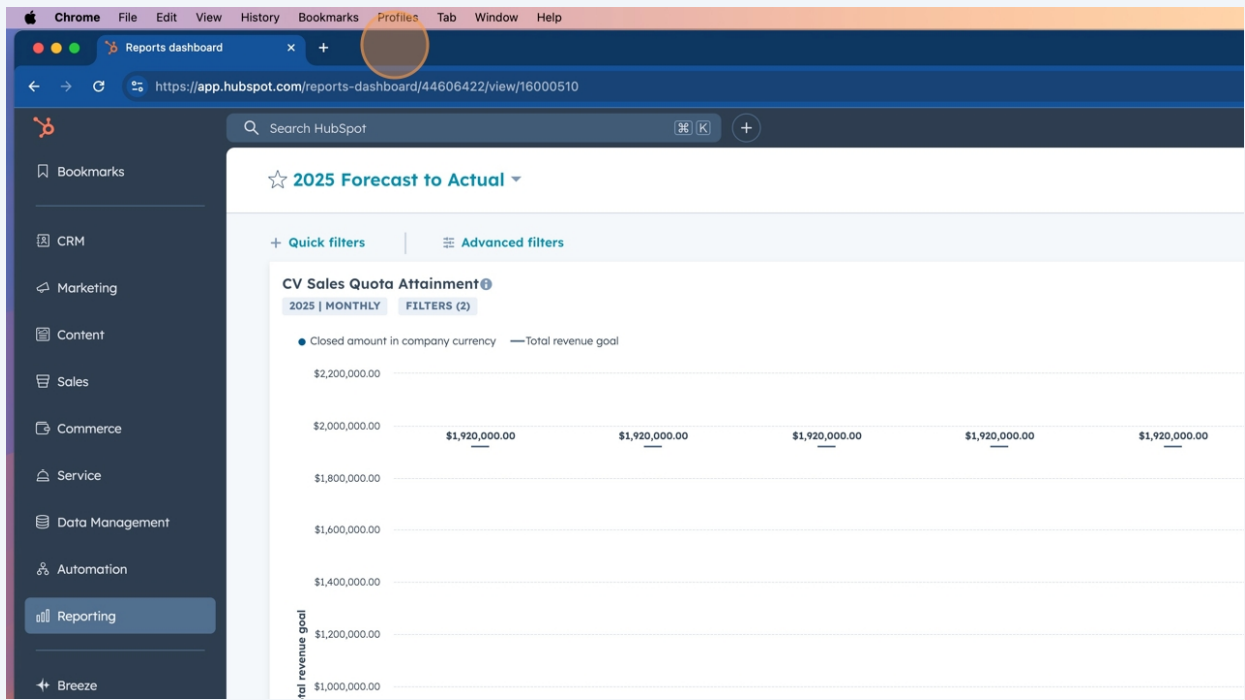


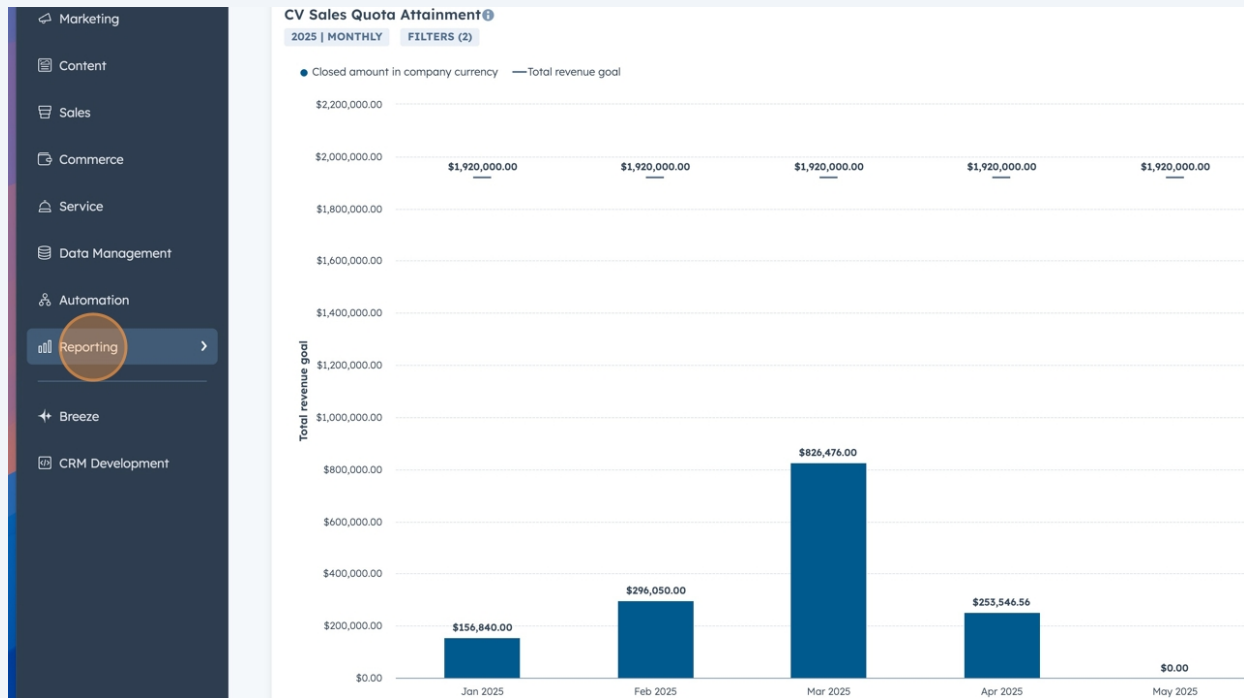
Microsoft Excel, Google Chrome, and Finder Workflow

1

Start in HubSpot



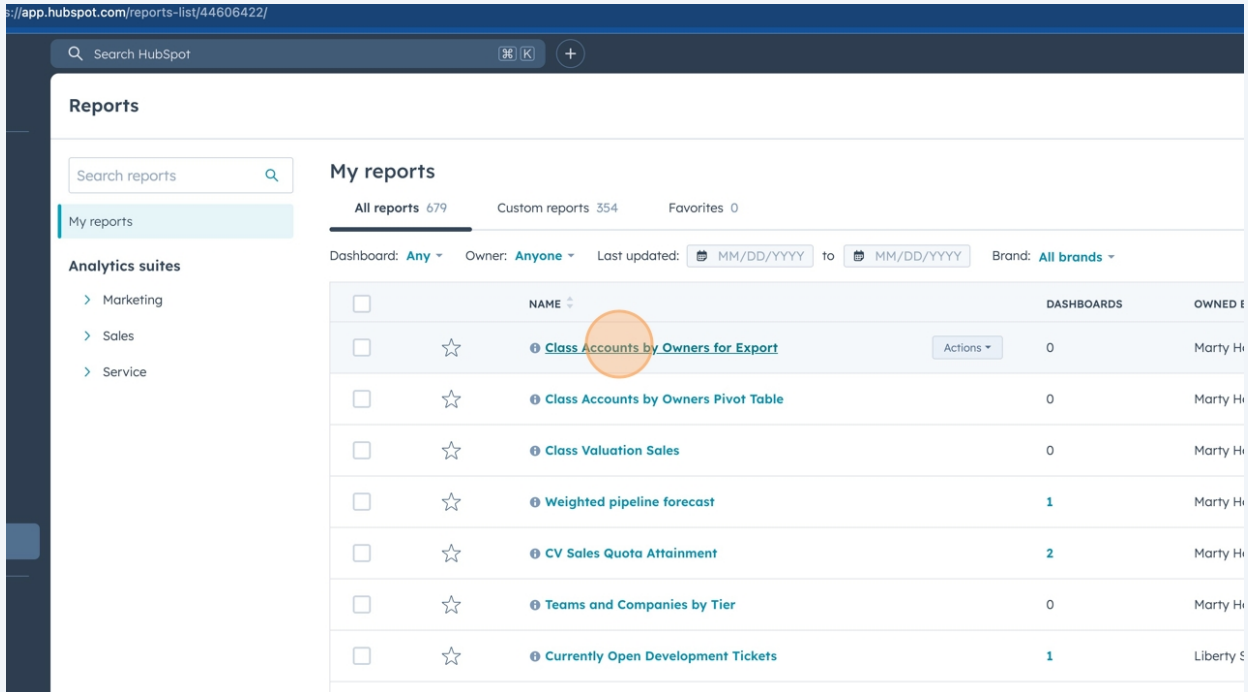
2 Click "Reporting"



3 Click the Reports menu item



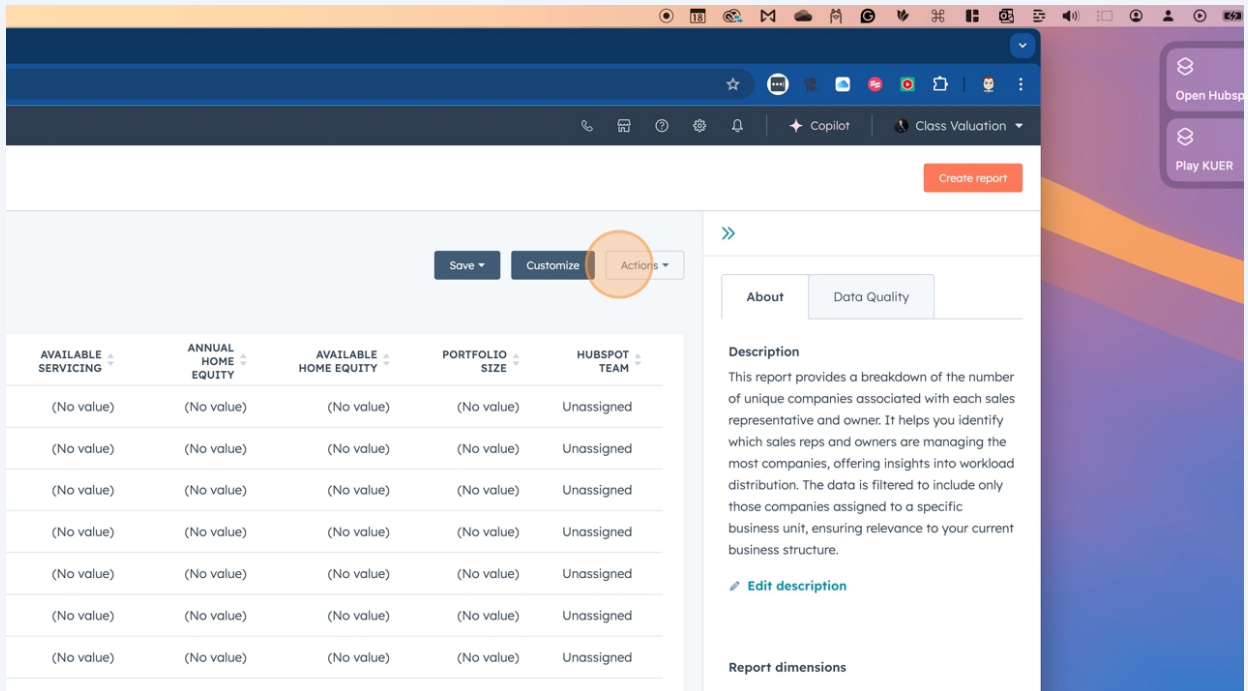
4 Click "Class Accounts by Owners for Export"



The screenshot shows the HubSpot Reports interface. On the left, there's a sidebar with 'Search reports' and 'Analytics suites' (Marketing, Sales, Service). The main area is titled 'My reports' and shows a list of reports. The first report, 'Class Accounts by Owners for Export', is highlighted with an orange circle. Below the list, there's a table with columns: NAME, DASHBOARDS, and OWNED BY.

NAME	DASHBOARDS	OWNED BY
Class Accounts by Owners for Export	0	Marty H
Class Accounts by Owners Pivot Table	0	Marty H
Class Valuation Sales	0	Marty H
Weighted pipeline forecast	1	Marty H
CV Sales Quota Attainment	2	Marty H
Teams and Companies by Tier	0	Marty H
Currently Open Development Tickets	1	Liberty S

5 Click "Actions"



The screenshot shows the HubSpot report 'Class Valuation'. The 'Actions' button is highlighted with an orange circle. Below the button, there's a table with columns: AVAILABLE SERVING, ANNUAL HOME EQUITY, AVAILABLE HOME EQUITY, PORTFOLIO SIZE, and HUBSPOT TEAM. The table contains 7 rows of data, all showing '(No value)' for the first four columns and 'Unassigned' for the last column.

AVAILABLE SERVING	ANNUAL HOME EQUITY	AVAILABLE HOME EQUITY	PORTFOLIO SIZE	HUBSPOT TEAM
(No value)	(No value)	(No value)	(No value)	Unassigned
(No value)	(No value)	(No value)	(No value)	Unassigned
(No value)	(No value)	(No value)	(No value)	Unassigned
(No value)	(No value)	(No value)	(No value)	Unassigned
(No value)	(No value)	(No value)	(No value)	Unassigned
(No value)	(No value)	(No value)	(No value)	Unassigned
(No value)	(No value)	(No value)	(No value)	Unassigned

6 Click "Export unsummarized data"

The screenshot shows a data table with columns: AVAILABLE HOME EQUITY, ANNUAL HOME EQUITY, AVAILABLE HOME EQUITY, PORTFOLIO SIZE, and HUBSPOT TEAM. A context menu is open over the table, with the option "Export unsummarized data" highlighted. Other options in the menu include Refresh, Clone, Rename, Change owner, Add to dashboard, Manage access, Set brand, Export as an image, Share Via (with a NEW badge), Copy report URL, and Delete. To the right of the menu, there is a sidebar with a "Data Quality" tab and a list of dimensions: COMPANY OWNER, COMPANY TIER, PORTFOLIO SIZE, AVAILABLE HOME EQUITY ORDERS - ANNUAL, AVAILABLE SERVING VOLUME ANNUAL, AVAILABLE ORIGINATION UNITS, and ANNUAL ORIGINATION UNITS. A "Reset Options" button is at the bottom of the sidebar.

7 Click "Export"

The screenshot shows an export dialog box. At the top, it says "rows of data for CSV files." Below this, there is a "Name" field with the text "Class Accounts by Owners for Export". Under "File format", a dropdown menu is set to "CSV". The dialog informs the user that "The exported file will be posted in your Notifications Center". It also includes a note: "Not getting our emails? Make sure that you've added HubSpot email addresses to your allowlist and turned on your export notifications". At the bottom, there are two buttons: "Export" (highlighted with an orange circle) and "Cancel".

8 Click on the notification that the report is ready

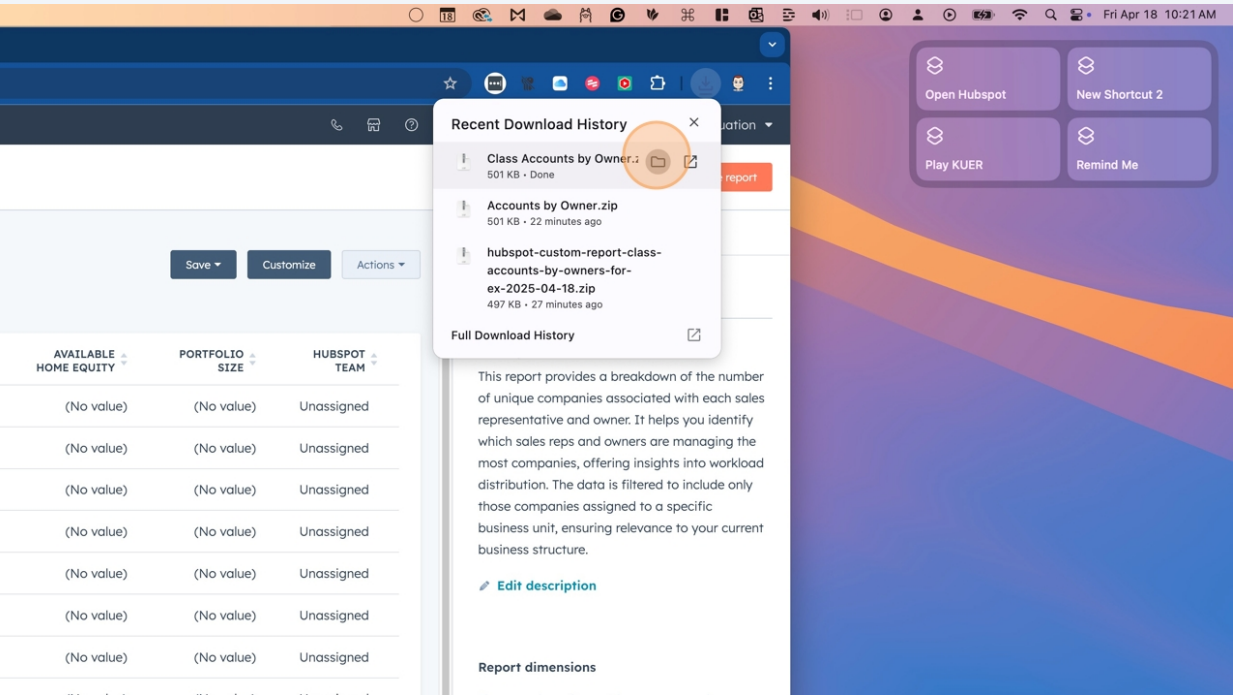
The screenshot shows a web application interface. At the top, there is a notification box with the text: "Your Report export 'Class Accounts by Owners for Export' has been delivered". Below the notification, there is a table with the following columns: NAME, COMPANY TIER, ANNUAL ORIGINATION, AVAILABLE ORIGINATION UNITS, ANNUAL SERVICING, AVAILABLE SERVICING, ANNUAL HOME EQUITY, AVAILABLE HOME EQUITY, and PORT. The table contains several rows of data, including "FEDERAL SAVINGS BANK", "rtgage", "o", "HIA FEDERAL CREDIT UN", "Loans LLC", and "OAST GUARD FCU".

NAME	COMPANY TIER	ANNUAL ORIGINATION	AVAILABLE ORIGINATION UNITS	ANNUAL SERVICING	AVAILABLE SERVICING	ANNUAL HOME EQUITY	AVAILABLE HOME EQUITY	PORT
	No Tier	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)
FEDERAL SAVINGS BANK	No Tier	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)
rtgage	No Tier	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)
o	No Tier	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)
HIA FEDERAL CREDIT UN	No Tier	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)
Loans LLC	No Tier	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)
OAST GUARD FCU	No Tier	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)

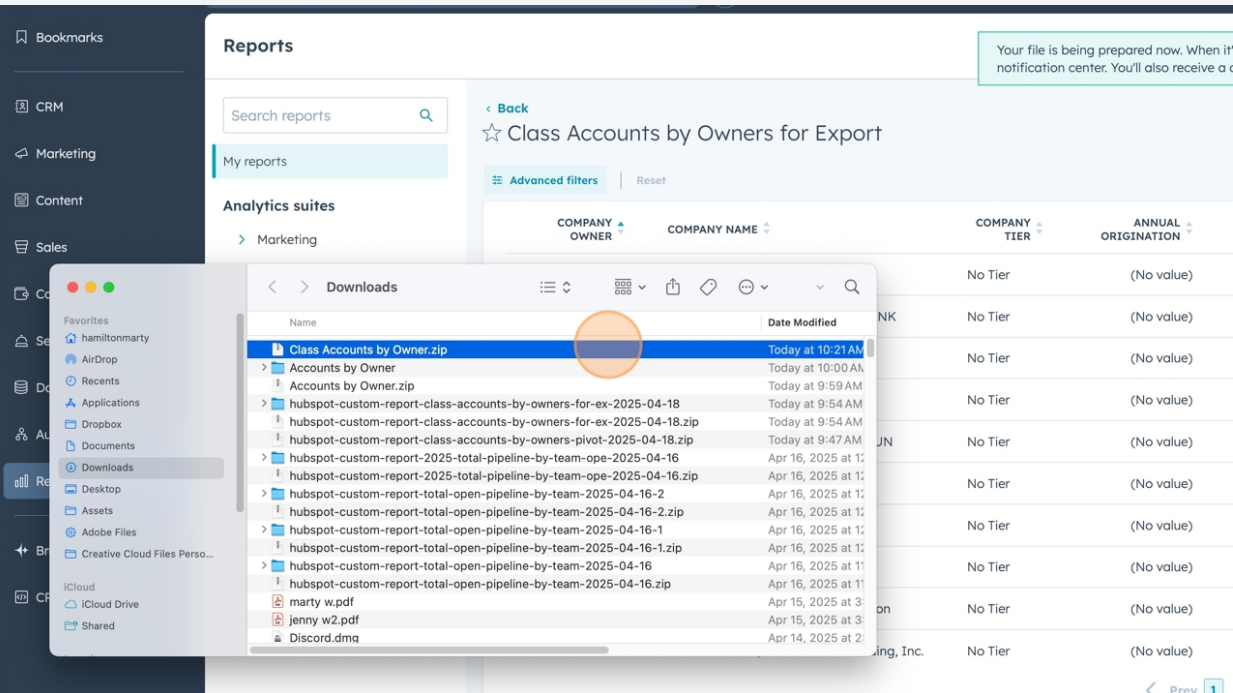
9 Type "Class Accounts by Owner" and Click "Save"

The screenshot shows a file explorer window. The "Save As" field is set to "Class Accounts by Owner". The "Downloads" folder is selected. The file list shows various files, including "2024 Client...2.18.2025.xlsx", "2024 Client...ta Details.csv", "2024 Compl...ta Details.csv", "2024 Orders...a Details.csv", "2025-03-20...dee List.xlsx", "2025-04-10...e List (1).xlsx", "2025-04-10...ndee List.xlsx", "2835_TheKa...LK_RGB.png", "2835_TheKa...T.pdf (2).png", "4820_Cardin...21336.png", "8321s1fmz9...6hzuk3c.pdf", "2556614_JC...r_022325.pdf", "2817160_2...11_59_46.pdf", "68177055_2...10_29_01.pdf", "B42994464...ee Report.csv", "1741972678825zfa7nbc", and "1741972678...zfa7nbc.zip". The "Save" button is highlighted with an orange circle.

10



11



12 Enter the folder with the data

The screenshot shows the HubSpot Reports interface. On the left is a sidebar with navigation links: Bookmarks, CRM, Marketing, Content, Sales, and a 'More' section. The main area is titled 'Reports' and contains a search bar, 'My reports' link, and 'Analytics suites' section. A file explorer window is open over the 'Downloads' folder, showing a list of files. An orange circle highlights the file 'Class Accounts by Owner.zip'. In the background, a report titled 'Class Accounts by Owners for Export' is visible, showing a table with columns: COMPANY OWNER, COMPANY NAME, COMPANY TIER, and ANNUAL ORIGIN. A notification at the top right states: 'Your file is being prepared now. When notification center. You'll also receive c'.

13 Click to open the file in Excel

The screenshot shows the same HubSpot Reports interface as in step 12. The file explorer window is still open, but now it shows the contents of the 'Class Accounts by Owner' folder. An orange circle highlights the file 'class-accounts-by-owners-for-ex.csv'. The background report table is the same as in step 12. The notification at the top right is still present.

14 Select all columns and click the line between the columns to expand the data

Reports

Search reports

< Back

☆ Class Accounts by Owners for Export

My reports

AutoSave

class-accounts-by-owners-for-ex

Insert Draw Page Layout Formulas Data Review View Automate Developer MAPCITE Acrobat

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Wrap Text

General

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Number

Conditional Formatting

Format as Table

Cell Styles

Insert Delete Format

Cells

Editing

AutoSum Fill Clear Sort & Filter Find & Select

Visible Data Loss Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format.

Company owner											Width: 10.00 (65 pixels)														
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V				
any own Company na	Company Tie	Annual Orig	Available Ori	Annual Servi	Available Ser	Annual Home	Available Hoi	Portfolio Size	HubSpot Tea	Company ID															
Zaroth American Pai	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth Kemba Credi	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth SERVICE FEE	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth ADVANTAGE	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0414E+10															
Zaroth Staley Credit	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.2067E+10															
Zaroth LorMet Comr	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.9288E+10															
Zaroth Copper Basin	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.2765E+10															
Zaroth Chambers Bt	Tier 3	464	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth New Dimens	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth POSTCITY FI	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.9288E+10															
Zaroth UNIVERSAL 1	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth HOUSTON FE	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.075E+10															
Zaroth Financial Ce	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.3904E+10															
Zaroth UNIFY Finan	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth DayMet Crec	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth Saco Valley C	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth VELOCITY CC	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth Tampa Bay Fi	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth i Fund Cities	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.8918E+10															
Zaroth DATCU Credi	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth Hancock Fed	Tier 4	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.0752E+10															
Zaroth Achieva Crec	Tier 4	12	(No value)	(No value)	(No value)	(No value)	(No value)	(No value)	Mid-Market	2.2162E+10															

15 Optional: To replace (No Value) in the data - Press **Cmd + f**

16 Optional: To replace (No Value) in the data - Click the More Options button

your file will appear in your mail.

Save Customize Actions

Search (Cmd + Ctrl + U)

Sort & Filter Find & Select Sensitivity Add-ins Analyze Data Show Taskpane Formulas Download Create PDF and share link Comments Share

Find in Document

Find in Sheet

Portfolio Size	HubSpot Team	Company ID
(No value)	Mid-Market	20752005721
(No value)	Mid-Market	20751997221
(No value)	Mid-Market	20752047110
(No value)	Mid-Market	20414342255
(No value)	Mid-Market	22067224995
(No value)	Mid-Market	29288313894
(No value)	Mid-Market	22765165614
(No value)	Mid-Market	20752198540
(No value)	Mid-Market	20752275808
(No value)	Mid-Market	29288316261
(No value)	Mid-Market	20752091029
(No value)	Mid-Market	20750055760
(No value)	Mid-Market	23903925591
(No value)	Mid-Market	20752116893
(No value)	Mid-Market	20752071686
(No value)	Mid-Market	20752163381
(No value)	Mid-Market	20752063570
(No value)	Mid-Market	20751820699
(No value)	Mid-Market	28918148217
(No value)	Mid-Market	20752099144

About Data Quality

Description

This report provides a breakdown of the number of unique companies associated with each sales representative and owner. It helps you identify which sales reps and owners are managing the most companies, offering insights into workload distribution. The data is filtered to include only those companies assigned to a specific business unit, ensuring relevance to your current business structure.

Edit description

Report dimensions

These are how the metrics are grouped:

- ANNUAL HOME EQUITY VOLUME
- ANNUAL SERVICING LOANS
- COMPANY NAME HUBSPOT TEAM
- COMPANY OWNER COMPANY TIER

17 Optional: To replace (No Value) in the data - Click "Replace..."

your file will appear in your mail.

Save Customize Actions

Search (Cmd + Ctrl + U)

Sort & Filter Find & Select Sensitivity Add-ins Analyze Data Show Taskpane Formulas Download Create PDF and share link Comments Share

Find in Document

Find in Sheet

Advanced Search... Replace...

Portfolio Size	HubSpot Team	Company ID
(No value)	Mid-Market	20752005721
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(No value)	Mid-Market	20752116893
(No value)	Mid-Market	20752071686
(No value)	Mid-Market	20752163381
(No value)	Mid-Market	20752063570
(No value)	Mid-Market	20751820699
(No value)	Mid-Market	28918148217
(No value)	Mid-Market	20752099144
(No value)	Mid-Market	20752063640
(No value)	Mid-Market	22161954965
(No value)	Mid-Market	2499507978

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Report dimensions

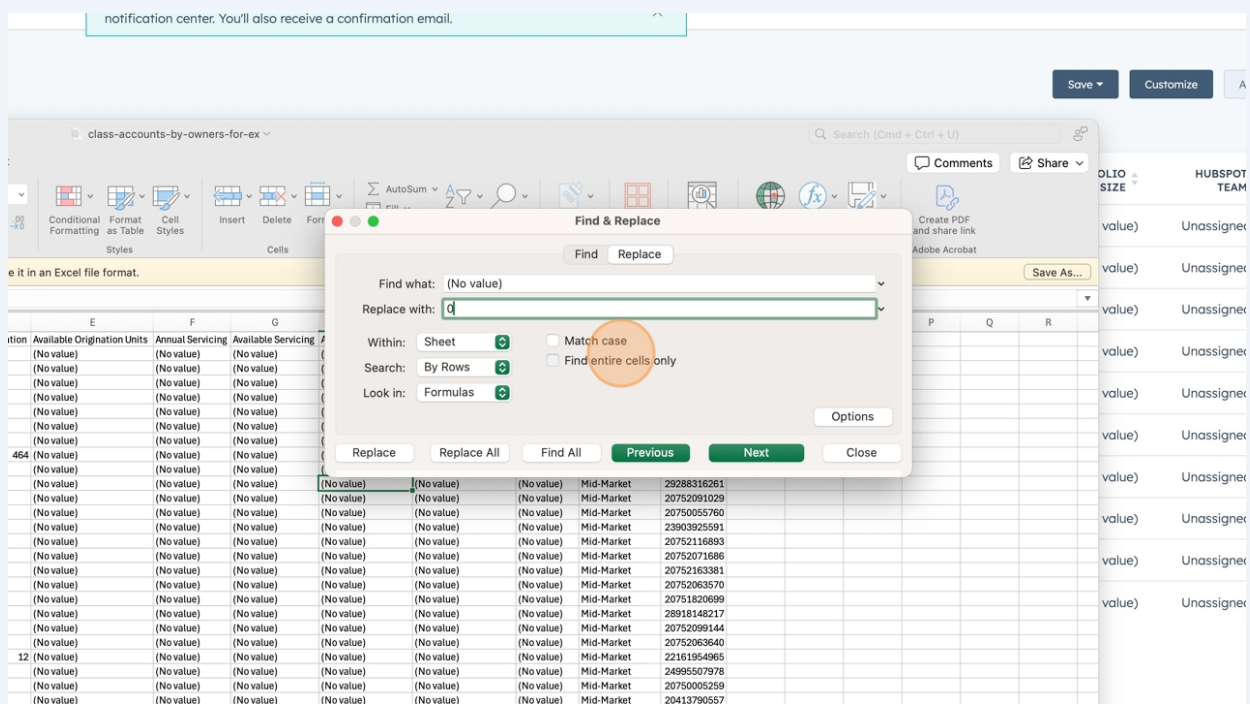
These are how the metrics are grouped:

- ANNUAL HOME EQUITY VOLUME
- ANNUAL SERVICING LOANS
- COMPANY NAME HUBSPOT TEAM
- COMPANY OWNER COMPANY TIER
- PORTFOLIO SIZE
- AVAILABLE HOME EQUITY ORDERS - ANNUAL

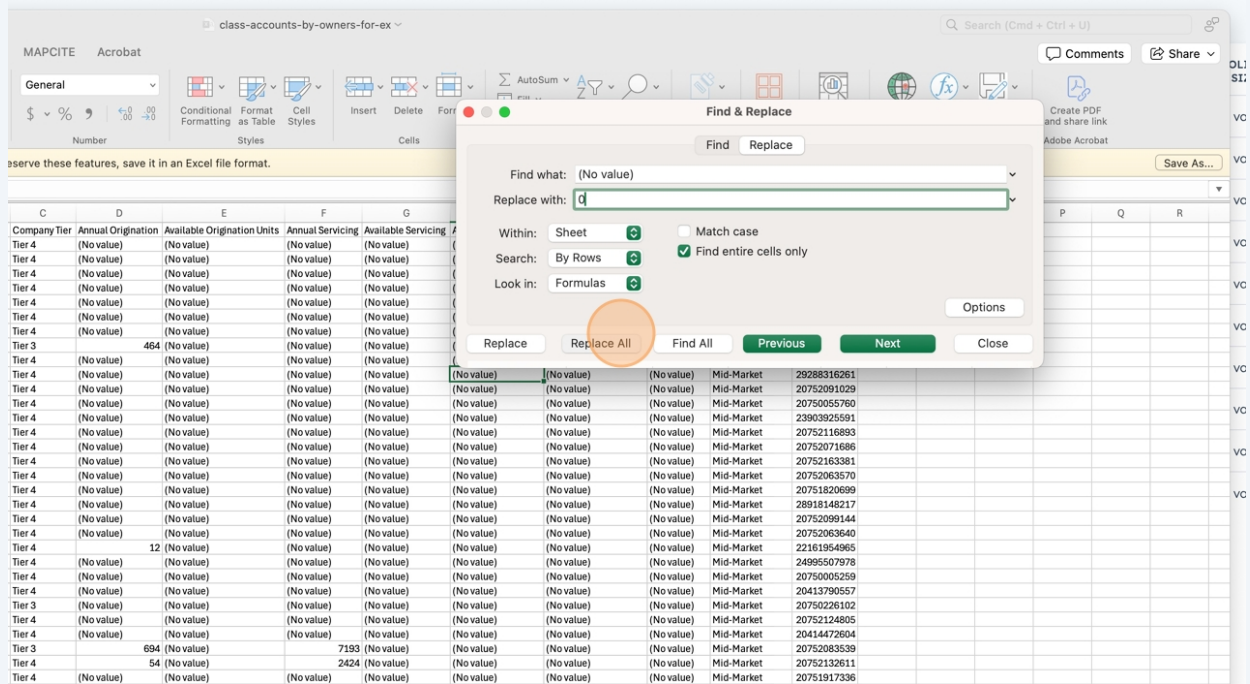
18 *Optional:* To replace (No Value) in the data - Type "(No value) **Tab**"

19 Type "0"

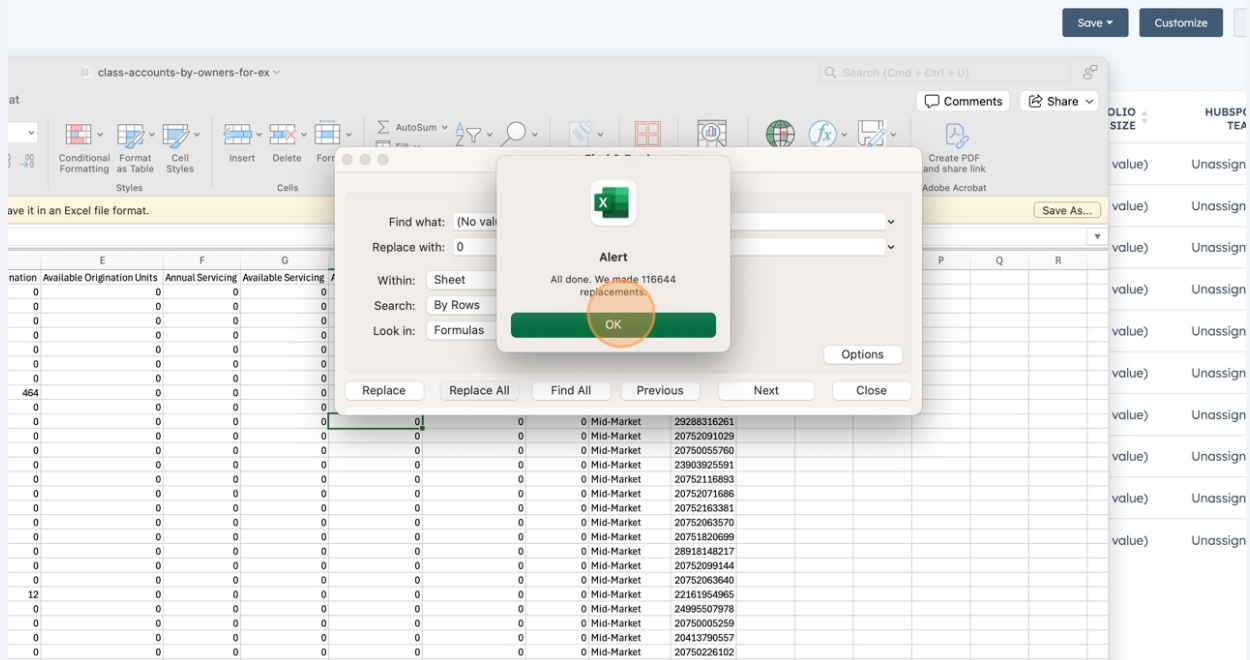
20 *Optional:* To replace (No Value) in the data - Type "(No value) " in the "Find what" field, then type 0 in the "Replace with" field, the select the "Find entire cells only" checkbox



21 Click "Replace All"



22 Click "OK" and close the "Find & Replace" window



23 Click "Insert"

My reports

AutoSave

class-accounts-by-owners-for-ex

Home Insert Draw Page Layout Formulas Data Review View Automate Developer MAPCITE Acrobat

Clipboard Font Alignment Number Styles Cells

Paste Cut Copy Format B I U A A Merge & Center Wrap Text General Conditional Formatting Format as Table Cell Styles Insert Delete Format AutoSum Fill Clear

Possible Data Loss Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format.

	A	B	C	D	E	F	G	H	I
1	Company owner	Company name	Company Tier	Annual Origination	Available Origination Units	Annual Servicing	Available Servicing	Annual Home Equity	Availab
2	Liam Carothers	American Partners Credit Union	Tier 4	0	0	0	0	0	0
3	Liam Carothers	Kemba Credit Union, Inc.	Tier 4	0	0	0	0	0	0
4	Liam Carothers	SERVICE FEDERAL CREDIT UNION	Tier 4	0	0	0	0	0	0
5	Liam Carothers	ADVANTAGE PLUS FCU	Tier 4	0	0	0	0	0	0
6	Liam Carothers	Staley Credit Union	Tier 4	0	0	0	0	0	0
7	Liam Carothers	LorMet Community Federal Credit Union	Tier 4	0	0	0	0	0	0
8	Liam Carothers	Copper Basin Federal Credit Union	Tier 4	0	0	0	0	0	0
9	Liam Carothers	Chambers Bank	Tier 3	464	0	0	0	0	0
10	Liam Carothers	New Dimensions FCU	Tier 4	0	0	0	0	0	0
11	Liam Carothers	POSTCITY FINANCIAL CREDIT UNION	Tier 4	0	0	0	0	0	0
12	Liam Carothers	UNIVERSAL 1 CREDIT UNION	Tier 4	0	0	0	0	0	0
13	Liam Carothers	HOUSTON FEDERAL CREDIT UNION	Tier 4	0	0	0	0	0	0
14	Liam Carothers	Financial Center First Credit Union	Tier 4	0	0	0	0	0	0
15	Liam Carothers	UNIFY Financial Credit Union	Tier 4	0	0	0	0	0	0
16	Liam Carothers	DayMet Credit Union	Tier 4	0	0	0	0	0	0
17	Liam Carothers	Saco Valley CU	Tier 4	0	0	0	0	0	0
18	Liam Carothers	VELOCITY COMMUNITY FCU	Tier 4	0	0	0	0	0	0
19	Liam Carothers	Tampa Bay Federal Credit Union	Tier 4	0	0	0	0	0	0
20	Liam Carothers	i Fund Cities	Tier 4	0	0	0	0	0	0
21	Liam Carothers	DATCU Credit Union	Tier 4	0	0	0	0	0	0
22	Liam Carothers	Hancock Federal Credit Union	Tier 4	0	0	0	0	0	0
23	Liam Carothers	Achieva Credit Union	Tier 4	12	0	0	0	0	0
24	Liam Carothers	Leatherstocking Credit Union	Tier 4	0	0	0	0	0	0
25	Liam Carothers	TREASURY DEPARTMENT FCU	Tier 4	0	0	0	0	0	0
26	Liam Carothers	iQ Credit Union	Tier 4	0	0	0	0	0	0
27	Liam Carothers	Georgia United Credit Union	Tier 3	0	0	0	0	0	0
28	Liam Carothers	MARSHALL COMMUNITY CREDIT UNION	Tier 4	0	0	0	0	0	0
29	Liam Carothers	Rocky Mountain CU	Tier 4	0	0	0	0	0	0
30	Liam Carothers	UNITED FEDERAL CREDIT UNION	Tier 3	694	0	7193	0	0	0
31	Liam Carothers	DuPage Credit Union	Tier 4	54	0	2424	0	0	0
32	Liam Carothers	COMMUNITY CHOICE CREDIT UNION	Tier 4	0	0	0	0	0	0

24 Click "PivotTable"

My reports

AutoSave

class-accounts-by-owners-for-ex

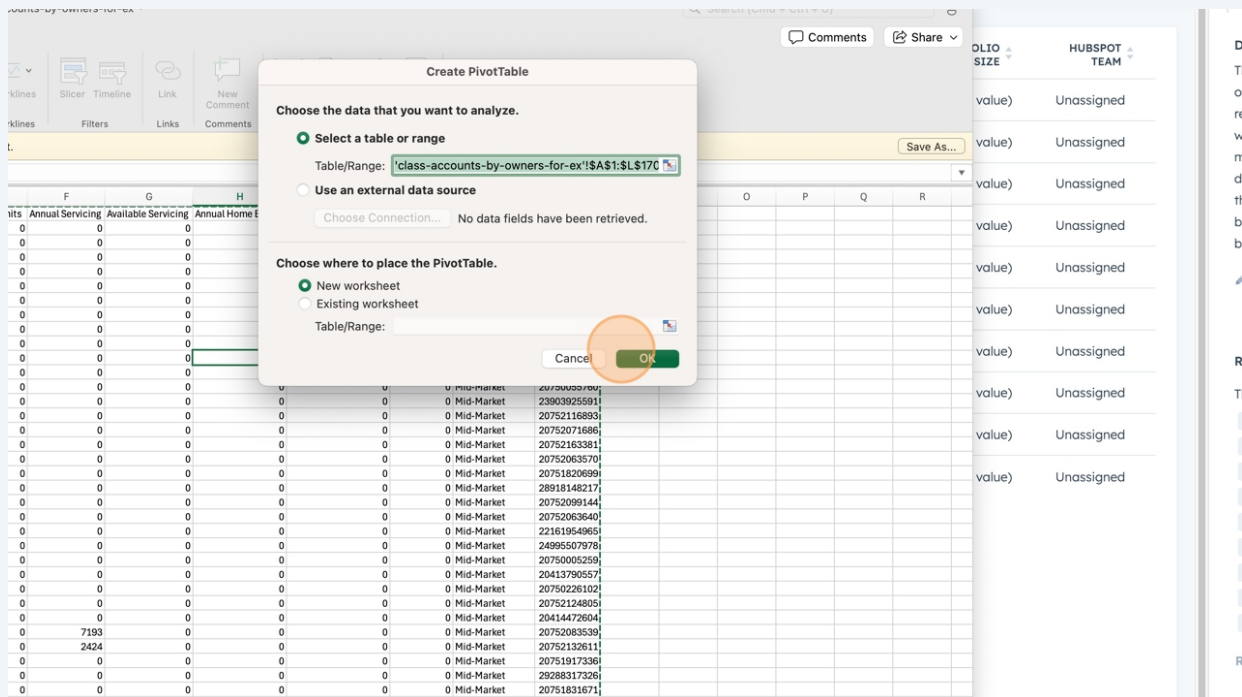
Home Insert Draw Page Layout Formulas Data Review View Automate Developer MAPCITE Acrobat

PivotTable Recommended PivotTables Table From Picture Pictures Shapes Icons SmartArt Screenshot Checkboxes Recommended Charts Maps PivotChart Sparklines Slicer Timeline Link New Comment Text Box

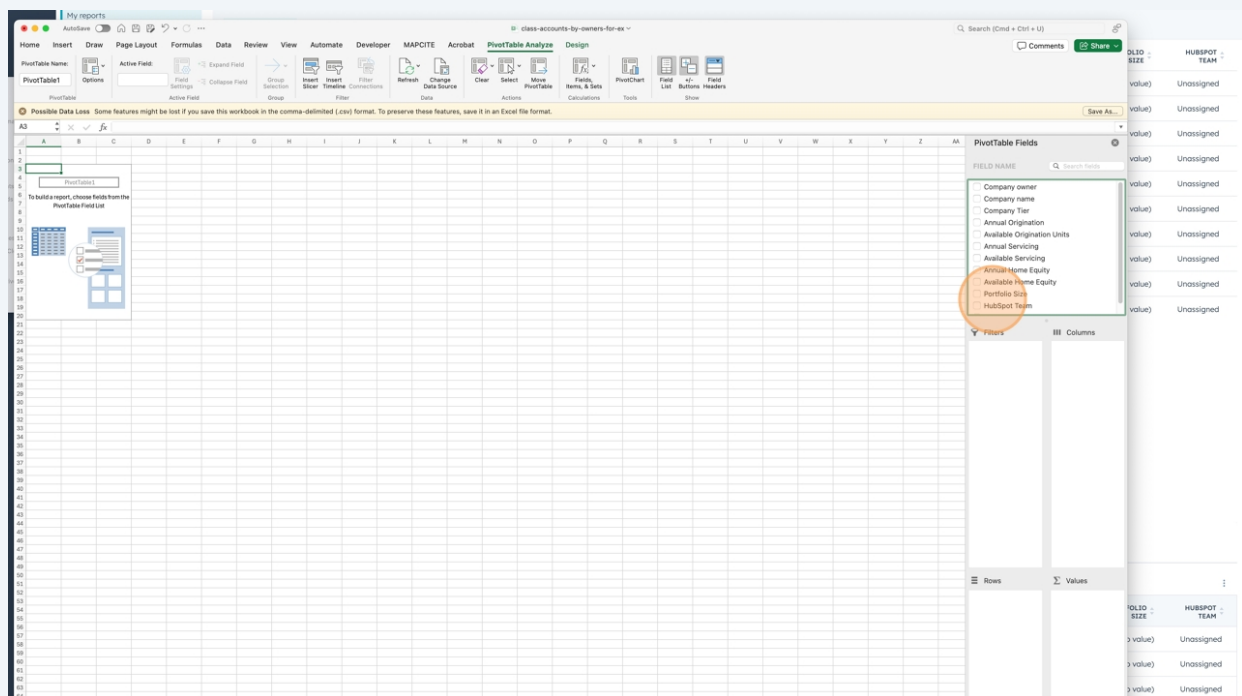
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5	Liam Carothers	ADVANTAGE PLUS FCU	Tier 4	0	0	0	0	0	0
6	Liam Carothers	Staley Credit Union	Tier 4	0	0	0	0	0	0
7	Liam Carothers	LorMet Community Federal Credit Union	Tier 4	0	0	0	0	0	0
8	Liam Carothers	Copper Basin Federal Credit Union	Tier 4	0	0	0	0	0	0
9	Liam Carothers	Chambers Bank	Tier 3	464	0	0	0	0	0
10	Liam Carothers	New Dimensions FCU	Tier 4	0	0	0	0	0	0
11	Liam Carothers	POSTCITY FINANCIAL CREDIT UNION	Tier 4	0	0	0	0	0	0
12	Liam Carothers	UNIVERSAL 1 CREDIT UNION	Tier 4	0	0	0	0	0	0
13	Liam Carothers	HOUSTON FEDERAL CREDIT UNION	Tier 4	0	0	0	0	0	0
14	Liam Carothers	Financial Center First Credit Union	Tier 4	0	0	0	0	0	0
15	Liam Carothers	UNIFY Financial Credit Union	Tier 4	0	0	0	0	0	0
16	Liam Carothers	DayMet Credit Union	Tier 4	0	0	0	0	0	0
17	Liam Carothers	Saco Valley CU	Tier 4	0	0	0	0	0	0
18	Liam Carothers	VELOCITY COMMUNITY FCU	Tier 4	0	0	0	0	0	0
19	Liam Carothers	Tampa Bay Federal Credit Union	Tier 4	0	0	0	0	0	0
20	Liam Carothers	i Fund Cities	Tier 4	0	0	0	0	0	0
21	Liam Carothers	DATCU Credit Union	Tier 4	0	0	0	0	0	0
22	Liam Carothers	Hancock Federal Credit Union	Tier 4	0	0	0	0	0	0
23	Liam Carothers	Achieva Credit Union	Tier 4	12	0	0	0	0	0
24	Liam Carothers	Leatherstocking Credit Union	Tier 4	0	0	0	0	0	0
25	Liam Carothers	TREASURY DEPARTMENT FCU	Tier 4	0	0	0	0	0	0
26	Liam Carothers	iQ Credit Union	Tier 4	0	0	0	0	0	0
27	Liam Carothers	Georgia United Credit Union	Tier 3	0	0	0	0	0	0
28	Liam Carothers	MARSHALL COMMUNITY CREDIT UNION	Tier 4	0	0	0	0	0	0
29	Liam Carothers	Rocky Mountain CU	Tier 4	0	0	0	0	0	0
30	Liam Carothers	UNITED FEDERAL CREDIT UNION	Tier 3	694	0	7193	0	0	0
31	Liam Carothers	DuPage Credit Union	Tier 4	54	0	2424	0	0	0
32	Liam Carothers	COMMUNITY CHOICE CREDIT UNION	Tier 4	0	0	0	0	0	0

25 Make sure the "Table/Range" field includes all the data



26 Add fields to the pivot table - select and drag "HubSpot Team", "Company Tier", "Company owner", and "Company Name" into the "Rows" field



27

Add fields to the pivot table - select and drag "HubSpot Team", "Company Tier", "Company owner", and "Company Name" into the "Rows" field. Add "Company ID" to the "Values" field

The screenshot shows the Microsoft Excel interface with the 'PivotTable Fields' task pane open on the right. The 'Add All' button at the top of the pane is highlighted with an orange box. The 'Rows' field contains the following fields: HubSpot Team, Company owner, Company Tier, and Company name. The 'Values' field contains the following field: Sum of Company ID. The background shows a blank Excel spreadsheet with the 'PivotTable Fields' task pane open over it.

28

Click on the information icon next to "Sum of Companies"

The screenshot shows the 'PivotTable Fields' task pane with the 'Sum of Companies' field highlighted. The 'Sum of Companies' field is highlighted with an orange circle, and the information icon (i) next to it is also highlighted with an orange circle. The 'Rows' field contains the following fields: HubSpot Team, Company owner, Company Tier, and Company name. The 'Values' field contains the following field: Sum of Companies. The background shows a blank Excel spreadsheet with the 'PivotTable Fields' task pane open over it.

29 Change the type of field to "Count"

Your file is being prepared now. When it's ready, a link to your file will appear in your notification center. You'll also receive a confirmation email. X

Port

Save Customize

class-accounts-by-owners-for-ex

Acrobat PivotTable Analyze Design

Clear Select Move PivotTable Fields, Items, & Sets PivotChart Field List +/- Buttons Headers

Actions Calculations Tools Show

Summarize by Show data as

Sum
Count
Average
Max
Min
Product
Count Numbers
StdDev

Number... Cancel OK

Source field: Company ID
Field name: Sum of Company ID

PivotTable Fields

FIELD NAME Search fields

- ☒ Company name
- ☒ Company Tier
- ☐ Annual Origination
- ☐ Available Origination Units
- ☐ Annual Servicing
- ☐ Available Servicing
- ☐ Annual Home Equity
- ☐ Available Home Equity
- ☐ Portfolio Size
- ☒ HubSpot Team
- ☒ Company ID

Filters Columns

30 Optional: Change the name of the "Count of Company ID" field

Your file is being prepared now. When it's ready, a link to your file will appear in your notification center. You'll also receive a confirmation email. X

Save Customize

class-accounts-by-owners-for-ex

bat PivotTable Analyze Design

Clear Select Move PivotTable Fields, Items, & Sets PivotChart Field List +/- Buttons Headers

Actions Calculations Tools Show

Summarize by Show data as

Sum
Count
Average
Max
Min
Product
Count Numbers
StdDev

Number... Cancel OK

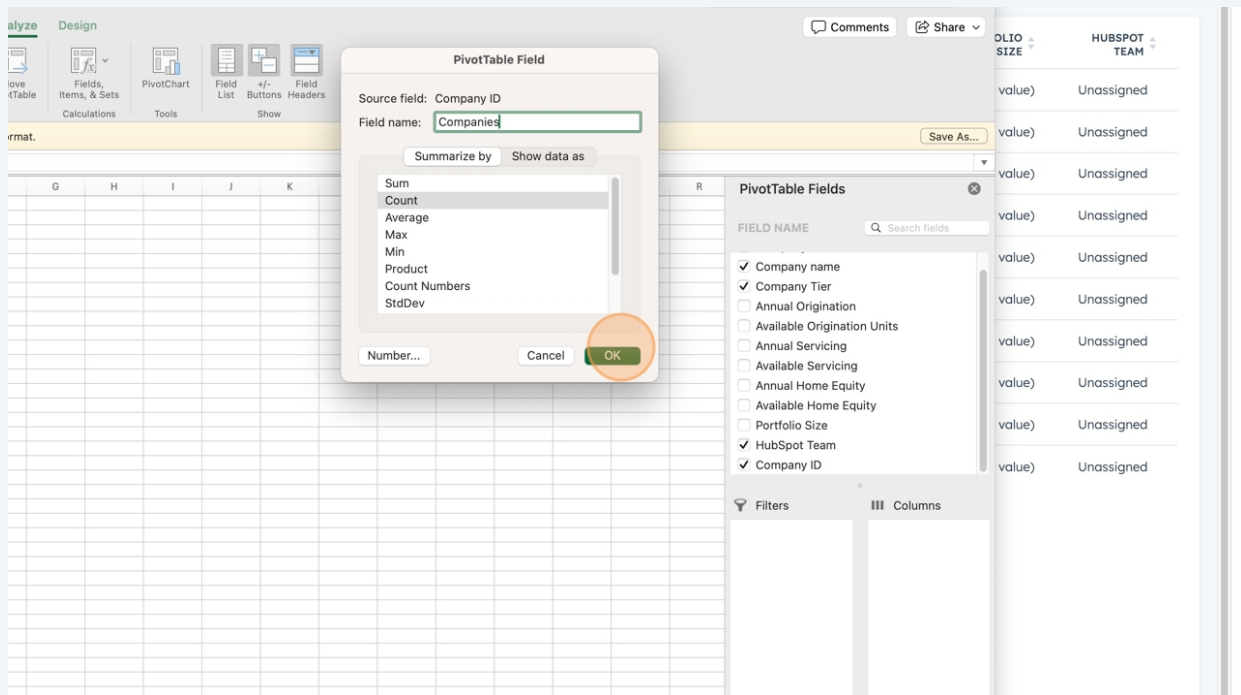
Source field: Company ID
Field name: Count of Company ID

PivotTable Fields

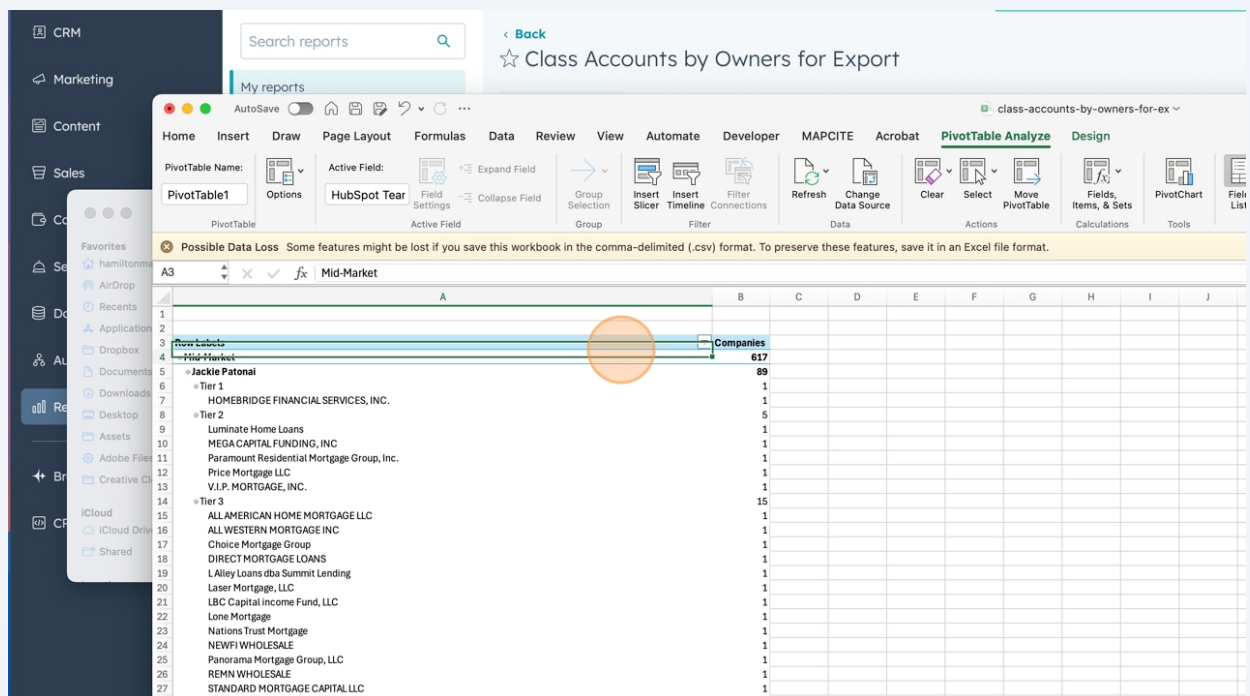
FIELD NAME Search fields

- ☒ Company name
- ☒ Company Tier
- ☐ Annual Origination
- ☐ Available Origination Units
- ☐ Annual Servicing
- ☐ Available Servicing
- ☐ Annual Home Equity
- ☐ Available Home Equity
- ☐ Portfolio Size
- ☒ HubSpot Team
- ☒ Company ID

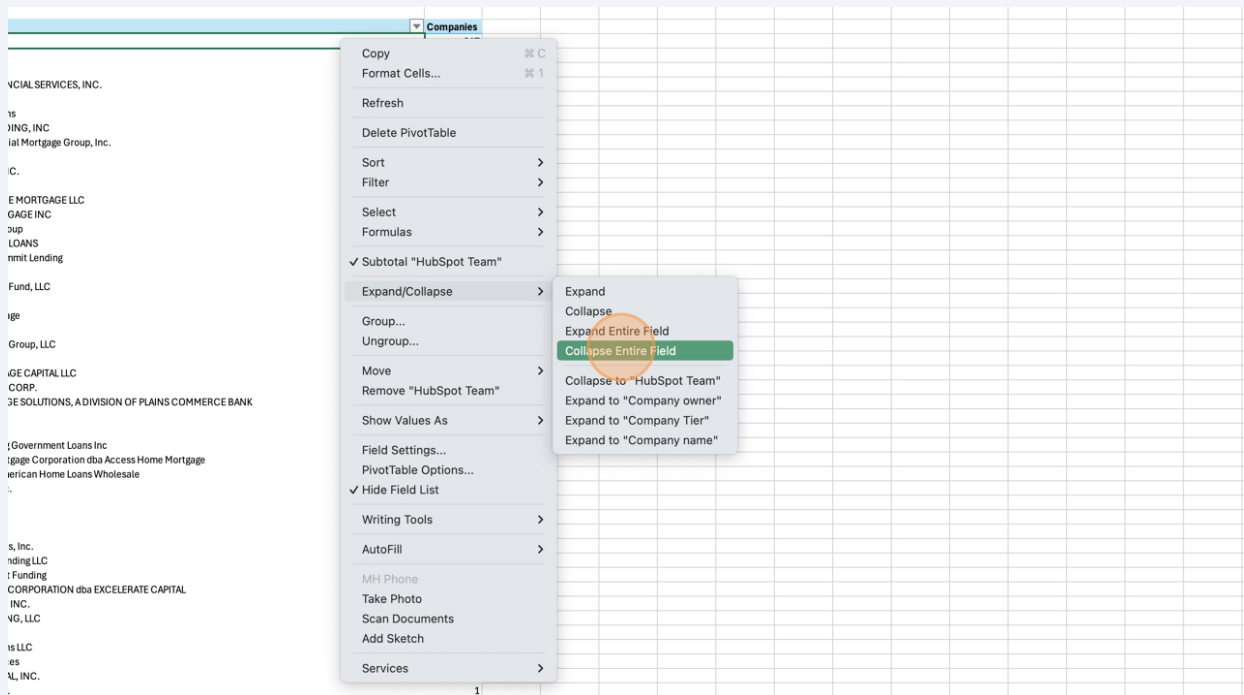
31 Click "OK"



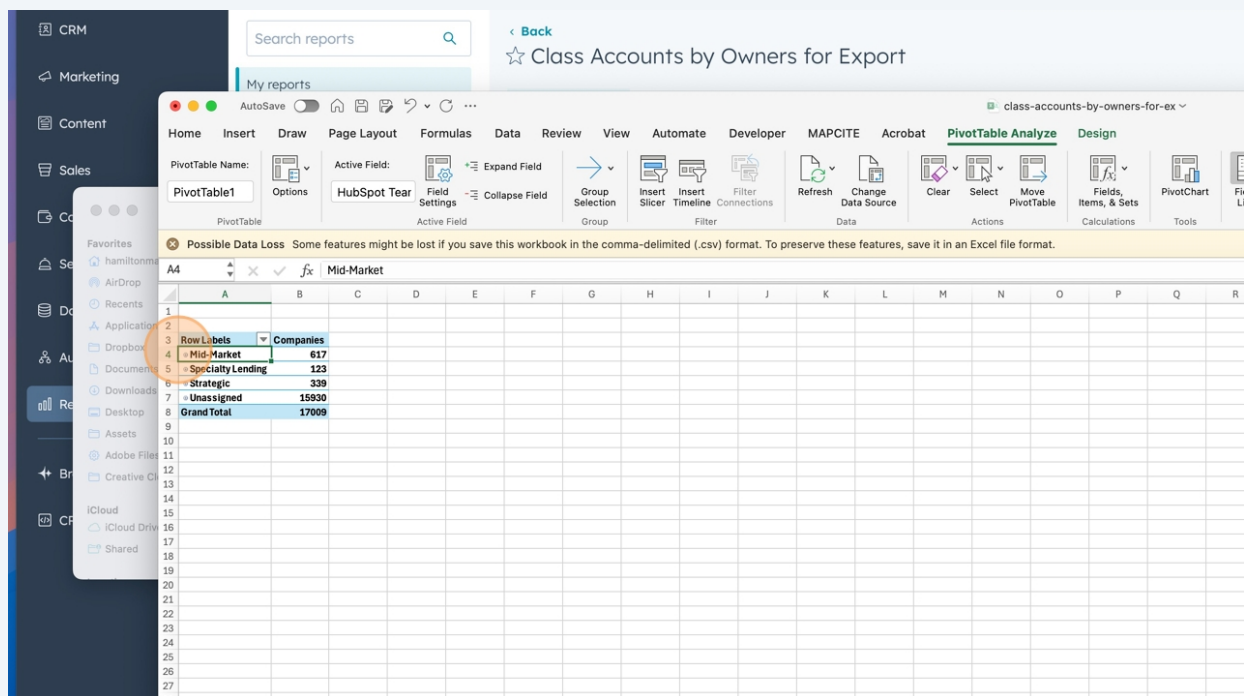
32 Click in any field to change the view.



33 Click "Collapse Entire Field"



34 Click the A4 text entry area



35

Click the circles next to the data to expand or collapse the data. (If there's no circle, you cannot expand or collapse the data.)

Search reports

< Back

☆ Class Accounts by Owners for Export

My reports

class-accounts-by-owners-for-ex

Home Insert Draw Page Layout Formulas Data Review View Automate Developer MAPCITE Acrobat PivotTable Analyze Design

PivotTable Name: PivotTable1 Active Field: Company ovr Field Settings Expand Field Collapse Field Group Selection Insert Slicer Insert Timeline Filter Connections Refresh Change Data Source Clear Select Move PivotTable Fields, Items, & Sets PivotChart Tools

Possible Data Loss Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format.

A5 Jackie Patonai

Row Labels	Companies
Mid-Market	617
Jackie Patonai	89
Tier 1	1
HOMEBRIDGE FINANCIAL SERVICES, INC.	1
Tier 2	5
Luminate Home Loans	1
MEGA CAPITAL FUNDING, INC.	1
Paramount Residential Mortgage Group, Inc.	1
Price Mortgage LLC	1
V.I.P. MORTGAGE, INC.	1
Tier 3	15
ALL AMERICAN HOME MORTGAGE LLC	1
ALL WESTERN MORTGAGE INC	1
Choice Mortgage Group	1
DIRECT MORTGAGE LOANS	1
Lalley Loans dba Summit Lending	1
Laser Mortgage, LLC	1
LBC Capital Income Fund, LLC	1
Lone Mortgage	1
Nations Trust Mortgage	1
NEWFI WHOLESALE	1
Panorama Mortgage Group, LLC	1
REMN WHOLESALE	1
STANDARD MORTGAGE CAPITAL LLC	1
UNITED MORTGAGE CORP.	1
WINTHROP MORTGAGE SERVICES A DIVISION OF PAINTS COMMERCIAL BANK	1

36

Click the A20 text entry area

Possible Data Loss Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format.

A13 Strategic

Row Labels	Companies
Mid-Market	617
Jackie Patonai	89
Liam Carothers	187
Mark Walter	276
Rob Roldan	65
Specialty Lending	123
Kevin Pettaway	69
Michael Tedesco	21
Zachary Schellenberger	33
Strategic	339
Amanda Callaghan	63
Amanda Standley	18
Jim Barnister	31
Jon Tallinger	97
Matthew Albino	97
Scott Shaw	33
Unassigned	15930
Grand Total	17009