

How To Transform and Format Phone Numbers Automatically

37 Steps

[View most recent version](#) 

Created by

Neighbourhood Co

Creation Date

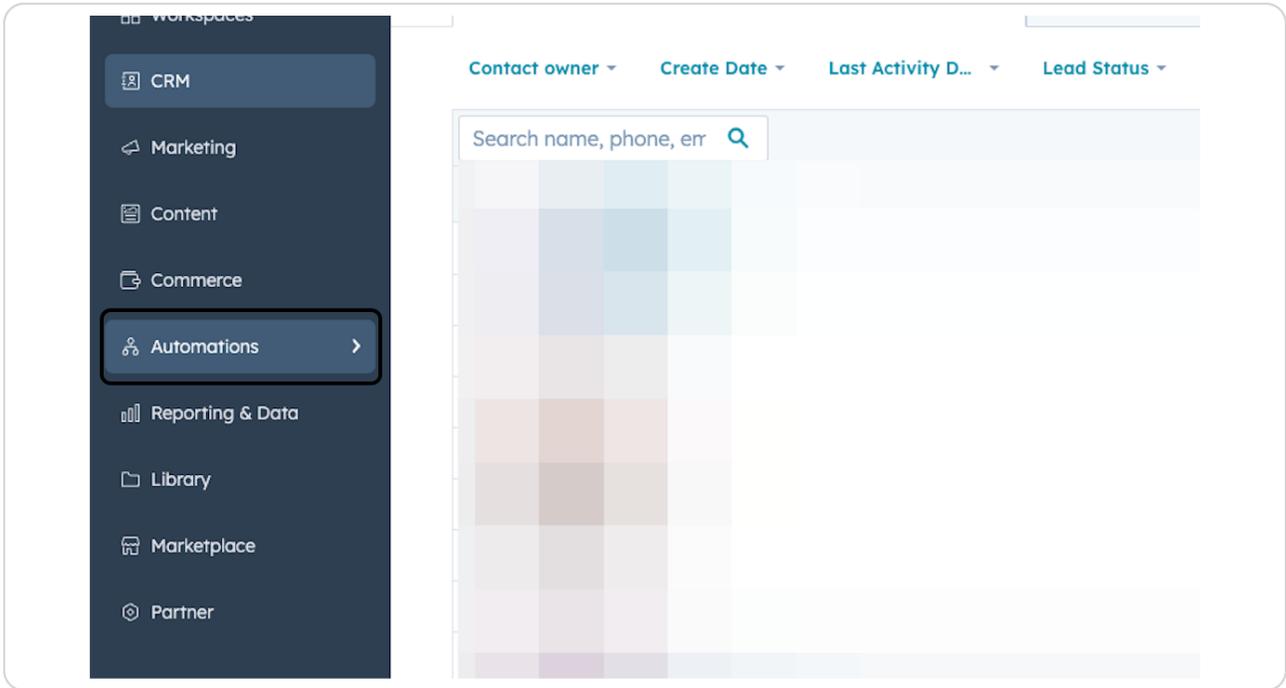
Jun 03, 2024

Last Updated

Jun 03, 2024

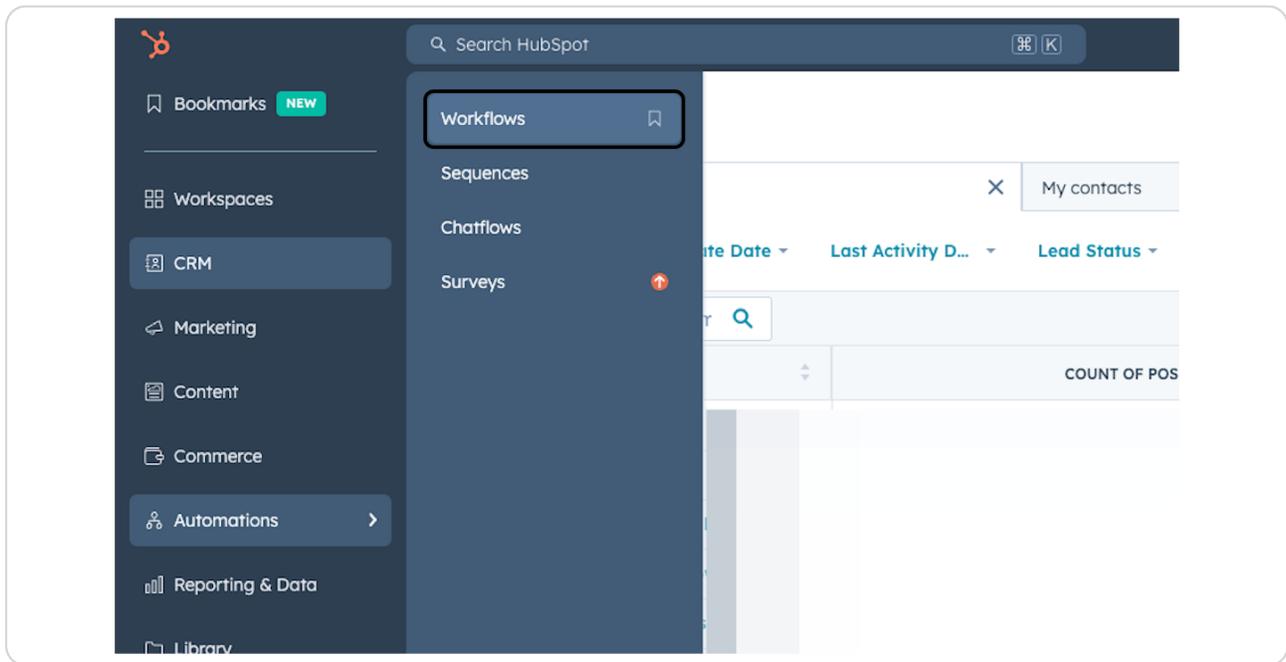
STEP 1

Click on Automations



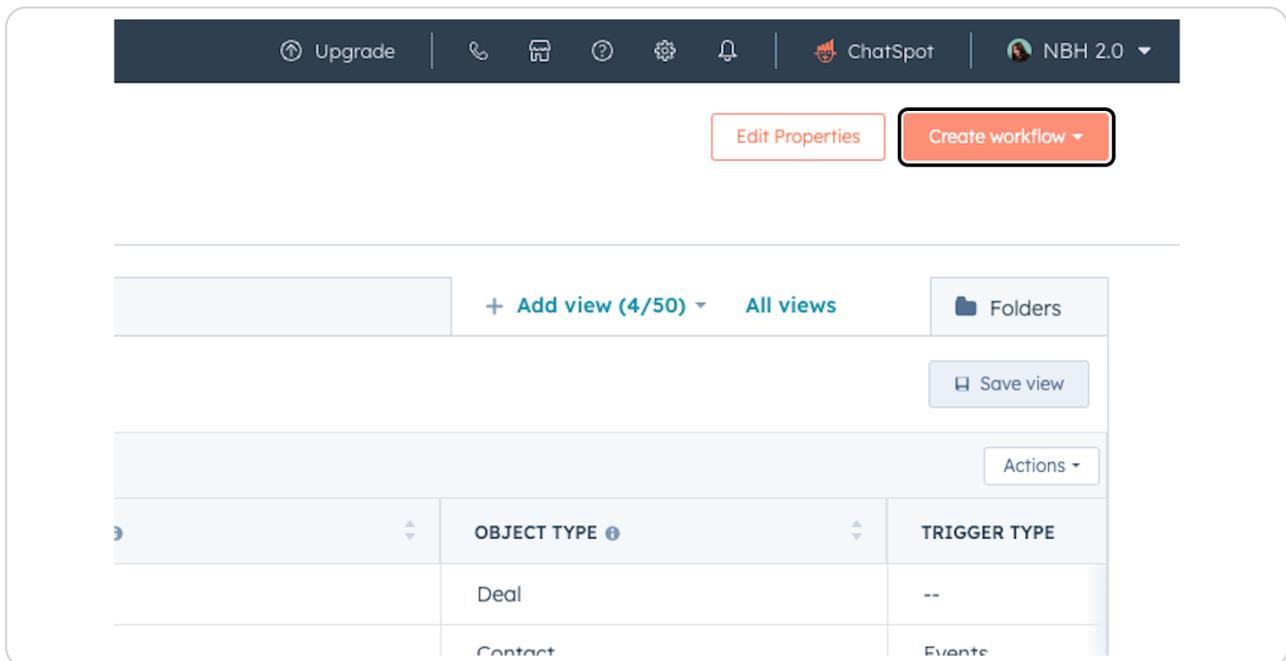
STEP 2

Click on Workflows



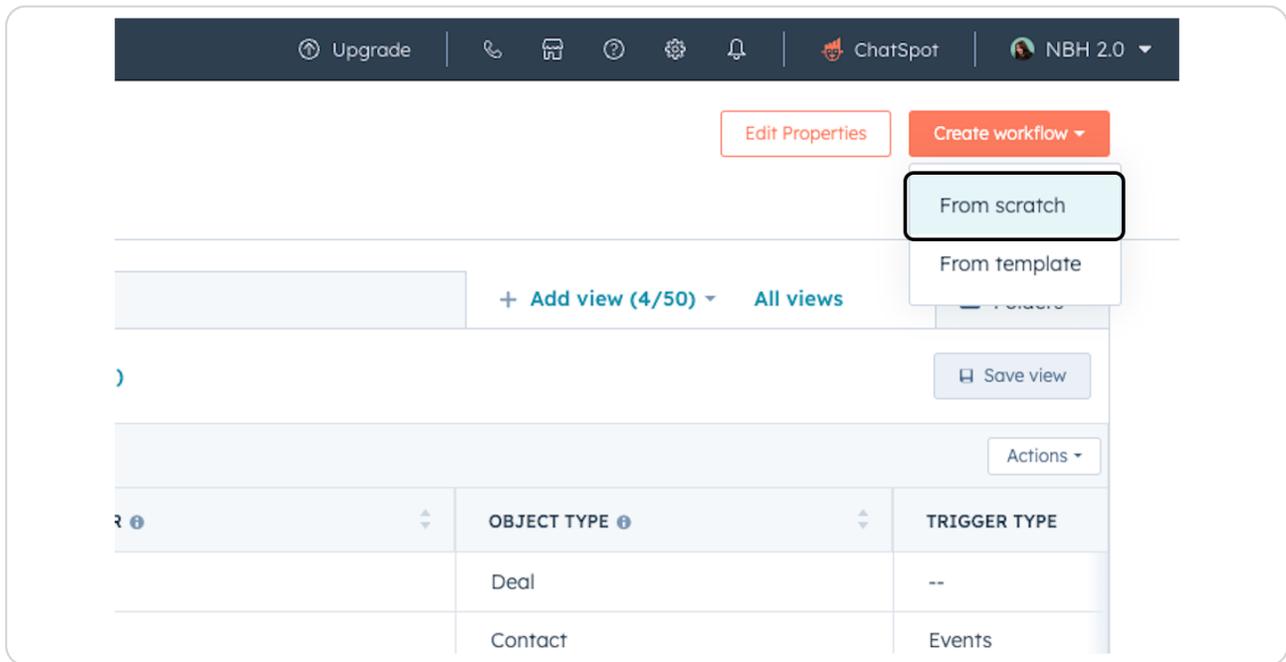
STEP 3

Click on Create workflow



STEP 4

Click on From scratch

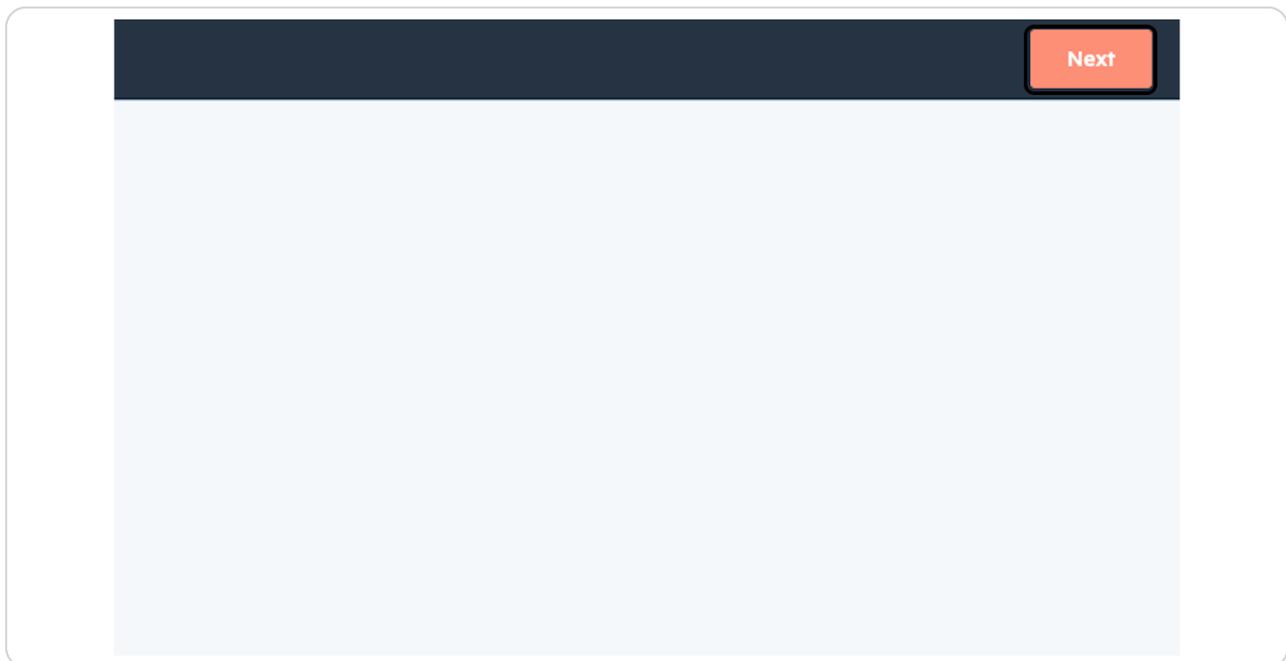


The screenshot shows a software interface with a dark top navigation bar containing 'Upgrade', 'ChatSpot', and 'NBH 2.0'. Below this, there are buttons for 'Edit Properties' and 'Create workflow'. A dropdown menu is open under 'Create workflow', with 'From scratch' highlighted. Other options in the menu include 'From template' and 'Save view'. Below the menu, there is a '+ Add view (4/50)' button and an 'All views' link. A table is visible at the bottom with columns for 'OBJECT TYPE' and 'TRIGGER TYPE'.

	OBJECT TYPE	TRIGGER TYPE
	Deal	--
	Contact	Events

STEP 5

Click on Next



The screenshot shows a software interface with a dark top navigation bar. A 'Next' button is highlighted in the top right corner. The main area of the interface is a large, empty light blue rectangle.

STEP 6

Click on Set up triggers

Contact enrollment trigger

Choose the triggers that decide how a contact enters this workflow.

No triggers set. Contacts can still be enrolled manually once the workflow is published.

Set up triggers [Show details](#)

+

END ¹

STEP 7

Click on When filter criteria is met...

Contacts can be manually enrolled

Automatically trigger enrollment (optional)

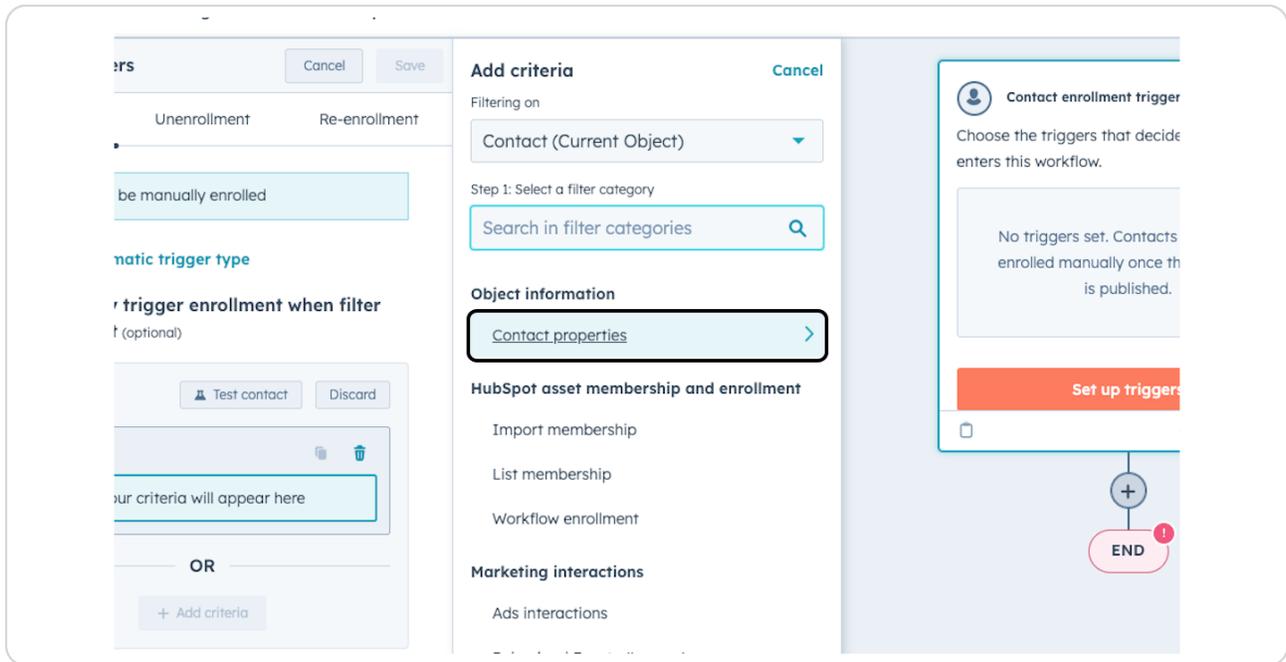
- When an event occurs**
Example: Contact has completed a **form** submission
- When filter criteria is met**
Example: **City** is equal to any of **Reno** AND **Job title** contains any of **Marketing**
- Based on a schedule**
Example: **Daily** at 8:00 AM

Advanced options

- When a webhook is received**
Example: **Webhook** is received from a third party

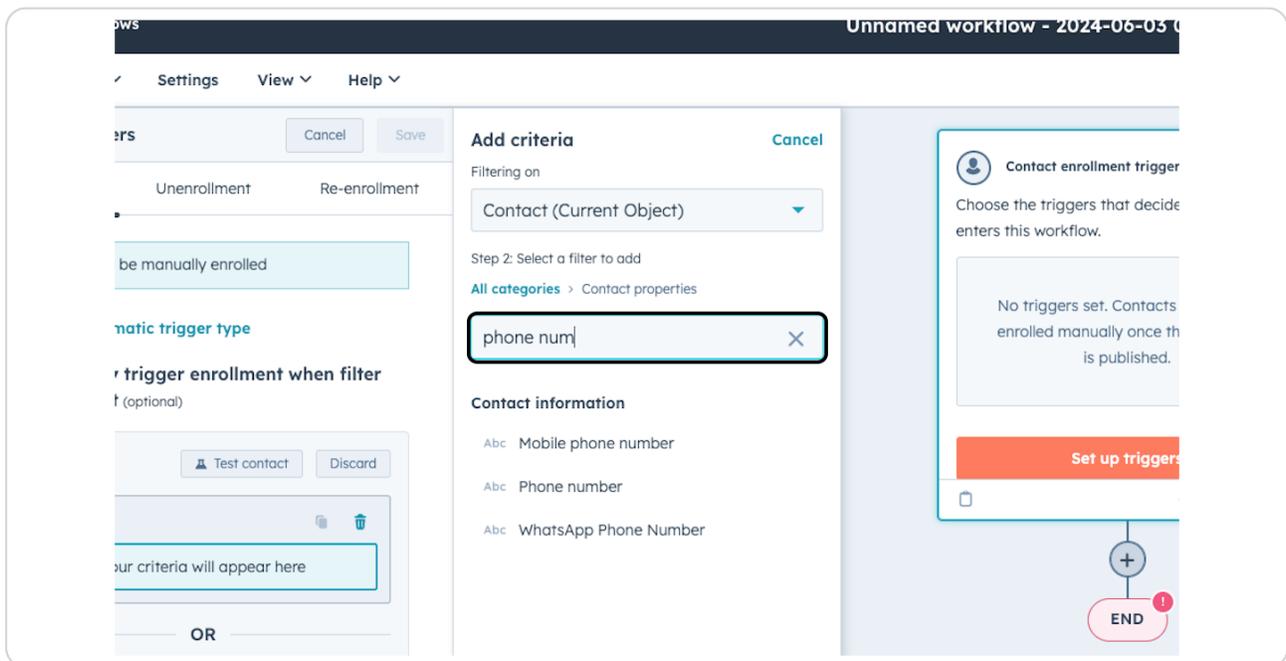
STEP 8

Click on Contact properties



STEP 9

Type "phone number"



STEP 10

Click on Phone number

The screenshot shows a workflow editor interface. On the left, there are tabs for 'Unenrollment' and 'Re-enrollment'. Below them, there's a section for 'Automatic trigger type' with a sub-section 'Trigger enrollment when filter' (optional). A 'Test contact' button is visible. The main area shows 'Filtering on' set to 'Contact (Current Object)'. Below this, it says 'Step 2: Select a filter to add' and 'All categories > Contact properties'. A search box contains 'phone num'. Under 'Contact information', 'Phone number' is selected and highlighted with a black box. Other options include 'Mobile phone number' and 'WhatsApp Phone Number'. On the right, a panel says 'Choose the triggers that decide enters this workflow.' and 'No triggers set. Contacts enrolled manually once the workflow is published.' There is a 'Set up triggers' button and a flow diagram with an 'END' node.

STEP 11

Click on is equal to any of

The screenshot shows the 'Edit criteria' dialog for 'Phone number'. The dialog has a title bar 'Unnamed workflow' and navigation links 'Settings', 'View', and 'Help'. There are 'Cancel' and 'Save' buttons. The main content shows 'Phone number' with a dropdown menu set to 'is equal to any of'. Below the dropdown is an 'Add values' input field. The background shows the same workflow editor as in Step 10, but the 'Phone number' filter is now being edited.

STEP 12

Click on is known

The screenshot shows a workflow configuration interface. On the left, there is a section for 'Trigger type' with 'Manual trigger type' selected. Below it, there is a section for 'Trigger enrollment when filter' with 'Optional' selected. A 'Test contact' button is visible. The main area shows a dropdown menu for 'Phone number' with the following options: 'is equal to any of', 'contains any of', 'doesn't contain any of', 'starts with any of', 'ends with any of', 'is known' (highlighted with a black box), and 'is unknown'. On the right, there is a section for 'Choose the triggers that decide when a contact enters this workflow.' with a 'Set up trigger' button and an 'END' button.

STEP 13

Click on Add criteria

The screenshot shows a workflow configuration interface. A 'Test contact' button is visible. The main area shows a group of criteria labeled 'Group 1'. Inside the group, there is a criterion 'Phone number is known'. Below it, there is an 'AND' section with a '+ Add criteria' button highlighted with a black box. Below the 'AND' section, there is an 'OR' section with a '+ Add criteria' button. At the bottom, there is a section for 'Enrollment settings' with a right-pointing arrow.

STEP 14

Click on Contact properties

The screenshot shows the 'Add criteria' dialog box in a workflow builder. The 'Filtering on' dropdown is set to 'Contact (Current Object)'. Under 'Object information', 'Contact properties' is selected and highlighted with a black box. The right sidebar shows a 'Contact enrollment trigger' configuration panel with a 'Set up triggers' button and a workflow diagram with an 'END' node.

STEP 15

Type "phone number"

The screenshot shows the 'Add criteria' dialog box in a workflow builder. The 'Filtering on' dropdown is set to 'Contact (Current Object)'. Under 'Object information', 'Contact properties' is selected. A search box is open with 'phone number' typed in it. The right sidebar shows the same 'Contact enrollment trigger' configuration panel as in Step 14.

STEP 16

Click on Phone number

The screenshot shows a workflow editor interface. On the left, there are tabs for 'Unenrollment' and 'Re-enrollment'. Below these, there are sections for 'Automatic trigger type' and 'Trigger enrollment when filter' (optional). A 'Test contact' button is visible. The main area is titled 'Add criteria' and shows a filter set to 'Contact (Current Object)'. Below this, there is a search bar containing 'phone number'. A list of 'Contact information' is shown, with 'Phone number' highlighted by a black box. To the right, a 'Contact enrollment trigger' panel is visible, containing a 'Set up triggers' button and a flow diagram with an 'END' node.

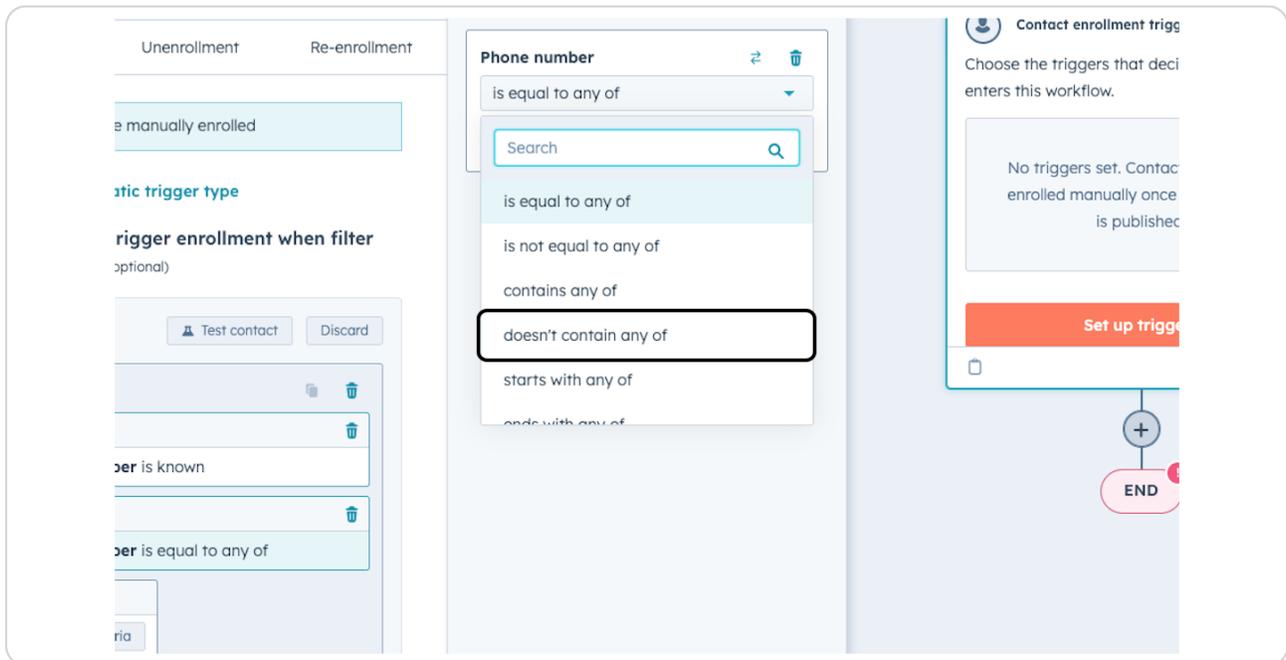
STEP 17

Click on is equal to any of

The screenshot shows a workflow editor interface titled 'Unnamed workflow'. It has a top navigation bar with 'Settings', 'View', and 'Help'. Below this, there are tabs for 'Unenrollment' and 'Re-enrollment'. The main area is titled 'Edit criteria' and shows a filter set to 'Phone number'. Below this, there is a dropdown menu with 'is equal to any of' selected and highlighted by a black box. An 'Add values' button is visible below the dropdown. To the right, a 'Contact enrollment trigger' panel is visible, containing a 'Set up triggers' button and a flow diagram with an 'END' node.

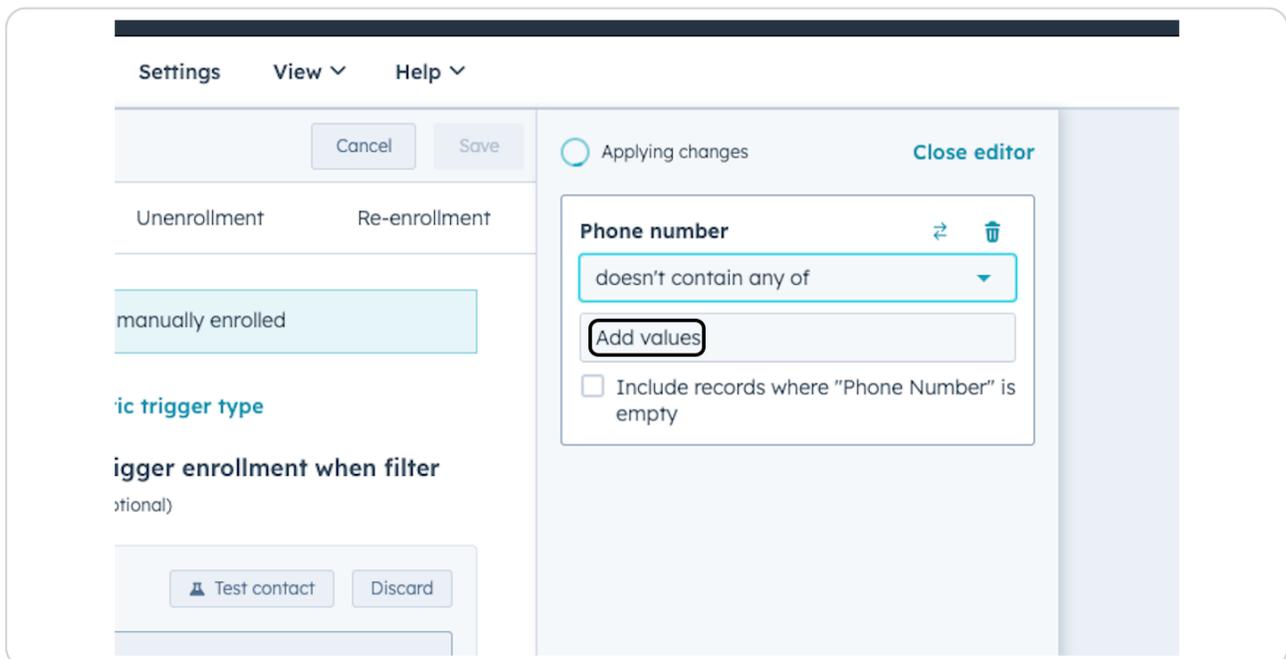
STEP 18

Click on doesn't contain any of



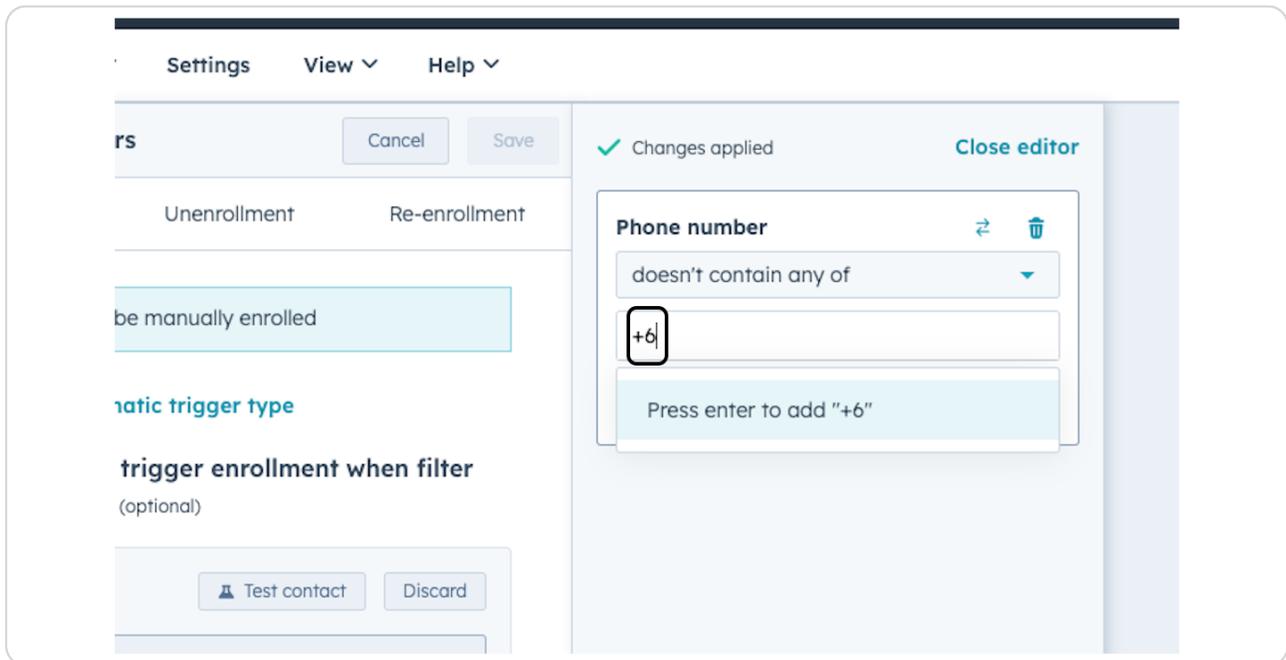
STEP 19

Click on Add values



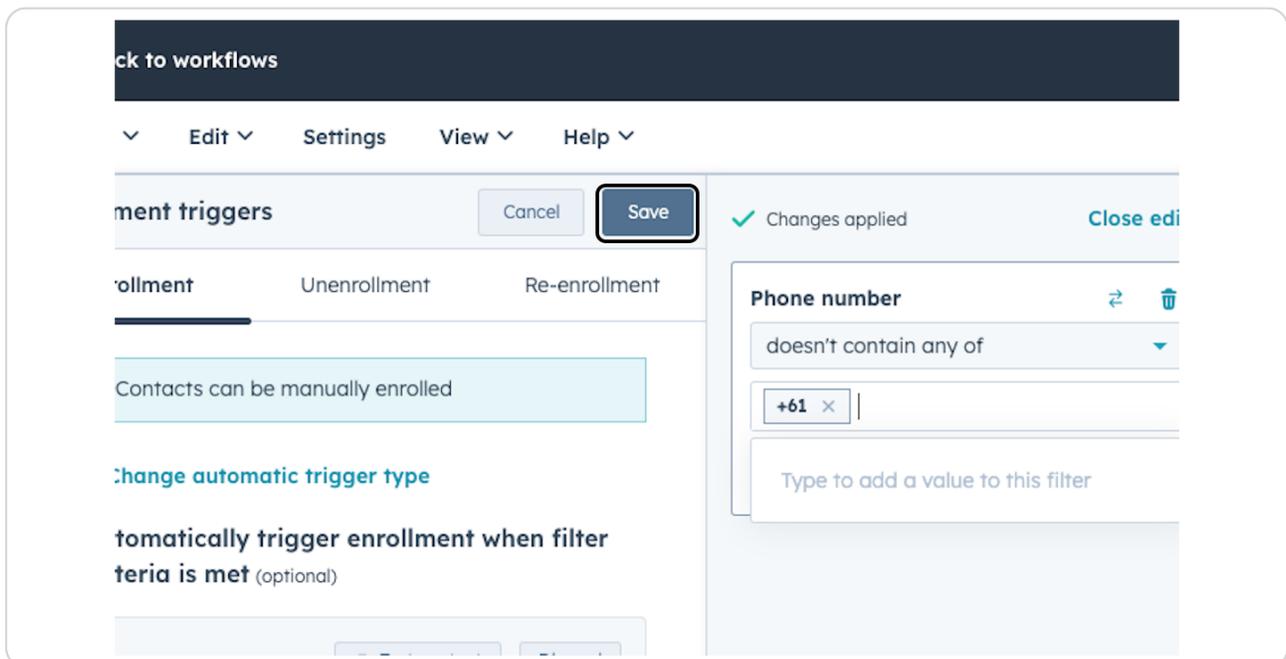
STEP 20

Type "+61"



STEP 21

Click on Save



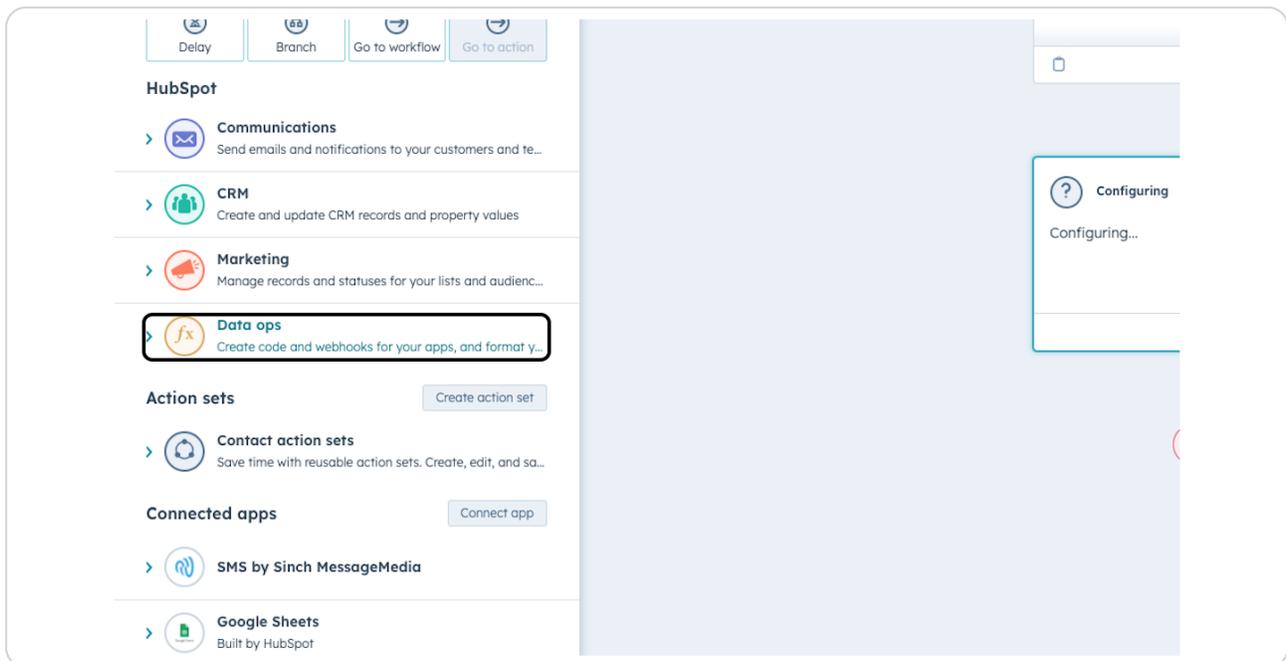
STEP 22

Click on Add new action



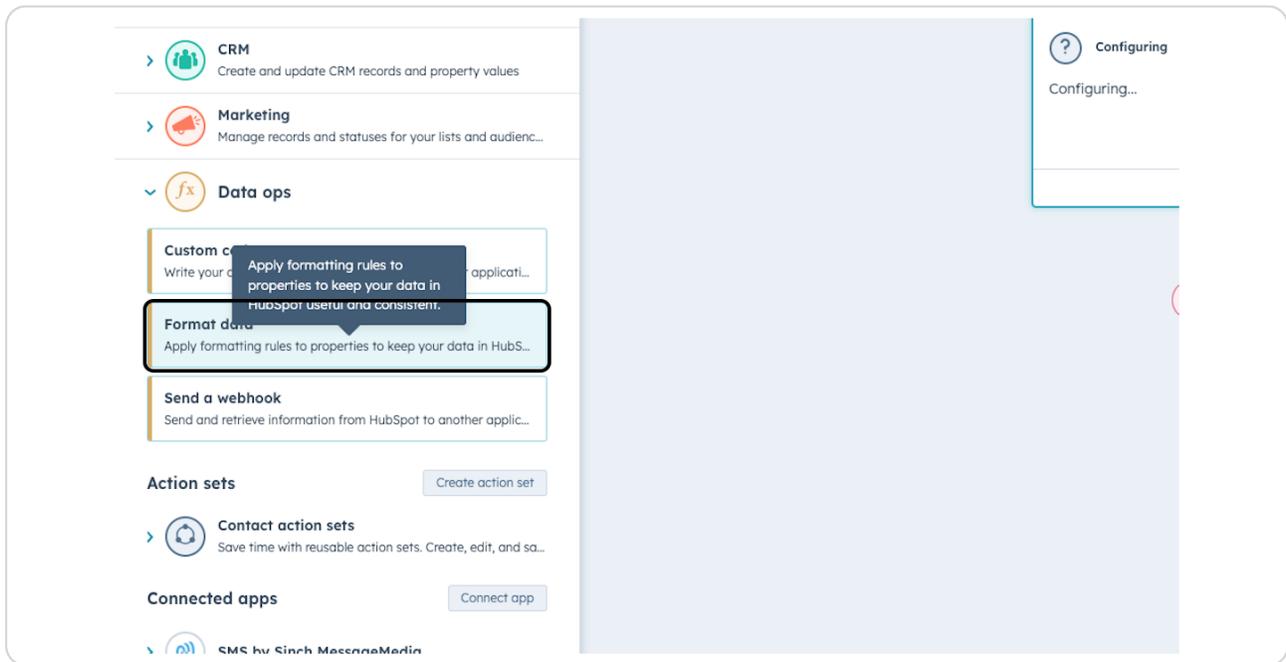
STEP 23

Click on Data ops...



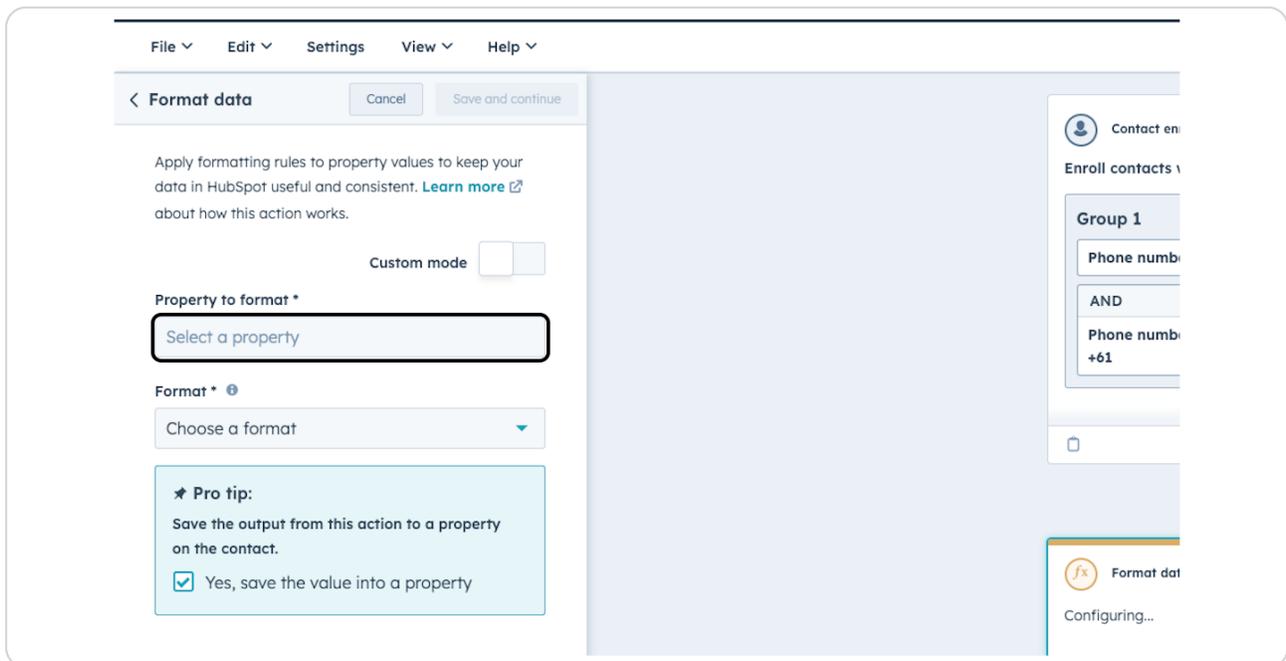
STEP 24

Click on Format data...



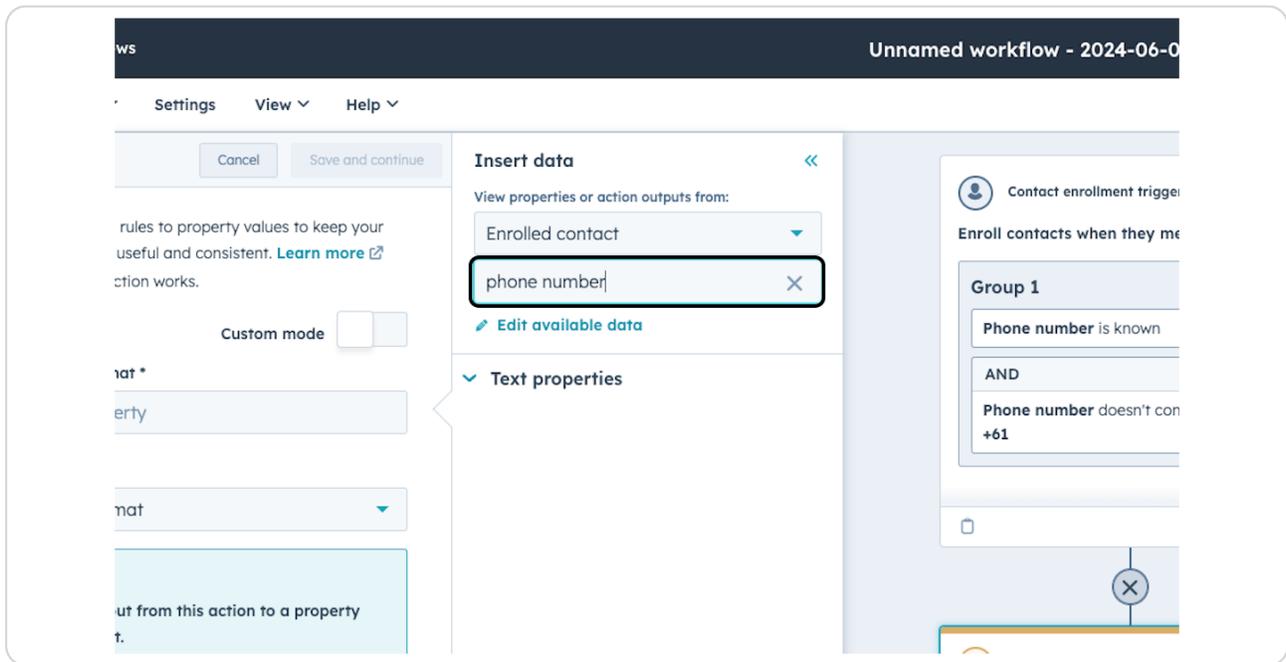
STEP 25

Click on Select a property



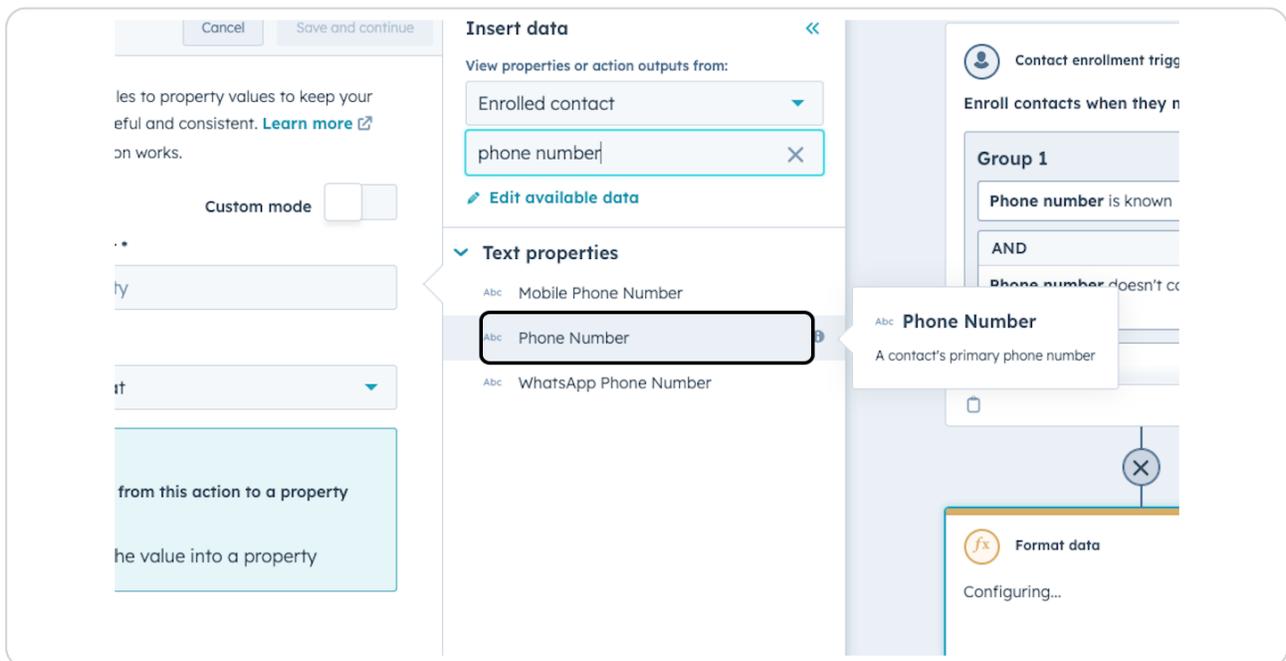
STEP 26

Type "phone number"



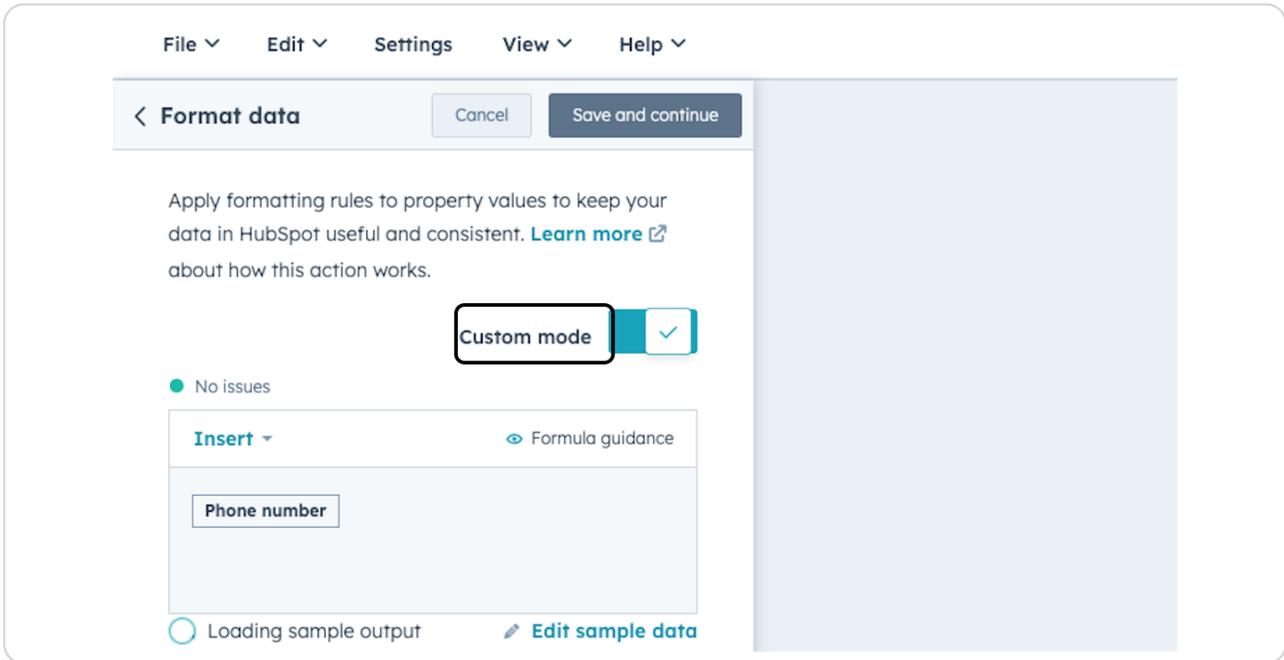
STEP 27

Click on Phone Number



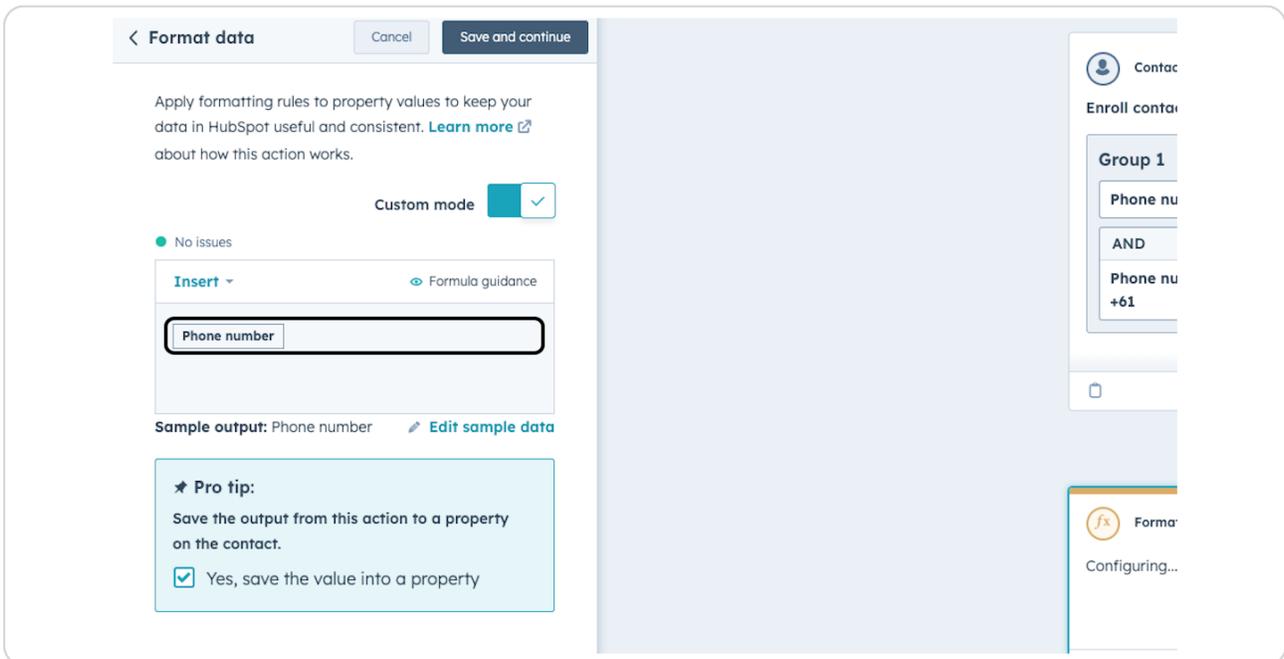
STEP 28

Check Custom mode



STEP 29

Click on Phone number



STEP 30

Click on Insert

Apply formatting rules to property values to keep your data in HubSpot useful and consistent. [Learn more](#)

Custom mode

No issues

Insert Formula guidance

Phone number

Sample output: Phone number [Edit sample data](#)

★ Pro tip:

View properties or action outputs from:

Enrolled contact

Search contact properties

[Edit available data](#)

> Text properties

✓ Enumeration properties

- Account Types
- Achieve Australia Category
- Adviser Email
- Advisor
- Allied Health Service Categorio

STEP 31

Click on Function

File Edit Settings View Help

< Format data [Cancel](#) [Save and continue](#)

Ap da ab

Action output >

HubSpot property >

fx Function >

Custom mode

Insert Formula guidance

Phone number

Sample output: Phone number [Edit sample data](#)

★ Pro tip:

View properties or action outputs from:

Enrolled contact

Search contact properties

[Edit available data](#)

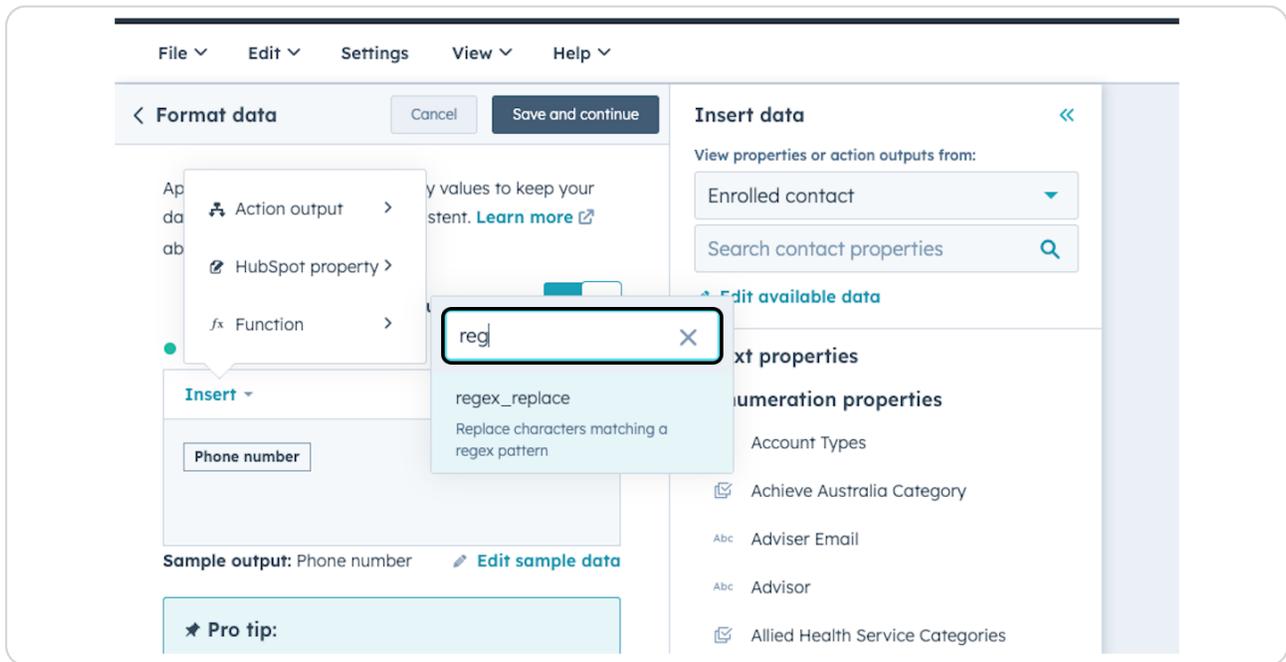
> Text properties

✓ Enumeration properties

- Account Types
- Achieve Australia Category
- Adviser Email
- Advisor
- Allied Health Service Categorio

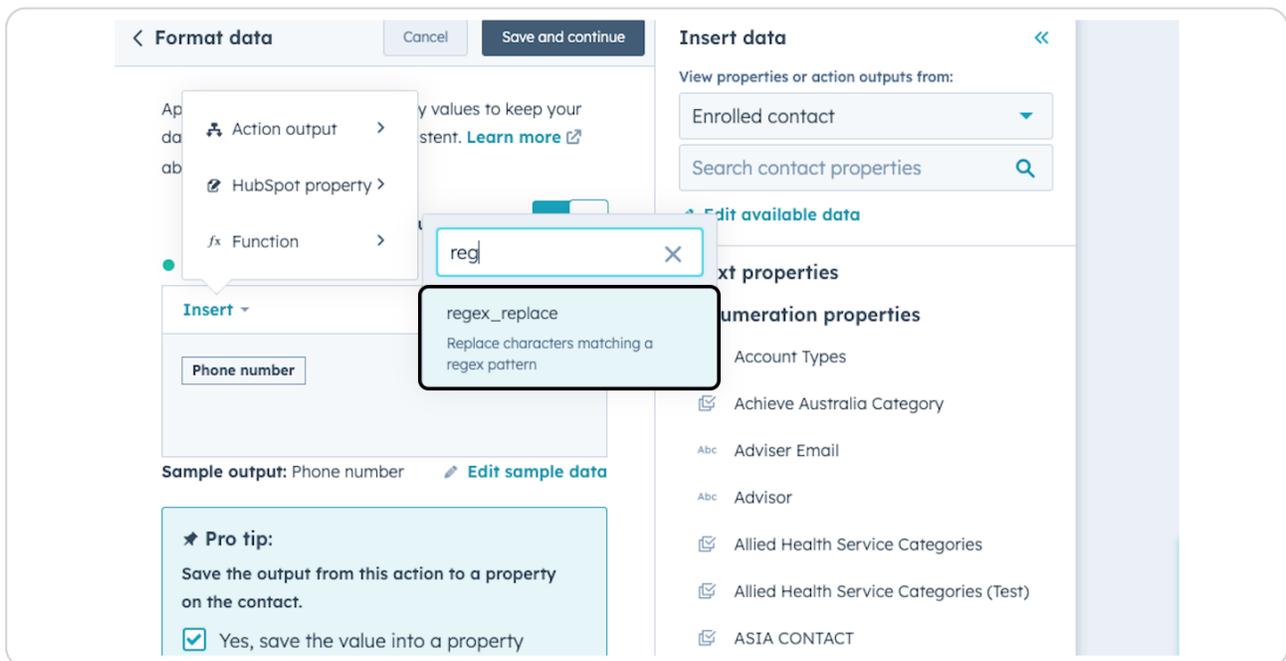
STEP 32

Type "reg"



STEP 33

Click on regex_replace...



STEP 34

Type `regex_replace(regex_replace([PhoneNumber], "[^0-9]", ""), "^0", "+61")`

The screenshot shows the HubSpot workflow editor interface. At the top, there's a dark header with a back arrow and the text "Back to workflows". Below that, a navigation bar contains "File", "Edit", "Settings", "View", and "Help" with dropdown arrows. The main content area is split into three panels. The left panel, titled "Format data", has a "Cancel" button and a "Save and continue" button. It contains a description: "Apply formatting rules to property values to keep your data in HubSpot useful and consistent. [Learn more](#) about how this action works." Below this is a "Custom mode" toggle which is checked. A "1 issue" notification is visible. The central panel, titled "Insert data", shows "View properties or action outputs from:" set to "Enrolled contact". It includes a search box for "Search contact properties" and a list of "Enumeration properties" such as "Achieve Australia Category", "Adviser Email", "Adviser", "Allied Health Service Categories", "Allied Health Service Categories (Test)", "ASIA CONTACT", "Assist Data", "AU Import", "Auckland virtual workshops", "Business units", "Buying Role", "Category", "Chameleon Data", and "Chameleon Life-cycle stage". The right panel shows a "Contact enrollment trigger" with filters: "Phone number is known" and "Phone number doesn't contain any of +61". Below the trigger is a "Format data" action box labeled "Configuring..." and an "END" node with a red notification icon. A black arrow points from the "Save and continue" button in the left panel to the "Format data" action box in the right panel.

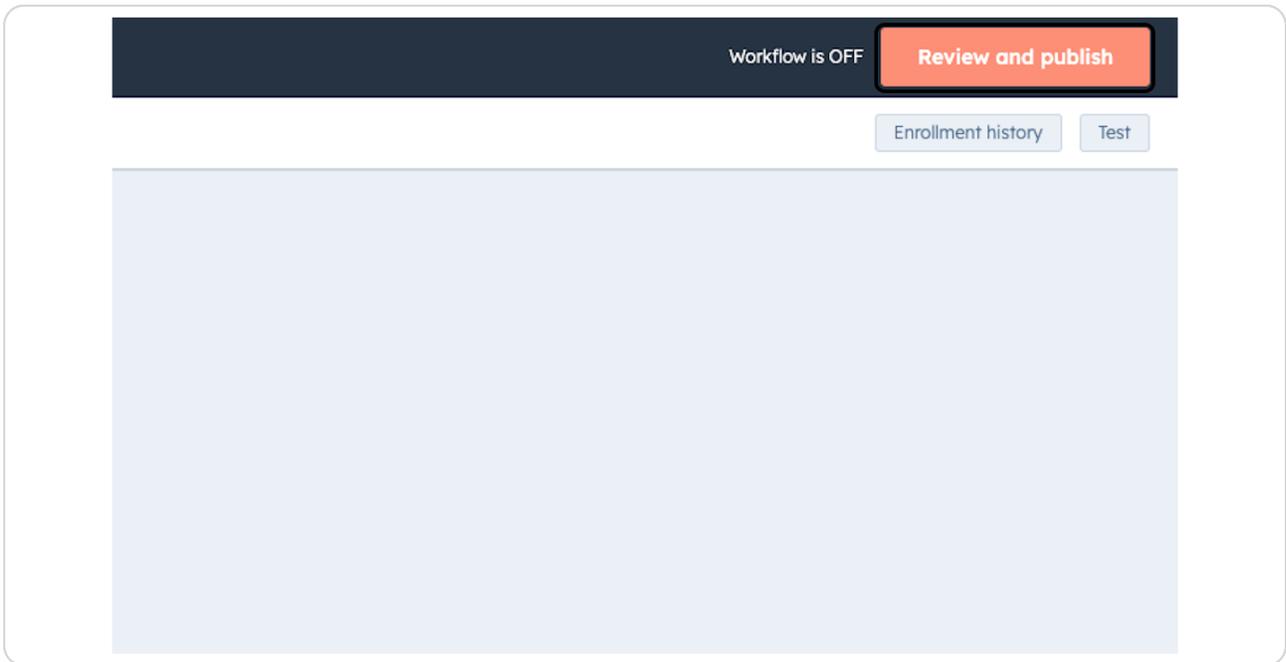
STEP 35

Click on Save and continue

This screenshot is similar to the previous one but highlights the "Save and continue" button in the "Format data" panel. The "1 issue" notification is now gone, replaced by a "No issues" notification. The "Enumeration properties" list in the central panel is updated to include "Account Types" and "Achieve Australia Category". The "Format data" action box in the right panel now shows the configured formula: `regex_replace(regex_replace("Phone number", "[^0-9]", ""), "^0", "+61")`. The "END" node still has a red notification icon.

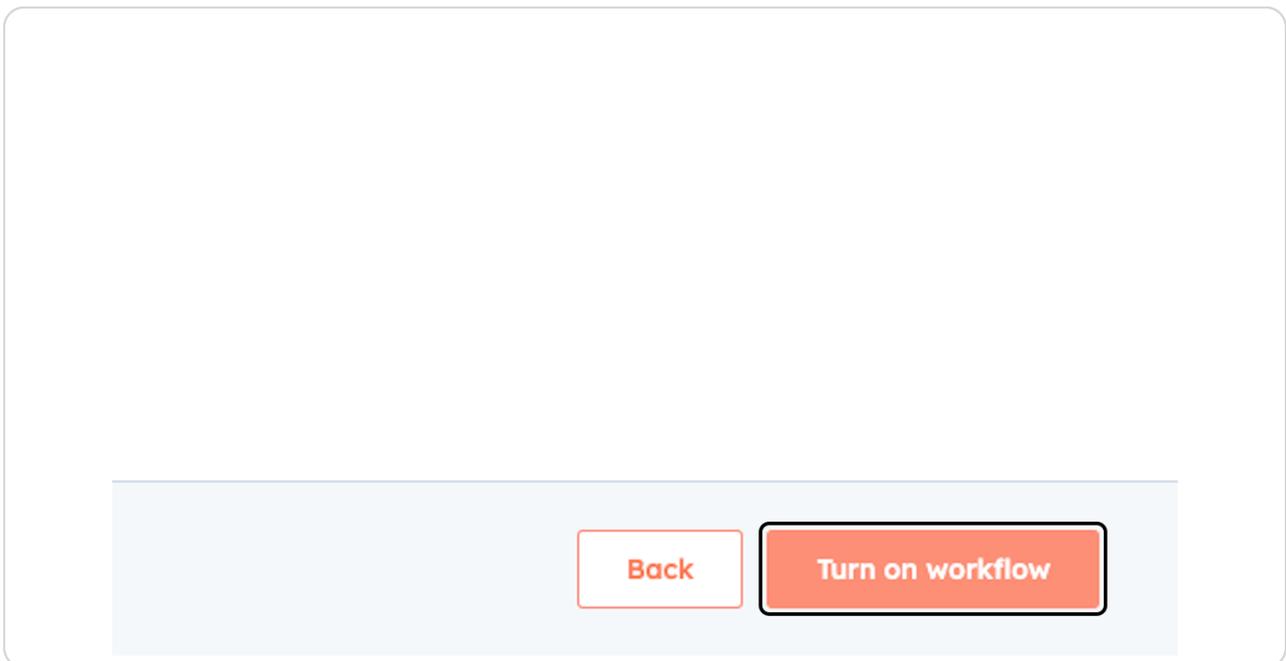
STEP 36

Click on Review and publish



STEP 37

Click on Turn on workflow



N | B
T | E