to take it out.

The ID documents are gone before you reviewed them

They're deleted after 14 days. Request the ID check again.

Nothing has moved for days

Send an email reminder, then an SMS prompt, from Recipient Options.

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