

Contacts

September 10, 2026

Contacts

What Contacts is for

Contacts is the shared contact database for the people and relationship details your teams need to find together. Use the list when you need to locate shared contact history instead of keeping names and contact details in personal phones, inboxes, or separate files.

If you need to...	Go to
Recognize the list and its columns	Understand the Contacts list
Open the list	Find the Contacts list
Create a contact	Create a contact
Review a saved contact	Contact record
Check why an action is unavailable	When a Contacts action is unavailable

Before you start

Actions appear only when your account and the contact meet the required access and branch conditions. Before you begin, make sure you are signed in with access to Contacts and know whether the contact belongs to the branch you are working with.

The list is available when the Contacts subscription is included. **New** is available when your account has permission to create a contact. A row's edit action is available when the row belongs to the same branch. The row's delete action requires both the same-branch

condition and
delete permission.

Find the Contacts list

Open the Contacts list when you need to review shared relationship information or choose a contact action.

Prerequisites

- You are signed in.
- Contacts is included in your subscription.

Steps

1. Open the Contacts area.
2. Confirm that the Contacts list is open.
3. Confirm that the page heading reads **Contacts**.

Title	Name	Position	Department	Account	Branch
Mr.	Mohamed Khattab	Procurement & contracts spec...	procurement	Phosphate Misr	Shotec S.A.E
Eng.	Mohamed shahien	manager	Engineering department	Arabian Milling	Shotec S.A.E
Eng.	Merna Gamal	project engineering	Engineering department	Petrojet	Shotec S.A.E
Mr.	essam saeed	process engineer	Engineering department	Enppi	Shotec S.A.E
Mr.	Mahmoud Abo Zeed		Purchasing	SOPC	Shotec S.A.E
Eng.	Adel Rabie	Operations Vice Manager	Operations	Petrogas	Shotec S.A.E
Eng.	Samuel Wadie			AMENT	Shotec S.A.E
Mr.	Amr Salah			BAI	Shotec S.A.E
Mr.	Karim Eltawill	Project Coordinator	Project	Orascom (OCI)	Shotec S.A.E
Mr.	Osama Ibrahim	Maintenance Manager &SHE ...		Archroma	Shotec S.A.E
Mr.	Ahmed Abd El-Rahman	turbines GM	turbines	WDEPC	Shotec S.A.E
Mr.	Abdelmoneim Gamal	Service engineer		ECM	Shotec S.A.E

Count: 3,097

< 1 2 3 4 5 ... 104 >

Tickets

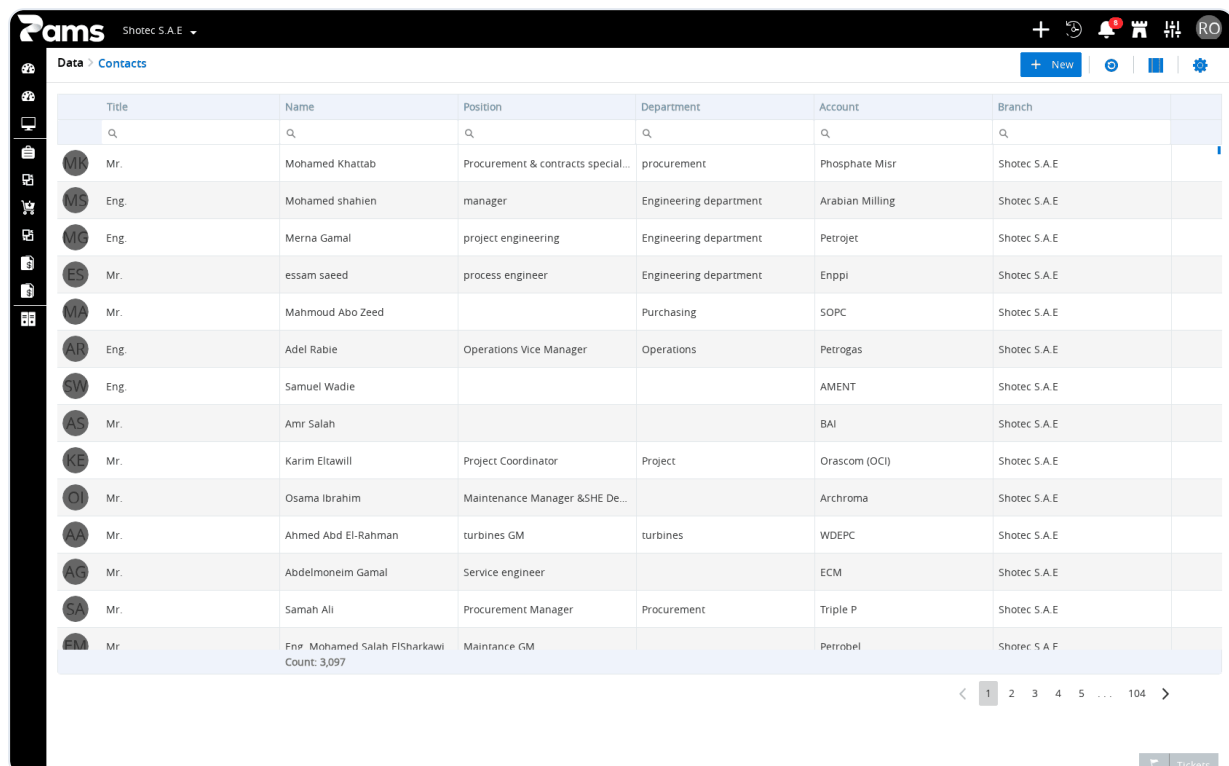
Result: The Contacts list is open.

Understand the Contacts list

A contact row brings together the visible identity, role, department, account, and branch information that helps you recognize the right person. The list currently shows these headers:

Header	What you use it to recognize
Title	The person's title or salutation
Name	The contact's name
Position	The person's position
Department	The person's department
Account	The related account
Branch	The related branch

The list also includes an identifier and avatar area for each row. The headers you see come from your saved list layout, so work from the headers visible in your list rather than expecting every list to have the same columns.



Title	Name	Position	Department	Account	Branch
Mr.	Mohamed Khattab	Procurement & contracts special...	procurement	Phosphate Misr	Shotec S.A.E
Eng.	Mohamed shahien	manager	Engineering department	Arabian Milling	Shotec S.A.E
Eng.	Merna Gamal	project engineering	Engineering department	Petrojet	Shotec S.A.E
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Mr.	Osama Ibrahim	Maintenance Manager &SHE De...		Archroma	Shotec S.A.E
Mr.	Ahmed Abd El-Rahman	turbines GM	turbines	WDEPC	Shotec S.A.E
Mr.	Abdelmoneim Gamal	Service engineer		ECM	Shotec S.A.E
Mr.	Samah Ali	Procurement Manager	Procurement	Triple P	Shotec S.A.E
Mr.	Enr Mohamed Salah F'Sharkawi	Maintenance GM		Petrobel	Shotec S.A.F

The list toolbar includes **New**, **Refresh**, **Table Layout**, and **Settings**. **New** is the labelled action; the other toolbar actions are identified by their displayed titles.

Choose the next Contacts action

From the list, you can start a contact, open a saved contact, export the list, or delete a contact.

If you need to...	Select or use
Start a new contact	New
Open a saved contact	Select the row's edit action
Prepare a list export	Export
Remove a contact	Select the row's delete action, then confirm Delete

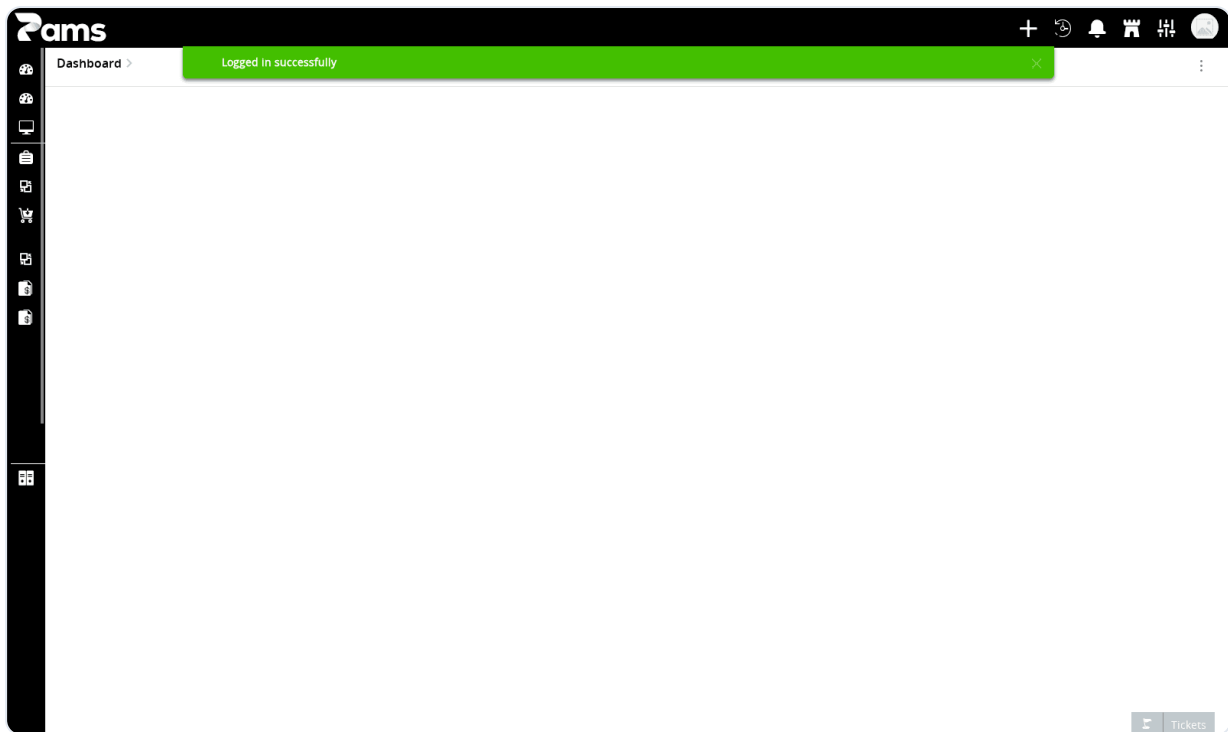
Prerequisites

- For **New**, your account has create permission.
- For a row edit or delete action, the contact belongs to the same branch.
- For deletion, your account also has delete permission.

Steps

1. Select the action that matches your task in the table above.
2. Complete the selected action:

Task	Action
Start a new contact	Select New .
Open a saved contact	Select the row's edit action.
Prepare a list export	Select Export .
Remove a contact	Select the row's delete action.
Confirm removal	After <code>Are you sure you want to delete this contact?</code> appears, select Delete .



The export choice is headed **Exporting List:** . Select **Cancel** to leave the export choices, or select **Export** to continue with the export action.

Result: The selected list action is open, or the contact deletion has been confirmed.

When a Contacts action is unavailable

If an expected action is absent, compare the list and contact conditions below.

What you check	What you see
Contacts subscription	The Contacts list is replaced by the subscription upgrade surface when Contacts is not included.
Create permission	New appears only when Contacts is included and your account has create permission.
Contact branch	The row edit or delete action is available when the contact belongs to the same branch.
Delete permission	The row delete action also requires delete permission.
Saved list layout	The headers currently visible on your list identify the columns available to you.

Result: You know whether the missing surface is controlled by subscription, permission, branch access, or the saved list layout.

When a list action goes wrong

Use the message text to choose the next response.

What you see	What to do
Are you sure you want to delete this contact?	Check the contact, then select Delete only when the deletion is intended.
Exporting List:	Choose Cancel to leave the export choices or Export to continue.
Forbidden characters detected. Please remove them and try again.	Remove the forbidden characters from the value you entered, then try the action again.

Result: You can match the message on screen to the applicable list action and continue from the correct page.

What to do next

Choose the page that owns the work you need to continue:

- Open [Create a contact](#) when you need to enter and save a new contact.
- Open [Contact record](#) when you need to review or maintain a saved contact.

Result: You are directed to the page for the next contact task.