



CompanyCam

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 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.

Common questions related to the install.

Lightning Setup

Classis Setup

Field Service Lightning

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](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

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. If you're not ready to do this, you 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

INSTALLING

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

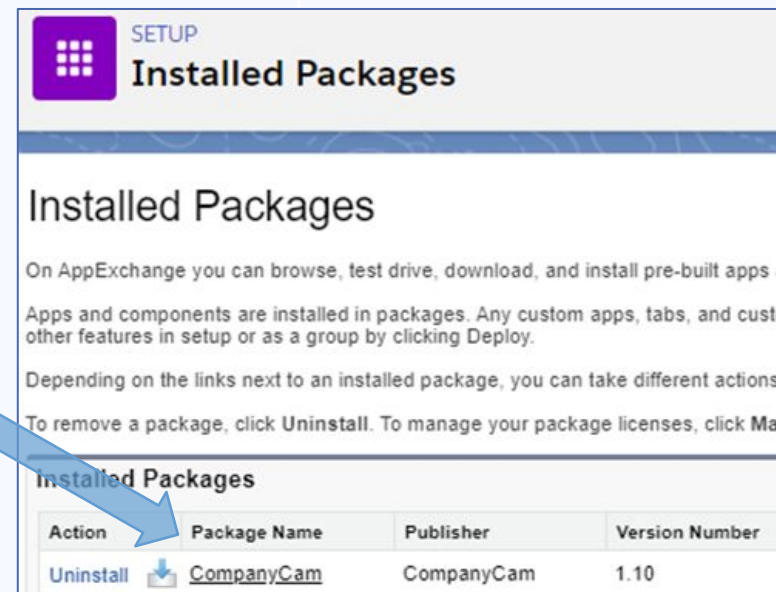
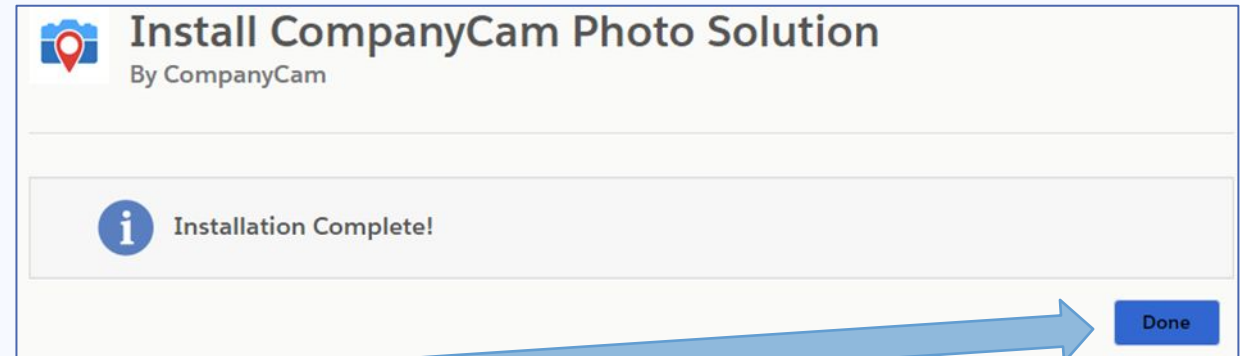
Because this package is governed at the instance level, and individual access to the package is provided through permission sets; (1) select the Install for All Users option, and then (2) click Install.

App Name	Publisher	Version Name	Version Number
CompanyCam Photo Solution	CompanyCam	Winter 2019	1.10

INSTALLING

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.

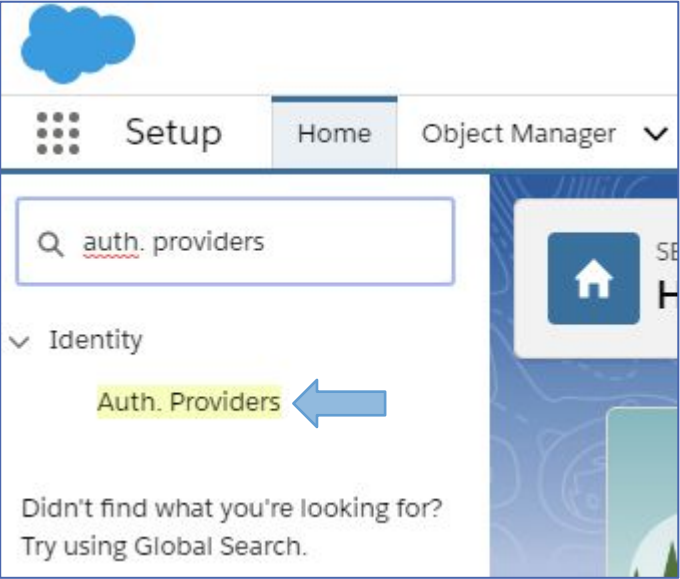
To confirm the package is installed, look for CompanyCam on the page.



AUTHORIZE

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

From Setup,
Search for auth. Providers



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

Find the Doorkeeper item.



Copy the Oauth-Only URL into your browser and GO

Salesforce Configuration	
Test-Only Initialization URL	https://
OAuth-Only Initialization URL	https://
Callback URL	https://
Single Logout URL	https://

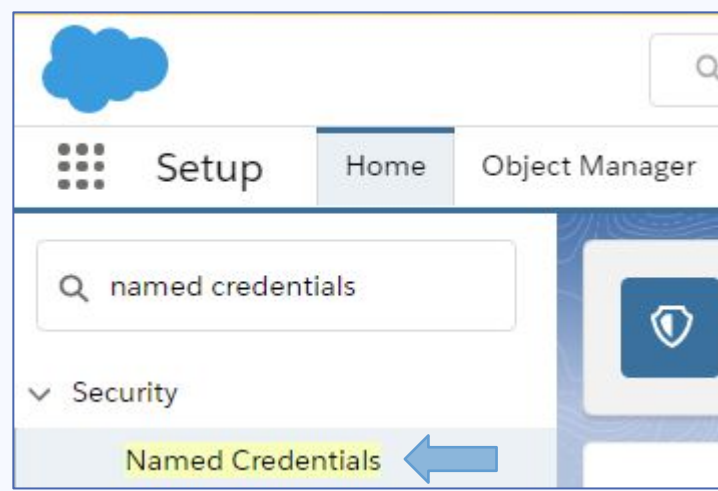
Login to CompanyCam

Click the Authorize button when it appears

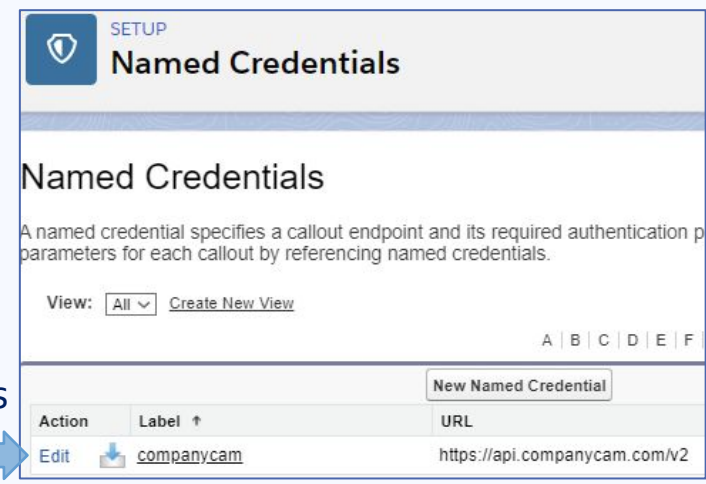
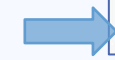
AUTHORIZE

To ensure Credentials are setup:

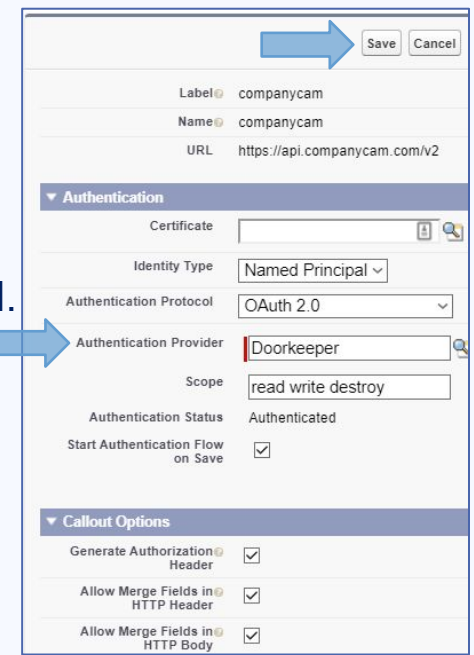
From Setup,
Search for Named Credentials



Click Edit on the
CompanyCam credentials



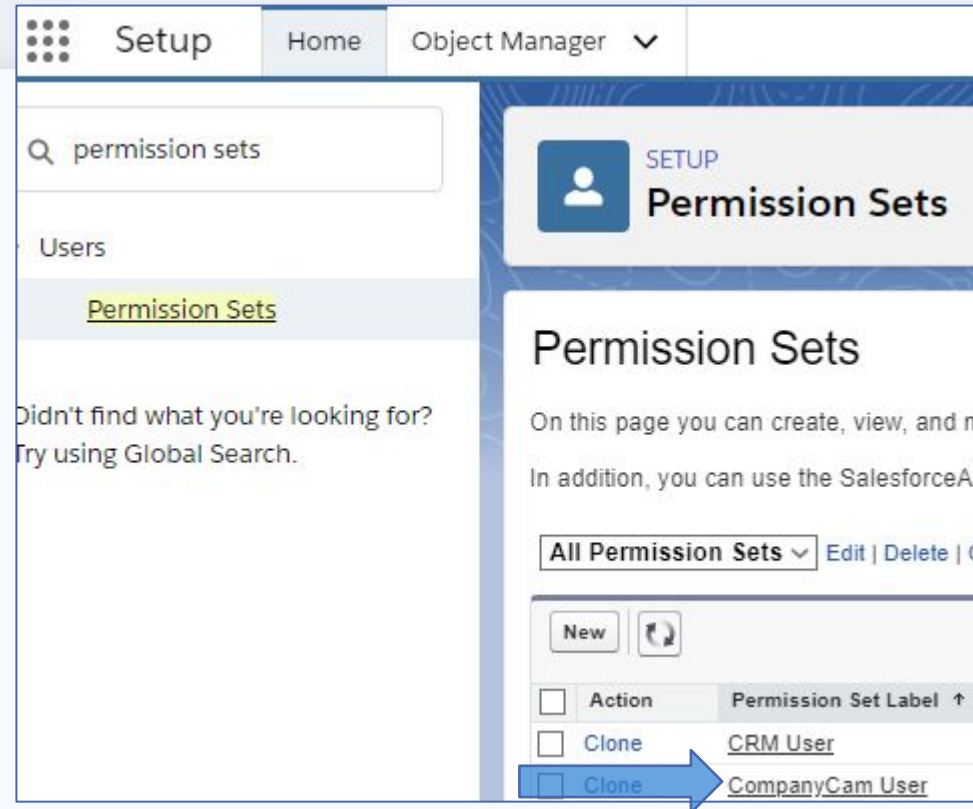
Ensure the Doorkeeper option is selected.



Click the Save button when completed.

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.



[Back to Roadmap](#)

OBJECT-LIGHTNING SETUP

- The objects available by default are:

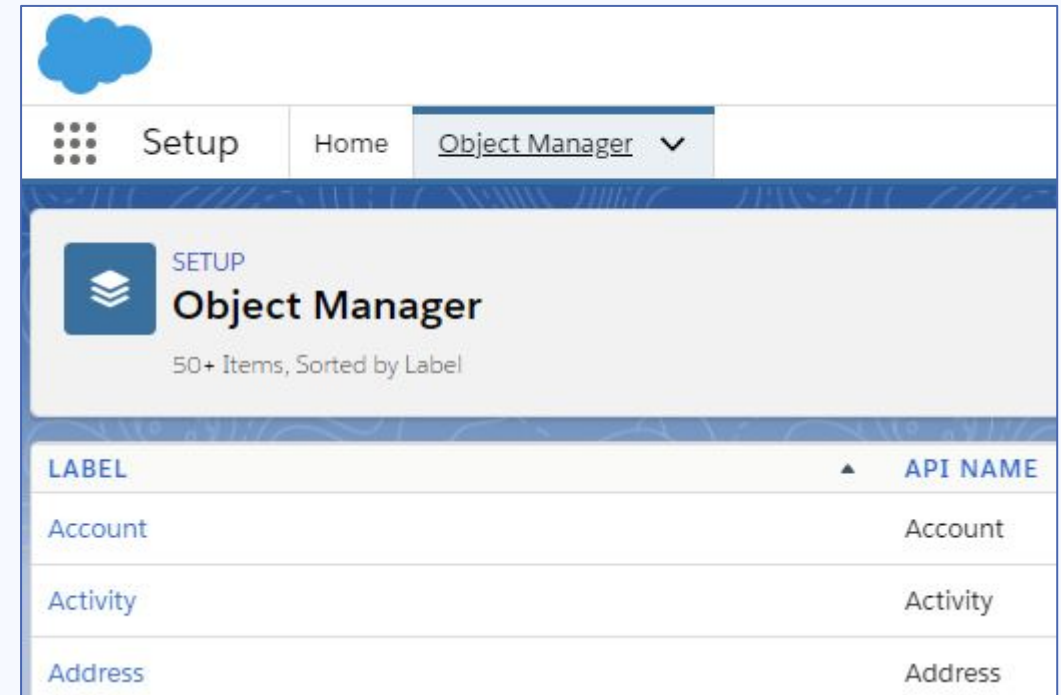
Account

Lead

Opportunity

- From Setup, click Object Manager and choose which object will store your CompanyCam projects.
- Add the CompanyCam Project ID field somewhere to the Page Layout.

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



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below the navigation bar, the 'Object Manager' section is displayed with a 'SETUP' icon and the text '50+ Items, Sorted by Label'. A table lists the default objects:

LABEL	API NAME
Account	Account
Activity	Activity
Address	Address

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.

Fields

Buttons

Custom Links

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Quick Find Button Name

Add to Call List	Check for New Data	Delete	Include Offline	Submit for Approval
Add to Campaign	Clean	Edit	Printable View	View Account Hier...
Change Owner	Company Hierarchy	Get Contacts	Prospecting Insights	View Partner Scor...
Change Record Type	Create as Project...	Get Survey Invita...	Sharing	

Salesforce Mobile and Lightning Experience Actions

Create as Project in CompanyCam

Account Detail

Standard Buttons

Edit Change Owner Change Record Type Delete View Account Hierarchy Sharing Include Offline

Custom Buttons

Create as Project in CompanyCam

Account Information (Header visible on edit only)

Account Owner Sample Text

CompanyCam Project ID Sample Text

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Page Name

Section vf017_AccountLigh...

Blank Space

CompanyCamProject...

CompanyCamProject...

Visualforce Pages

Billing

New Section

CompanyCamProject_Account

OBJECT-LIGHTNING SETUP (OPTION 2)

Create (or edit an existing) Lightning Record Page.

Add a Visualforce component somewhere to your Layout.

Example below:

The screenshot illustrates the process of adding a Visualforce component to a Lightning Record Page. On the left, the 'Lightning Record Pages' sidebar is visible, showing a list of components. A blue arrow points to the 'Visualforce' component at the bottom of this list. The main area displays the 'CompanyCam Project' record page. A blue arrow points to the 'CompanyCam Project' tab in the top navigation bar. On the right, the 'Actions & Recommendations' panel is open, showing a dropdown menu for 'Tab Label' with 'Custom' selected. A blue arrow points to the 'Custom' option. Below the dropdown, the 'Custom Label' field is populated with 'CompanyCam Project'. A blue arrow points to the 'Add Tab' button. At the bottom right, the 'Set Component Visibility' section is visible, showing a '+ Add Filter' button. A blue box in the bottom left corner contains the text: 'Note: A MyDomain is required to use Lightning Components'.

SETUP > OBJECT MANAGER
Account

Details
Fields & Relationships
Page Layouts
Lightning Record Pages

Lightning Record Pages
0 Items, Sorted by
LABEL

Search components... ⚙

- Recent Items
- Recommendations
- Record Detail
- Related List - Single
- Related List Quick Links
- Related Lists
- Related Record
- Report Chart
- Rich Text
- Tab
- Topics
- Trending Topics
- Twitter
- Visualforce**

Account
Edge Communications

Type: Customer - Direct Phone: (512) 757-6000 Website: http://edgecomm.com Account Owner: ROBERT PIC... Account Site: Industry: Electronics

Related Details **CompanyCam Project**

CompanyCamProject_Account

Open in CompanyCam→
Capture Photos→

Displaying 0 of photos.

Actions & Recommendations

Tab Label
Custom
* Custom Label
CompanyCam Project

Add Tab

Set Component Visi
Filters
+ Add Filter

Activity History (0)

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.

This screenshot shows the 'Salesforce Mobile and Lightning Experience Actions' configuration page. The left sidebar lists categories like Fields, Buttons, Custom Links, Quick Actions, Mobile & Lightning Actions, and Expanded Lookups. The main area displays a grid of actions including 'Add to Call List', 'Candidates', 'Create as Project...', 'Email (mobile only)', 'Get Survey Invita...', 'Log a Call', and 'New Case'. Below this, the 'Account Detail' section shows 'Standard Buttons' (Edit, Change Owner, Change Record Type, Delete, View Account Hierarchy, Sharing, Include Offline) and 'Custom Buttons' (Create as Project in CompanyCam). At the bottom, the 'Account Information' header is visible, showing 'Account Owner' and 'Sample Text'. A blue arrow points to the 'Create as Project in CompanyCam' button in the Custom Buttons section.

This screenshot shows the Salesforce Page Layout editor. The left sidebar lists components like Mobile & Lightning Actions, Expanded Lookups, Related Lists, Report Charts, Components, and Visualforce Pages. The main area shows a 'New Section' being added to the page layout. A blue arrow points to the 'New Section' label. Below the section, a Visualforce page is added, labeled 'CompanyCamProject_Account'. A blue arrow points to the 'Visualforce Pages' component in the sidebar.

INSTALLING FOR FSL

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

The current version (v1.14) of the CompanyCam managed package is available here:

[https://\[yourInstance\].salesforce.com/packaging/installPackage.apexp?po=04t3l000000KnGS](https://[yourInstance].salesforce.com/packaging/installPackage.apexp?po=04t3l000000KnGS)

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

Production Default: login

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. You 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

My Domain Settings [Edit](#)

Login Policy ☐ Prevent login from <https://login.salesforce.com>

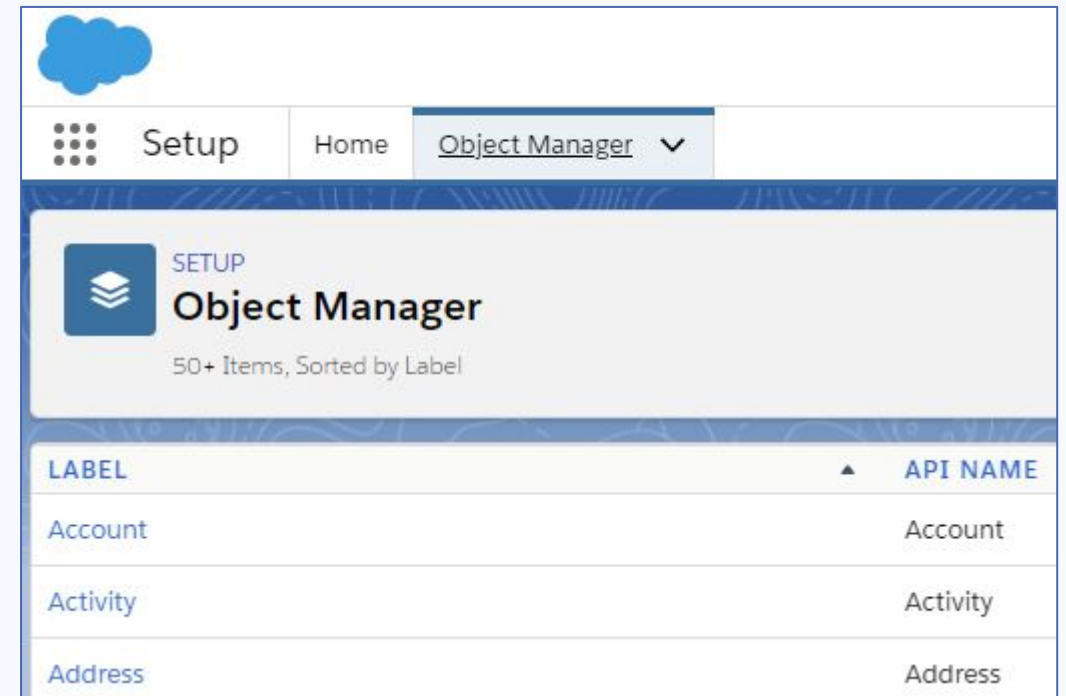
Redirect Policy Decide whether to redirect anyone who uses bookmarks and links that contain your previous instance-specific domain:: Redirect to the same page within the domain

Your domain name is

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.

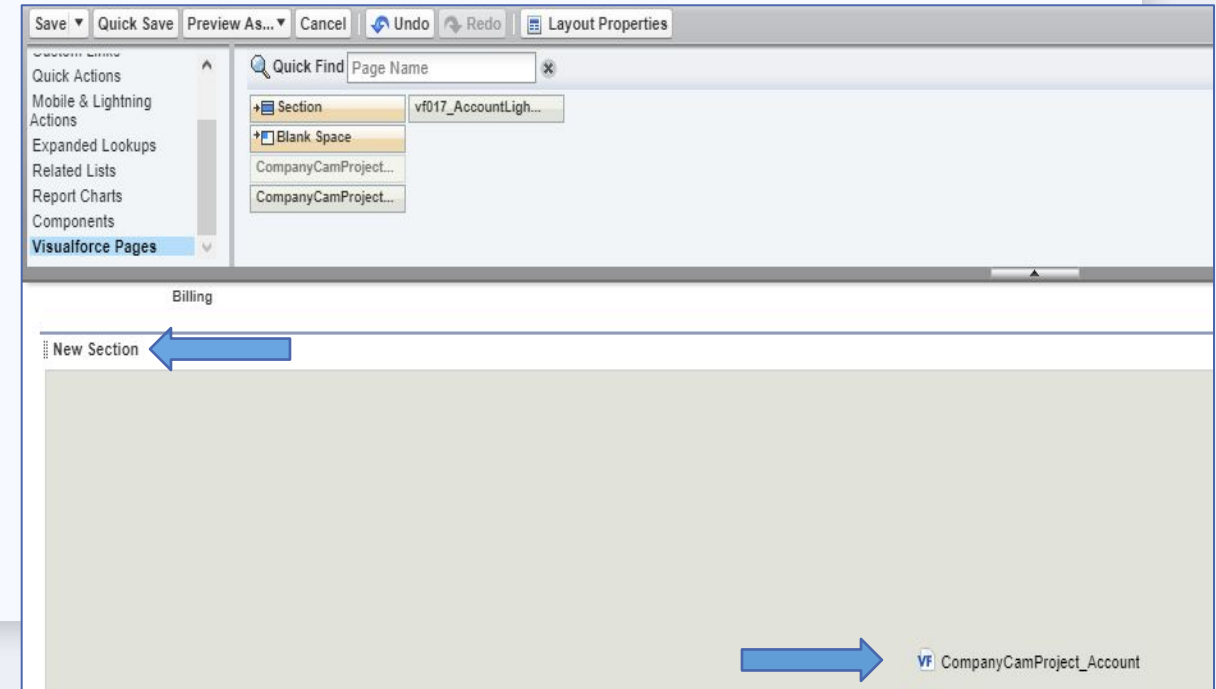
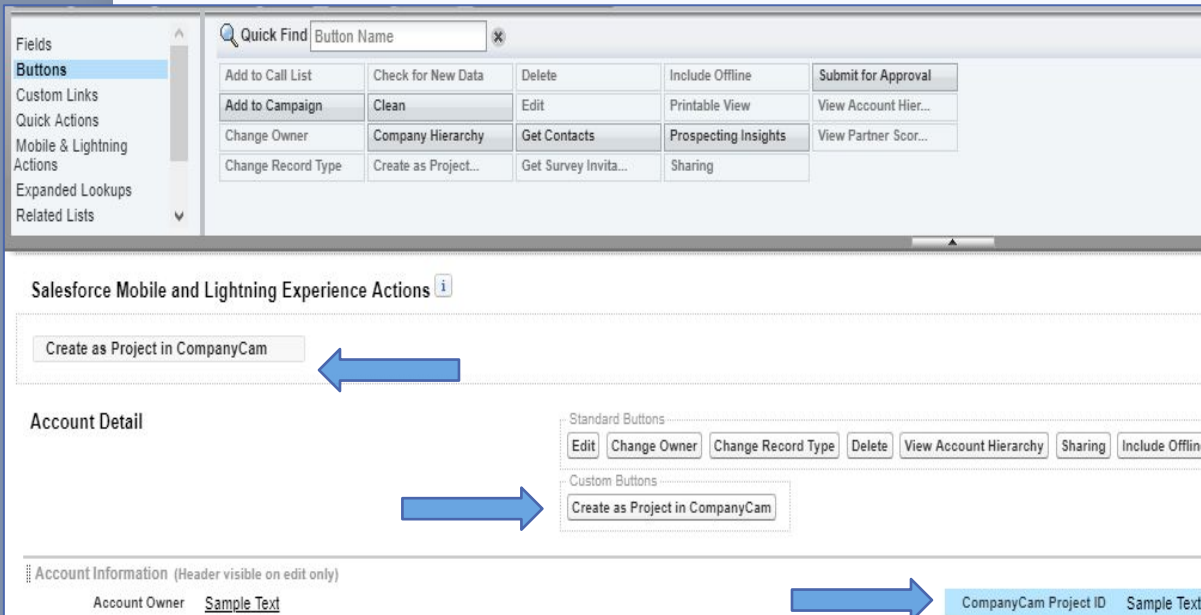


The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below the navigation bar, there's a section titled 'Object Manager' with a sub-header '50+ Items, Sorted by Label'. The main content area displays a table with the following data:

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:

SETUP > OBJECT MANAGER

Work Order

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

Note: A MyDomain is required to use Lightning Components

Components

Search components...

> Standard (29)

▼ Custom (0)
No components available.

▼ Custom - Managed (4)

- Appointment Booking Communi...
- CompanyCamLightningCompon...
- Crews Management
- EnhancedMatchRule

CompanyCam Project


00000001

Open in CompanyCam→

Capture Photos→

PHOTOS DOCUMENTS

Displaying 2 of 2 photos.



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.

\$1000

Follow-Up to ensure satisfaction
and best practices.

Additional hours or
customization available on
request.

Fixed Cost

Ongoing Support Services
available.