



CompanyCam

COMPANYCAM INTEGRATION

Process for integrating the CompanyCam app into your Salesforce Organization

This document is intended for use by Salesforce users who are installing the CompanyCam managed application package in their own Salesforce instance.

PURPOSE

The documentation outlines in step-by-step detail how to install the application package and configure the Salesforce instance to display the integrated CompanyCam data using standard Salesforce Objects.

Instructions are included for organizations using Lightning, and also for Classic.

Please note:

Only Salesforce users with System Administrator privileges are able to install application packages.

ROADMAP

INSTALL

Install CompanyCam package.

AUTHORIZE

Receive Authorization Link from CompanyCam and apply to Salesforce system.

PERMISSIONS

Add user permissions as needed to access the CompanyCam details.

OBJECT

Choose which object to add the CompanyCam projects to in Salesforce.

QUESTIONS

Common questions related to the install.

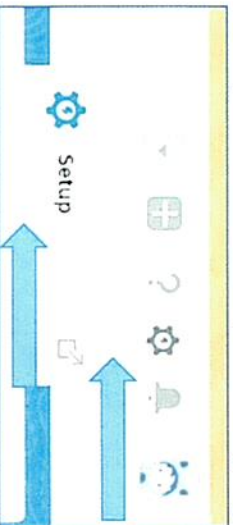
[Lightning Setup](#)

[Classic Setup](#)

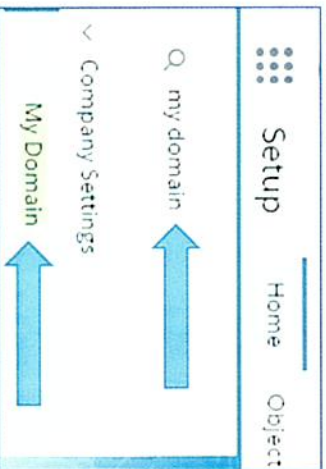
[Field Service Lightning](#)

INSTALLING

(1) Open the Setup homepage.



(2) In the Quick Find box, search for **My Domain** & Click the option available



NOTE:
Apppackages can only be installed by Salesforce System Administrators

(3) If you do not have a custom domain created yet, then you will need to EDIT your settings.



INSTALLING

After setting up a custom domain name, add the below to the link and GO.

[/packaging/installPackage.apexp?p0=04t310000000KnFy](#)

Our example would be:

[Companycam.my.salesforce.com/packaging/installPackage.apexp?p0=04t310000000KnFy](#)

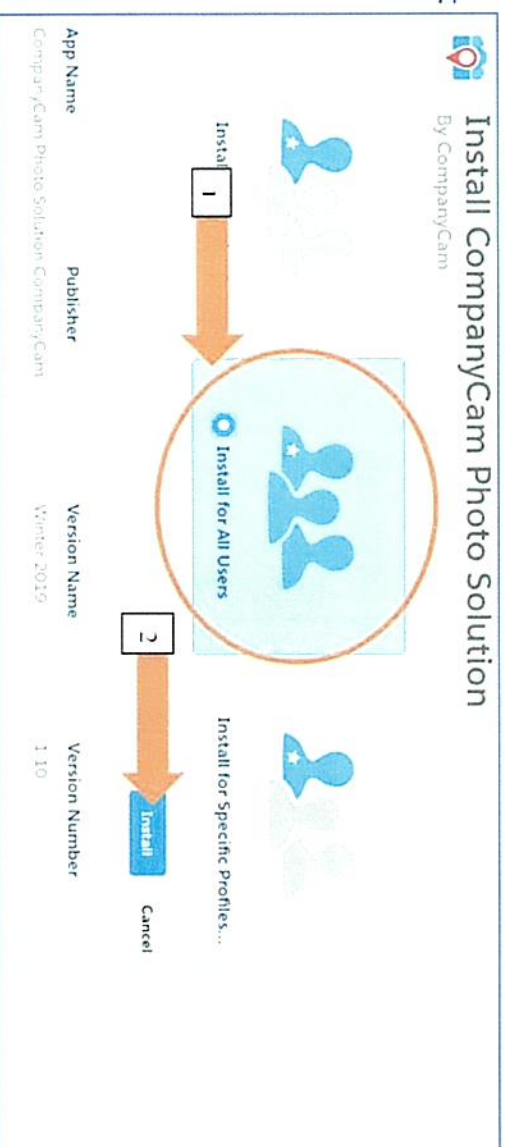
The screenshot shows the Salesforce 'My Domain' configuration page. At the top, there's a 'My Domain' header with a gear icon. Below it, the 'My Domain Step 4' section is active, with a sub-header 'Your domain name' and the value 'Companycam.my.salesforce.com'. A blue arrow points from this text to a diagram titled 'Step 4: Domain Deployed to Users'. The diagram shows a four-step process: 'Choose Domain Name' (with a checkmark), 'Domain Registration Pending', 'Domain Ready for Testing' (with a checkmark), and 'Domain Deployed To Users'. Below the diagram, the 'My Domain Settings' section is visible, showing 'My Domain Name' as 'Companycam' and 'Preferred Organization' as 'MySalesforce.com'. A 'Test' button is also present.

INSTALLING

After adding the updated URL to your browser and loading the new page, you will see the options on the right.

Because this package is governed at the instance level, and individual access to the package is provided through permission sets;

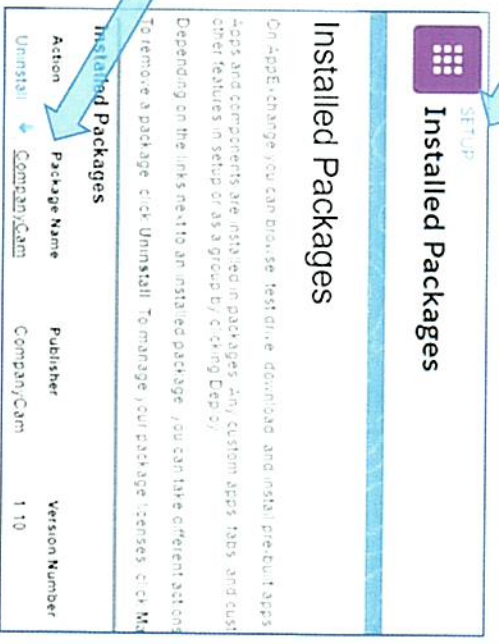
- (1) select the Install for All Users
- (2) click Install.



INSTALLING

After the package is installed, you will be directed to a Salesforce Setup page for Installed Packages and the system admin will receive an email notification stating that the package is installed.

To confirm the package is installed, look for CompanyCam on the page.

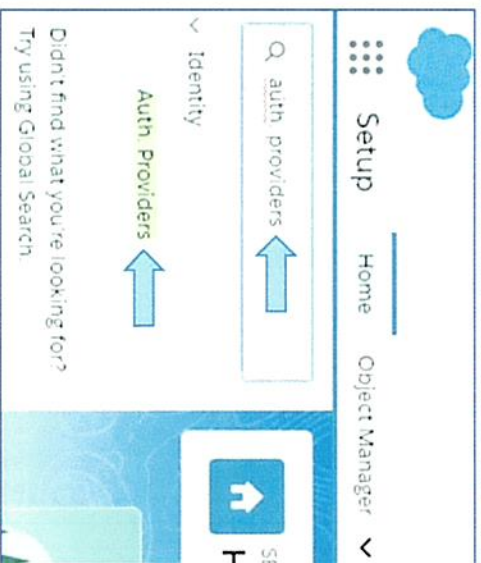


AUTHORIZE

For security, you need to Authorize the CompanyCam application, and receive approval notification from CompanyCam.

Note:
It could take up to 48 hours to receive Whitelisting email.

From Setup,
(1) Search for **Auth. Providers** in the Quick Find.



(2) Find the **Doorkeeper** item on the page.



Copy the **OAuth-Only URL** into your browser and GO



(4) Log in to CompanyCam (you must have a CompanyCam account)

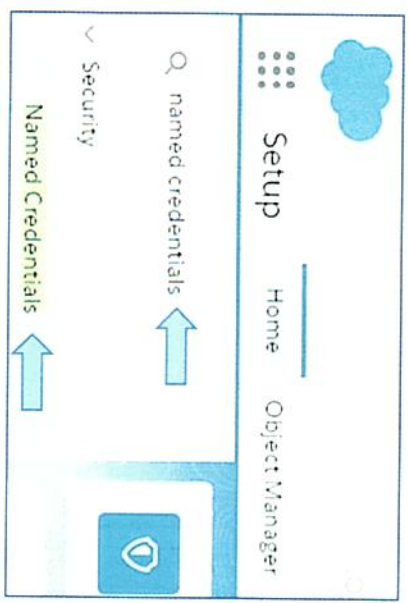
(5) Click the **Authorize** button when it appears

AUTHORIZE

To ensure Credentials are setup:

From Setup,

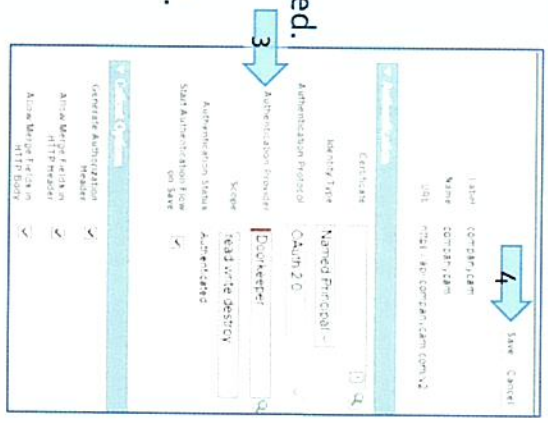
(1) Search for Named Credentials



(2) Click Edit on the CompanyCam credentials



(3) Ensure the Doorkeeper option is selected.



(4) Click the Save button when completed.

PERMISSIONS

From Setup,

- (1) Search for Permission Sets
- (2) Click the CompanyCam User permission set
- (3) Click Manage Assignments
- (4) Click Add Assignments
- (5) Select all the needed users from the list
- (6) Click the Assign button.

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The breadcrumb trail is Setup > Home > Object Manager > Permission Sets. The main heading is 'Permission Sets'. A search bar at the top contains 'permission sets'. Below the search bar, there are two tabs: 'Users' and 'Permission Sets'. The 'Permission Sets' tab is selected, showing a list of permission sets. The first item in the list is 'CompanyCam User', which is highlighted with a blue arrow labeled '2'. Below the list, there are buttons for 'New', 'Action', and 'Clone'. The 'Action' button is highlighted with a blue arrow labeled '3'. Below the 'Action' button, there is a dropdown menu for 'All Permission Sets' and a 'CompanyCam User' link. The 'CompanyCam User' link is highlighted with a blue arrow labeled '4'. Below the 'CompanyCam User' link, there is a table with columns for 'Full Name', 'Username', and 'Assign'. The table contains three rows of user information. The 'Assign' button is highlighted with a blue arrow labeled '6'. Below the table, there is a 'Remove Assignments' button.

Setup
Permission Sets

permission sets

Users

Permission Sets

Didn't find what you're looking for?
Try using Global Search.

Permission Sets

On this page you can create, view, and manage permission sets. In addition, you can use the Salesforce Admin Console to manage permission sets.

All Permission Sets Edit Delete

New

Action

Clone

CRM User

CompanyCam User

Setup
Permission Sets

CompanyCam User

Find Settings

Manage Assignments

Add Assignments

Remove Assignments

View: 21 Users Edit Settings

Full Name	Username	Assign
<input type="checkbox"/> User:CompanyCam	USER	<input type="checkbox"/> Assign <input type="checkbox"/> Cancel
<input type="checkbox"/> User:JIMPERSON	USER	<input type="checkbox"/> Assign <input type="checkbox"/> Cancel
<input type="checkbox"/> User:EDGAR	USER	<input type="checkbox"/> Assign <input type="checkbox"/> Cancel

OBJECT-LIGHTNING SETUP

The objects available by default are:

- Account
- Lead
- Opportunity

From Setup, click Object Manager and choose which object will store your CompanyCam projects.



OBJECT-LIGHTNING SETUP

Select the appropriate Page Layout you want to use for the CompanyCam details.

You can add the details to multiple Page Layouts on the same object.

SETUP > OBJECT MANAGER
Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

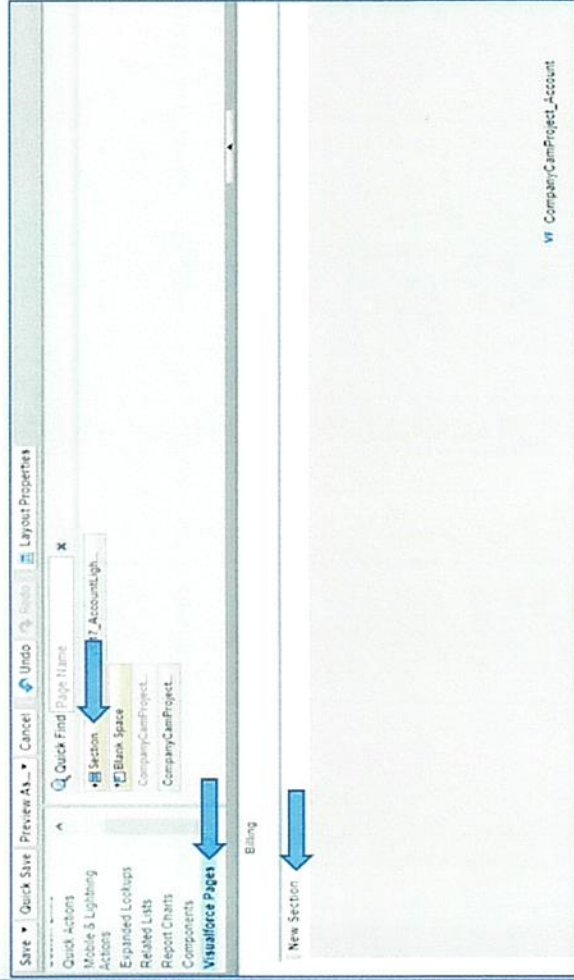
Field Sets

Page Layouts
4 Items, Sorted by Page Layout Name

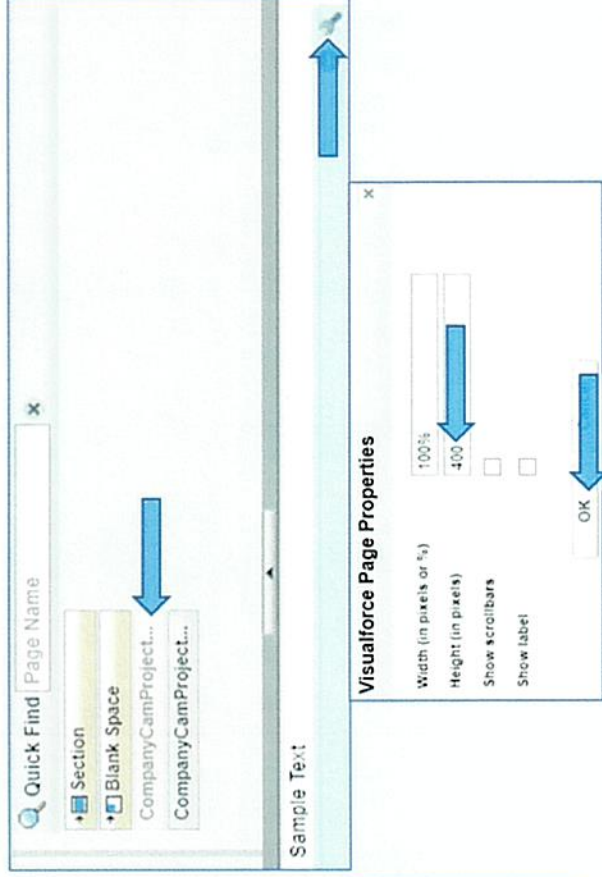
PAGE LAYOUT NAME
Account (Marketing) Layout
Account (Sales) Layout
Account (Support) Layout
Account Layout

OBJECT-LIGHTNING SETUP (OPTION 1)

Add a new Section somewhere to the Page Layout.



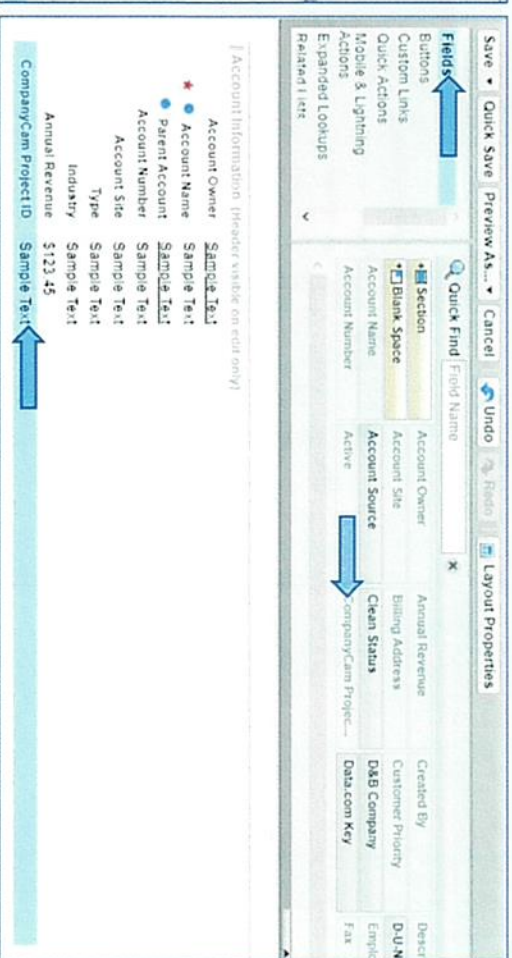
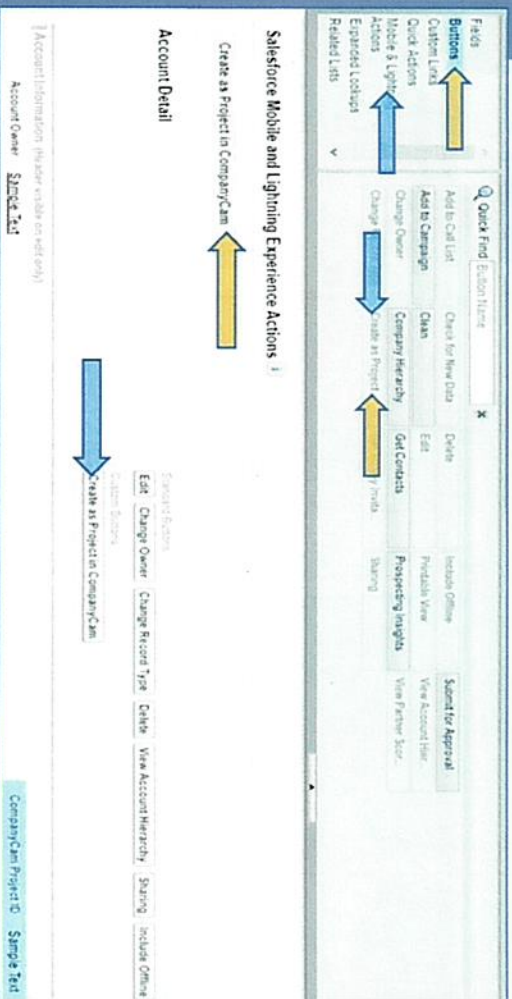
Add the Visualforce Page for the Object to the new Section, and set the pixel Height to at least 400.



OBJECT-LIGHTNING SETUP (OPTION 1)

Add the Create a CompanyCam Project Button, and Mobile Action to the Page Layout.

Add the CompanyCam Project ID field somewhere to the Page Layout.

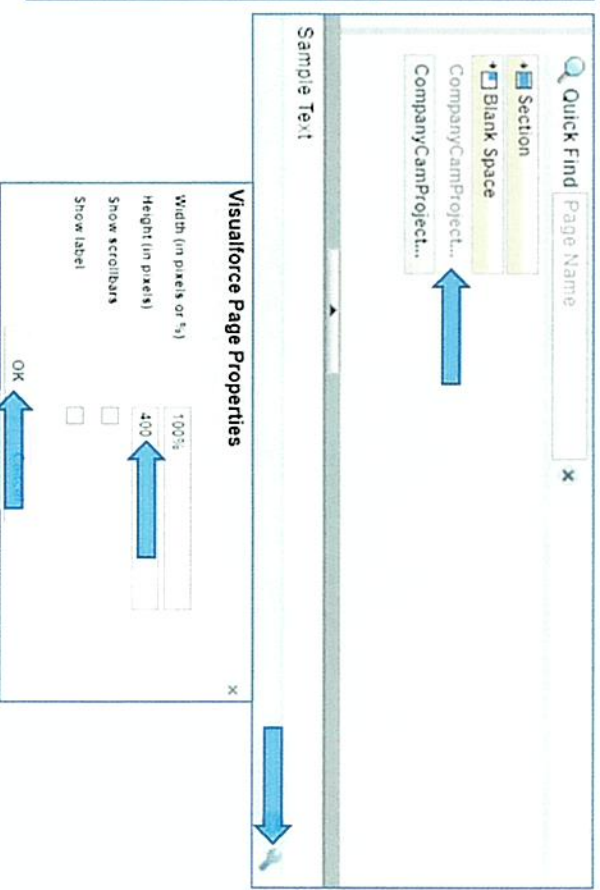


OBJECT-LIGHTNING SETUP (OPTION 1)

Add a new Section somewhere to the Page Layout.



Add the Visualforce Page for the Object to the new Section, and set the pixel Height to at least 400.

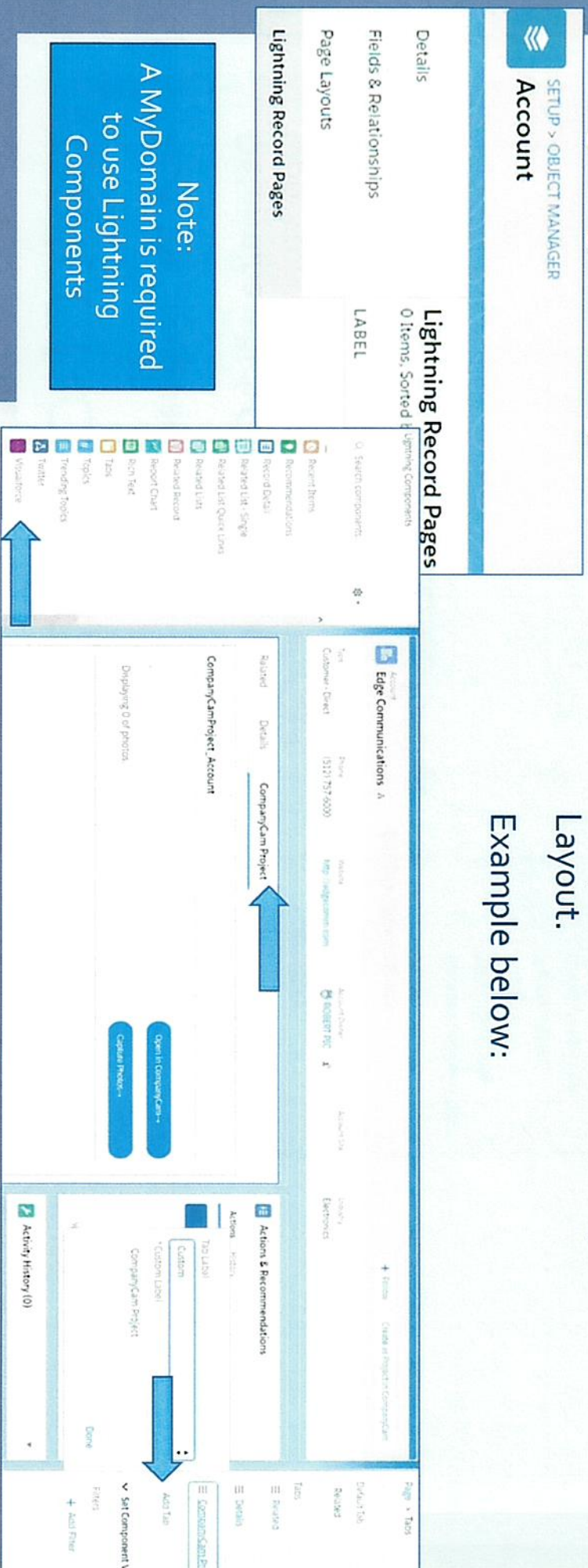


OBJECT-LIGHTNING SETUP (OPTION 2)

Create (or edit an existing) Lightning Record Page.

Click and drag a Visualforce component somewhere to your Layout.

Example below:



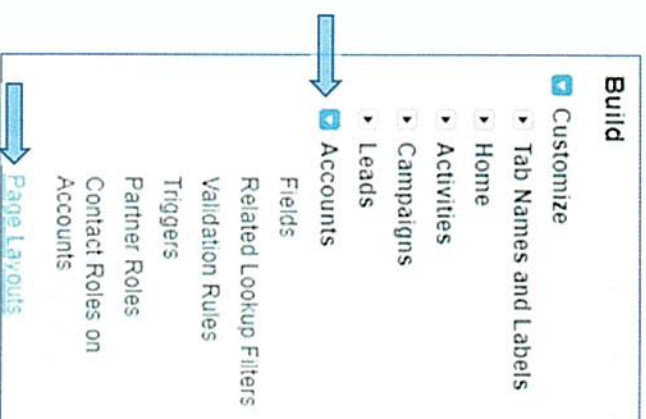
Note:
A MyDomain is required
to use Lightning
Components

OBJECT-CLASSIC SETUP

From the Setup page,

Determine which Object (Accounts, Leads, Opportunities) to add the CompanyCam projects into.

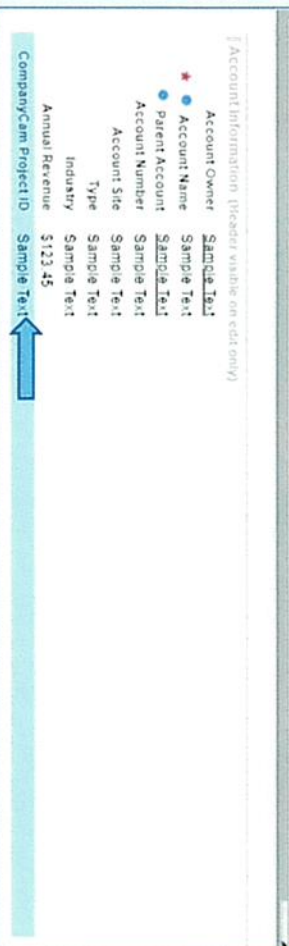
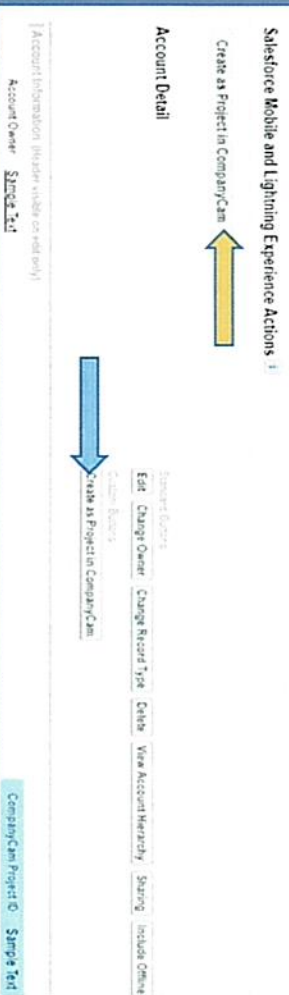
Open the appropriate Page Layout for that Object.



OBJECT-CLASSIC SETUP

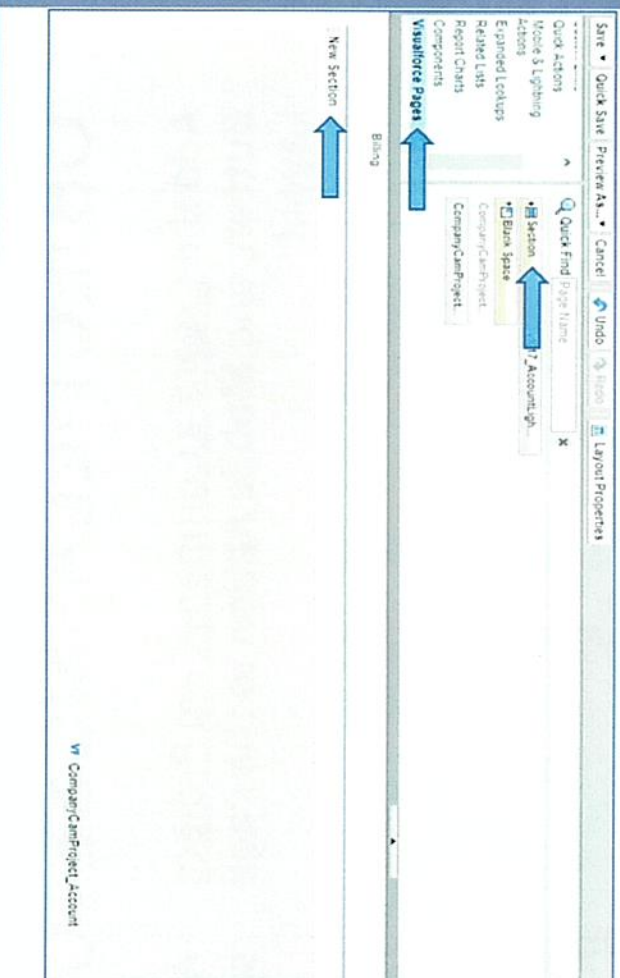
Add the Create a CompanyCam Project Button, and Mobile Action to the Page Layout.

Add the CompanyCam Project ID field somewhere to the Page Layout.

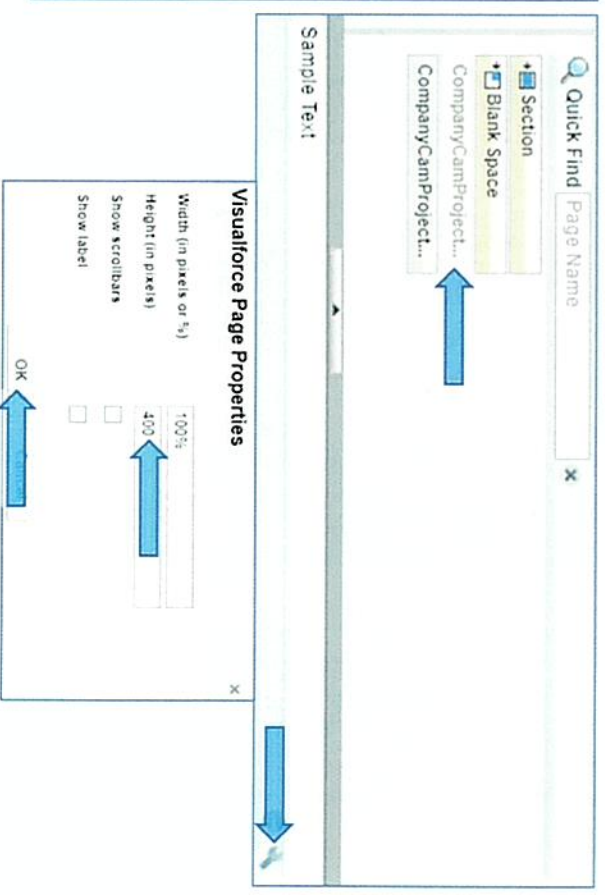


OBJECT-CLASSIC SETUP

Add a new Section somewhere to the Page Layout.



Add the Visualforce Page for the Object to the new Section, and set the pixel Height to at least 400.



INSTALLING FOR FSL

NOTE:
Appackages can only be installed by Salesforce System Administrators

After setting up a custom domain name, add the below to the link and GO.
/packaging/installPackage.apexp?po=04t3l00000KngS

Our example would be:
Companycam.my.salesforce.com/packaging/installPackage.apexp?po=04t3l00000KngS

The screenshot shows the 'My Domain' configuration page in Salesforce. At the top, it says 'My Domain' and 'My Domain Step 4'. Below this, there is a progress indicator for 'Step 4: Domain Deployed to Users' with a checkmark. A flowchart shows the steps: 'Choose Domain Name' -> 'Domain Registration Pending' -> 'Domain Ready for Testing' -> 'Edit My Domain Settings'. The 'Domain Ready for Testing' step is highlighted with a checkmark. Below the flowchart, there is a 'Domain Settings' section with a 'Domain Name' field containing 'Companycam'. A blue arrow points from the 'Domain Settings' header to the 'Domain Name' field.

OBJECT-FSL SETUP

The objects available by default for FSL are:
[Work Order](#)
[Service Appointment](#)

From [Setup](#), click [Object Manager](#) and choose which object will store your CompanyCam projects.

Add the [CompanyCam Project ID](#) field somewhere to the Page Layout.

[Back to Roadmap](#)

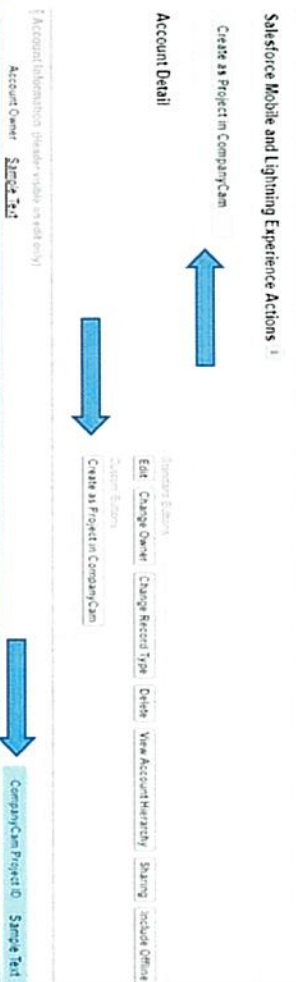
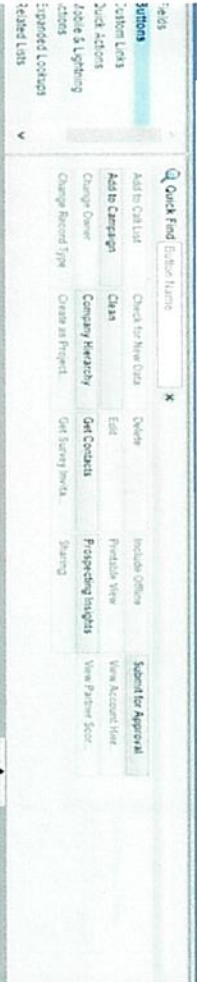


Back to Roadmap

OBJECT-FSL SETUP (OPTION 1)

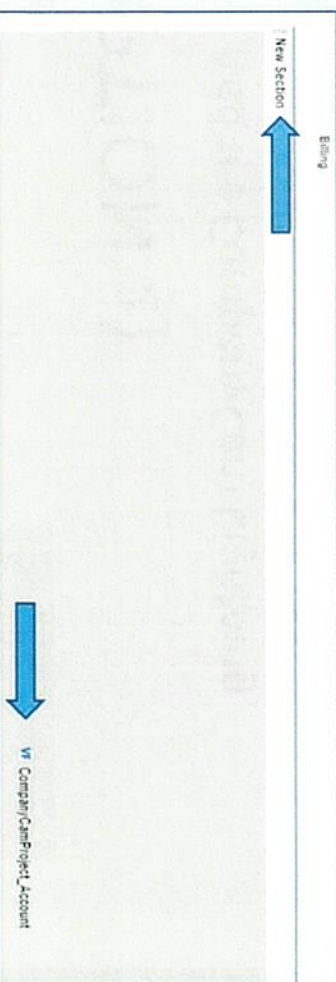
Add the Create a CompanyCam Project Button and Mobile Action to the Page Layout.

Add the CompanyCam Project ID field somewhere to the Page Layout.



Add a new Section somewhere to the Page Layout.

Add the Visualforce Page for the Object to the new Section, and set the pixel Height to at least 400.



OBJECT-FSL SETUP (OPTION 2)

Create (or edit an existing) Lightning Record Page.

SETUP > OBJECT MANAGER
Work Order

Details	Lightning Record Pages
Fields & Relationships	1 Items, Sorted by Label
Page Layouts	LABEL
Lightning Record Pages	Work Order Record Page
	ORG DEFAU
	Desktop

NOTE:
A MyDomain is required to use Lightning Components

Add the CompanyCam Lightning component somewhere to your Layout.

Example below:

The screenshot shows the Lightning Components editor interface. On the left, a 'Components' list is visible with categories: 'Standard (29)', 'Custom (0)', and 'Custom - Managed (4)'. Under 'Custom - Managed (4)', several components are listed, including 'Appointment Booking Communi...', 'CompanyCamLightningCommu...', 'Gantt Management', and 'EnhancedMaterials'. A blue arrow points from 'CompanyCamLightningCommu...' to the main editor area. In the main editor, a component titled 'CompanyCam Project' is being added to a layout. The component's ID is '000000001'. Below the component, there are two buttons: 'Open in CompanyCam...' and 'Capture photo...'. The right side of the editor shows a preview of the layout with fields for 'Owner', 'Case', 'Status', 'Start Date', 'End Date', and 'Subject'.

QUESTIONS?

<https://intercom.help/companycam/en/>

If you have issues with the pictures or projects disappearing, try resaving the Named Credentials.

For Custom objects, or custom install questions, contact CompanyCam Support & Alex Pickens will respond promptly.

Issues with Authorization or Whitelisting can be sent to Support@companycam.com. Please include your Organization ID, MyDomain (if applicable), and Company Name.

Adding a Lightning Component for the CompanyCam app requires setting up a MyDomain.

