

FAQ: How to Format Phone Numbers in a Report

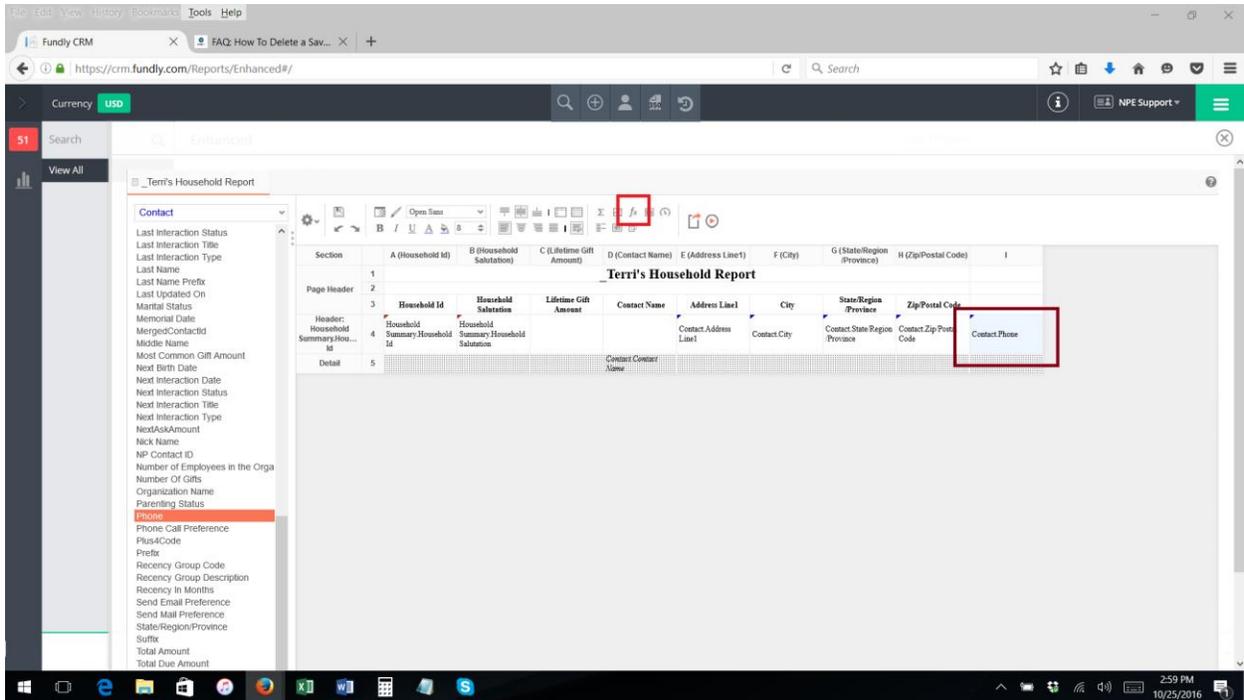
By default, phone numbers appear as an unformatted string in reports.

Household Id	Household Substation	Lifetime Gift Amount	Contact Name	Address Line1	City	State/Region /Province	Zip/Postal Code
2				123 Bob Lane	Robson Park	CA	94928
21	Arnan Sunn and John Crickson			145 Moya Lane	Bloomfield	CA	94952
25	Ben and Jenny Broder						
84	Vianya and Mira Singh			1990 Alan Dr	Penngrove	CA	94951
208	Heratio and Helen Spectacular						
211	Charles and Mary Lamb						
226	Bob Plumb and Mia Mary						
294	Bob and Jane Johnson						
332	Bob and Jane Smith						
466	Ben Pierce and Loneta Piere						
526							
577							
874							
905	Garry and Edvina Singh						
913							
923	Jeremy Pansatel and Rio Nigle			1900 Gold Way	Robson Park	CA	94928
973	Taylor and Erik Metzler			1300 Valley House Dr	Robson Park	CA	94928
979	Lois Lane and Clark Kent						
1232							
1276							
1289							

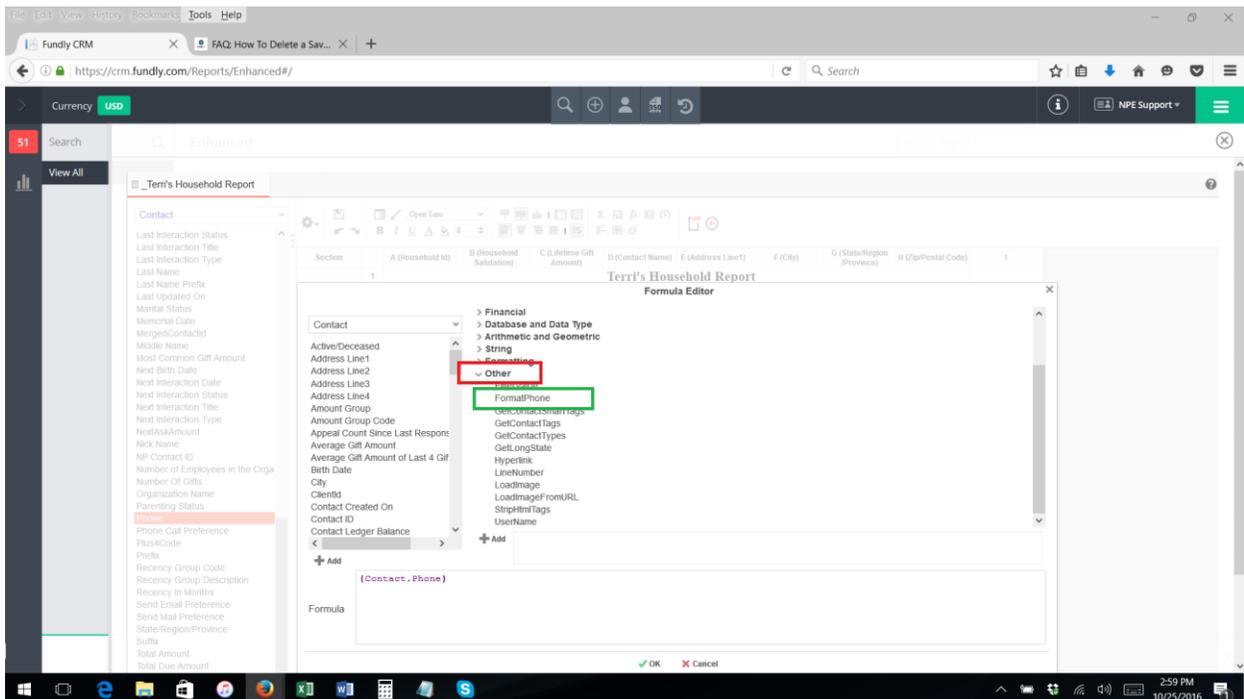
Using the “Format Phone” function, users can have the phone numbers automatically formatted as (XXX) XXX-XXXX.

Household Id	Household Substation	Lifetime Gift Amount	Contact Name	Address Line1	City	State/Region /Province	Zip/Postal Code
2				123 Bob Lane	Robson Park	CA	94928
21	Arnan Sunn and John Crickson			145 Moya Lane	Bloomfield	CA	(707) 547-5484
25	Ben and Jenny Broder						
84	Vianya and Mira Singh			1990 Alan Dr	Penngrove	CA	94951
208	Heratio and Helen Spectacular						
211	Charles and Mary Lamb						
226	Bob Plumb and Mia Mary						
294	Bob and Jane Johnson						
332	Bob and Jane Smith						
466	Ben Pierce and Loneta Piere						
526							
577							
874							
905	Garry and Edvina Singh						
913							
923	Jeremy Pansatel and Rio Nigle			1900 Gold Way	Robson Park	CA	94928
973	Taylor and Erik Metzler			1300 Valley House Dr	Robson Park	CA	94928
979	Lois Lane and Clark Kent						
1232							
1276							
1289							

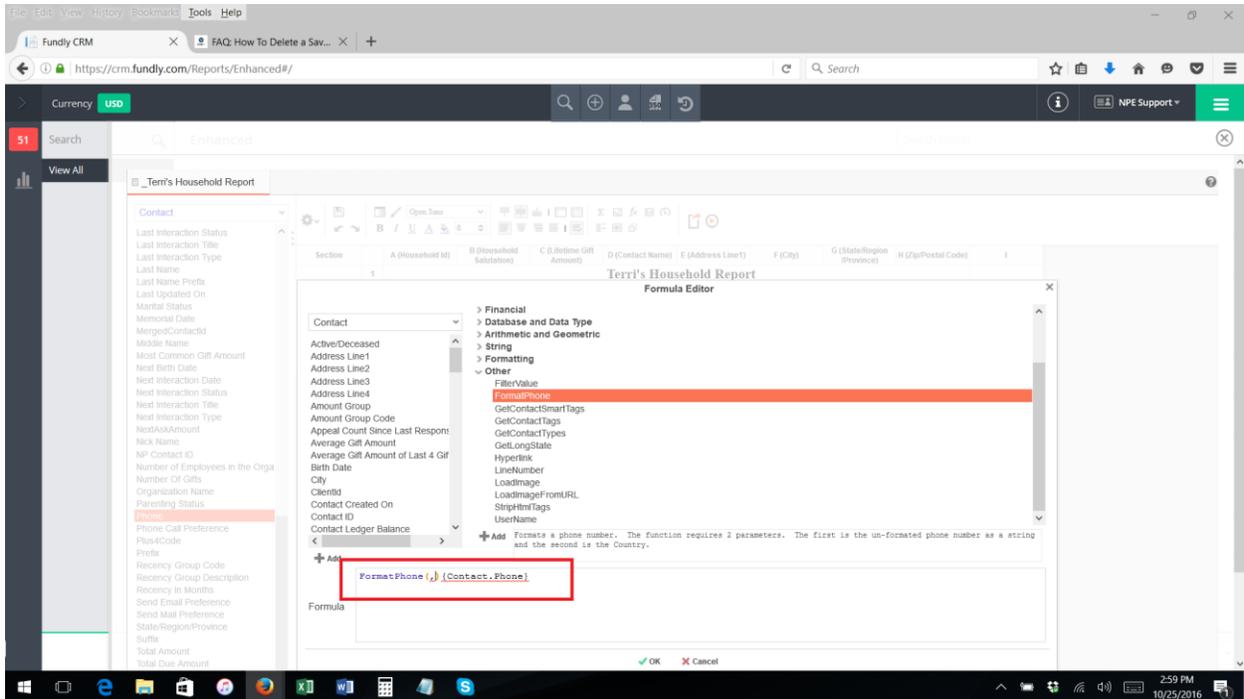
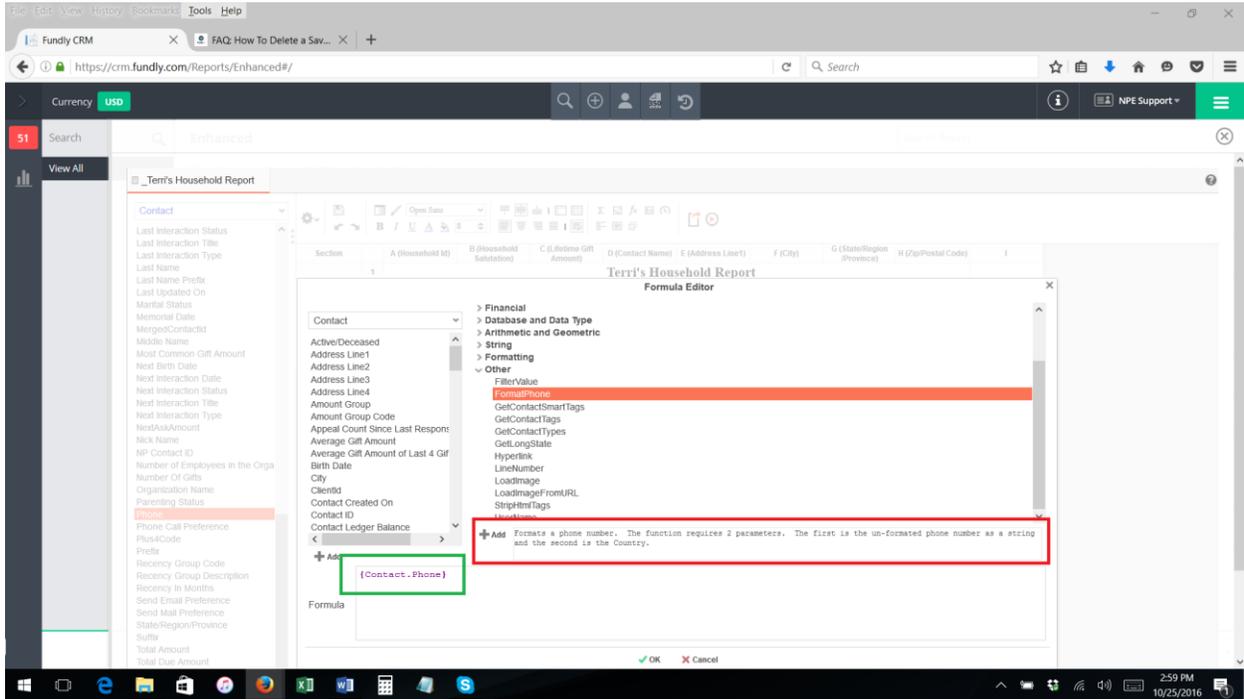
1. When creating or editing a report, add a phone number field to the report.
2. Click in the cell (so that it is highlighted/blue) then select the function editor (fx) on the tool bar to open the function/formula editor dialog box



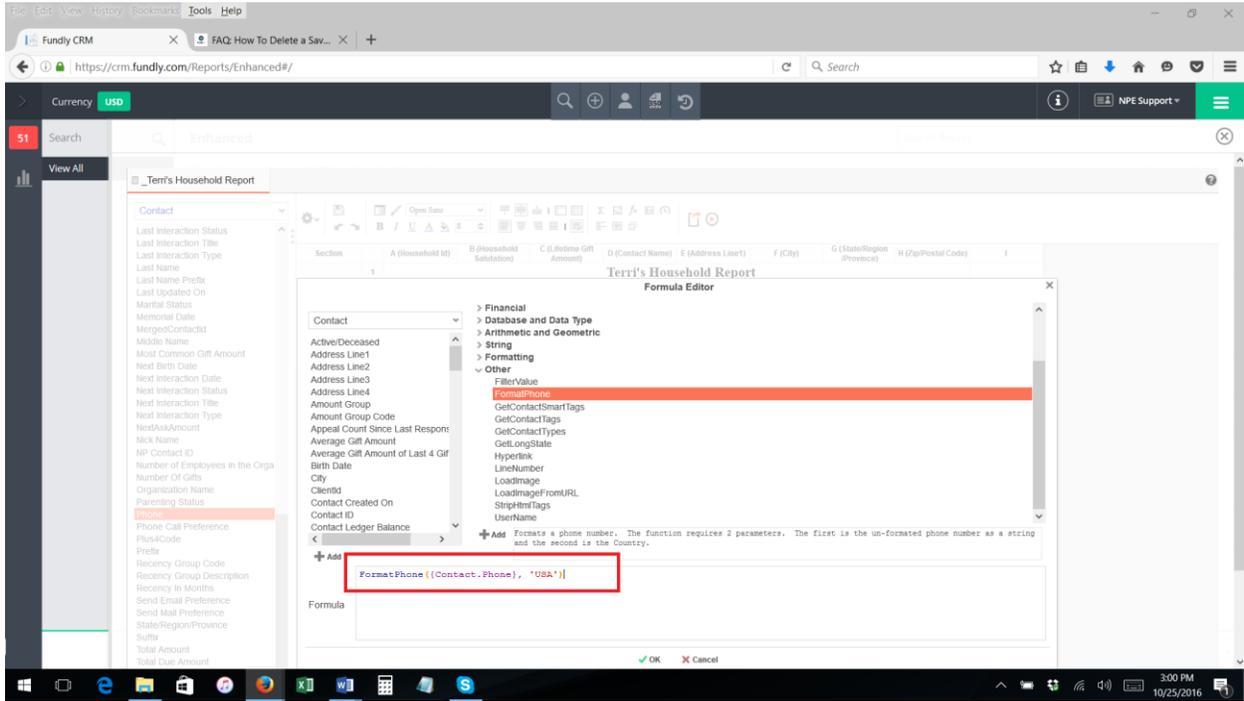
3. In the Formula Editor, click the drop down next to the "other" category



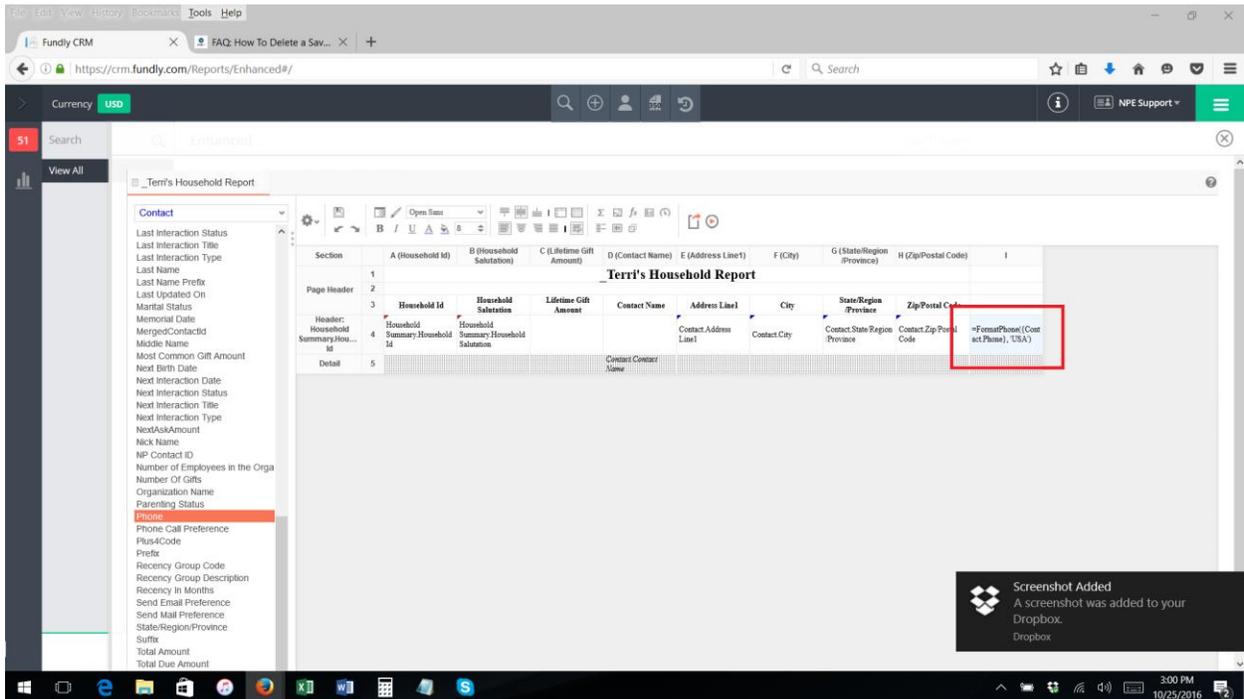
4. Select the "Format Phone" function and drag it to the formula editor area at the bottom (drag it before the Phone Number field)



5. Delete the “,” and “)” and move them after the Phone Number field. Between the “,” and “)” add “USA”) so that the formula appears as it does in the picture.



6. Click “OK” to save the formula. Now the field on the report should have the formula in the cell.



7. Save your report. Now, when you run the report, the phone number field will be formatted as (XXX) XXX-XXXX.

The screenshot displays a web browser window with the Fundy CRM interface. The main content area shows a report titled "_Terri's Household Report". The report is presented as a table with the following columns: Household Id, Household Salutation, Lifetime Gift Amount, Contact Name, Address Line1, City, State/Region /Province, and Zip/Postal Code. The first row of data is highlighted with a red box around the phone number field, which contains the text "(707) 547-5484".

Household Id	Household Salutation	Lifetime Gift Amount	Contact Name	Address Line1	City	State/Region /Province	Zip/Postal Code
2				123 Bob Lane	Robson Park	CA	94928
21	Ann Sun and John Crichton			145 Moya Lane	Bloomfield	CA	94952
25	Ben and Jenny Boulder						
84	Vinaya and Mira Singh			1900 Alan Dr	Penngrove	CA	94951
208	Harato and Helem Spectacular						
211	Charles and Mary Lamb						
226	Bob Frank and Mrs. Mary						
294	Bob and Jane Johnson						
332	Bob and Jane Smith						
466	Ben Pierce and Lorena Piers						
526							
577							
874							
905	Garry and Edwina Singh						
913							
923	Jenny Pimentel and Rio Nagle			1900 Gold Way	Robson Park	CA	94928
973	Taylor and Erik Melrose			1300 Valley House Dr	Robson Park	CA	94928
979	Lois Lane and Clark Kent						
1232							
1276							
1789							