



Principal Life Illustration System

User Guide

[Getting Started](#)

[Running an Illustration](#)

[Helpful Tips](#)

Getting Started

The Principal Life Illustration System (PLIS) is **available online ONLY**. To access the system, open your browser and navigate to the Principal® website for financial professionals:

advisors.principal.com.

- Note: PLIS is available on any web browser. However, Google Chrome is recommended for the best system performance.

From the menu options at the top of the screen, click on New Business. When the menu screen appears, look under Quotes & Proposals and click on Life Insurance Illustrations.

The screenshot shows the Principal website navigation menu. The 'New Business' tab is highlighted with an orange arrow. Below it, the 'Quotes & Proposals' section is expanded, and 'Life Insurance Illustrations' is highlighted with another orange arrow.

Products	Existing Business	Forms & Materials	Resource Center	News & Trends
Get Started <ul style="list-style-type: none">AnnuitiesDisability InsuranceGroup & Voluntary BenefitsLife InsuranceNQ Deferred CompPrincipal Securities Broker-DealerRetirement PlansMore Available with Log In Guidelines & Underwriting <ul style="list-style-type: none">Annuity GuidelinesDisability Insurance UnderwritingLife Insurance UnderwritingMore Available with Login Quotes & Proposals <ul style="list-style-type: none">Life Insurance IllustrationsDisability Insurance IllustrationsGroup & Voluntary BenefitsRetirement PlansMore Available with Login	Submit Business <ul style="list-style-type: none">Principal Life OnlineAnnuitiesCreate Annuity Application PacketDisability InsuranceCreate Disability Insurance Application PacketGroup & Voluntary BenefitsLife InsuranceCreate Life Application PacketLife Business Case SubmissionPrincipal Securities Broker-DealerRetirement PlansMore Available with Login Track Your Business <ul style="list-style-type: none">Pending Business Report (Life & DI)More Available with Login Investments, Rates & Performance <ul style="list-style-type: none">Retirement Plan Investment Tools & ResourcesRates, Values & PerformanceMore Available with Login	Policy Delivery <ul style="list-style-type: none">Disability InsuranceLife Insurance Implementation & Enrollment <ul style="list-style-type: none">Group & Voluntary BenefitsNQ Deferred CompRetirement Plans Administrative Capabilities <ul style="list-style-type: none">Group & Voluntary BenefitsLife Business Market AdministrationNQ Deferred Comp		

You should see the Life Insurance Quotes & Illustrations page below. To access the illustration system, click on Principal Life Illustration System.

- Note: For easy system access, bookmark the Life Insurance Quotes & Illustrations page.
- Note: There will be NO mention of Existing Policy for the new System due to it being internal users only until Field Release is done.

[Home](#) > [New Business](#) > [Quotes & Proposals](#) > [Life Insurance Illustrations](#)

Quotes and Proposals

Life Insurance Quotes & Illustrations
Requests for Proposals
Principal Life Quote Edge
Group & Voluntary Benefits
Disability Insurance Illustrations
Retirement Plans
More Available with Login

Life Insurance Quotes & Illustrations

Our Principal Life Illustration System (PLIS) enables you to illustrate new individual life insurance solutions for your clients. You can learn more about the system in the [PLIS Overview](#).

Important note: You can access PLIS with a variety of web browsers, but we recommend Google Chrome for the best experience. Principal Illustration Edge is only available in Internet Explorer.

Getting Access

- [Principal Life Illustration System](#) (new online illustration system launched November 2020)
- [Principal Illustration Edge](#) (online)
- [Register to download](#) our life illustration software (desktop).
- [Download the software](#) if you are already registered.

Illustration Assistance

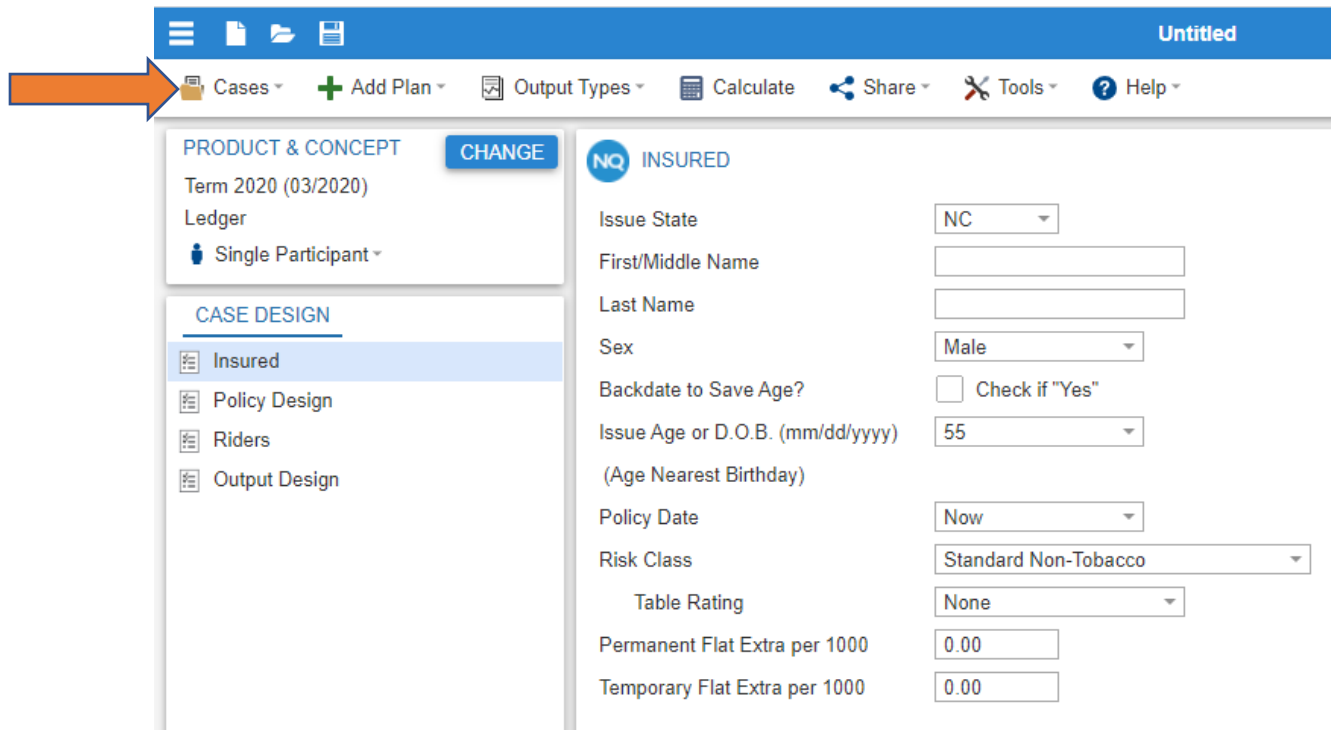
- For installation support, call Distribution Technology Support at 800-786-4461, or email them at DTS@Principal.com.
- View the [user guide](#) for details on the most commonly used features and functionality.
- To run illustrations, use the help features within the illustration system. Click the question mark icon next to each input field for help with individual inputs.

- Note: The Principal Illustration Edge system will continue to allow all current Existing Policy products to be illustrated during the transition to the PLIS system—for both online and desktop systems. Saved cases in Illustration Edge **will not** transfer over to PLIS, but they'll remain accessible in Illustration Edge until that system is no longer available.

[Return to top](#)

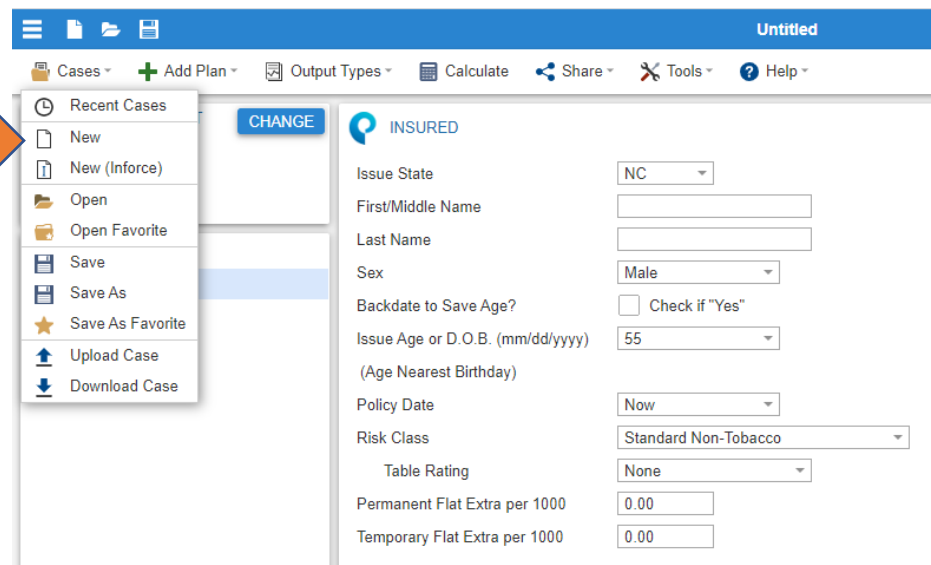
Running an Illustration

Once in the system, you'll see a screen similar to this. To begin an illustration, click on Cases in the top left corner.




The screenshot shows the application interface with the 'Cases' dropdown menu open. The menu options are: Recent Cases, New, New (Inforce), Open, Open Favorite, Save, Save As, Save As Favorite, Upload Case, and Download Case. The 'New' option is highlighted. The background shows the 'PRODUCT & CONCEPT' section with 'Term 2020 (03/2020)' and 'Ledger' set to 'Single Participant'. The 'CASE DESIGN' section has 'Insured' selected. The 'INSURED' section shows fields for Issue State (NC), First/Middle Name, Last Name, Sex (Male), Backdate to Save Age? (unchecked), Issue Age or D.O.B. (55), Policy Date (Now), Risk Class (Standard Non-Tobacco), Table Rating (None), Permanent Flat Extra per 1000 (0.00), and Temporary Flat Extra per 1000 (0.00).

In the dropdown menu, there is a New and New (Inforce) Option. The New is to start a New Issue Case and New (Inforce) is to start an Existing Policy Case.



The screenshot shows the application interface with the 'Cases' dropdown menu open. The menu options are: Recent Cases, New, New (Inforce), Open, Open Favorite, Save, Save As, Save As Favorite, Upload Case, and Download Case. The 'New' option is highlighted. The background shows the 'PRODUCT & CONCEPT' section with 'Term 2020 (03/2020)' and 'Ledger' set to 'Single Participant'. The 'CASE DESIGN' section has 'Insured' selected. The 'INSURED' section shows fields for Issue State (NC), First/Middle Name, Last Name, Sex (Male), Backdate to Save Age? (unchecked), Issue Age or D.O.B. (55), Policy Date (Now), Risk Class (Standard Non-Tobacco), Table Rating (None), Permanent Flat Extra per 1000 (0.00), and Temporary Flat Extra per 1000 (0.00).


For the New Issue case, select New and the following New Case screen will appear. Choose the product you'd like to illustrate and click New Case at the bottom of the window.



New Case		
▼ PRODUCT / CONCEPT FILTER		
Product Type:	Any ▼	Approved State: Any ▼
Concept Type:	Any ▼	Issue Age: Any ▼
Concept:	Ledger ▼	
PRODUCT NAME		PRODUCT TYPE
2020 Executive VUL III	Variable Universal Life	i
One Year Term 2020	Term	i
Principal UL Protector V (06/2020)	Universal Life	i
Principal VUL Income IV	Variable Universal Life	i
Term 2020 (03/2020)	Term	i

New Case Cancel

You can now run an illustration by completing the applicable fields in each of the Case Design tabs. Note: The Case Design section will have more or less tabs available depending on the product selected.



PRODUCT & CONCEPT	
Principal UL Protector V (06/2020)	
Ledger	
Single Participant ▼	

CHANGE

CASE DESIGN

- Insured
- Policy Design
- Income and Targeting
- Riders
- Output Design

For the Existing Policy cases, select New (Inforce) and the following Inforce Data screen will appear. Click on Get Policy Data and select New Policies.

The screenshot shows the 'Inforce Data' interface. At the top, there's a blue header with a menu icon and the text 'Inforce Data'. Below the header is a toolbar with buttons: 'New Case From Selected Policies', 'Pending Policy', 'Update Current Case', 'Get Policy Data', and 'Filter'. Below the toolbar is a table with three columns: 'POLICY #', 'GROUP', and 'INSURED'. The first row has a checkbox, '4040400', and 'ARMOURA, ALVIN'. The second row has a checkbox, '4040401', and 'ARMOURA, ALVIN'. An orange arrow points from the 'INSURED' column to a dropdown menu that is open, showing 'New Policies' and 'Selected Policies'.

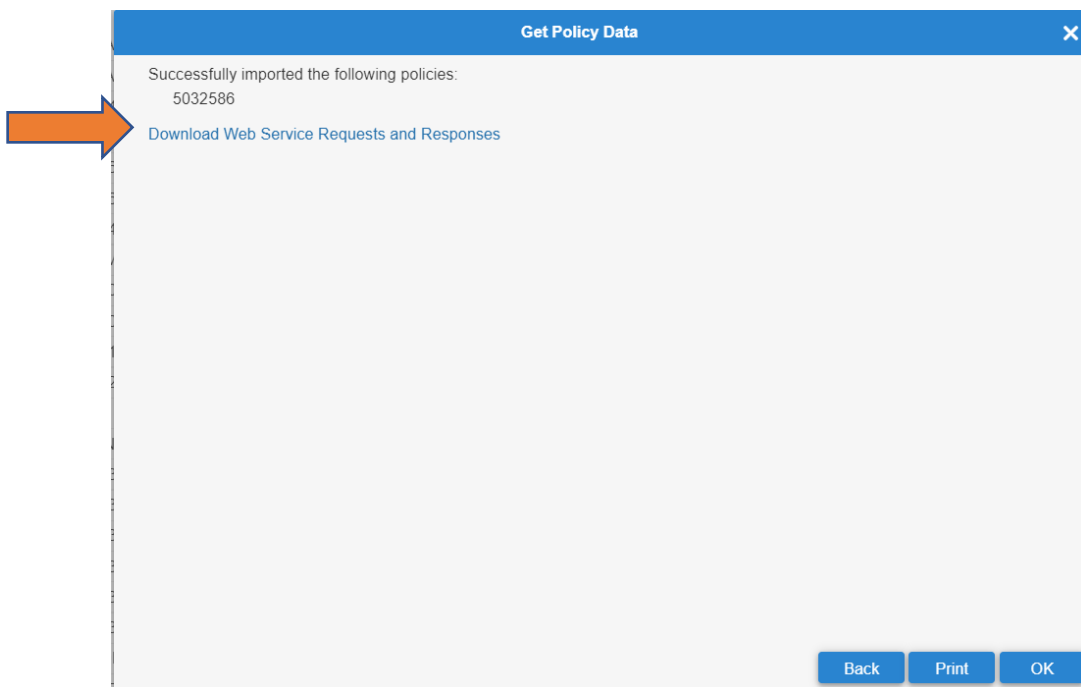
	POLICY # ↑	GROUP	INSURED
<input type="checkbox"/>	4040400		ARMOURA, ALVIN
<input type="checkbox"/>	4040401		ARMOURA, ALVIN

Enter the Contract Number, also multiple Contracts can be entered at once. Then click on Download. *No UserID or Password needed to download.*

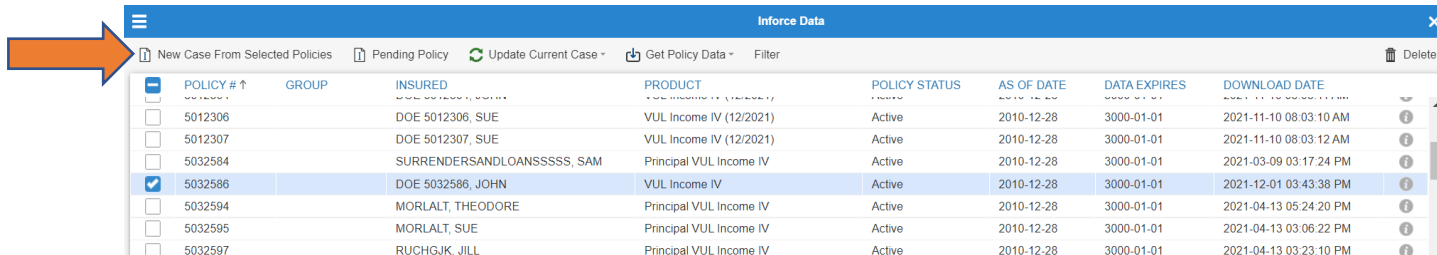
The screenshot shows the 'Get Policy Data' dialog box. It has a blue header with the text 'Get Policy Data' and a close button. Below the header is a 'Download Option' dropdown menu set to 'Specify Policies'. Below the dropdown is a table with a header 'Policy Number' and one row containing '5032586'. An orange arrow points from the table to 'Download' and 'Cancel' buttons.

Policy Number
5032586

The following screen will appear with a message that the contract(s) has successfully downloaded. If the contract(s) errors out, a message will appear why to the User. Click OK to exit the pop up screen.



The Contract(s) will then appear in the list of Contracts on the Inforce Data Screen. The Contract will be selected and highlighted. To start a New Existing Contract, keep the Contract selected and select New Case From Selected Policies.



You can now run an illustration. The Case Design Filed will be populated from the CCA download and you can change fields to the appropriate updates that are necessary. *Note: The Case Design section will have more or less tabs available depending on the product selected.*

PRODUCT & CONCEPT		CHANGE	
VUL Income IV			
Inforce Ledger			
Single Participant ▾			

CASE DESIGN	
Insured	
Inforce Values	
Policy Design	
Investment Options	
Income and Targeting	
Riders	
Output Design	

INSURED	
Policy Number	5032586
Issue State	IA ▾
First/Middle Name	JOHN
Last Name	DOE 5032586
Gender	Male ▾
Issue Age or D.O.B. (mm/dd/yyyy)	2/19/1978 ▾
Issue Date	1/5/2010 ▾
Issue Age	32
Business Underwriting Program	None ▾
Risk Class	Preferred Non-Tobacco ▾
Permanent Flat Extra per 1000	0.00
Temporary Flat Extra per 1000	0.00
Owner Type	Insured ▾
Assumed Retirement Age	65

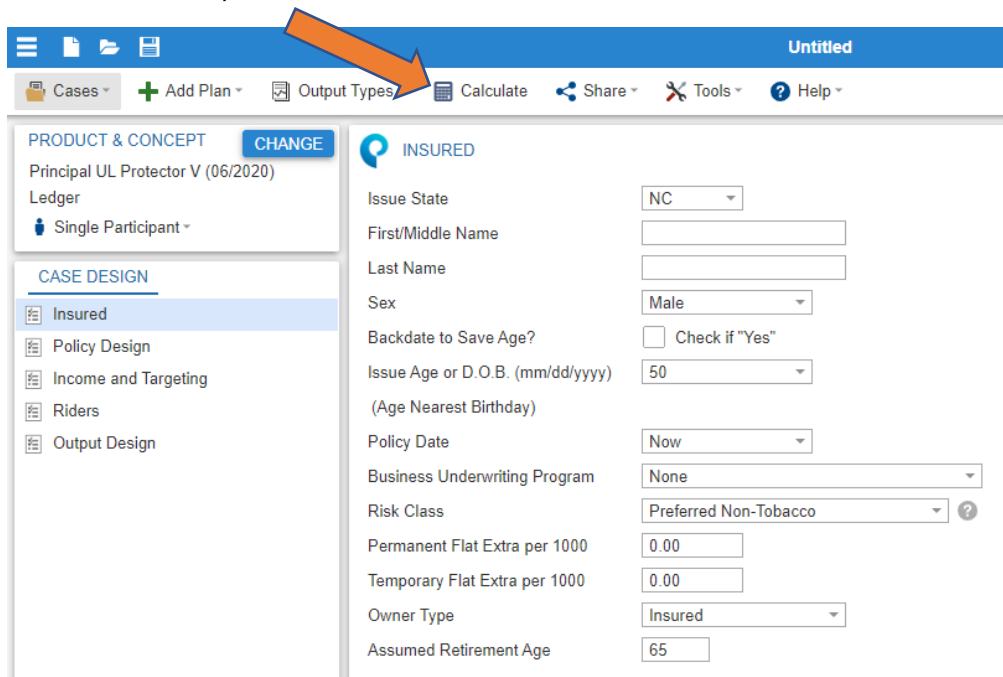
When completing the input fields, you may notice the Question Mark icon next to the field. This is the Help button for the individual fields.

The screenshot shows the 'INSURED' section of a software interface. On the left, there's a sidebar with 'PRODUCT & CONCEPT' (Principal UL Protector V (06/2020)) and 'CASE DESIGN' (Insured, Policy Design, Income and Targeting, Riders, Output Design). The main area contains the 'INSURED' form with fields for Issue State (NC), First/Middle Name, Last Name, Sex (Male), Backdate to Save Age? (Check if "Yes"), Issue Age or D.O.B. (50), Policy Date (Now), Business Underwriting Program (None), Risk Class (Preferred Non-Tobacco), Permanent Flat Extra per 1000 (0.00), Temporary Flat Extra per 1000 (0.00), Owner Type (Insured), and Assumed Retirement Age (65). An orange arrow points to a question mark icon next to the 'Risk Class' dropdown.

Clicking the Question Mark icon will bring up the Help section with information about what's required for that particular field.

The screenshot shows the 'RISK CLASS' help section. The 'INSURED' form is visible in the background, with the 'Risk Class' dropdown highlighted. A pop-up window titled 'RISK CLASS' is open, displaying the instruction: 'Enter the insured's risk class and tobacco status.' The pop-up also has a 'Comments' section.

When all inputs have been entered and you are ready to see the results, click on the Calculate button at the top of the screen.



The screenshot shows the 'INSURED' form in a software application. The top navigation bar includes buttons for 'Cases', 'Add Plan', 'Output Types', 'Calculate', 'Share', 'Tools', and 'Help'. An orange arrow points from the 'Calculate' button to the main form area. The form is titled 'INSURED' and contains various input fields for policy details.

PRODUCT & CONCEPT CHANGE

Principal UL Protector V (06/2020)
Ledger
Single Participant

CASE DESIGN

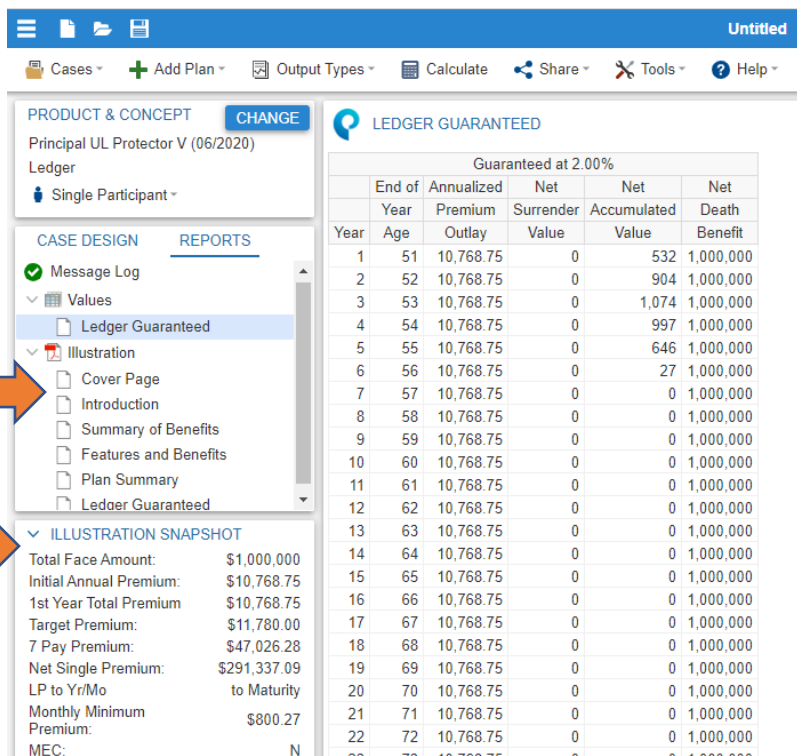
- Insured
- Policy Design
- Income and Targeting
- Riders
- Output Design

INSURED

Issue State: NC
First/Middle Name:
Last Name:
Sex: Male
Backdate to Save Age? ☐ Check if "Yes"
Issue Age or D.O.B. (mm/dd/yyyy): 50
(Age Nearest Birthday)
Policy Date: Now
Business Underwriting Program: None
Risk Class: Preferred Non-Tobacco
Permanent Flat Extra per 1000: 0.00
Temporary Flat Extra per 1000: 0.00
Owner Type: Insured
Assumed Retirement Age: 65

You'll now see a screen displaying the values of your illustration.

- On this screen you can access the PDF of the illustration, including the ability to click directly on certain sections of the illustration.
- The Illustration Snapshot provides a direct view of important values in the illustration.



The screenshot shows the 'LEDGER GUARANTEED' screen. The top navigation bar is the same as the previous screen. The left sidebar has a 'REPORTS' tab selected, showing a list of reports. An orange arrow points to the 'Illustration' report. Another orange arrow points to the 'ILLUSTRATION SNAPSHOT' section, which displays a table of values.

PRODUCT & CONCEPT CHANGE

Principal UL Protector V (06/2020)
Ledger
Single Participant

CASE DESIGN **REPORTS**

- Message Log
- Values
- Ledger Guaranteed
- Illustration
- Cover Page
- Introduction
- Summary of Benefits
- Features and Benefits
- Plan Summary
- Ledger Guaranteed

ILLUSTRATION SNAPSHOT

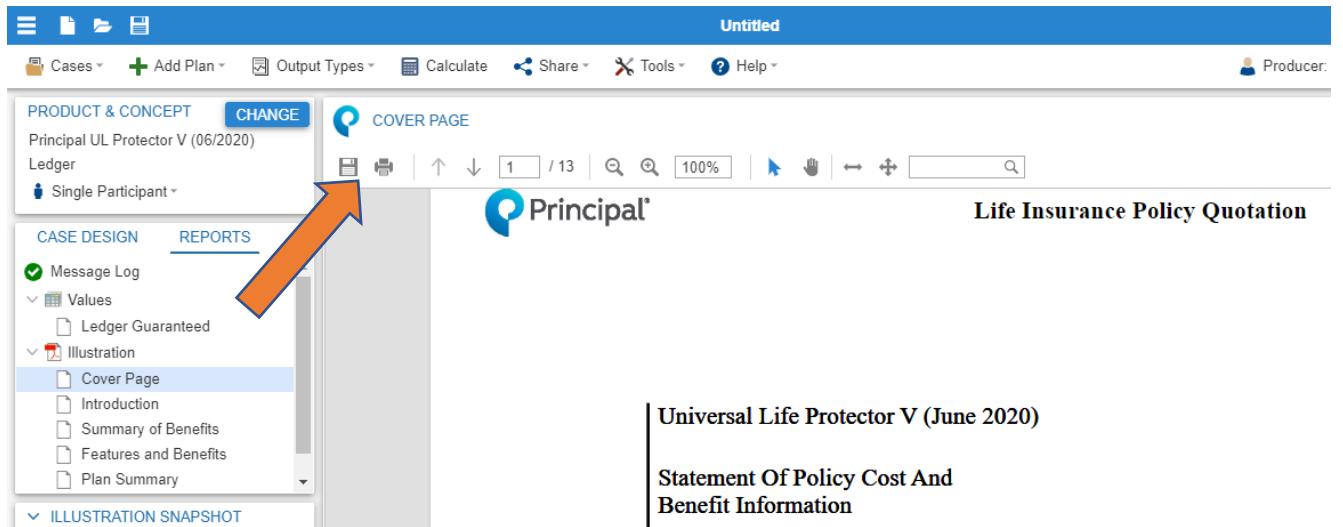
Total Face Amount: \$1,000,000
Initial Annual Premium: \$10,768.75
1st Year Total Premium: \$10,768.75
Target Premium: \$11,780.00
7 Pay Premium: \$47,026.28
Net Single Premium: \$291,337.09
LP to Yr/Mo to Maturity
Monthly Minimum Premium: \$800.27
MEC: N

LEDGER GUARANTEED

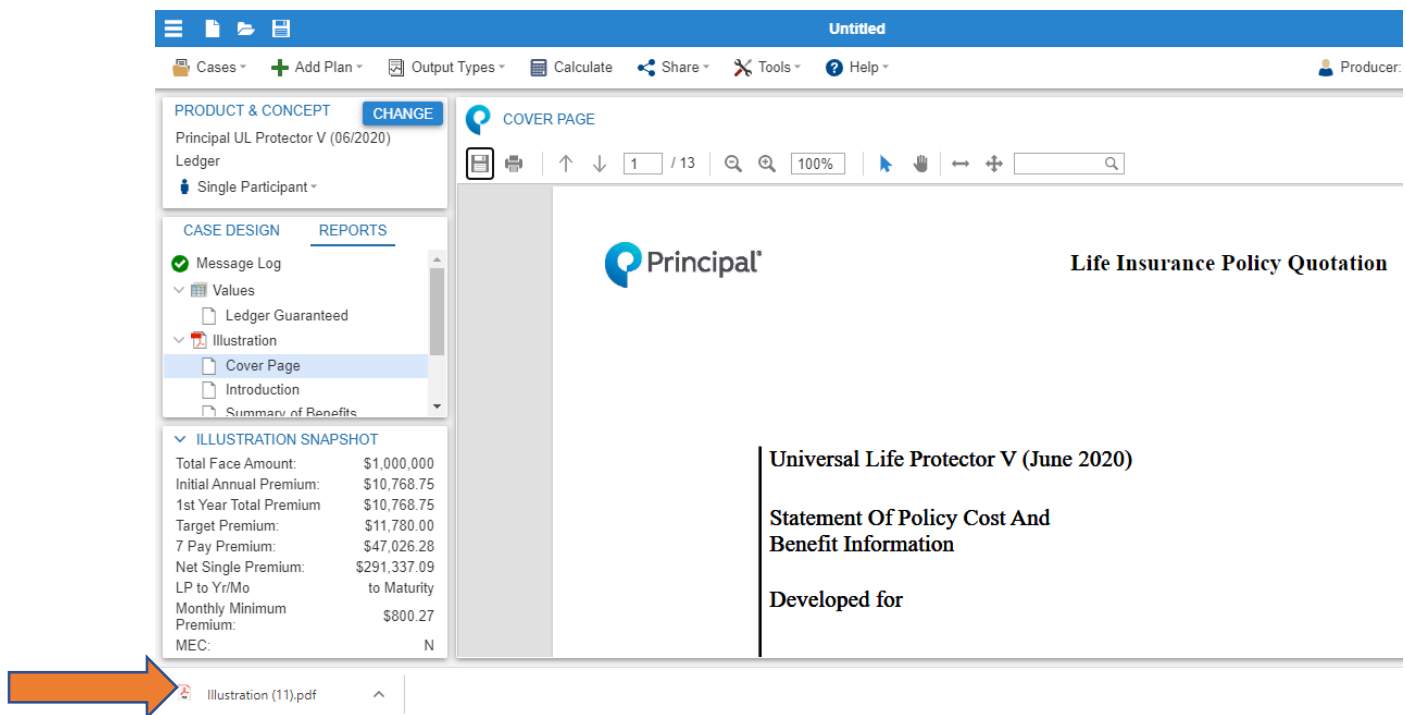
Guaranteed at 2.00%

Year	Age	Annualized Premium	Net Surrender Value	Net Accumulated Value	Net Death Benefit
1	51	10,768.75	0	532	1,000,000
2	52	10,768.75	0	904	1,000,000
3	53	10,768.75	0	1,074	1,000,000
4	54	10,768.75	0	997	1,000,000
5	55	10,768.75	0	646	1,000,000
6	56	10,768.75	0	27	1,000,000
7	57	10,768.75	0	0	1,000,000
8	58	10,768.75	0	0	1,000,000
9	59	10,768.75	0	0	1,000,000
10	60	10,768.75	0	0	1,000,000
11	61	10,768.75	0	0	1,000,000
12	62	10,768.75	0	0	1,000,000
13	63	10,768.75	0	0	1,000,000
14	64	10,768.75	0	0	1,000,000
15	65	10,768.75	0	0	1,000,000
16	66	10,768.75	0	0	1,000,000
17	67	10,768.75	0	0	1,000,000
18	68	10,768.75	0	0	1,000,000
19	69	10,768.75	0	0	1,000,000
20	70	10,768.75	0	0	1,000,000
21	71	10,768.75	0	0	1,000,000
22	72	10,768.75	0	0	1,000,000

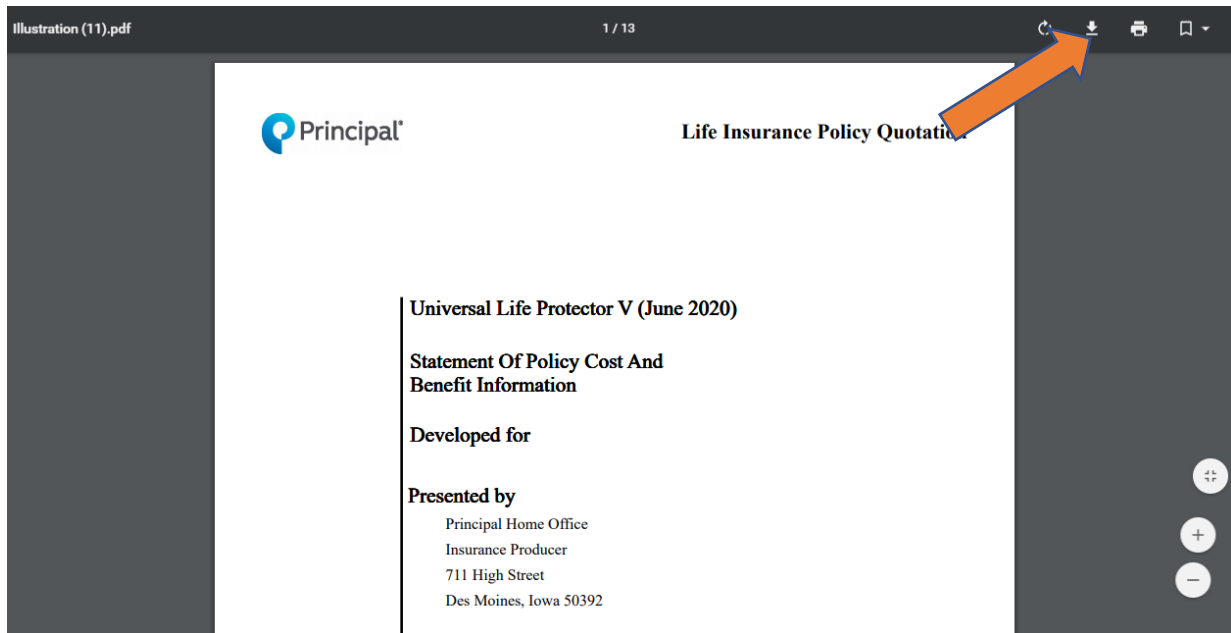
When finished with the illustration, click on a PDF section to bring up the PDF output. From here, you can elect to Save the PDF or Print the illustration output.



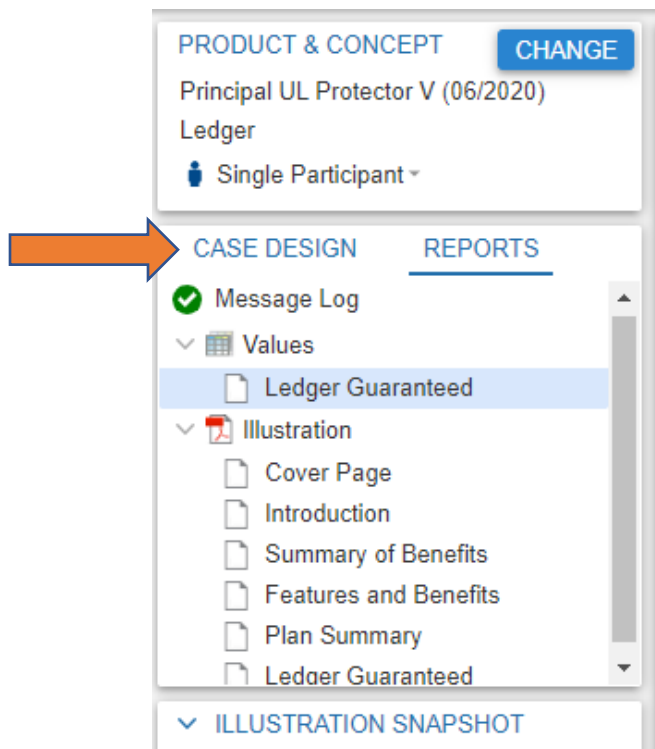
When clicking the Save button to save the PDF, an Illustration tab will appear at the bottom of the screen.



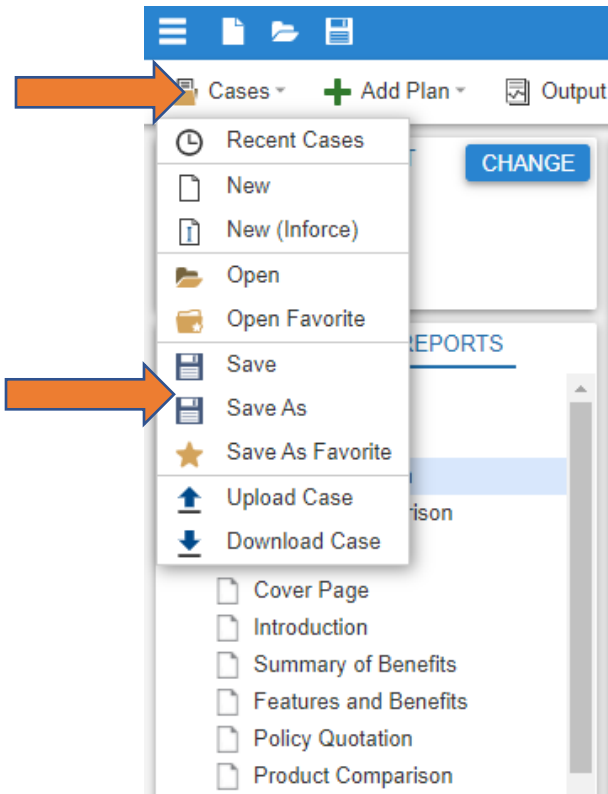
Click on this tab to bring up the PDF in a separate window. From here you can either click the Download button, or right click and press Save As to save the PDF to your computer. *This would be helpful for any Illustrations that need to be emailed out.*



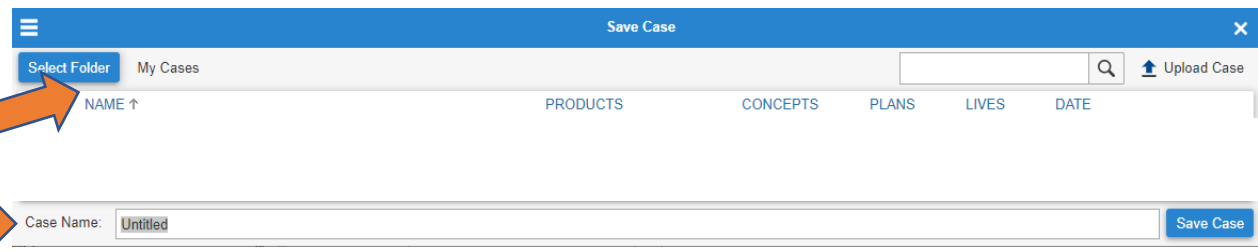
If modifications are needed, click on Case Design to go back and adjust your inputs.



If you're finished illustrating the case and want to save it, click on Cases and choose either Save, or Save As if the case has not yet been named.



The Save Case window will open, and you can name the case. It will then be saved under My Cases, or you can select a folder to save the case to.



[Return to top](#)

Helpful Tips

Click on one of the below to go directly to that section.

[Change button](#)

[Schedules](#)

[Message Log](#)

[Input age](#)

[Defining solves](#)

[Illustration system time out](#)

[Producer Information](#)

[Set Default preferences](#)

[Output Types](#)

[Organize by Folder](#)

[Save Favorite](#)

[Download Case](#)

[Upload Case](#)

[Help Contact numbers](#)

Use the Change button to select a different product while retaining the inputs already entered for the case you're working on.

The screenshot displays the software's main interface. At the top is a blue header bar with the title 'Untitled' on the right and a menu bar on the left containing icons for file operations. Below the header is a toolbar with buttons for 'Cases', 'Add Plan', 'Output Types', 'Calculate', 'Share', 'Tools', and 'Help'. The main workspace is divided into three panels. The left panel, titled 'PRODUCT & CONCEPT', shows a tree view with 'Term 2020 (03/2020)', 'Ledger', and 'Single Participant'. An orange arrow points to a blue 'CHANGE' button located next to the 'Term 2020' entry. Below this is the 'CASE DESIGN' panel, which contains a list of design elements: 'Insured', 'Policy Design', 'Riders', and 'Output Design'. The 'Insured' element is currently selected. The right panel, titled 'INSURED', contains a form with various input fields and dropdown menus for configuring the insured's details, including 'Issue State' (set to NC), 'First/Middle Name', 'Last Name', 'Sex' (set to Male), 'Backdate to Save Age?' (with a checkbox for 'Check if "Yes"'), 'Issue Age or D.O.B. (mm/dd/yyyy)' (set to 50), '(Age Nearest Birthday)', 'Policy Date' (set to Now), 'Risk Class' (set to Preferred Non-Tobacco), 'Permanent Flat Extra per 1000' (set to 0.00), and 'Temporary Flat Extra per 1000' (set to 0.00).

For some fields, a button will appear that allows you to schedule your inputs. When scheduling is needed, click on the button shown below.

PRODUCT & CONCEPT CHANGE

Principal VUL Income IV
Ledger
Single Participant

CASE DESIGN


- Insured
- Policy Design**
- Investment Options
- Income and Targeting
- Riders
- Output Design

POLICY DESIGN

Death Benefit

Definition of Life Ins. Test: Guideline Premium Test

Total Face Amount: 1,000,000

Death Benefit Option: Face... 

Premium

Planned Premium: 1,000.00

Premium Mode: Annual

User Specified Premium is: Annualized Amount

Lump Sum: 0.00

1035 Exchange: None

Avoid MEC? ☒ Check if "Yes"

Revised ☐ Check if "Yes"

When the Schedule button is clicked, a new field will appear allowing you to schedule your inputs in future years.

PRODUCT & CONCEPT CHANGE

Principal VUL Income IV
Ledger
Single Participant

CASE DESIGN REPORTS

- Insured
- Policy Design**
- Investment Options
- Income and Targeting
- Riders
- Output Design

POLICY DESIGN

Death Benefit

Definition of Life Ins. Test

Total Face Amount

Death Benefit Option

Premium

Planned Premium

Premium Mode

User Specified Premium is:

Lump Sum

1035 Exchange

Avoid MEC?

Revised

Death Benefit Option

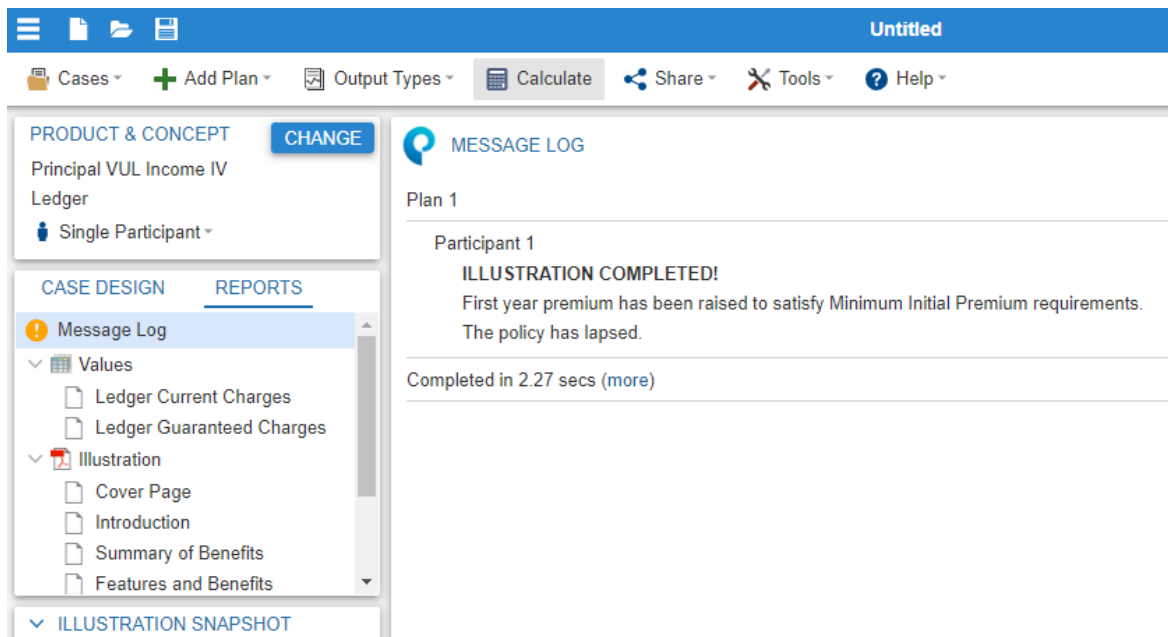
Option	From	Thru
Face + Policy Value	1	A65
Face	A66	Max

Clear OK Cancel

ILLUSTRATION SNAPSHOT

Total Face Amount:	\$1,000,000
Initial Modal Premium:	\$21,210.00
Target Premium:	\$21,210.00
7 Pay Premium:	\$50,227.47
Guideline Annual Premium:	\$51,777.76

At times, after clicking the Calculate button to run an illustration, a Message Log will appear instead of the values. This screen will often let you know that the illustration ran with an Illustration Completed message. But it may also describe changes or potential issues to be aware of. Below is an example.



You may notice a difference from our previous illustration system when inputting ages. For example, when illustrating distributions and entering 'A65' as the time to begin, the previous system would start distributions at age 66. In PLIS, the age you enter is when the distributions will begin. In the example below, distributions would begin at age 66.

Distribution Amounts ✕

Amount	Action	From	Thru
Solve	Withdraw / Loan	A66	A85

Clear
OK

Advanced
Cancel

Solves may need further definition, which can be done in the Income and Targeting screen. For example, you may have 'Solve' entered for Planned Premium.

Policy Design

Income and Targeting

Premium
Planned Premium

Solve

You can then click on the Income and Targeting screen on the left and define the solve you want to use.

Income and Targeting

Riders

Output Design

Targeting (when Solves utilized)

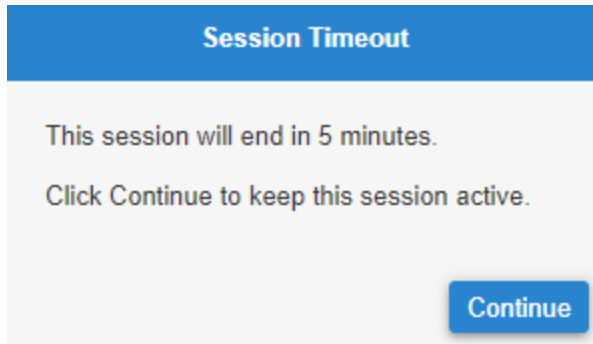
Targeting Goal

Lapse Protection Guarantee

Target Year or Age

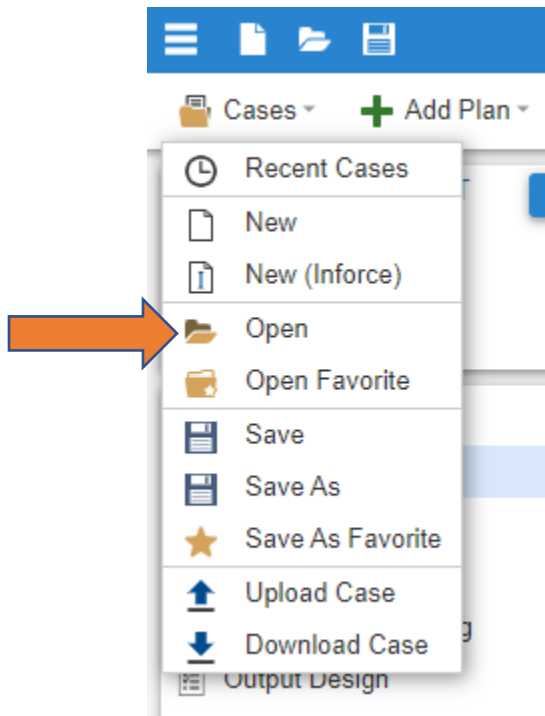
Lifetime

As part of our corporate security policy for online systems, there's a timeout function that occurs if you're inactive for 20 minutes. Five minutes prior to closing, the Session Timeout window shown below will appear. You'll have the option to click Continue if you want to keep the system open.

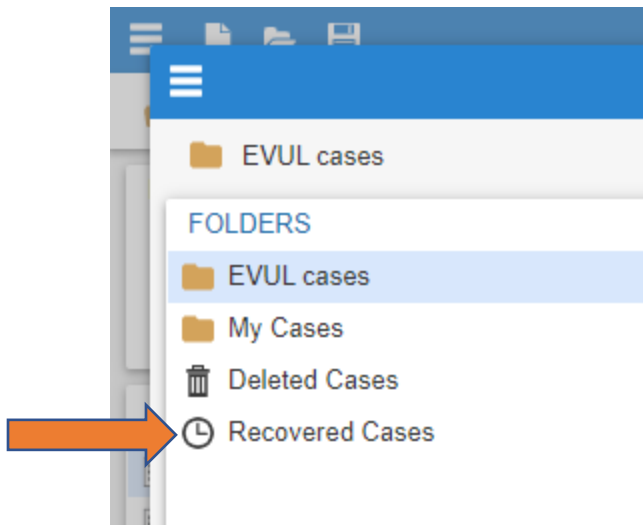


If the Continue button isn't clicked within five minutes, the illustration system will close. You may see an error screen at this point. You'll need to go back and reopen the system.

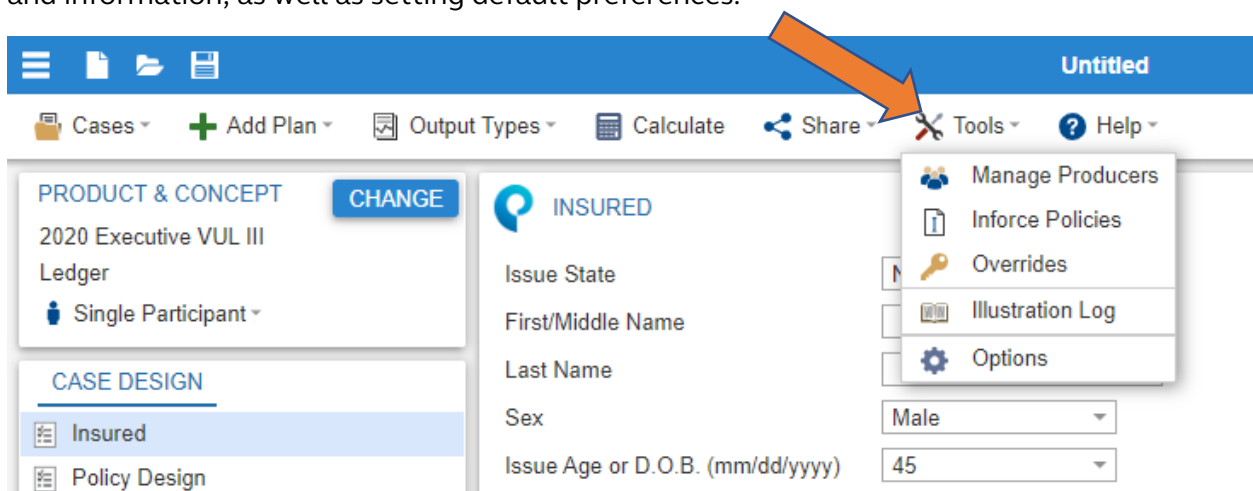
If the system does close due to the 20-minute timeout, and you were working on a case that hadn't been saved, you likely won't need to start over with your case inputs. When back in the system, click on Cases and click Open.



After clicking Open, a new screen will appear with the option to click Recovered Cases. After clicking this, a new screen will open. The case with the inputs you had been working on should be showing here.



The Tools button along the top toolbar will be helpful for things like adding Producer names and information, as well as setting default preferences.



To add a Producer, click on Manage Producers. A new window will appear with the option to click New.

Manage Producers

New

Edit

Delete

Import

Export

PRODUCER

★ Home Office, Principal

After clicking New, a window will appear allowing you to enter a Producer and applicable information.

Producer Information

Save and Close

Title

Phone

First Name

Fax

Middle Name

Email

Last Name*

Suffix

Credentials

File As*

Office Name

Broker / Dealer

Street **

City **

State **

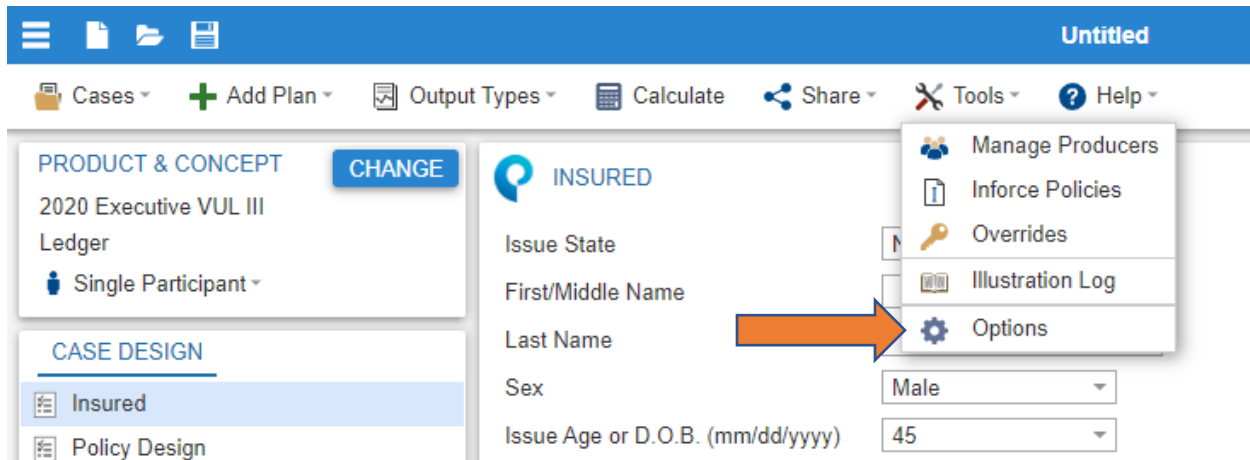
Zip Code **

State	License

*Required for all Illustrations

**Required for non-variable illustrations

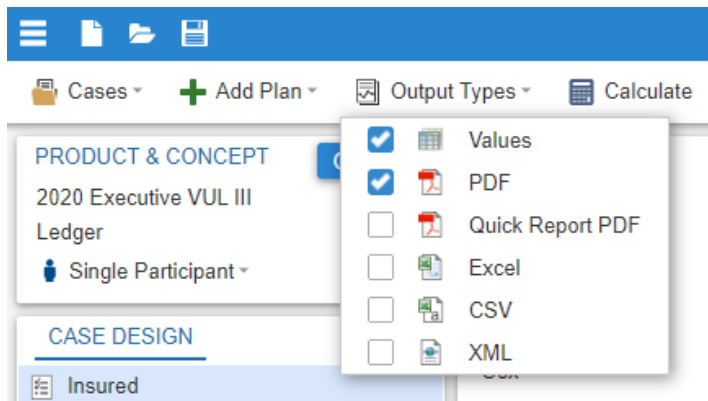
Another option under Tools is to set default preferences for various fields within the illustration system. To do this, click on Options.



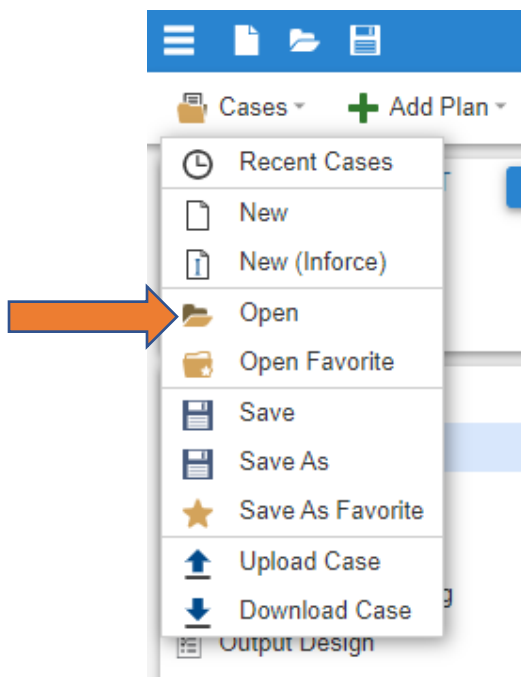
The following screen will appear allowing you to set the default values that will automatically populate each time you run a new case.

A screenshot of the 'Options' dialog box. It has two tabs: 'GENERAL' and 'FILE MASK'. The 'GENERAL' tab is active. Under 'DEFAULT VALUES FOR NEW CASES', there are fields for 'Producer' (set to 'Home Office, Principal'), 'State' (set to 'NC'), 'Premium Mode' (set to 'Annual'), and 'Tax Rate' (set to '40%'). Below these are several checkboxes: 'Cover' (unchecked), 'Introduction' (checked), 'Rider Charge Analysis Report' (unchecked), 'Premium Analysis Report' (unchecked), 'Premium Detail Report' (unchecked), 'Internal Rate of Return' (unchecked), and 'Input Summary' (unchecked). Under 'DISPLAY SETTINGS', there are fields for 'Font Size' (set to 'Medium') and 'Display Density' (set to 'Compact'). Under 'OUTPUT SETTINGS', there are fields for 'Excel Multilife Format' (set to 'Composite Then 1 Life Per Tab') and 'PDF Display Mode' (set to 'Display in the current window'). At the bottom are 'OK' and 'Cancel' buttons.

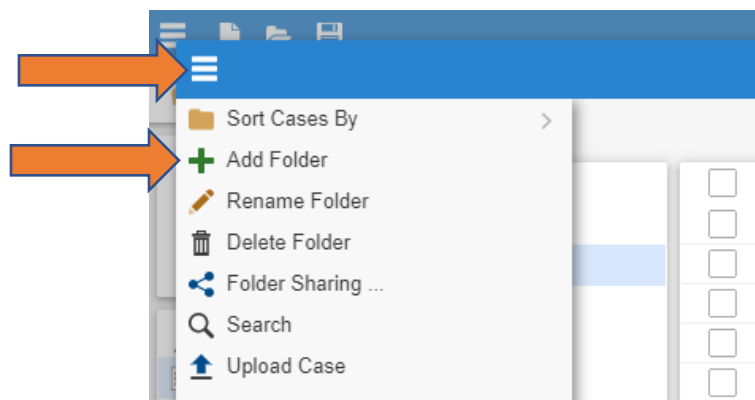
Another choice along the top toolbar is Output Types. This can allow you to see the illustration values in a variety of formats.



To help organize your cases, folders can be created to manage what you've illustrated and saved. To do this, click on Cases and click Open.



In the Open Case window, click the “3 bars” menu option in the top left-hand corner. Then click on Add Folder.



The below window will appear allowing you to name the folder.

A dialog box titled 'Add Folder' with a close button (X) in the top right corner. It contains the text 'Please enter the folder name:' followed by a text input field. At the bottom, there are two buttons: 'OK' and 'Cancel'.

After naming the folder and clicking OK, the new folder will appear as an option under Folders. To move previously saved cases into the folder, check the box next to the saved case.

A screenshot of the 'Open Case' window. It features a table with columns: 'NAME ↑', 'PRODUCTS', 'CONCEPTS', and 'DATE'. The first row is 'AA Sample case' with 'Term 2020 (03/2020)' under PRODUCTS, 'Ledger' under CONCEPTS, and 'Aug 15, 2020' under DATE. An orange arrow points to the checkbox in the first column, which is checked. Above the table, there are icons for 'Rename', 'Delete', 'Move', 'Copy', and 'Download'.

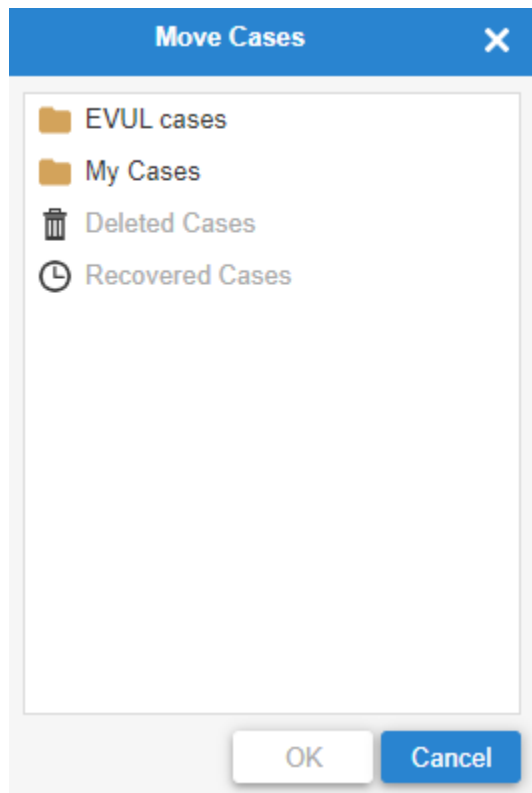
	NAME ↑	PRODUCTS	CONCEPTS	DATE
<input checked="" type="checkbox"/>	AA Sample case	Term 2020 (03/2020)	Ledger	Aug 15, 2020

Then, click on Move.

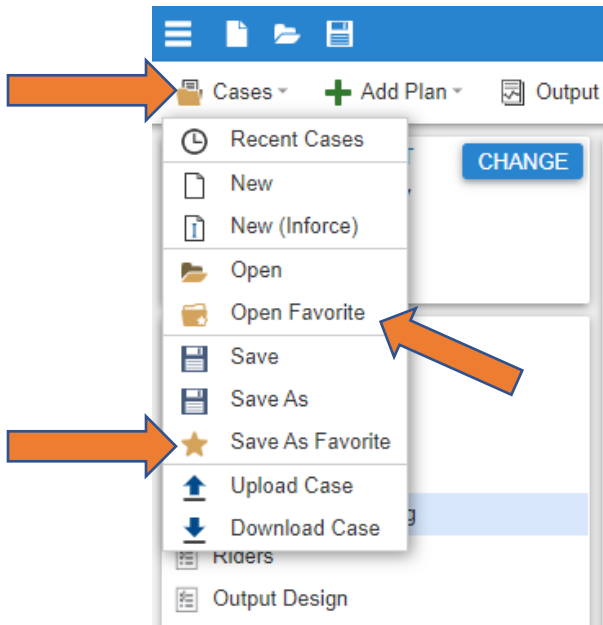
A screenshot of the 'Open Case' window, similar to the previous one. An orange arrow points to the 'Move' button (represented by a folder icon) in the top toolbar.

	NAME ↑	PRODUCTS	CONCEPTS	DATE
<input checked="" type="checkbox"/>	AA Sample case	Term 2020 (03/2020)	Ledger	Aug 15, 2020

After clicking Move, a new window will appear. You can now choose which folder to move the case into and click OK.

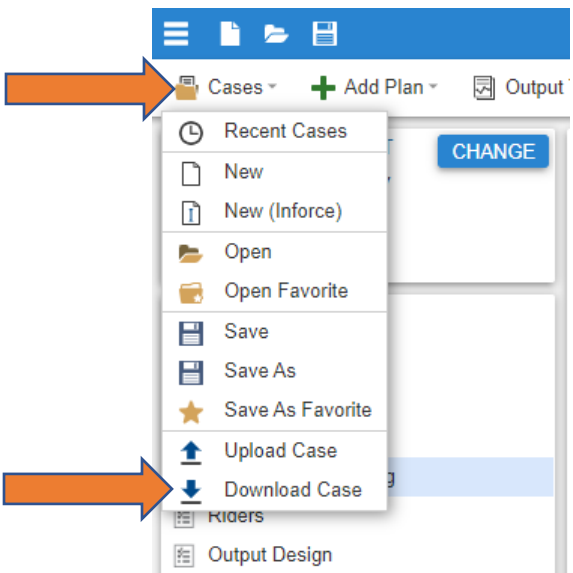


PLIS offers the ability to save a case as a favorite for quick reference. Examples for using this function might be a case that is currently taking quite a bit of time—or perhaps for a case that continues to get revisited. Another example could be creating a certain type of sample case, such as a retirement income from life insurance scenario, that can be referenced with many of the inputs already in place. To do this, once the case inputs are built and illustrating as intended, simply click Cases and then click Save As Favorite.

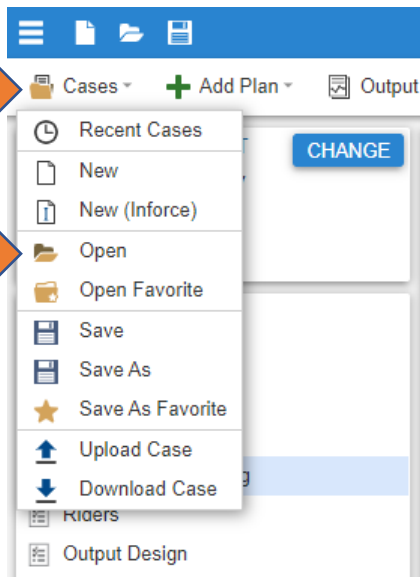


When ready to reference this case again, click on Cases and choose Open Favorite (above).

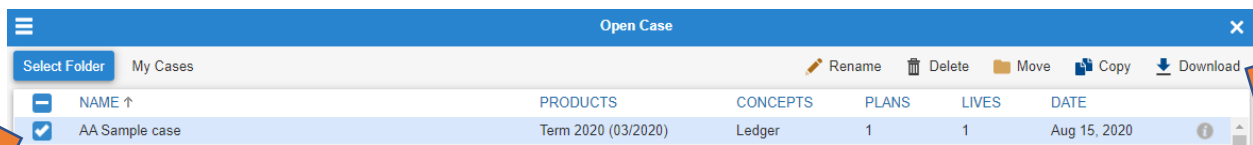
There may be times when it would be beneficial to send the case inputs to another user. This can be accomplished by using the Download/Upload Case function. You can do this directly from the case you're working on by clicking on Cases and choosing Download Case.



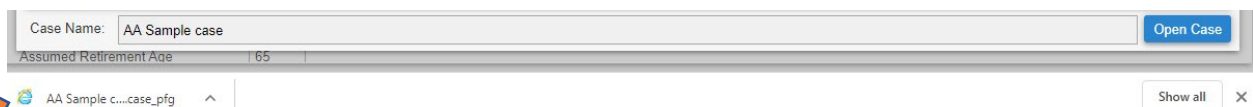
You can also download a previously saved case. To do this, click on Cases and choose Open.



In the Open Case window, check the box next to the case you want to download. Options will appear in the top right corner. Click on Download.

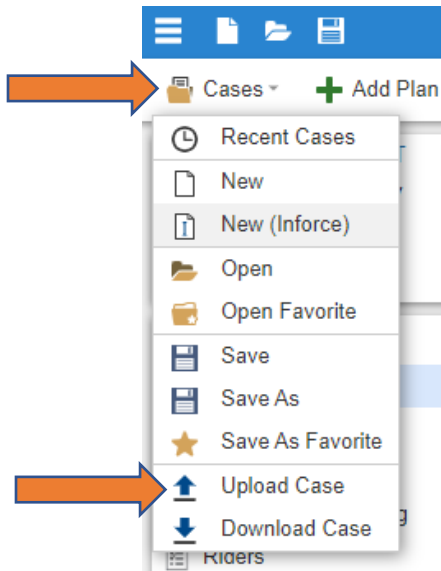


A tab with the case name will appear at the bottom. Click on the tab.

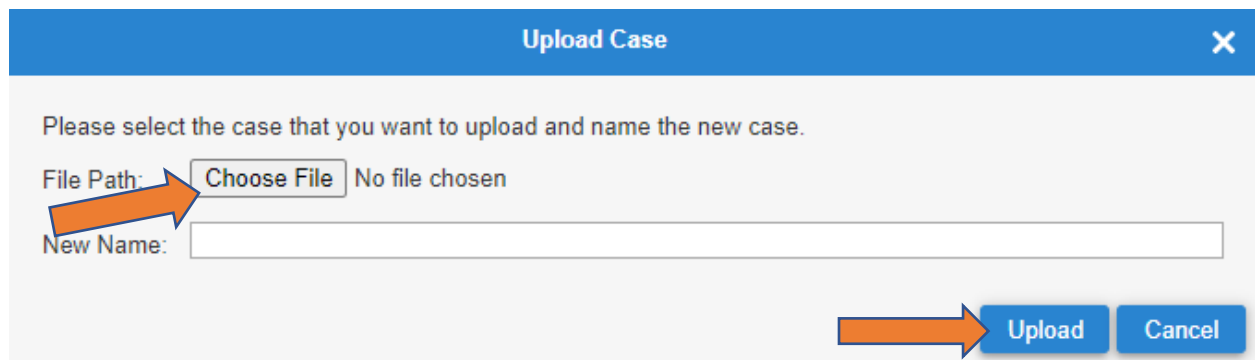


In the window that opens, you can save the case to your computer. The case is now available to attach to an email and send to another user.

If case inputs have been sent to you to view, you can save the file and then click on Cases and choose Upload Case.



In the Upload Case window, click on Choose File to select the case you want to view. You can name the case here as well. Then click on Upload to bring the case inputs into your system.



If you have questions about running illustrations, contact the National Sales Desk at 800-654-4278. For questions about accessing the system, contact Distribution Technology Services at 800-786-4461.

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