|  |  |
| --- | --- |
| **ACCOUNT BRIEF - {{ACCOUNT\_NAME}}** | |
| **Primary Contact** | **Account Information** |
| {{CONTACT\_NAME}}  {{CONTACT\_TITLE}}  {{CONTACT\_PHONE}}  {{CONTACT\_EMAIL}} | {{ACCOUNT\_NAME}}  {{ACCOUNT\_PHONE}}  {{ACCOUNT\_BILLINGSTREET}}  {{ACCOUNT\_BILLINGCITY \f ,}} {{ACCOUNT\_BILLINGSTATE}} {{ACCOUNT\_BILLINGPOSTALCODE}} |

| **CONTACTS ({{RowCount:Contacts}}){{TableHide:Contacts}}** | | |
| --- | --- | --- |
| **Name** | **Title** | **Phone** |
| {{TableStart:Contacts}}{{Contact\_FirstName}} {{Contact\_LastName}} | {{Contact\_Title}} | {{Contact\_Phone}}{{TableEnd:Contacts}} |

| **OPPORTUNITIES ({{RowCount:Opptys}}){{TableHide:Opptys}}** | | | |
| --- | --- | --- | --- |
| **Name** | **Stage** | **Close Date** | **Amount** |
| {{TableStart:Opptys}}{{Opportunity\_Name}} | {{Opportunity\_StageName}} | {{Opportunity\_CloseDate \@ MM/dd/yyyy}} | {{Opportunity\_Amount \# Currency}}{{TableEnd:Opptys}} |
|  |  | **TOTAL:** | **{{=SUM(Above)}}** |

| **ACTIVITIES ({{RowCount:Activities}}){{TableHide:Activities}}** | | |
| --- | --- | --- |
| **Subject** | **Status** | **Due Date** |
| {{TableStart:Activities}}{{Task\_Subject}} | {{Task\_Status}} | {{Task\_ActivityDate \@ MM/dd/yyyy}}{{TableEnd:Activities}} |

| **CASES ({{RowCount:Cases}}){{TableHide:Cases}}** | | |
| --- | --- | --- |
| **Subject** | **Status** | **Opened Date** |
| {{TableStart:Cases}}{{Case\_Subject}} | {{Case\_Status}} | {{Case\_CreatedDate \@ MM/dd/yyyy}}{{TableEnd:Cases}} |