Cruz Morato & Associates
Certified Public Accountant & Consultants

How to upload a document to the Portal:

1. Visit our website at www.flkeyscpa.com

2. Click on Client Portal

3. Enter your login and password

4. Once logged in, there will be a "File Exchange" (top left corner under 'NetClient CS') to select from
5. Click the file type (Actionable Items, Correspondence, etc)
6. Click "upload"
7. Click "Add files" at the bottom left of the dialogue box
8. Select the file you want to upload from your computer
9. Click "Start upload" and wait for file to be uploaded

Please contact Tami if you have any questions at accountant@flkeyscpa.com or (305) 743-4599