FYI Integration with Seamlss

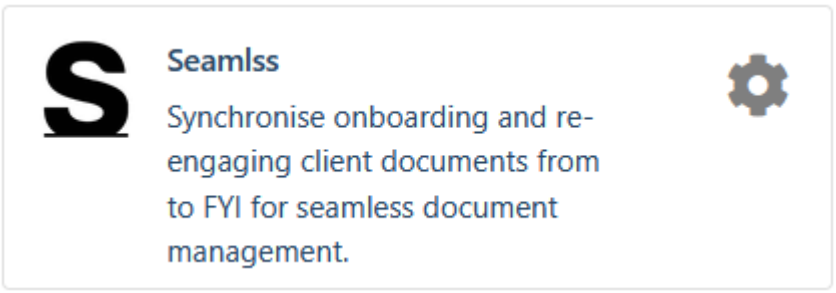
Integrated Apps · https://seamlss.com.au/help/fyi-integration-with-seamlss/

Here’s a detailed guide to help you properly set up **FYI integration with Seamlss**, configure folders (cabinets), and ensure file flows work smoothly for onboarding, re-engagement, Fetch forms, and more.

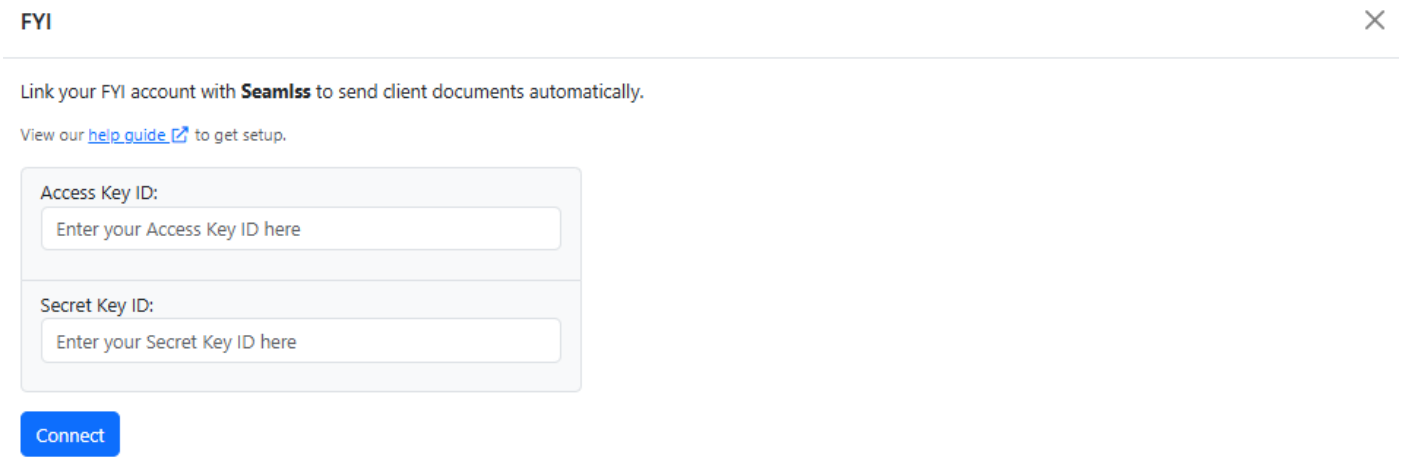
Connecting FYI to Seamlss

To get started:

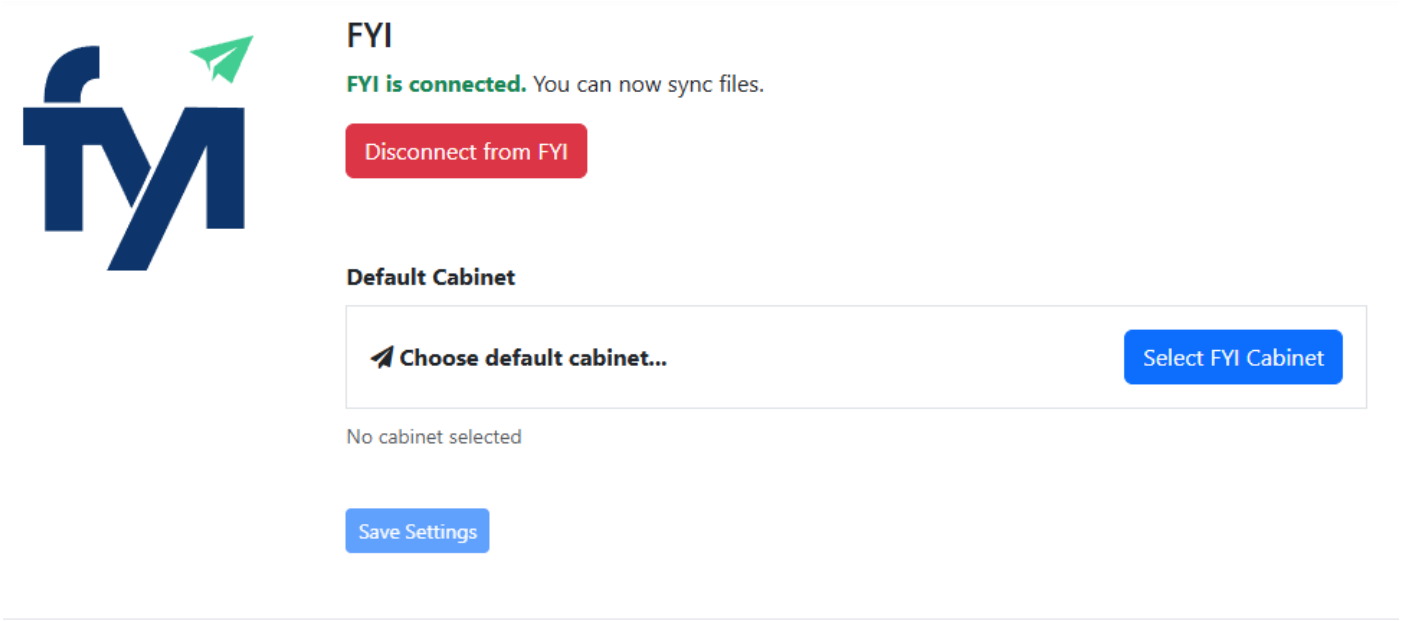
- In FYI app, navigate in the menu to **Automation> Apps >** fine the Seamlss option.



- Click on the Seamlss Option from the list of apps.
- Click Create new secret button.
- Copy and paste the **Access Key ID** and **Secret Key ID** into the Seamlss Setting.
- In **Seamlss**, go to **Settings**, the **Integrations** tab, then click **Connect** on the FYI card.
- Enter your **Access Key ID** and **Secret Key ID** from your FYI account.
- Click **Connect**.



Once connected, you'll see the status: "**FYI is connected. You can now sync files.**"



Selecting a Default Cabinet in FYI

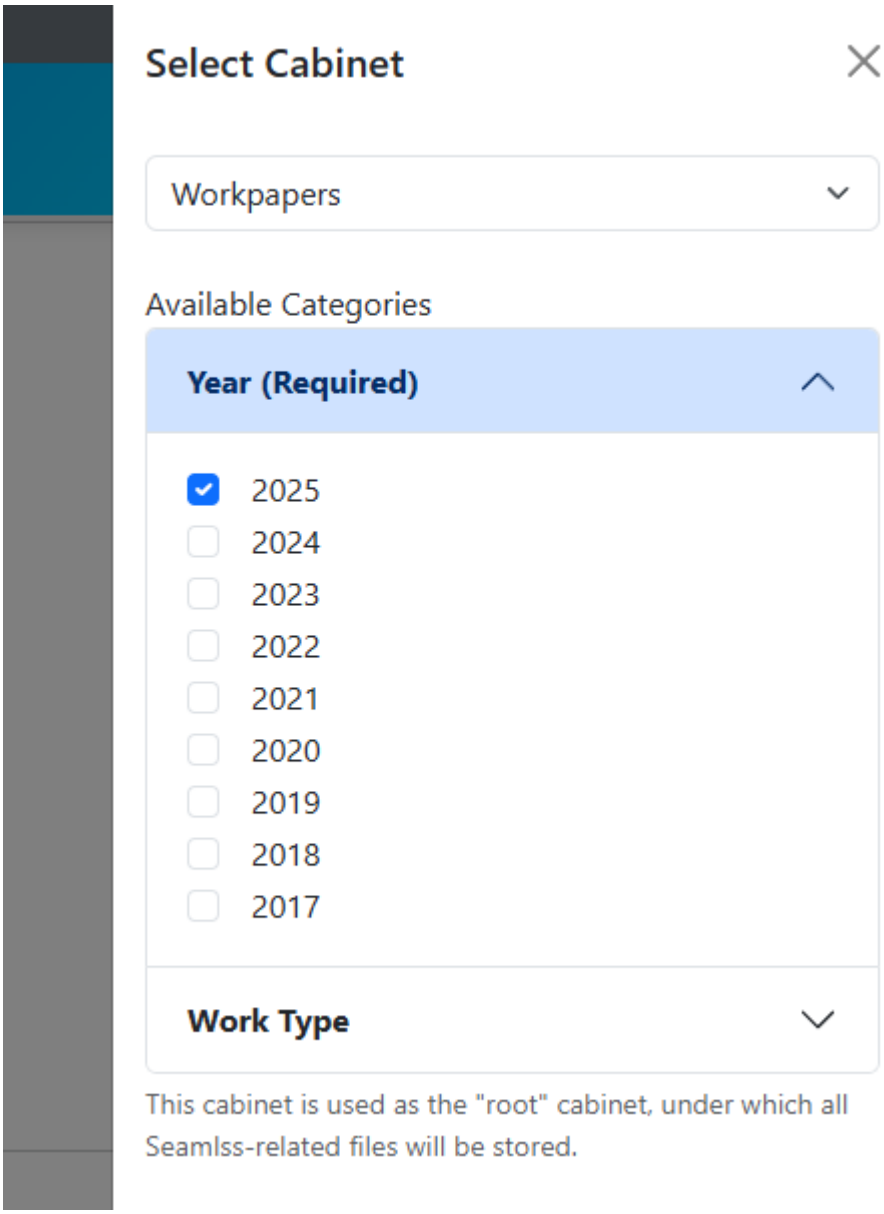
After connection, you'll be prompted to select a **default cabinet**:

- Click **"Select FYI Cabinet"**.
- Choose a cabinet (e.g. **Workpapers**) and assign required categories like:
  - **Year (required):** e.g. 2025
  - **Work Type:** e.g. Accounting & Tax, Tax Planning, Bookkeeping

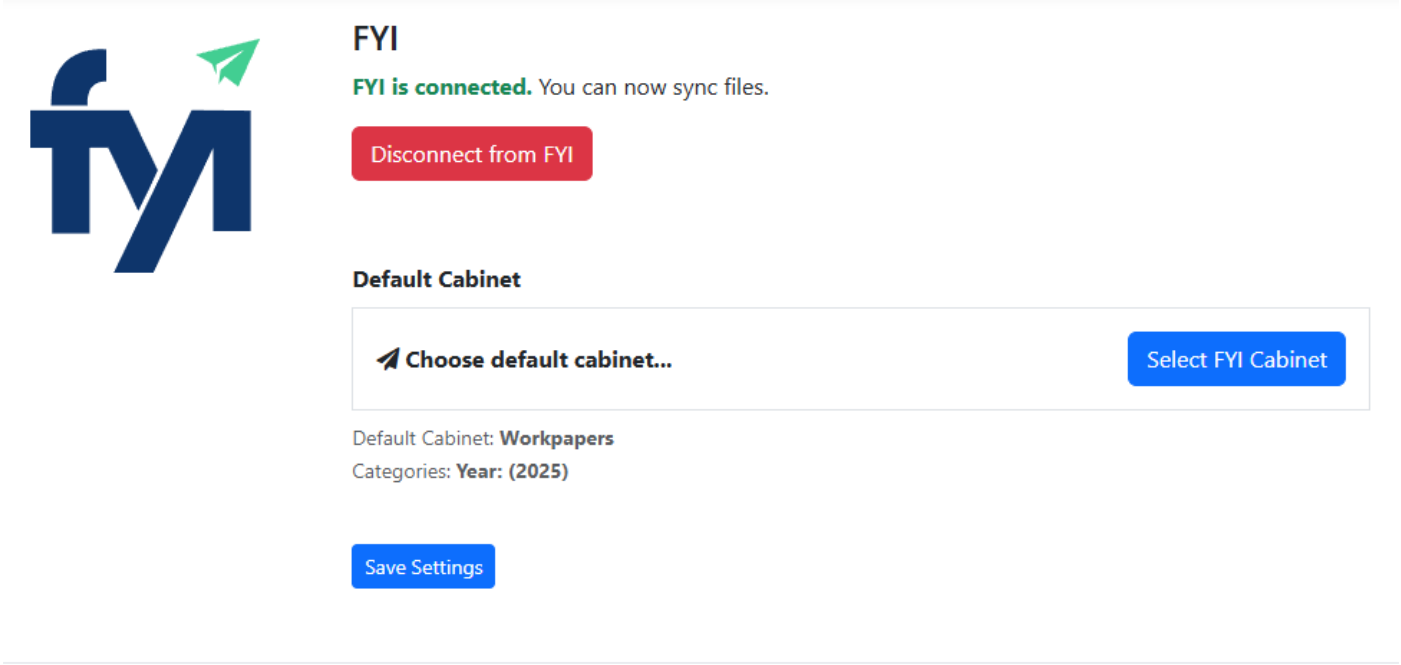
These categories help with automatic file tagging when syncing from Seamlss to FYI.

Press the **Done** button complete the cabinet selection.

⚠ **Note**: The cabinet selected here becomes the *default location* where all Seamlss-related files will be stored.



Back in the main area, press **Save Settings** to finish.



File Flow: How Files Move from Seamlss to FYI

Once FYI is connected and a cabinet is selected, documents generated through:

- **Onboarding forms**
- **Re-engagement forms**
- **Fetch requests**
- **Client Links**

...will automatically sync into FYI, landing in the designated cabinet/category.

You can further manage those documents directly within FYI for task assignment, filing, or review.

Automating with Client Links + Fetch

Using **Fetch** + **Client Links** is a powerful way to collect client data and sync output into FYI.

Example Use Cases:

- **Onboarding:**
  - New client fills out onboarding form via a Client Link.
  - Their documents and responses are synced and stored in FYI under the selected cabinet.
- **Re-Engagement:**
  - Admin or CSA team sends out a pre-set re-engagement form.

- Client uploads info → files sync into FYI → job begins once data is validated.

- **FBT Season:**
  - Use a simplified FBT form → trigger a Fetch request → auto-file client responses + files into FYI under 2025 » FBT.

Demonstration

Embedded media: https://www.youtube.com/embed/k9lp443qEt0?feature=oembed