

## MVOL and VisionWorks: Importing and Exporting Files

To test MVOL, you must register as a client and use a *personal* email address. Make the advisor's email address your business address.

### Importing a File from the MyVisionOfLife.ca Web site into VisionWorks

If clients have registered on the MyVisionOfLife.ca site and created their vision, you can import their file into VisionWorks.

1. Run VisionWorks and click the Add button.
2. Select the Import Existing File From Web option.
3. Name the file and click the OK button.

In the Import Vision From Web dialog box, you'll see a list of client files for which clients have named you as their advisor and have given their permission for you to view their file.

4. Select the desired file, click the Import button, and click the OK button.
5. The imported file is displayed in the Files list.
6. Click the Open button to open it.

### Exporting a File from VisionWorks to the MyVisionOfLife.ca Web Site

You can export a file from VisionWorks to the MyVisionOfLife Web site. For example, you created a Retirement Assessment plan for clients. They have become more engaged in the planning process and want to amplify on the "wants" in life.

1. In VisionWorks, open the client file and select the Questionnaires page in the Navigation Pane.
2. Click the Export button.
3. Select To Web.
4. In the Export Vision to Web dialog box, click the Add button.
5. Enter the client's email address, create a password, and click the OK button.
6. Click the Export button and the OK button.

Only the following data is exported:  
the parties,  
general expenses,  
homes and related expenses,  
vehicles and related expenses, and  
career salary and self-employed income entries.

7. Provide your client with the login credentials.
8. The client can login to the MyVisionOfLife.ca site and amplify on their wants in life.

## Importing from MyVisionOfLife to Update a VisionWorks File

After a client has added to a file on the MyVisionOfLife site, you can update an existing VisionWorks file.

1. Open the client's file and in the Navigation Pane select Questionnaires.
2. Click the Import button.
3. Select From Web.
4. In the Import Vision From Web dialog box, select the desired file.
5. Select the Import Into Existing Solution or Import Into New Solution option.  
For the Import Into New Solution option, you must assign the Solution a name.
6. Click the Import button.
7. The Web Import Changes dialog box displays the changes the client made. If desired, click the Print button to print the changes and then click the Close button.
8. The file is updated based on the changes the client made on the MyVisionOfLife.ca Web site.

## Find an Advisor


If prospective clients do **not** have a licensed VisionWorks advisor, the MyVisionOfLife.ca Web site footer displays a Find an Advisor link.

When clicked, it opens a map of Canada. Prospective clients can search for a VisionWorks advisor in their region.

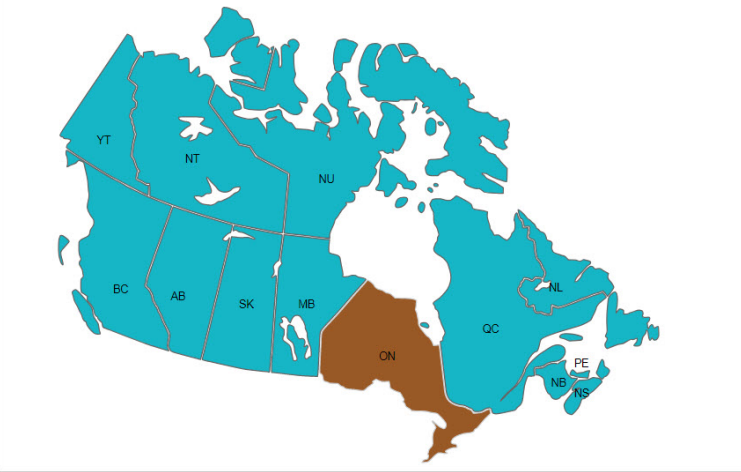
**If you do not want your contact information to appear in the list, please advise us.**

My Vision of Life

Secure Transaction. For your protection, this website is secured with the highest level of SSL Certificate encryption.



The vision of life that you created is designed for the VisionWorks life-planning software. You may use the following features to locate a licensed VisionWorks advisor in your area.



**Province list**

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland/Labrador
- Nova Scotia
- Northwest Territories
- Nunavut
- ▾ Ontario
  - Aurora
  - Barrie
  - Brampton
  - Brantford
  - Brantford
  - Clinton
  - Cobourg
  - Collingwood
  - Etobicoke
  - Guelph
  - Kanata
  - King City
  - Kingston
  - Kitchener
  - Kleinburg
  - London

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