Understanding Contacts, Clients and Groups

Clients · https://seamlss.com.au/help/understanding-contacts-clients-and-groups/

Embedded media: https://www.youtube.com/embed/cL7v2VLulto?feature=oembed

Seamlss organises your firm's data using three key concepts: **Contacts**, **Clients** (entities), and **Groups**. Understanding how these work together is essential for getting the most out of the platform.

Overview

In previous versions of Seamlss, a "client" represented both the person and the business entity in a single record. The updated model separates these into three distinct concepts, giving your firm more flexibility and accuracy when managing client relationships.

Contacts

A **Contact** is a person: an individual with a name, email address, and phone number. Contacts are the people your firm communicates with.

Key things to know about contacts:

- A contact can be linked to one or more clients (entities)
- The first contact added to a client becomes the **Primary Contact**: this is the person who receives requests, notifications, and communications
- Identity verification is completed at the contact level
- You can manage contacts from **Client Management > Contacts**

To add a contact, go to **Client Management > Contacts** and select the **Add** tab. Enter their first name, last name, email address, and mobile phone number.

Clients (Entities)

A **Client** in Seamlss represents a business entity or structure. When you add a client, you select an entity type that matches the client's business structure.

Available entity types include:

- Individual
- Company
- Sole Trader
- Partnership
- Trust
- Trust with Trustee Company
- SMSF (Self-Managed Super Fund)
- Unit Trust
- Not for Profit
- Estate
- Club or Society
- Government Entity
- Other

Each client has a **Primary Contact** who is the main point of communication. You can view and manage clients from **Client Management > Clients**.

> **Tip:** If you are adding a client who is a second spouse or an individual without an ABN, select "Individual" as the entity type. This avoids ABN requirement prompts during onboarding.

Groups

A **Group** is a way to organise related clients together. For example, you might group all entities belonging to the same family or business group.

Groups are useful for:

- Organising clients that share common ownership or management
- Viewing related entities at a glance

- Streamlining how you manage multi-entity client relationships

You can create and manage groups from **Client Management > Groups**.

How They Work Together

Here is how the three concepts connect in practice:

1. A **Contact** (e.g. John Smith) is the person you communicate with
2. John may be the primary contact for multiple **Clients** (e.g. “Smith Family Trust”, “John Smith: Individual”, “Smith Holdings Pty Ltd”)
3. All of these clients can be placed into a **Group** (e.g. “Smith Family Group”)

When you send a request, Seamlss sends it to the **Primary Contact** on the client record. That contact then completes the requested items for that specific entity.

Navigation

All three sections are found under **Client Management** in the left-hand menu:

- **Client Management > Clients**: view, add, and manage entity records
- **Client Management > Contacts**: view, add, and manage contact records
- **Client Management > Groups**: view, add, and manage client groups

Related Guides

- Managing Contacts
- Adding Clients to Seamlss
- Managing Groups
- How to Send a Client Request
- Understanding the Requests Dashboard

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