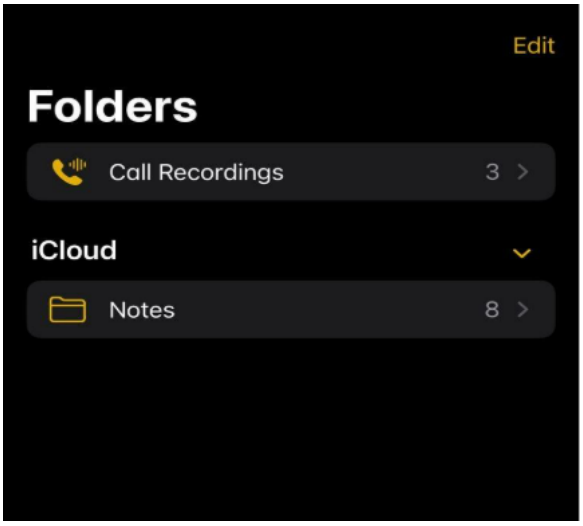
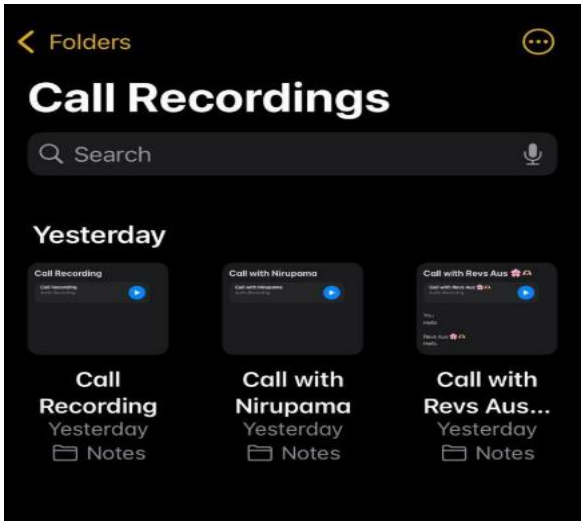
Phone Call to CRM Workflow (iOS Shortcuts and Pipedream)

Automate iPhone call recordings into a CRM using an iOS Share Sheet Shortcut and a webhook workflow (Pipedream).

INTRODUCTION

Apple introduced built-in call-recording and transcription in **iOS 18.1**. When you record a call, the iPhone stores both an audio file and a text transcript in the Notes app and places the note in a **"Call Recordings"** folder.





The transcript typically appears after a short processing delay.
Today, iOS does not provide an official Shortcuts action to automatically read/export note attachments, so exporting the call audio requires one manual Share Sheet action.

This automation uses an iOS Share Sheet Shortcut to send the call audio + metadata to a webhook (Pipedream), where the workflow transcribes the call, generates a summary + action items, and updates a CRM record (e.g., contact + call note).

PREREQUISITES

1. **Update your iPhone – install iOS 18.1 or later** and check that call recording is available in your region (Apple restricts it in some countries).

   Enable Notes sync in Settings > **iCloud so** call recordings folder appears on all devices.

2. A **Pipedream workflow** with an HTTP trigger

3. A storage destination for audio (optional but recommended) e.g., Drive folder, S3 bucket, or Pipedream-managed storage

4. API keys for:
   - transcription (e.g., Whisper/Deepgram)
   - summarization/structured extraction (e.g., OpenAI Chat)

5. CRM API access (example: HubSpot private app token)

6. Compliance: always obtain consent and follow local laws.

A stable network connection is recommended during upload / transcription.

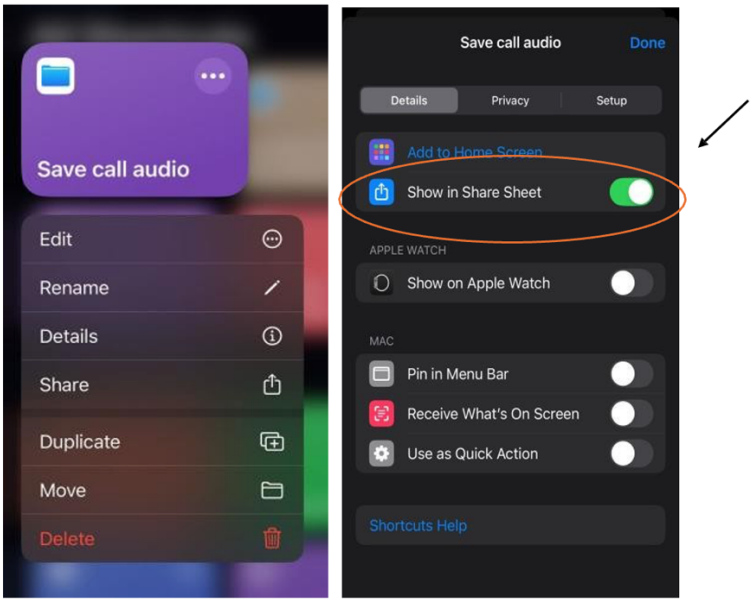
HOW IT WORKS

1. Record a call using the Phone app. Tap the **record** button (a red waveform) in the call UI. Everyone on the call hears "This call is now being recorded."

When you're done, stop the recording or hang up. iOS saves the file and transcript as a note in **Notes → Call Recordings → tap "View Saved Call"** to open the note immediately.

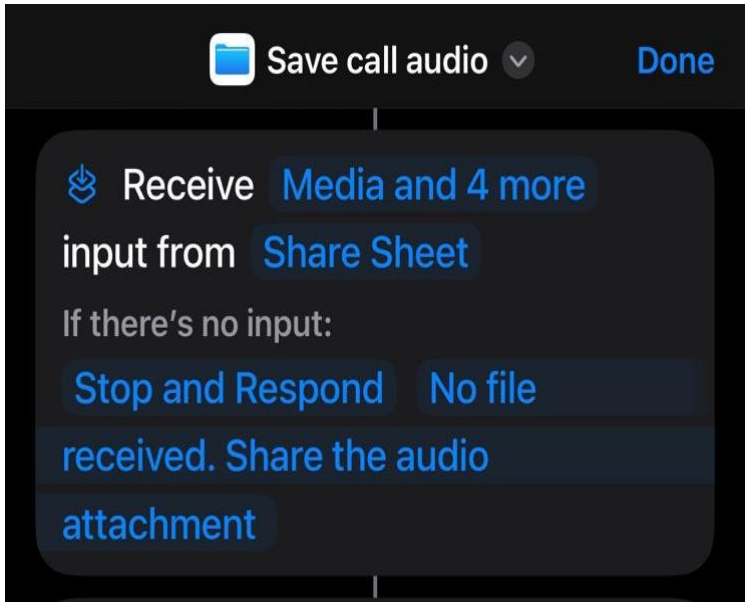
2. In the note you can tap **Transcript** to view the transcription. Use **Add Transcript to Note** to insert the text into the note body.

3. You manually export the audio attachment via Share Sheet.



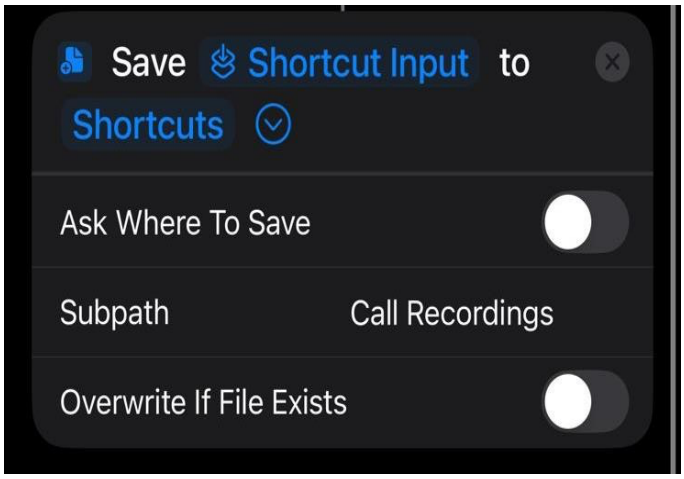
Because iOS can't automatically export a call recording attachment from Notes, the Share Sheet is used to pass the audio file into a Shortcut

Tap the **…** icon, enable **"Show in Share Sheet"**, and set **Accepts** to **Files** and Media → Audio. Actions are added in this order:



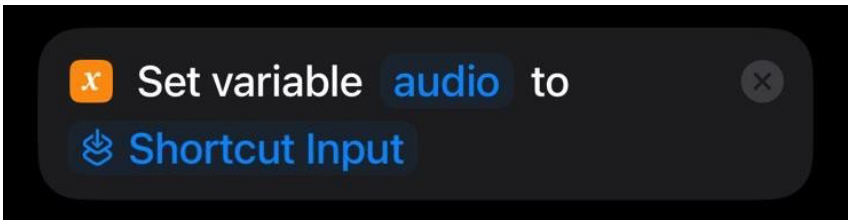
"If provided input is empty → Stop and show message 'No file received'."

- **Save File** → Input (**Provided Input)**, Ask Where to Save = **Off**, Save to = **Shortcuts**, Subpath = Call Recordings. This stores the .m4a in iCloud Drive/Shortcuts/Call Recordings.



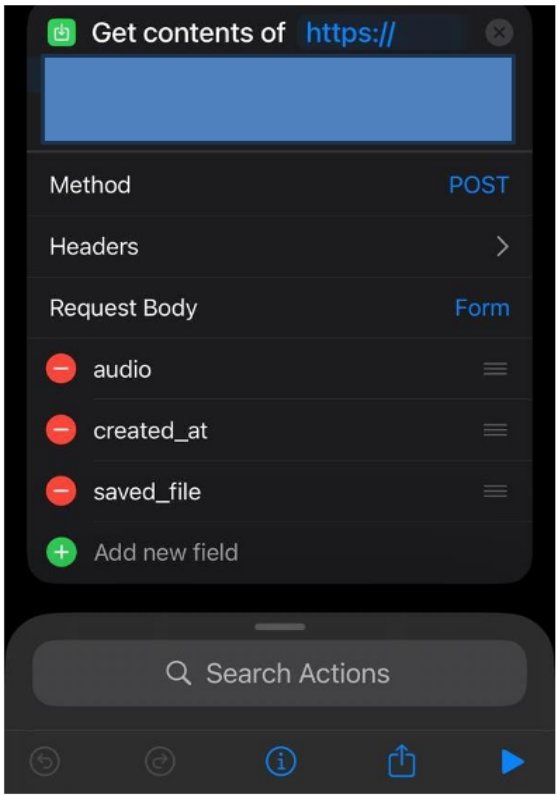
Here, it gets saved in the cloud in a folder called Call Recordings. (You can name this folder anything; 'Call Recordings' is recommended.)

- **Set Variable** audio to **Provided Input** to reuse this for the upload.



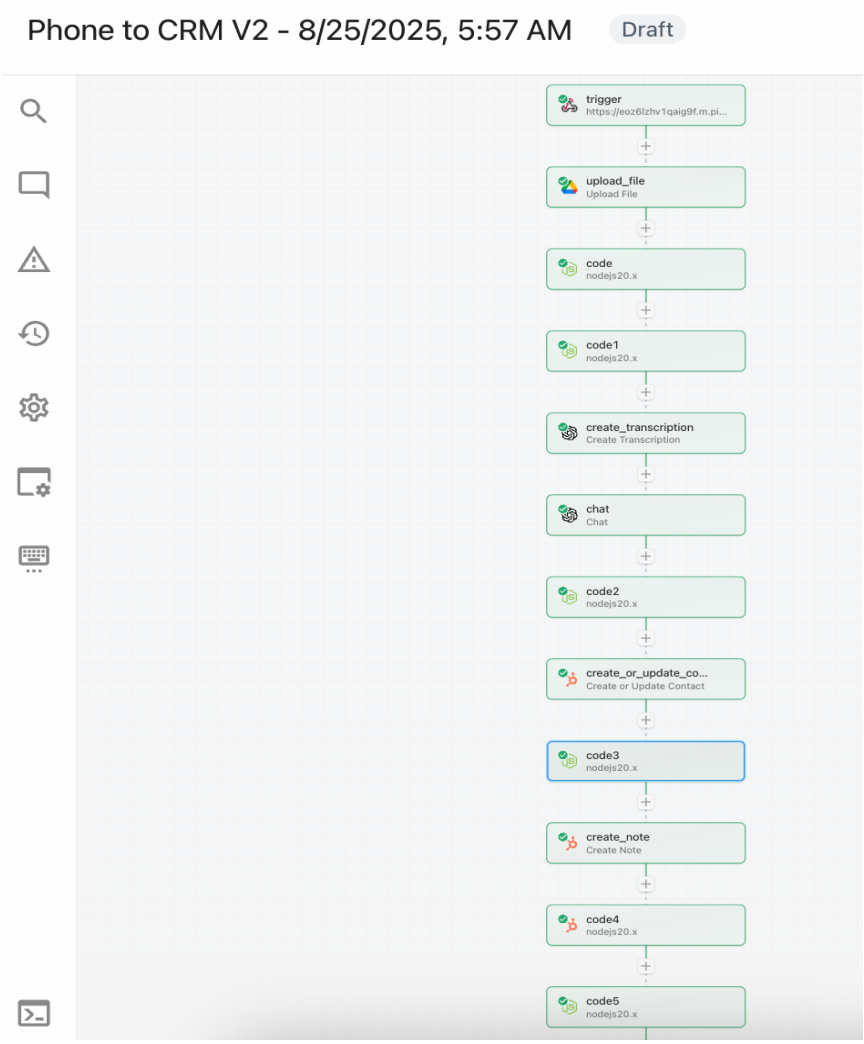
- **Get Contents of URL** → URL = Pipedream Webhook endpoint → Method = **POST** → **Request Body** = **Form**. Add fields:

  - **audio** → File (Shortcut variable: `audio`)
  - **filename** → Text (original filename or custom)
  - **phone_raw** → Text (if available)
  - **duration_seconds** → Number (if available)
  - **created_at** → Current Date (ISO 8601)



Tip: Pin the shortcut to the top of the Share Sheet (Edit Actions → Add to Favorites) for one-tap access.

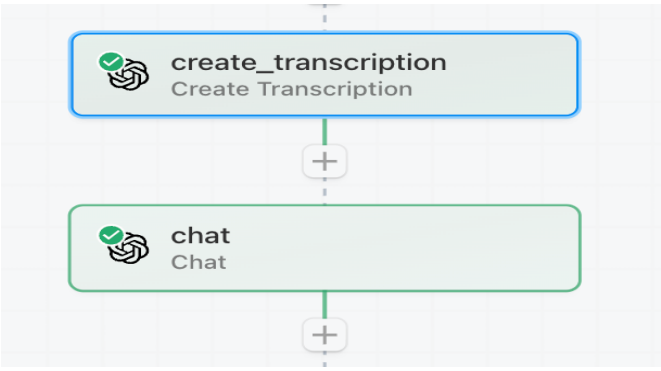
4. **Webhook workflow (Pipedream)**
   a. Receive audio and metadata from the Shortcut.
   b. Store/upload audio (optional).
   c. Transcribe audio → `transcript_text`.
   d. Summarize and extract structured fields (summary, key points, action items, follow-up suggestions).
   e. Find or create CRM contact (commonly keyed by `phone_raw`).
   f. Create a CRM note with summary, actions and transcript.

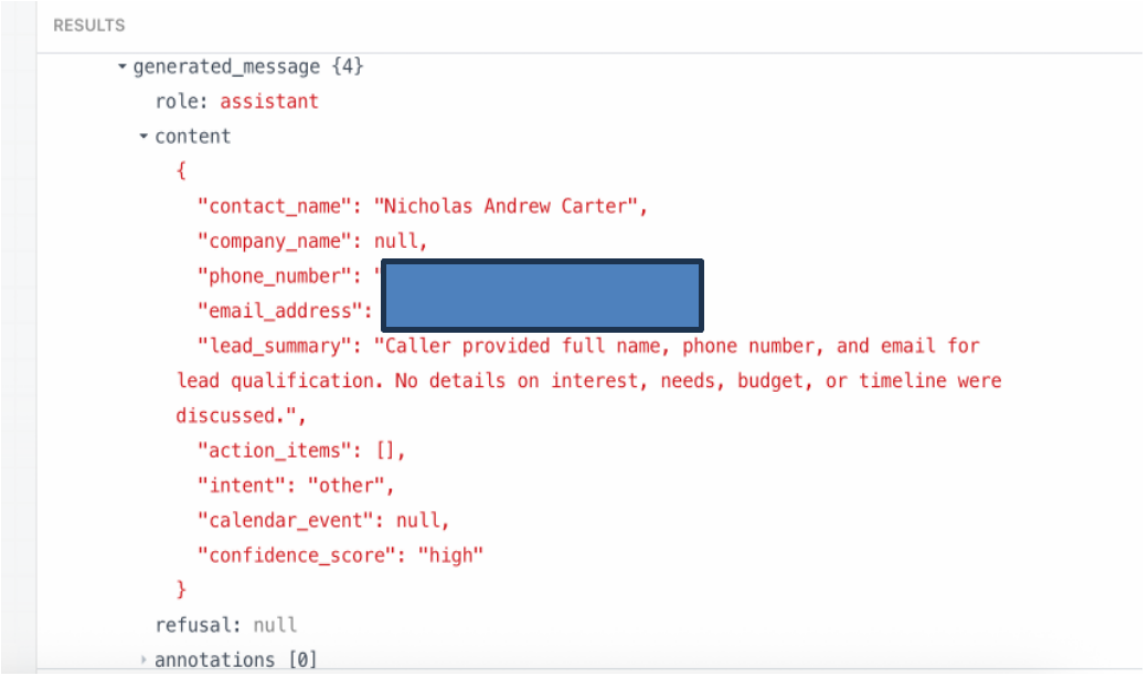


Transcription (Deepgram + optional Whisper)

This workflow transcribes the exported call recording using a transcription provider (Deepgram). For reliability, a second transcript can be generated (e.g., Whisper) and the extraction step can compare both transcripts, prioritizing details that match (names, phone numbers, emails).

Mode selection: short files can be transcribed synchronously; larger files may use async/callback processing.". **Output:** transcription returns `transcript_text` which is passed into the extraction step."



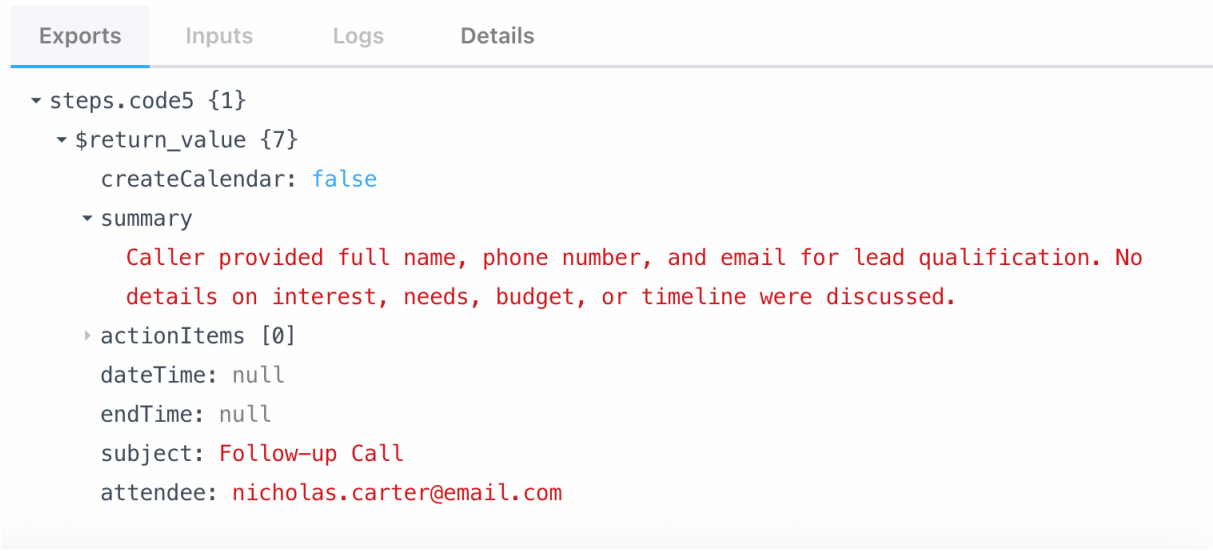


After the audio is uploaded and transcribed (Deepgram/Whisper), the transcript text is passed into the OpenAI **Chat** step with instructions to return a **single valid JSON object**.

The model reads the transcript and extracts CRM-ready fields such as `contact_name`, `phone_number`, `email_address`, plus a short `lead_summary`, `action_items`, and an `intent` classification. In the example shown, the caller provided only their contact details, so `action_items` is an empty list and `calendar_event` is `null` (no scheduling request detected).

This structured JSON output is then used by the next steps (e.g., parsing/validation, CRM upsert, note creation, and optional calendar logic).

Finally, the workflow writes the extracted summary and action items to HubSpot as a Note. If a follow-up time is detected, it optionally creates a calendar event.



Security
- API keys are stored in environment variables (e.g., `DEEPGRAM_API_KEY`) and are not included in this repository.
- Webhook/callback URLs are replaced with placeholders in public documentation.

Limitations:
- **No automatic export**: iOS does not currently allow Shortcuts to automatically extract call recording attachments from Notes, so one manual Share Sheet action is required.
- **Region availability**: call recording availability varies by region/language.
- **Consent requirements**: you must comply with applicable consent and privacy laws.

CONCLUSION

This setup creates a lightweight “one-tap export” path from iPhone call recordings into a webhook workflow. From there, transcription and summarization can run automatically and update your CRM in a consistent format.
It’s a practical middle-ground until iOS supports fully automatic export of call recordi