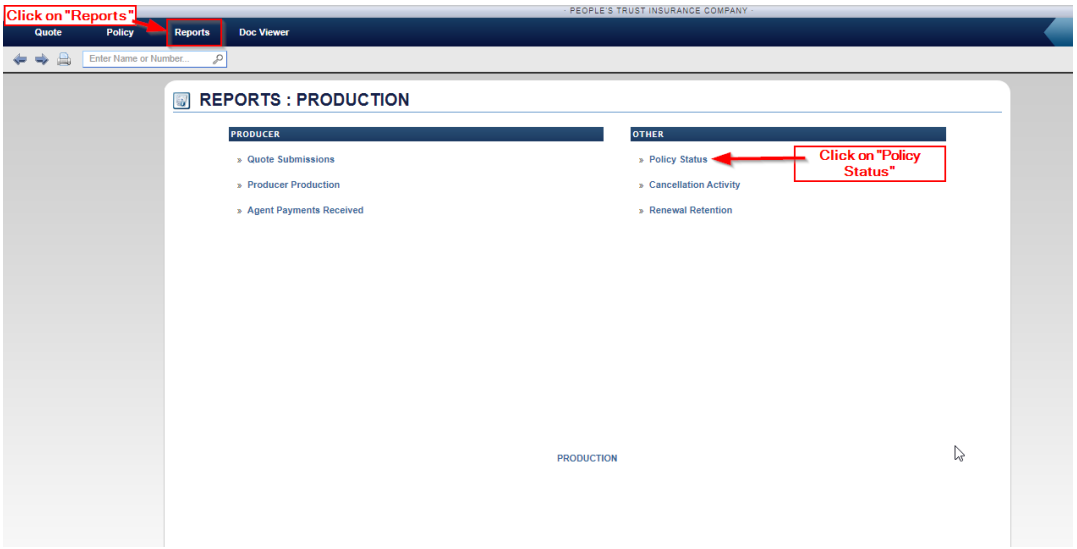
People's Trust Insurance Company

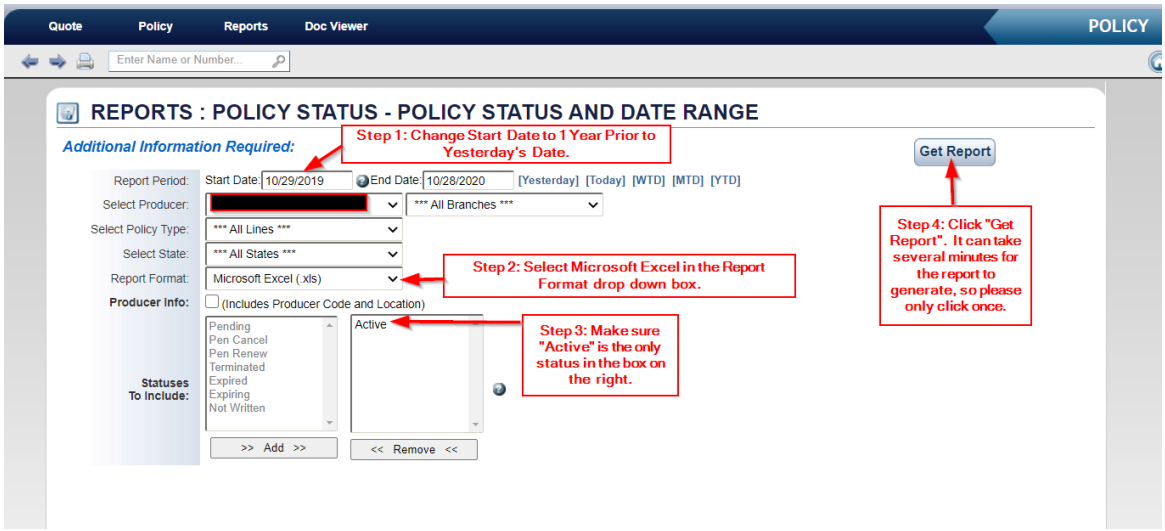
Personalized Service.
Customized Solutions

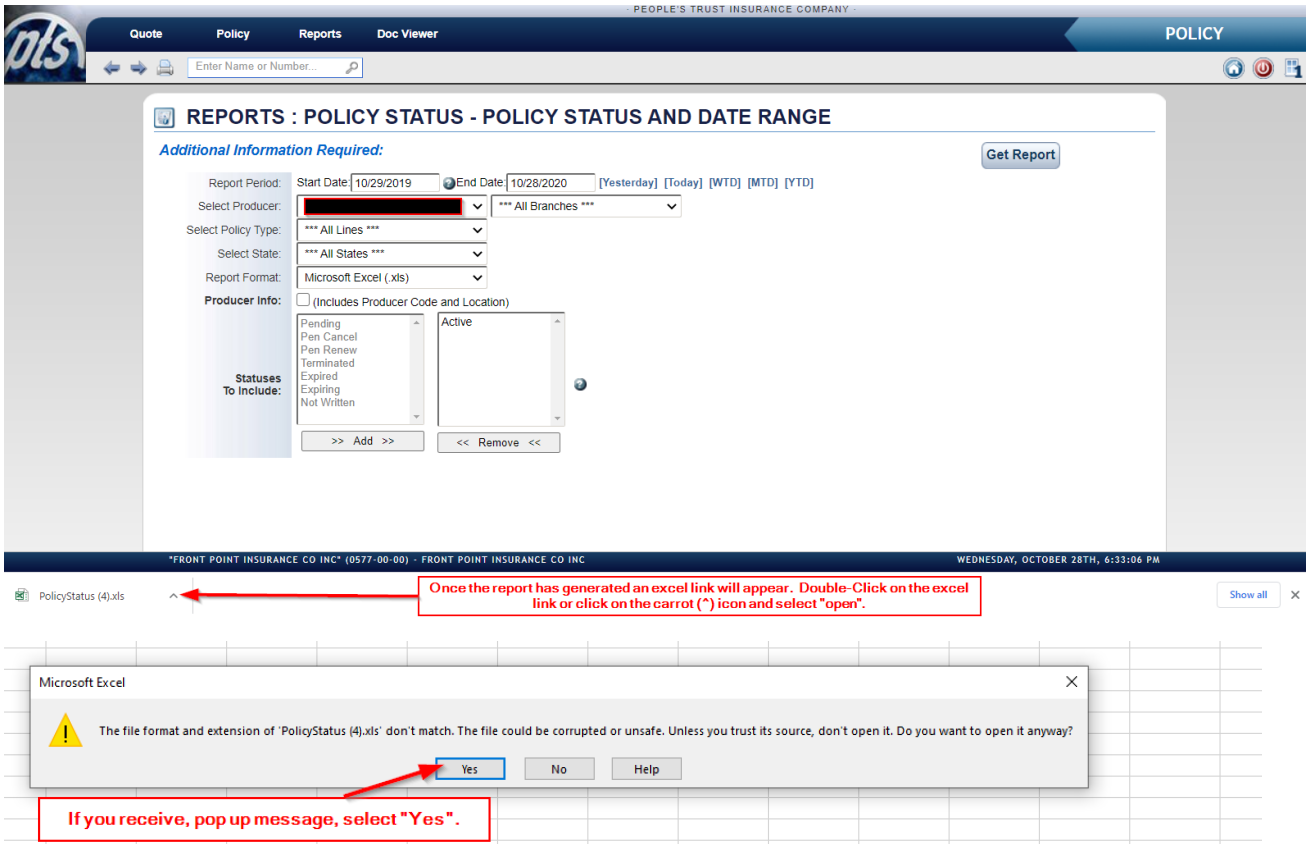
How to Pull Book of Business Report on PTS

1. Click on “Reports” on the menu bar at the top of the page.
2. Click on “Policy Status” under ‘Other’ on the right side of the screen.



3. Change Start Date to 1 Year Prior to Yesterday's Date.
4. Select Microsoft Excel in the Report Format drop down box.
5. Make sure "Active" is the only status in the box on the right.
6. Click "Get Report". It can take several minutes for the report to generate, so please only click once.



Once the report has generated an excel link will appear. Double-Click on the excel link or click on the carrot (^) icon and select "open".

If you receive, pop up message, select "Yes".