COMPANYCAM INTEGRATION

Process for integrating the CompanyCam app into your Salesforce Organization

PURPOSE

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

2. The documentation outlines how to install the package and configure the Salesforce instance to display the integrated CompanyCam data.

ROADMAP

INSTALL	AUTHORIZE	PERMISSIONS	OBJECT	QUESTIONS

Install CompanyCam package.

Receive Authorization Link from CompanyCam and apply to Salesforce system.

Add user permissions as needed to access the CompanyCam details.

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

Lightning Setup

Classis Setup

Field Service Lightning

Common questions related to the install.

INSTALLING

NOTE: App packages can only be installed by Salesforce System Administrators

The current version (v1.13) of the CompanyCam managed package is available here:

https://[yourInstance].salesforce.com/packaging/installPackage.apexp?p0=04t3l000000KnFy

Replace [yourInstance] with the below depending on your Org setup:

Production Default: login

Sandbox Default: test

Custom Environment: custom mydomain
                         IE. Companycam.my

INSTALLING

After adding the updated URL to your browser and loading the new page, you will see the options on the right.
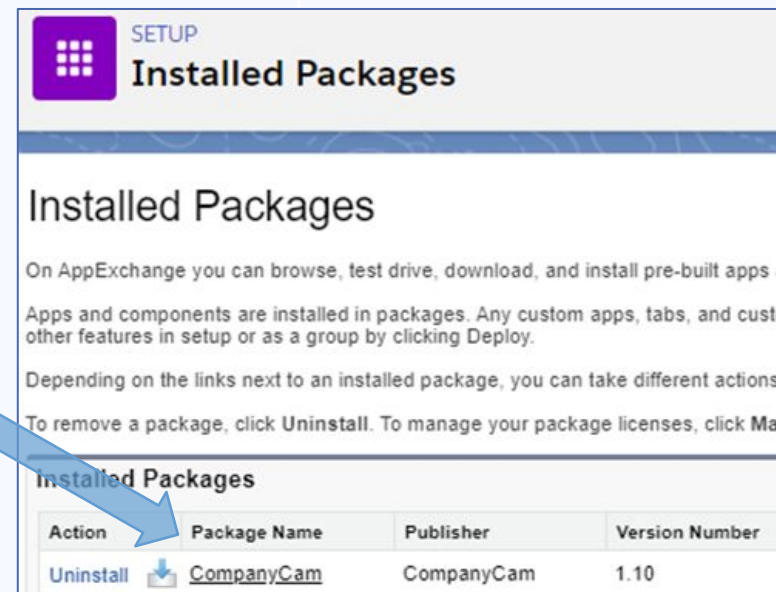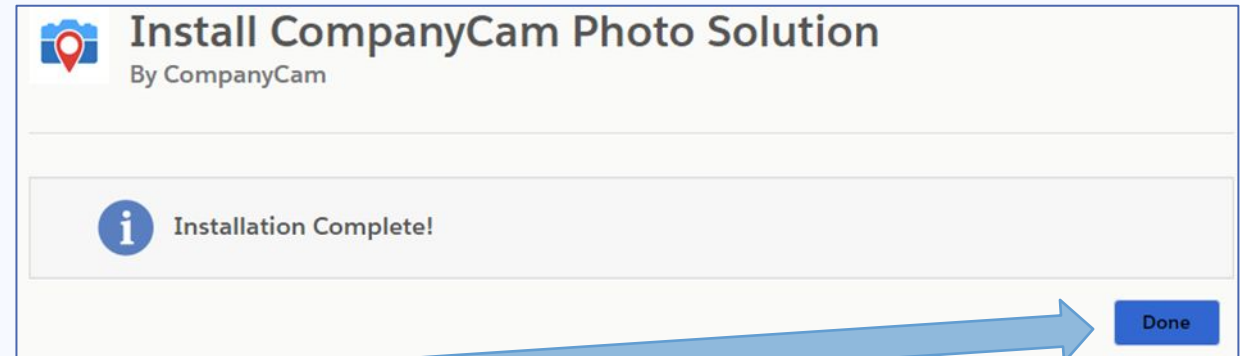
Because this package is governed at the instance level, and individual access to the package is provided through permission sets; (1) select the Install for All Users option, and then (2) click Install.

INSTALLING

Install CompanyCam Photo Solution
By CompanyCam

ℹ️ Installation Complete!

Done

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

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

SETUP
Installed Packages

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps

Apps and components are installed in packages. Any custom apps, tabs, and cust other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions

To remove a package, click **Uninstall**. To manage your package licenses, click Ma

Installed Packages

Action		Package Name	Publisher	Version Number
Uninstall	⬇️	CompanyCam	CompanyCam	1.10

AUTHORIZE

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

From Setup,
Search for auth. Providers
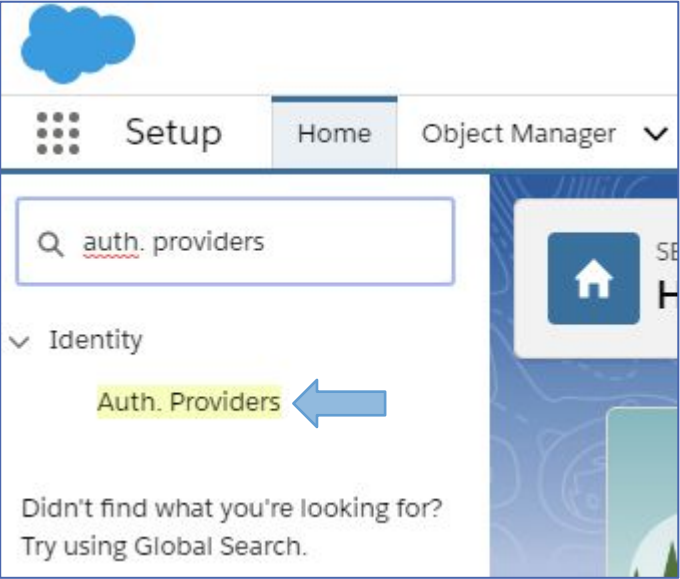
Find the Doorkeeper item.
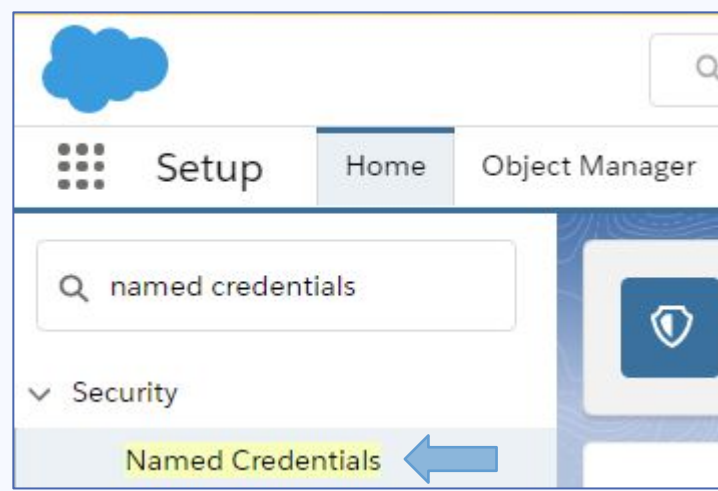

Copy the Oauth-Only URL into your browser and GO

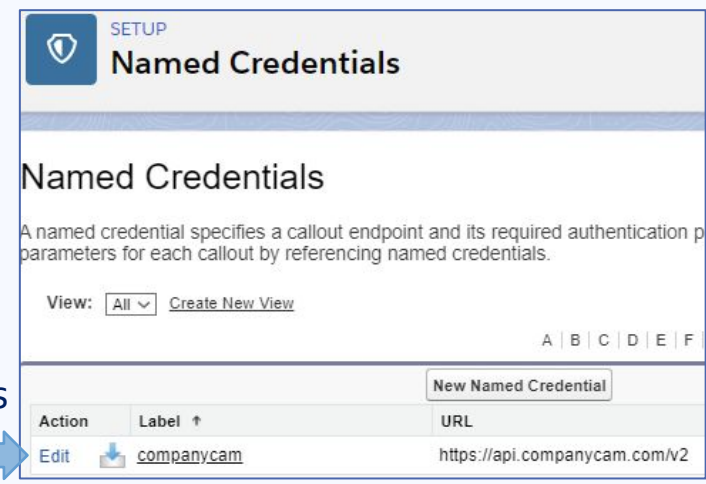Login to CompanyCam

Click the **Authorize** button when it appears
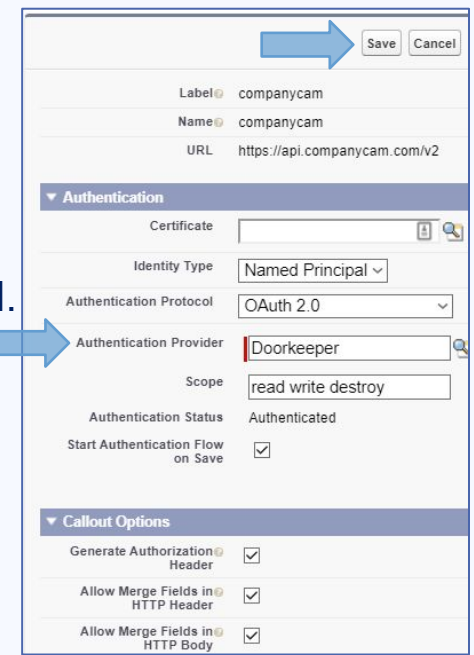
AUTHORIZE

To ensure Credentials are setup:

From Setup,
Search for Named Credentials

SETUP
Named Credentials

Named Credentials

A named credential specifies a callout endpoint and its required authentication p
parameters for each callout by referencing named credentials.

View: All Create New View

A | B | C | D | E | F

New Named Credential

Action	Label ↑	URL
Edit companycam	https://api.companycam.com/v2

Click Edit on the
CompanyCam credentials

Setup | Home | Object Manager

Q named credentials

∨ Security

Named Credentials

Save | Cancel

Label	companycam
Name	companycam
URL	https://api.companycam.com/v2

▼ **Authentication**

Certificate	
Identity Type	Named Principal
Authentication Protocol	OAuth 2.0
Authentication Provider	Doorkeeper
Scope	read write destroy
Authentication Status	Authenticated
Start Authentication Flow on Save	☑

Ensure the Doorkeeper option is selected.

Click the **Save** button when completed.

▼ **Callout Options**

Generate Authorization Header	☑
Allow Merge Fields in HTTP Header	☑
Allow Merge Fields in HTTP Body	☑

PERMISSIONS

- From Setup,

- Search for Permission Sets

- Click the CompanyCam User permission set

- Click Manage Assignments

- Click Add Assignments

- Select all the needed users from the list

- Click the Assign button.

OBJECT-LIGHTNING SETUP

Note: CompanyCam partners with Kruse.Cloud for all custom object implementations.
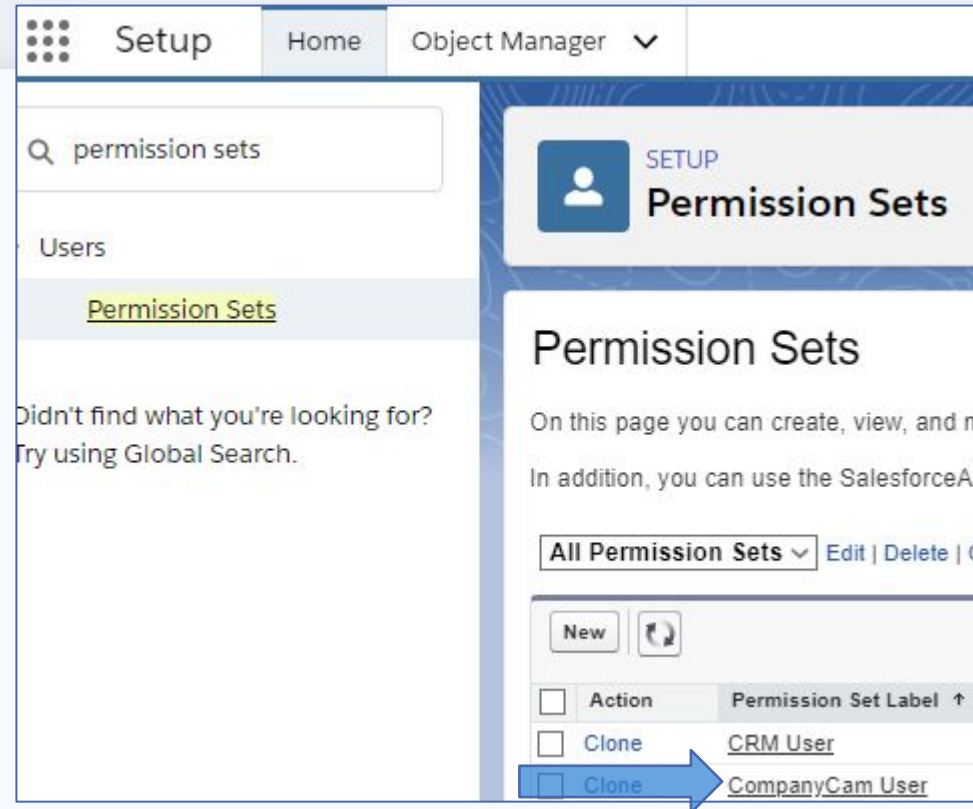
▪ The objects available by default are:
Account
Lead
Opportunity

▪ 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.

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.

- 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.

- Add a Visualforce component somewhere to your Layout.

- Example below:

Note: A MyDomain is required to use Lightning Components

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.

- 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: App packages can only be installed by Salesforce System Administrators

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https://[yourInstance].salesforce.com/packaging/installPackage.apexp?po=04t3loooooooKnGS

Replace [yourInstance] with the below depending on your Org setup:

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Sandbox Default: test

Custom Environment: custom mydomain
                              IE. Companycam.my

SETUP
My Domain

My Domain

My Domain Step 4

Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require it. can agree on.

Step 4 Domain Deployed to Users

Choose Domain Name → Domain Registration Pending → Domain Ready for Testing → Domain Deployed to Users

Edit My Domain Settings

Your domain name is   Companycam.my.salesforce.com

My Domain Settings   Edit

Login Policy   ☐ Prevent login from https://login.salesforce.com
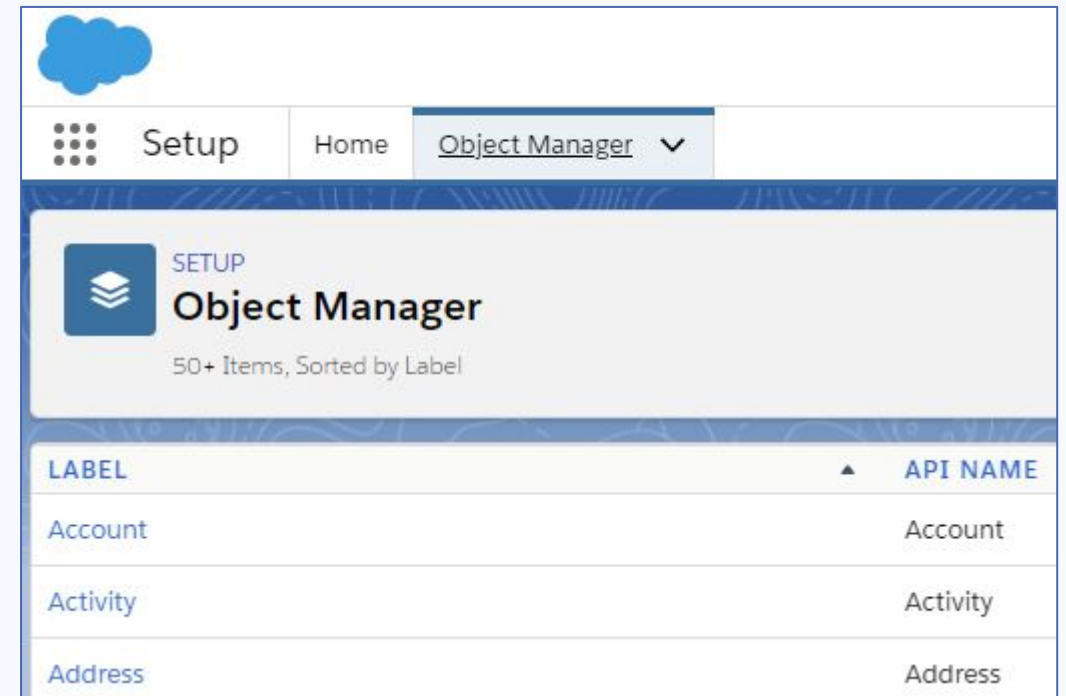
Redirect Policy   Decide whether to redirect anyone who uses bookmarks and links that contain your previous instance-specific domain::
                 Redirect to the same page within the domain

Your domain name is   Companycam

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.

Note: CompanyCam partners with Kruse.Cloud for all custom object implementations.

Setup   Home   Object Manager ⌄

SETUP
Object Manager
50+ Items, Sorted by Label

LABEL	API NAME
Account	Account
Activity	Activity
Address	Address

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.
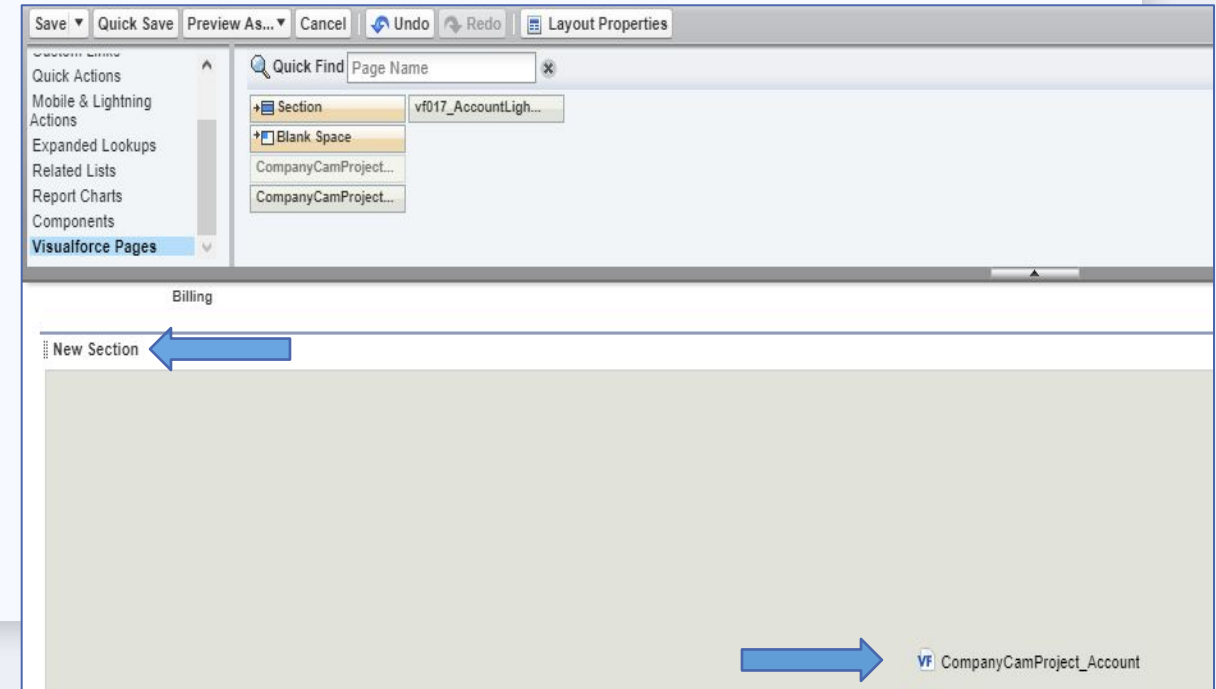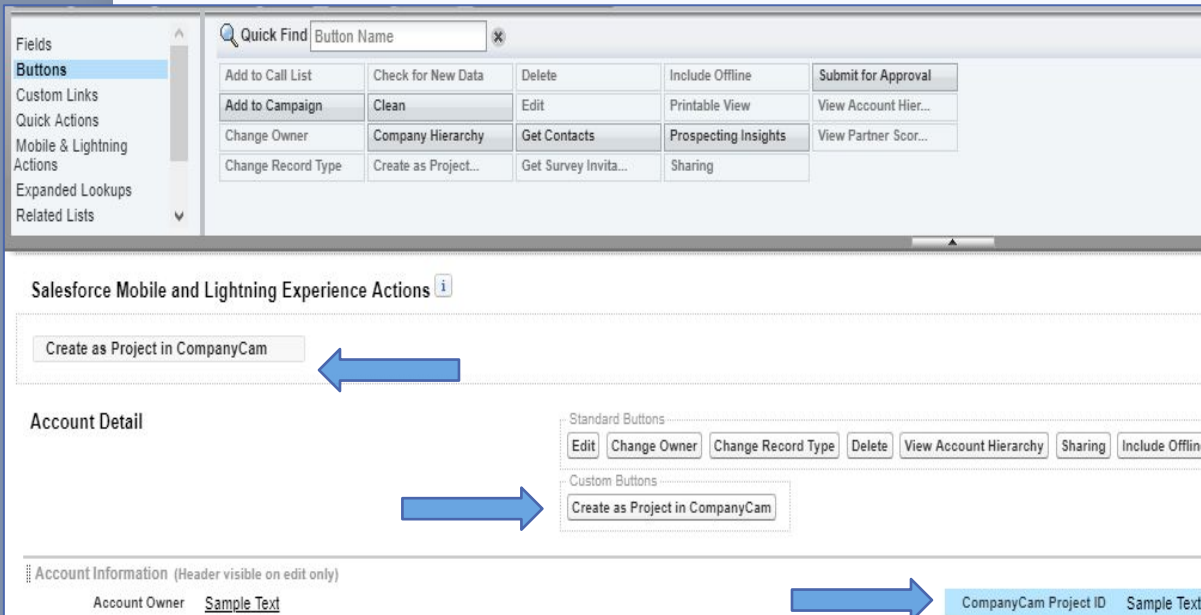
OBJECT-FSL SETUP (OPTION 2)

- Create (or edit an existing) Lightning Record Page.

- Add the CompanyCam Lightning component somewhere to your Layout.

- Example below:

Note: A MyDomain is required to use Lightning Components

QUESTIONS?

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

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

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.

For Custom objects, or custom install questions, contact Kruse.Cloud for additional services.

KRUSE.CLOUD | CompanyCam

www.kruse.cloud
Courtney@Kruse.Cloud
linkedin.com/company/kruse-cloud/

CompanyCam Salesforce Integration with **kruse.cloud**

Download Package

Contact Kruse.Cloud for Help

Enjoy Quick Implementation & New App

Included
Implementation on up to Three Custom Objects Performed by Salesforce Certified Resources.

Additional hours or customization available on request.

$1000
Fixed Cost

Post Implementation
Follow-Up to ensure satisfaction and best practices.

Ongoing Support Services available.