Share your Client Links

Clients · https://seamlss.com.au/help/share-client-links/

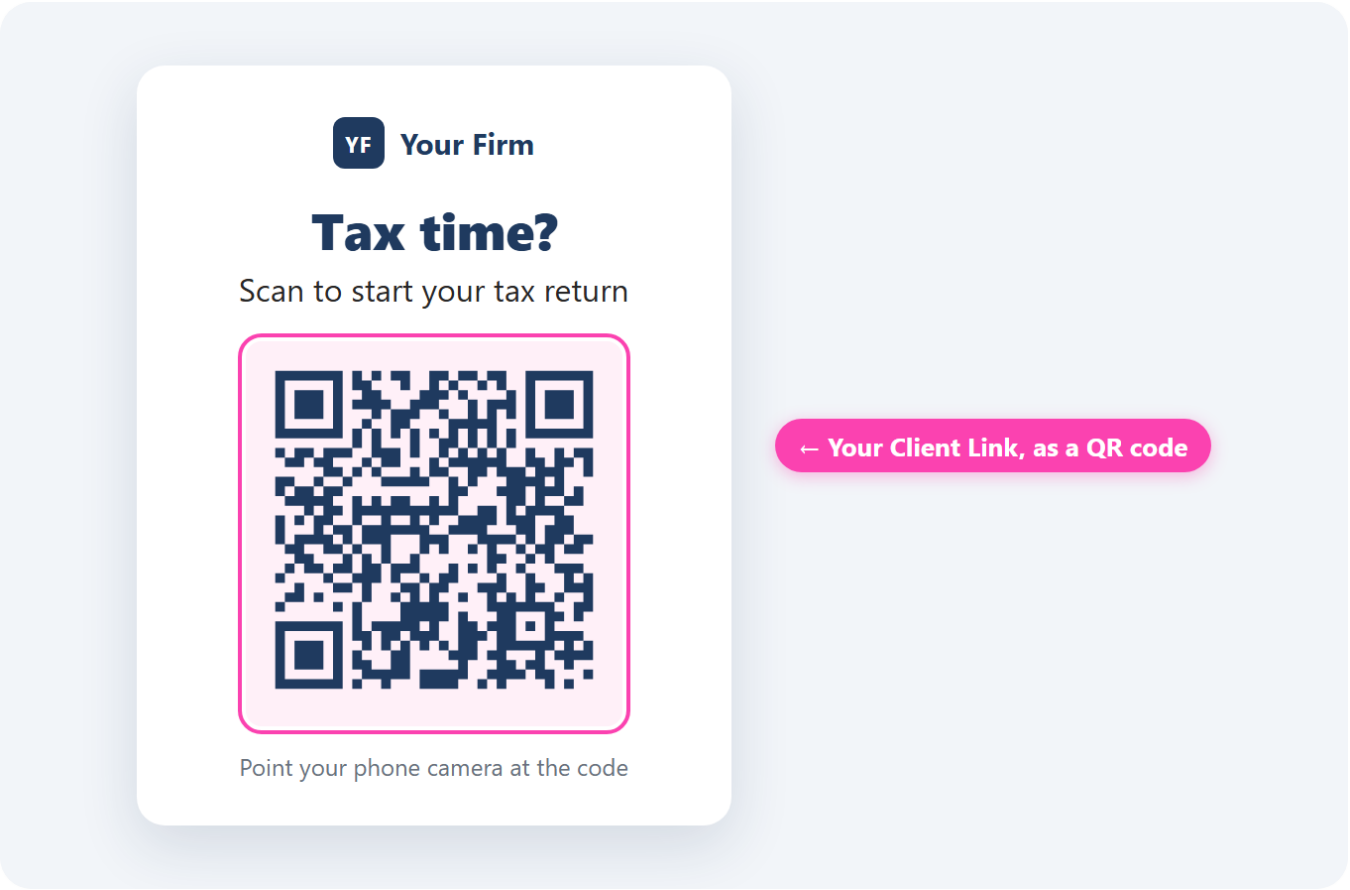
A Client Link is a web address, so it works anywhere a client might see it. The more places it sits, the more clients start onboarding, re-engaging or sending their information without a phone call or an email from you. Here are eight places firms use them, with wording you can copy.

> **In Seamlss: Clients**, the **Client Links** tab. Copy the web address next to the link you want to share.
>
> **Open Client Links**

Before you share it. Open the link in a private browser window and go through it as a client would. Check the title and description make sense to someone who has never heard of Seamlss, because that's the first thing they see.

QR codes in your office and on paper

Put a QR code where clients already are: the front window, reception, business cards, brochures, or a letter to your client list. Make one from the web address with the **Canva QR code generator** or **QR Code Monkey**. QR Code Monkey lets you add your logo.



A counter sign with the link as a QR code. Every mockup on this page uses a made-up firm; the pink outline marks the Client Link.

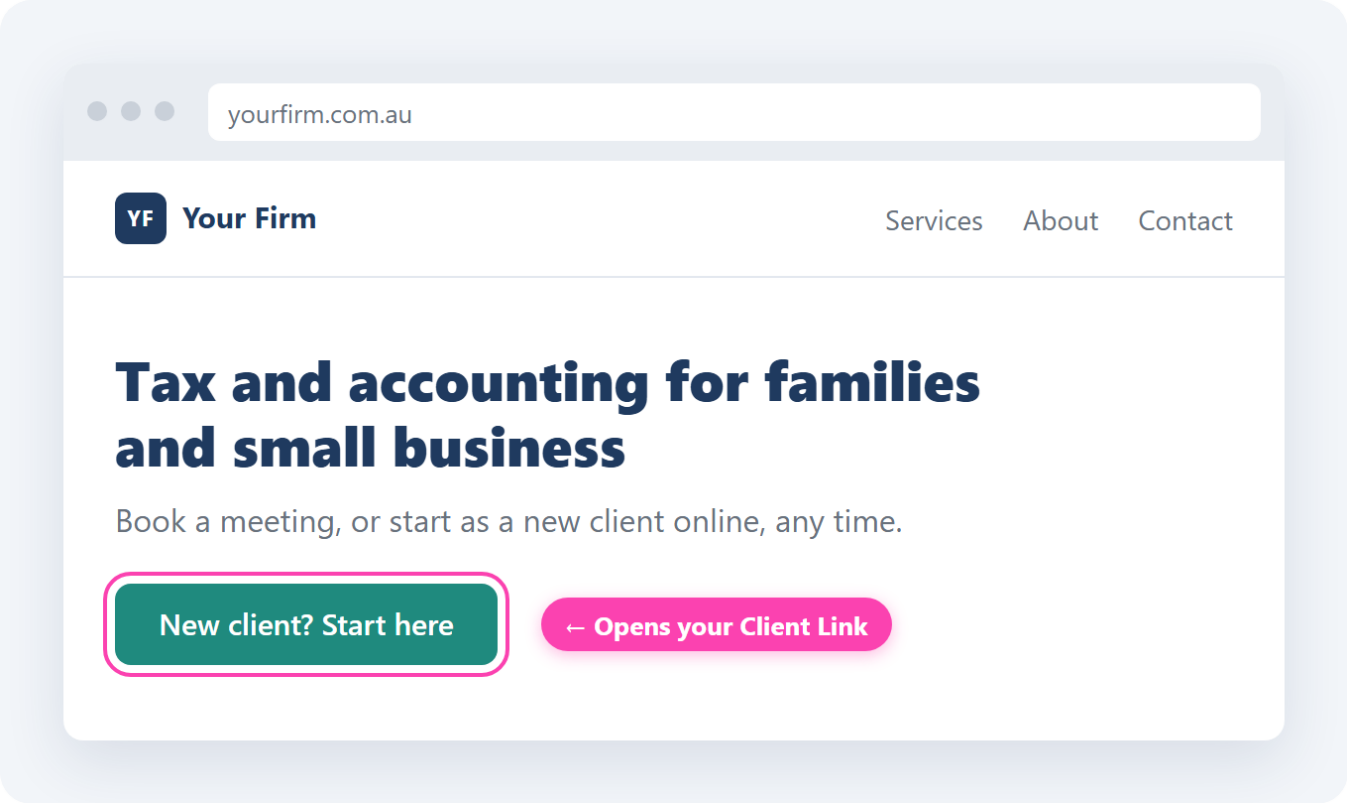
Put a reason next to it, such as "*Scan to start your tax return*". Scan the printed code with your own phone before it goes out.

Your website

Add a button to your home page, contact page or new client page, and to any FAQ that answers how to get started. Clients can then start any time, including after hours.

Page	Button wording
Home or new client page	*"Start onboarding"*
Tax return page	*"Start your tax return"*

Page	Button wording
Contact page	*"New client? Start here"*



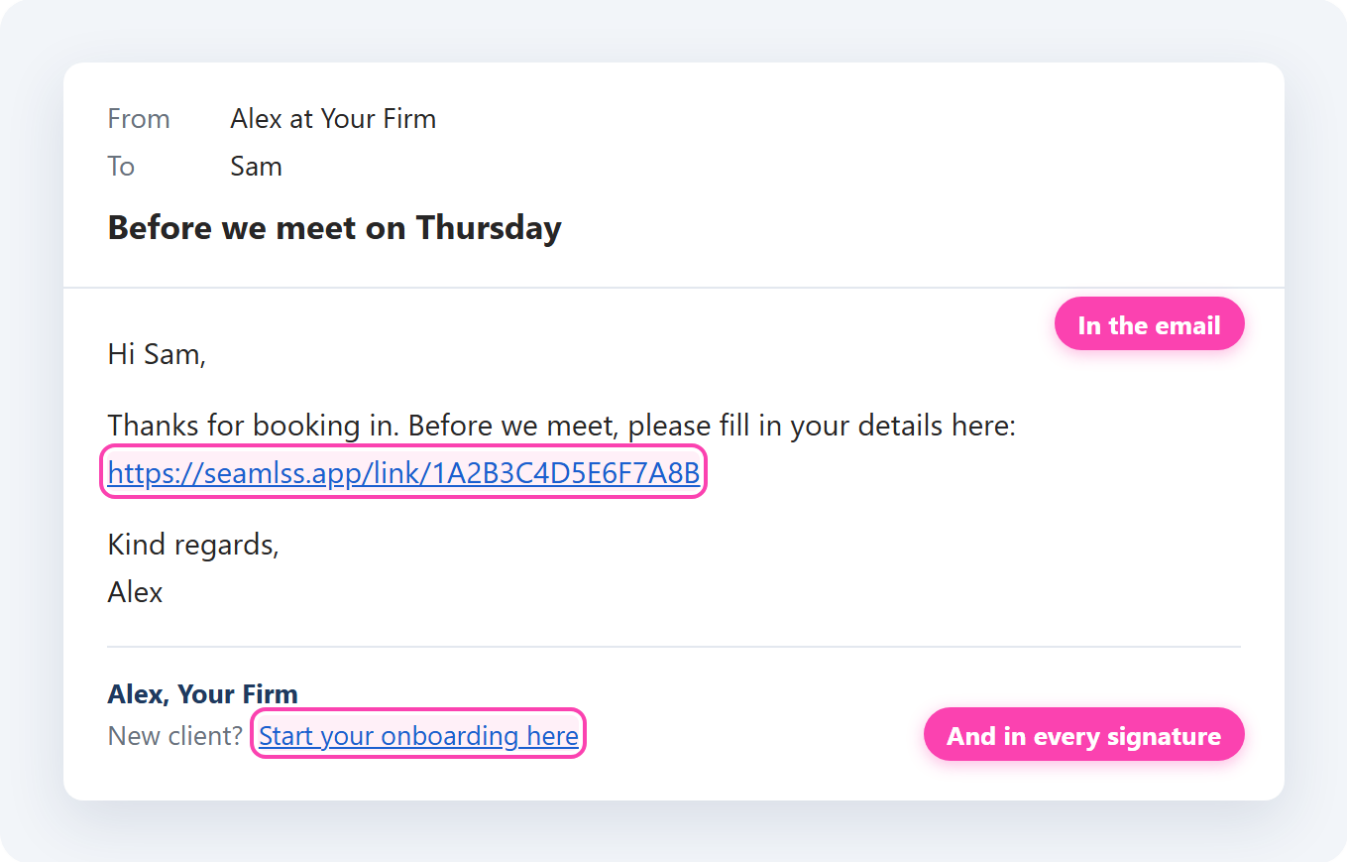
A button on the home page. Clients who click it start onboarding straight away.

Whoever looks after your website can add a button that opens the web address. Check it on a phone too, because many clients will open it there.

Email

Add the link to the emails you already send: welcome emails, appointment confirmations and requests for tax information. For example: "*Before we meet, please fill in your details here: [your link]*"

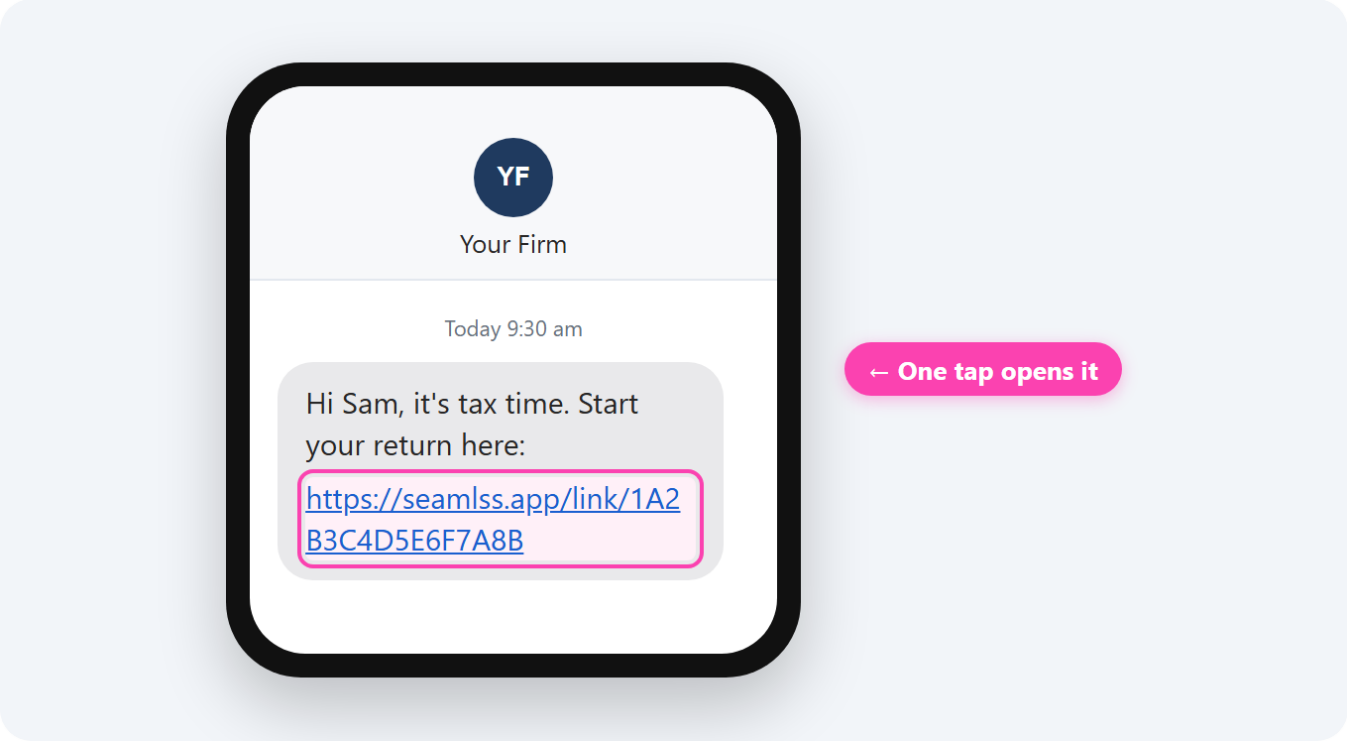
Add it to everyone's email signature too: "*New client? Start your onboarding here: [your link]*"



The link in a booking confirmation, and again in the signature, so every email your team sends carries it.

SMS

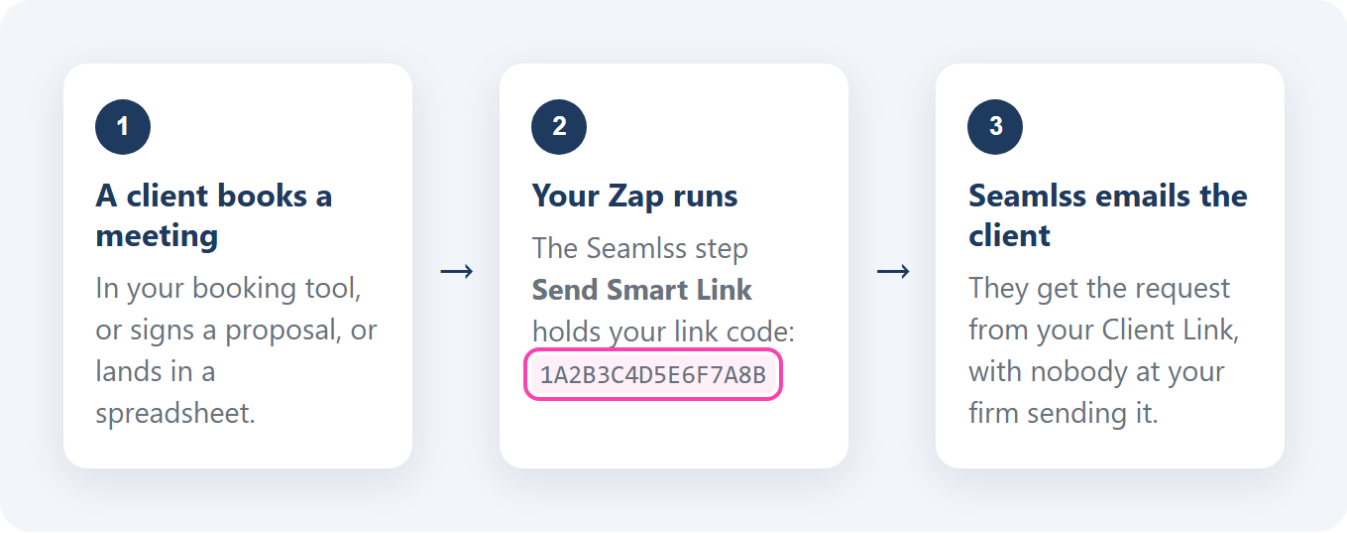
For clients who live on their phone, or anything with a deadline, paste the link into a text: "*Hi Sam, it's tax time. Start your return here: [your link]*" or "*Hi Sam, welcome aboard. Before our first meeting, please fill in your details here: [your link]*"



A text with the link. Clients tap it and start on their phone.

Zapier

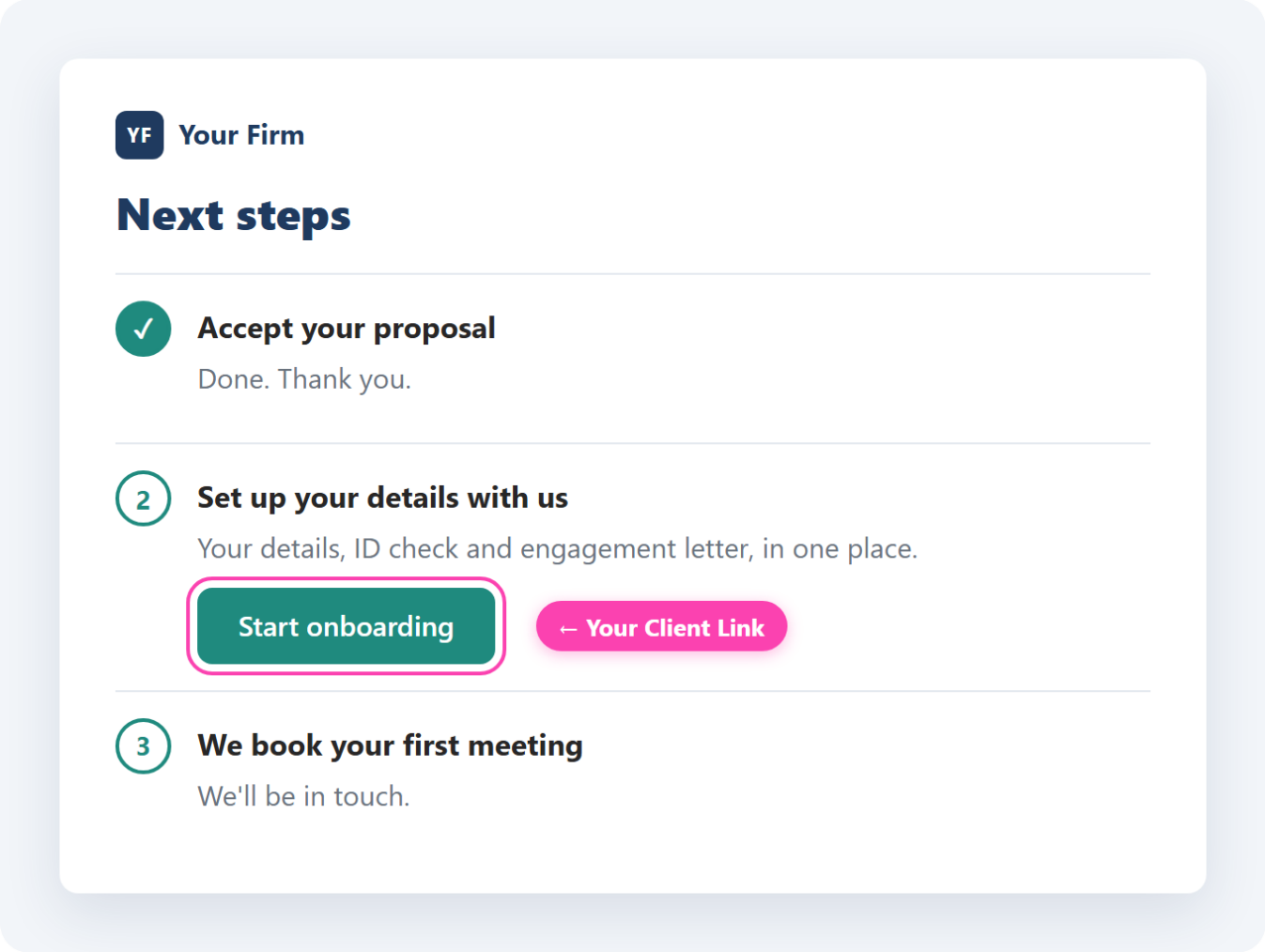
Send a Client Link automatically when something happens somewhere else: a client books a meeting, signs a proposal or is added to a spreadsheet. The end of the web address, after /link/, is the link code. Paste it into a Zap and Seamlss sends the client that request. **Zapier Integration** shows how.



Nobody at your firm has to send it: the Zap passes the link code to Seamlss, and Seamlss emails the client.

Proposals

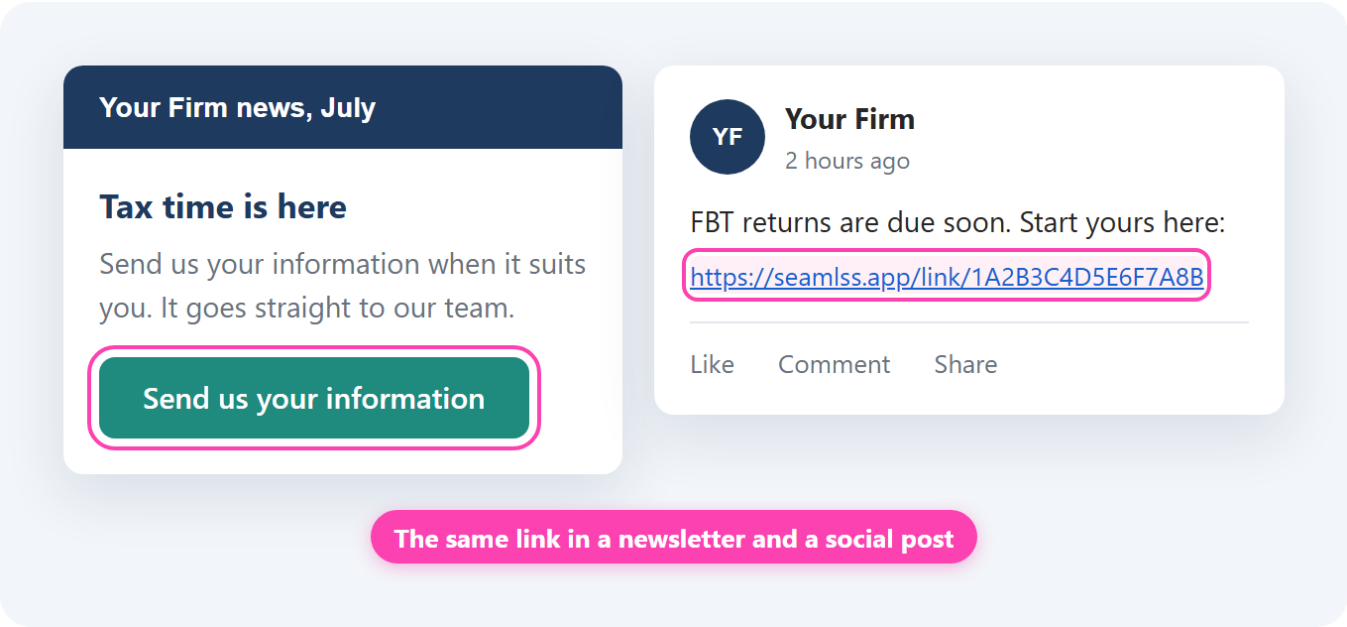
Put the link on the next steps page of your proposal, or in the email that follows an accepted proposal. The client goes straight from saying yes to onboarding, with no separate instructions. **Ignition and Client Links** shows how with Ignition. For example: "*Next step: set up your details with us here: [your link]*"



The link as the next step after a client accepts.

Newsletters and social posts

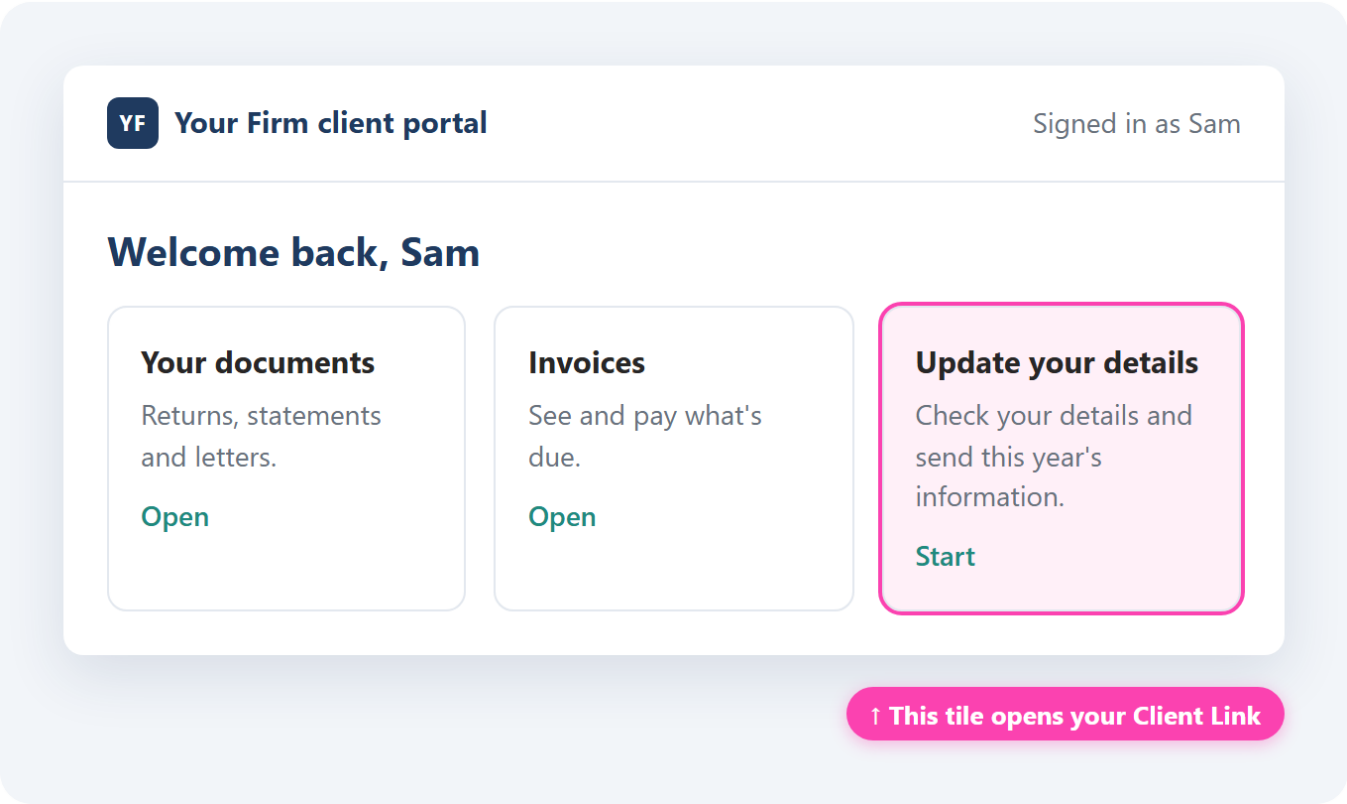
Share the link in your client newsletter or on LinkedIn and Facebook, tied to something seasonal: "*Tax time is here. Send us your information here: [your link]*" or "*FBT returns are due soon. Start yours here: [your link]*"



The same link as a newsletter button and in a social post.

Client portals

If clients log in to a portal or document system to see their files, put the link there too, so it's where they already go. A tile such as "*Update your details*" works well.



A portal tile that opens the link.

Something not working?

Clients say the link doesn't open

Check the link is still **Active** on the **Client Links** tab, and that the whole web address was copied, including the code at the end.

Clients are asked for things they've already given you

Edit the link and untick what that job doesn't need. **Client Links** shows what to tick for each use.

A QR code opens the wrong page

Make a new code from the web address on the Client Links tab and scan it before you print.

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

New to Client Links? **Client Links** shows how to set one up and which link to use for which job.