



MVOL and VISIONWORKS:

IMPORTING AND EXPORTING FILES

This guide outlines how to export and import files from VisionWorks and MyVisionnOfLife.ca (MVOL). 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 MVOL into VisionWorks

If clients have registered on MVOL and created their vision, you can import their file into VisionWorks. This is **not** the suggested procedure. Instead, you should export a file from VisionWorks to MVOL.

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 and click the Import 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 MVOL

You can export a file from VisionWorks to the MVOL. For example, you created a Retirement Plan (RP) for clients. They have become more engaged in the planning process and want to amplify on their "wants" in life.

1. In VisionWorks, open the client file and select the Imp/Exp/Quest 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 name, email address, create a password, and click the OK button.
6. Click the Export button.
7. When the export has completed, click the OK button.
8. Provide your client with the login credentials.
9. The client can login to the MVOL website and amplify on their wants in life.

Creating a clear vision of life is the most important step in the planning process. Without it, clients can't understand the gap between what they have now and what they need to do to achieve their vision.

USING THE PDF QUESTIONNAIRES



2

Importing from MVOL to Update a VisionWorks File

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

1. Open the client's file and in the Navigation Pane select Imp/Exp/Quest.
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 MVOL website.

Find an Advisor

If clients do **not** have a licensed VisionWorks advisor, the MVOL footer displays a Find an Advisor link.

When clicked, it opens a map of Canada. 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.

The screenshot shows the 'My Vision of Life' website interface. At the top, there is a header with the title 'My Vision of Life' and a security notice: 'Secure Transaction. For your protection, this website is secured with the highest level of SSL Certificate encryption.' Next to this is a 'SECURE' logo with a padlock icon and 'DATA ENCRYPTED' text, and the 'networksolutions' logo. Below the header, a text box states: '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.' The main content area features a map of Canada with provinces and territories labeled with their abbreviations: YT, NT, NU, BC, AB, SK, MB, ON, QC, NL, PE, NB, and NS. To the right of the map is a 'Province list' with a scrollable menu. The list includes: Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland/Labrador, Nova Scotia, Northwest Territories, Nunavut, and Ontario. Under Ontario, there is a list of cities: Aurora, Barrie, Brampton, Brantford, Brantford, Clinton, Cobourg, Collingwood, Etobicoke, Guelph, Kanata, King City, Kingston, Kitchener, Kleinburg, and London. At the bottom of the page, there is a footer with navigation links: 'Manage Account | Change Password | Restore | Home | Find An Advisor | Contact Us | Privacy Policy | Legal Disclaimer | Logout' and a copyright notice: 'Copyright 2002—2018. Vision Systems Corp. All Rights Reserved.'

Vision Systems Corp., 2625 B Yonge Street, Toronto, Ontario, Canada M4P 2J6
P: 1-888-578-3247, ext. 100/option 1 P: 416 421-2431, ext. 100/option 1 E: info@visionsystemscorp.com
www.visionsystemscorp.com