

ILLUSTRATIONS

Easily Move Illustration Work to Online PLI and See Immediate Benefits!

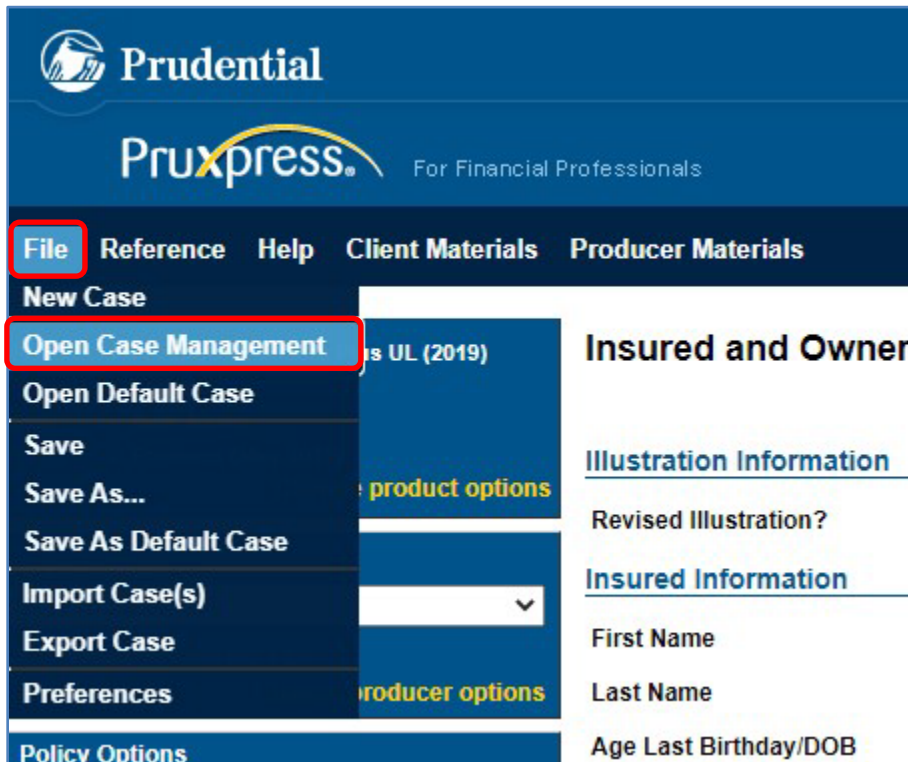
If you're not already using Online PLI - you can now easily move existing illustration case work from Desktop PLI to Online PLI in just a few clicks. By doing so you'll realize immediate benefits, such as:

- New reports only available with Online PLI (Marketing Story, No-Lapse Guarantee, etc.).
- Never update PLI software again! Online PLI gives you the most up to date version of the software 24/7 without the need to install any updates.
- Ability to access your illustration work from any computer/tablet that has internet connectivity.
- Illustration work is saved online so there's no chance of losing work if there's a problem with your computer/tablet.

Get Set Up With Online PLI

To move your illustration case work from Desktop PLI to Online PLI, take the following steps:

1. Begin by exporting your cases from Desktop PLI. This can be done as follows:
 - Open the Desktop PLI software, go to "File", then choose "Open Case Management".



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- This will open the “Case Management” screen where all your cases are stored. To be sure all cases show up - go to the “Date Range” field, set it to “All Dates”, and click “Apply Filter”. See *red outlined items in the screen below*.
- To export all cases, click on the "Select All Cases" option at the bottom of the Case Management window. To export just some of your cases, go to the "Select" column and click on just the cases you want to export. See *green outlined items in the screen below*.
Note: We recommend exporting all cases with the “Select All Cases” option – this ensures no cases are left behind in Desktop PLI.
- When done choosing the cases to export – click on "Export" (See *orange outlined item in the screen below*). The system will export all the selected cases to a zip file named “exportedCases.zip” and put the file in the location your machine normally downloads files to (Windows 10+ typically downloads files to a folder named “Downloads”).

The screenshot displays the "Case Management" interface. At the top, there are search fields for "First Name:", "Last Name:", and "Case Name:", followed by "Apply Filter" and "Clear Filter" buttons. Below these are dropdown menus for "Product" (All Products), "Concept" (All Concepts), "Producer" (All Producers), and "Date Range" (All Dates). The "Date Range" dropdown is highlighted with a red box. Below the filters is a table with columns: "Select", "Favorite", "Case Name", "Product", "Concept", "First Name", and "Last Name". The "Select" column contains checkboxes, with the first five checked and highlighted by a green box. The table lists five cases: three VUL Lindler cases and two SUL Anders cases. At the bottom, there is a "Select All Cases" checkbox (checked and highlighted with a green box) and buttons for "Open", "Rename", "Delete", and "Export" (highlighted with an orange box).

2. Now that your cases have been exported from Desktop PLI, import them into Online PLI.

- First, log-in to PruXpress – this is where you access Online PLI. If you don't have a PruXpress account, you can quickly set one up on the log-in page at www.pruexpress.com (See *section labeled “Not Registered for PruXpress?” on the screen that follows*).

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Welcome!

Prudential's Pruxpress provides the resources you need to successfully expand your business with life insurance. It is designed so you can find what you need and get back to helping your clients.

When you're licensed and appointed to sell Prudential insurance policies, PruXpress is the place to:

- Get illustrations
- Submit a new policy application
- View pending case status
- Find additional forms
- Review underwriting requirements, niches, and criteria

In addition to submitting business easily, it also helps you:

- Grow your business with marketing concepts, tools, and educational resources
- Manage existing policies
- Explore Prudential products

Not a financial professional? Come see what Prudential is all about.

Log In

Financial professional must have a valid user ID and password to gain access to PruXpress.

User Name

User Name

Password

Password

LOGIN

Not Registered for PruXpress?

Register now to receive a PruXpress user name and password.

REGISTER NOW

- Once in PruXpress - go to the “Place New Business” tab and choose “Launch Pru Life Illustrations” – this will open Online PLI.
- Next, go to “File” and click on “Import Case(s)”.

Prudential Pruxpress. For Financial Professionals

File Reference Help Client Materials Producer Materials

New Case

Open Case Management

Open Default Case

Save

Save As...

Save As Default Case

Import Case(s)

Export Case

Preferences

Policy Options

Insured and Owner

Illustration Information

Revised Illustration?

Insured Information

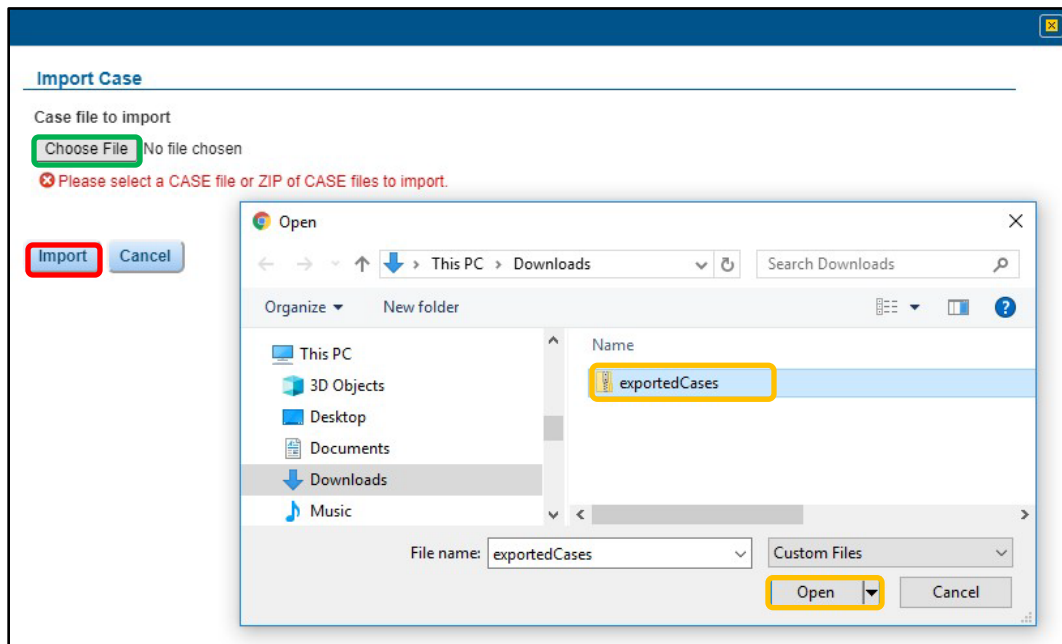
First Name

Last Name

Age Last Birthday/DOB

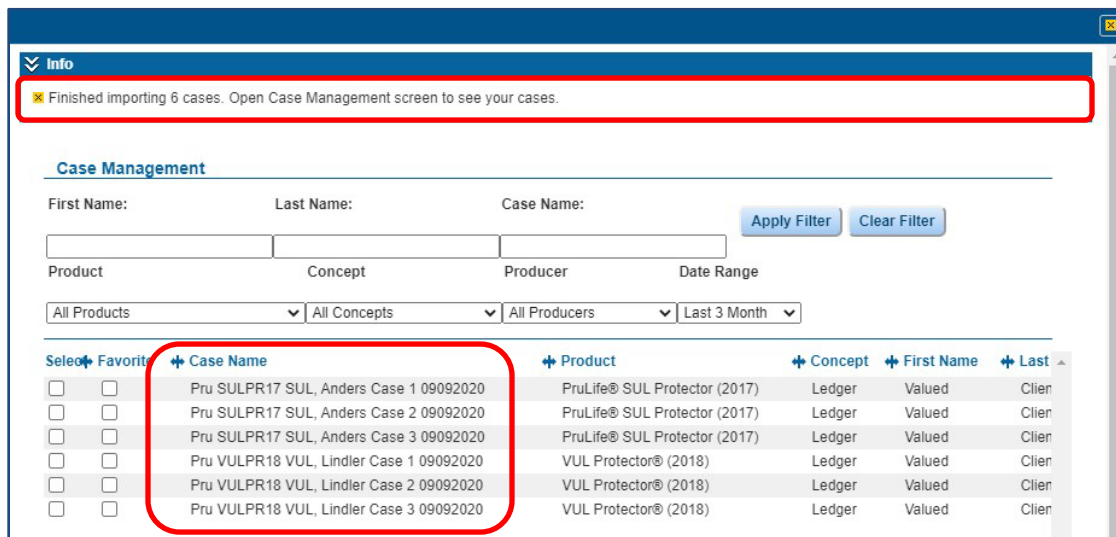
- An “Import Case” screen will appear with an option to “Choose File” (green highlighted field below) - click on it and browse for the zip file you created which contains the cases you want to import into Online PLI.
- Located the zip file, click on it, and then click “Open” (orange highlighted fields below).
- This will bring you back to the “Import Case” screen where you can simply click “Import” (red highlighted field below).

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- This will import all the cases into Online PLI. Depending on the number of cases you're importing it may take a few minutes.
- When the import process is complete you can go to the Case Management section of Online PLI to view your cases and begin working with them.

Note: Imported cases will have the same name they had in Desktop PLI, but we've added a Product Identifier to the start of the case name and the import date to the end of the case name.



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When you've finished moving your cases to the online environment – let us know how it went and if there any improvements we can make. You can contact us at illustrations.feedback@prudential.com

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