



# COMPANYCAM INTEGRATION

Process for integrating the CompanyCam app into your Salesforce Organization

# PURPOSE

1. This document is intended for use by Salesforce users who are installing the CompanyCam managed application package in their own Salesforce instance.
2. 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.

3. Please note:  
Only Salesforce users with System Administrator privileges are able to install application packages.

# 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.

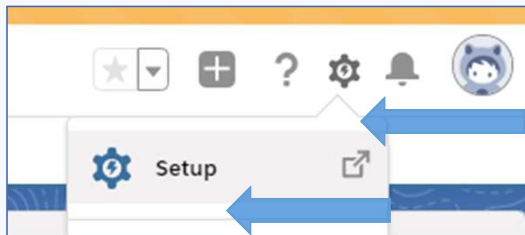
[Lightning Setup](#)

[Classic Setup](#)

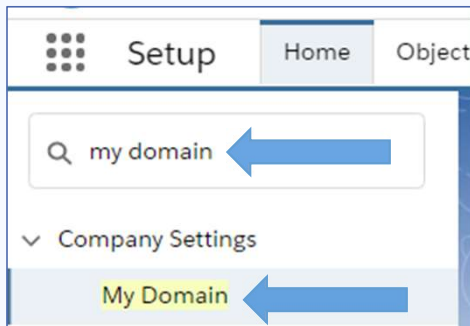
[Field Service Lightning](#)

# INSTALLING

(1) Open the Setup homepage.



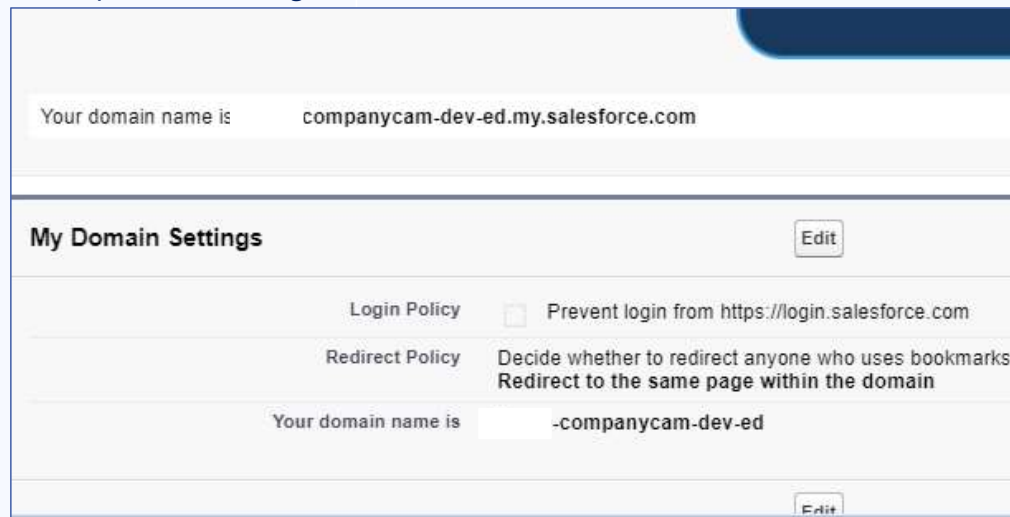
(2) In the Quick Find box, search for **My Domain** & Click the option available



## NOTE:

App packages 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.



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# INSTALLING

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

</packaging/installPackage.apexp?p0=04t3l000000KnFy>

Our example would be:

<Companycam.my.salesforce.com/packaging/installPackage.apexp?p0=04t3l000000KnFy>


The screenshot shows the 'My Domain' setup page in Salesforce. At the top, it says 'SETUP My Domain'. Below that, 'My Domain Step 4' is displayed. A message states: '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.' To the right, a flowchart titled 'Step 4 Domain Deployed to Users' shows the process: 'Choose Domain Name' → 'Domain Registration Pending' → 'Domain Ready for Testing' → 'Domain Deployed to Users'. Below the flowchart, a text field shows 'Your domain name is Companycam.my.salesforce.com' with a blue arrow pointing to it from the 'Domain Ready for Testing' step. At the bottom, the 'My Domain Settings' section is visible, including 'Login Policy' (with a checkbox for 'Prevent login from https://login.salesforce.com'), 'Redirect Policy' (with a note to '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'), and 'Your domain name is' (with the value 'Companycam' and a red underline).

# 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.



**Install CompanyCam Photo Solution**  
By CompanyCam

☐ Install 1 ☒ **Install for All Users** ☐ Install for Specific Profiles...

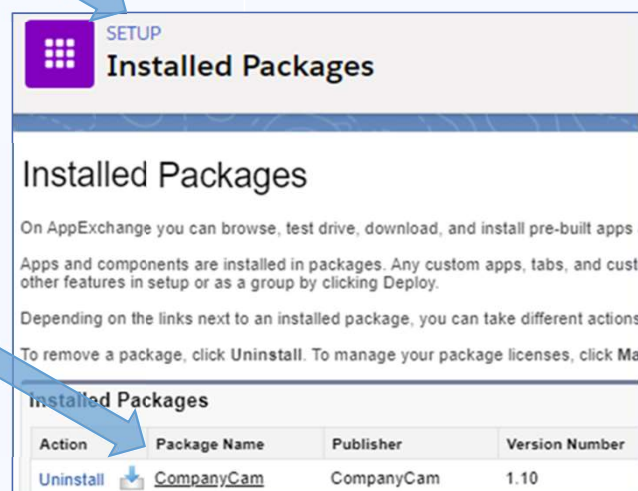
2

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 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.



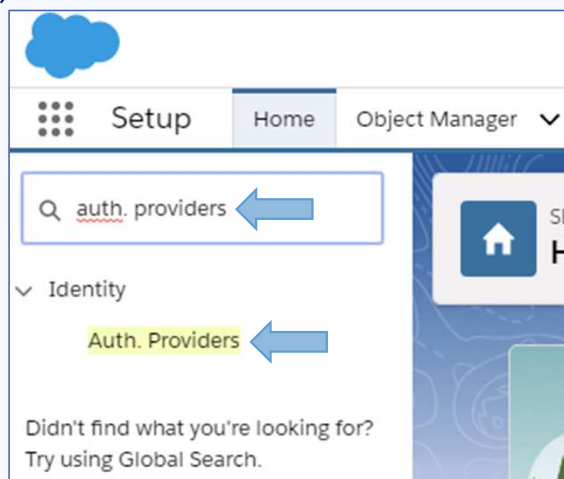
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# AUTHORIZE

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

From [Setup](#),

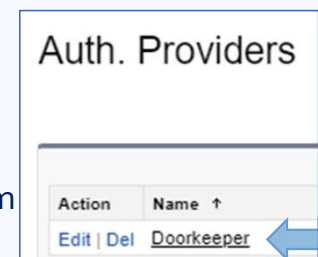
(1) Search for **Auth. Providers** in the Quick Find.



Note:

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

(2) Find the [Doorkeeper](#) item on the page.



Copy the [OAuth-Only URL](#) into your browser and GO

A screenshot of the 'Salesforce Configuration' page. It shows a table with four rows: 'Test-Only Initialization URL', 'OAuth-Only Initialization URL', 'Callback URL', and 'Single Logout URL'. The 'OAuth-Only Initialization URL' is highlighted, and a blue arrow points to it.

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

(4) [Login](#) to CompanyCam (you must have a CompanyCam account)

(5) Click the [Authorize](#) button when it appears



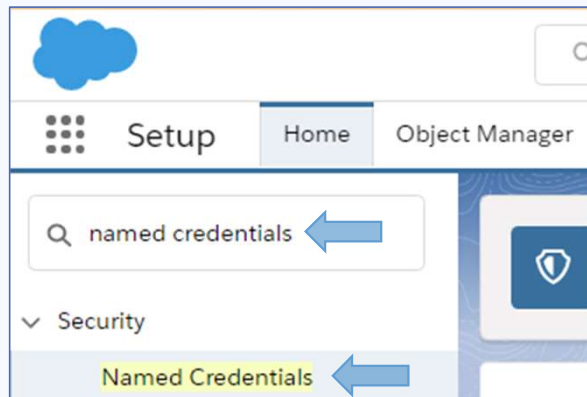
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# AUTHORIZE

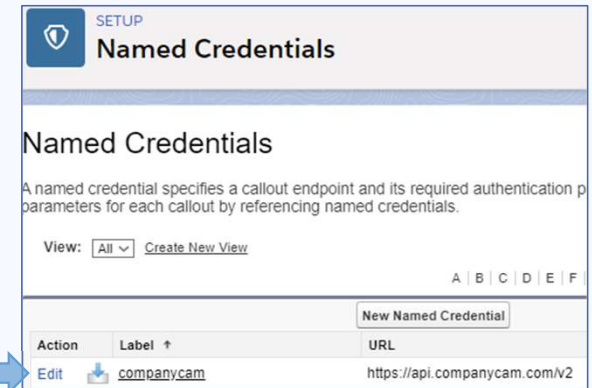
To ensure Credentials are setup:

From [Setup](#),

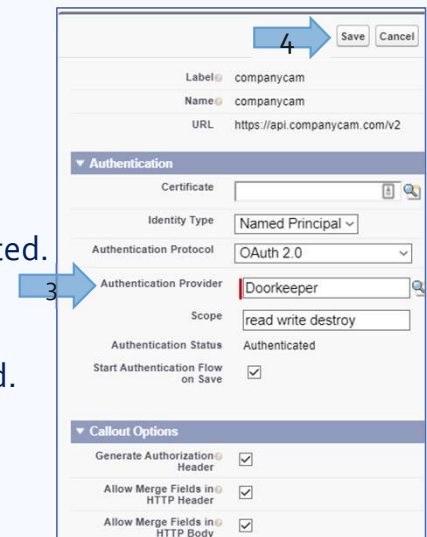
(1) Search for [Named Credentials](#)



(2) Click [Edit](#) on the CompanyCam credentials



(3) Ensure the [Doorkeeper](#) option is selected.

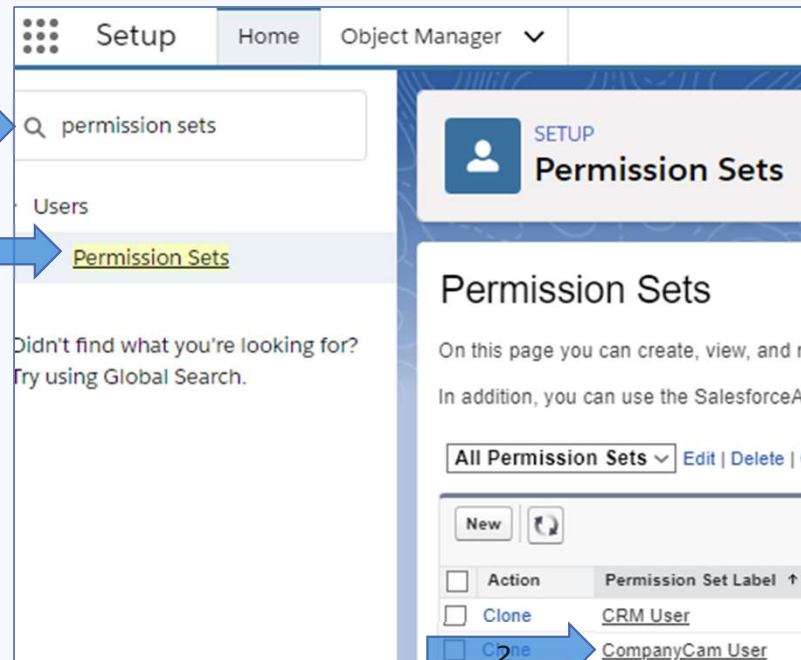
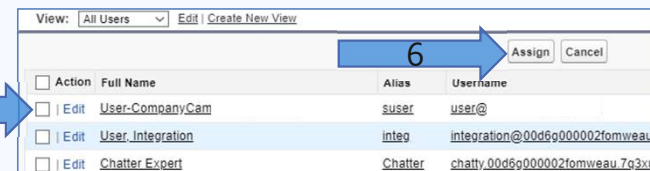
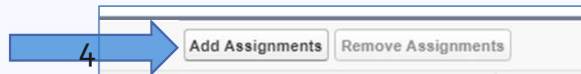
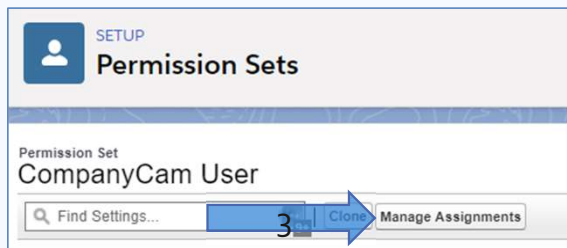


(4) Click the [Save](#) button when completed.

# PERMISSIONS

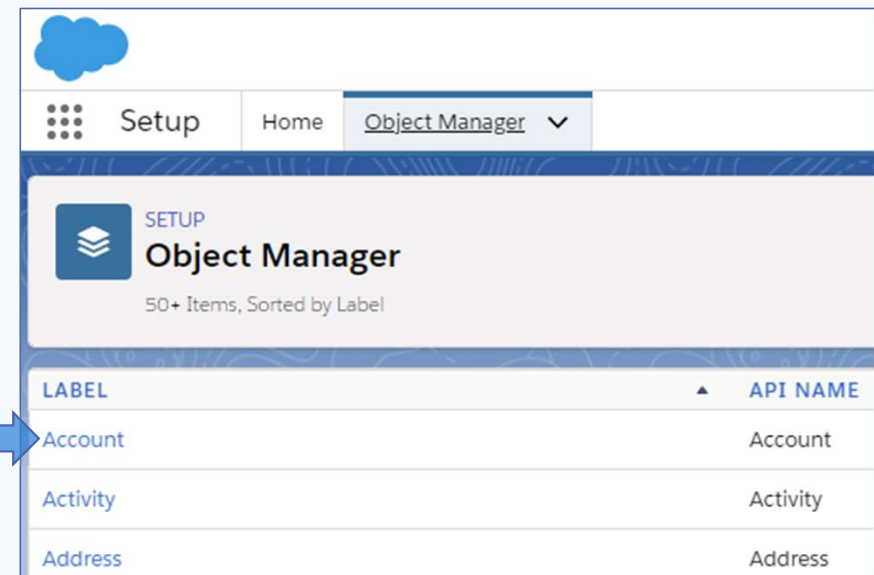
From Setup,

- (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.



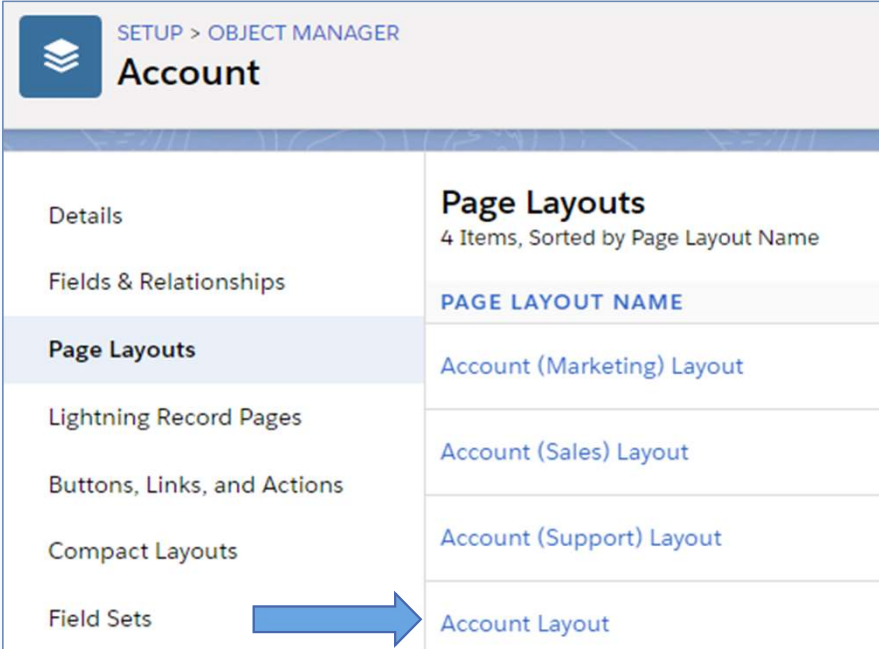
# OBJECT-LIGHTNING SETUP

- 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.



The screenshot shows the Salesforce Object Manager interface for the 'Account' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. A blue arrow points from the 'Field Sets' item to the 'Account Layout' entry in the main content area. The main content area is titled 'Page Layouts' and shows '4 Items, Sorted by Page Layout Name'. The list of page layouts includes: Account (Marketing) Layout, Account (Sales) Layout, Account (Support) Layout, and Account Layout.

SETUP > OBJECT MANAGER	
Account	
Details	<b>Page Layouts</b> 4 Items, Sorted by Page Layout Name
Fields & Relationships	
<b>Page Layouts</b>	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
	<b>PAGE LAYOUT NAME</b>
	Account (Marketing) Layout
	Account (Sales) Layout
	Account (Support) Layout
	Account Layout

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# 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.

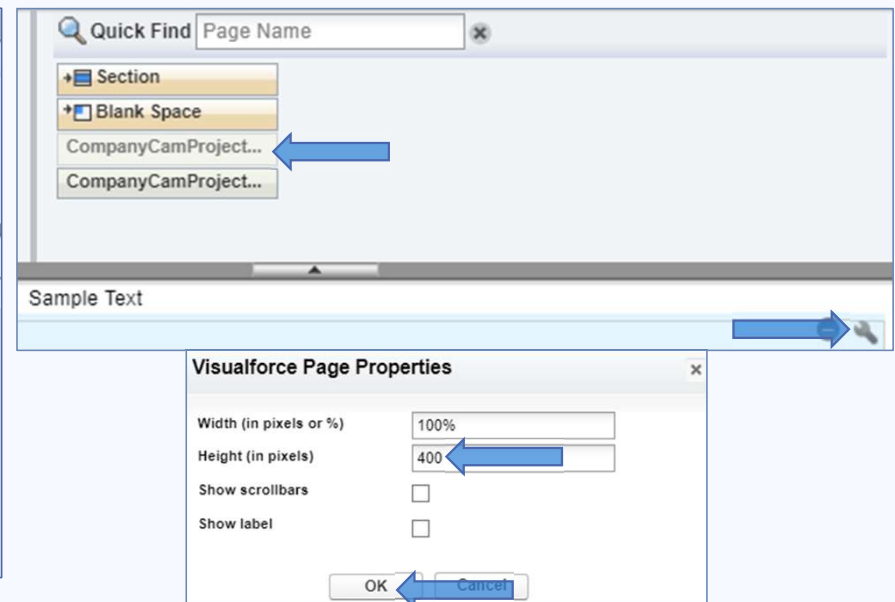
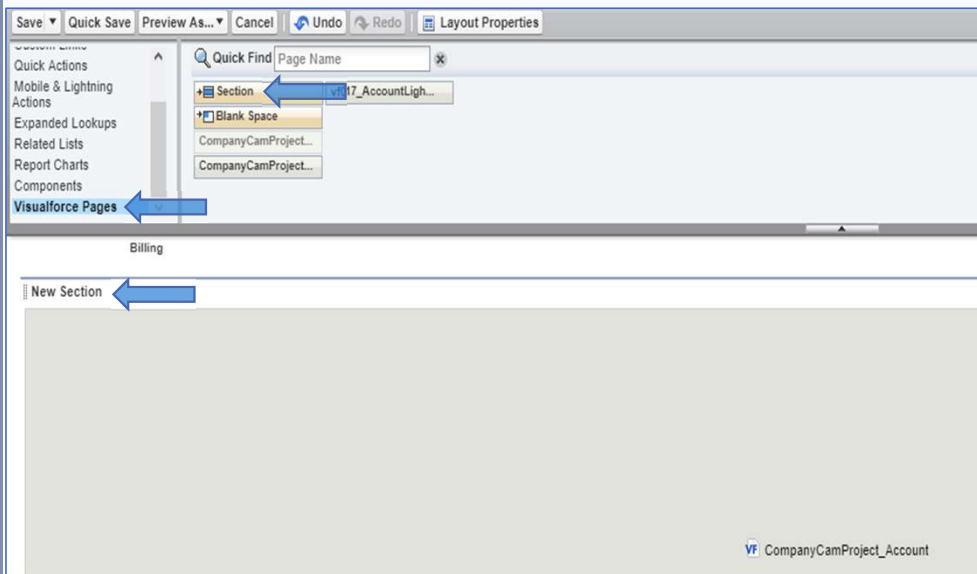
This screenshot shows the Salesforce Page Layout Editor. In the left sidebar, the 'Buttons' and 'Mobile & Lightning Actions' sections are highlighted with blue arrows. The main area displays a grid of buttons. A blue arrow points to the 'Create as Project' button in the 'Mobile & Lightning Actions' section. Below the grid, the 'Salesforce Mobile and Lightning Experience Actions' section is visible, with a blue arrow pointing to the 'Create as Project in CompanyCam' button. The 'Account Detail' section shows a 'Create as Project in CompanyCam' button in the 'Custom Buttons' area, also highlighted with a blue arrow. At the bottom, the 'Account Information' header is visible, showing fields like 'Account Owner' and 'CompanyCam Project ID'.

This screenshot shows the Salesforce Page Layout Editor. In the left sidebar, the 'Fields' section is highlighted with a blue arrow. The main area displays a grid of fields. A blue arrow points to the 'CompanyCam Project ID' field in the 'Fields' section. Below the grid, the 'Account Information' header is visible, showing fields like 'Account Owner', 'Account Name', 'Account Number', 'Account Site', 'Type', 'Industry', 'Annual Revenue', and 'CompanyCam Project ID'. The 'CompanyCam Project ID' field is highlighted with a blue arrow.

# 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.



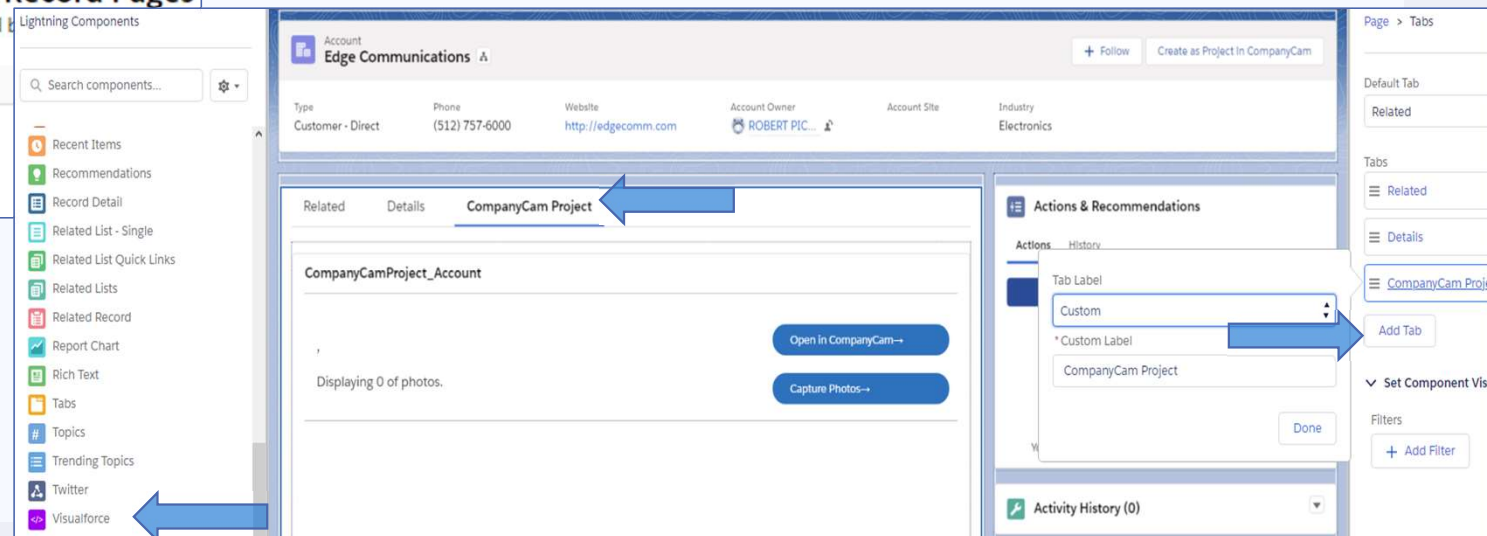
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# OBJECT-LIGHTNING SETUP (OPTION 2)

- 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

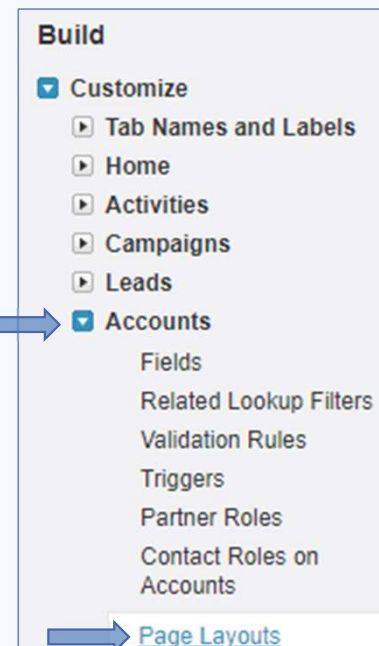


# OBJECT-CLASSIC SETUP

From the Setup page,

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

Open the appropriate Page Layout for that Object.





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# 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.

The screenshot shows the Salesforce Object Classic Setup interface. On the left, the 'Fields' sidebar is expanded, and the 'Buttons' section is selected. In the main area, a grid of buttons is displayed. The 'Create as Project' button is highlighted with a blue arrow. Below the grid, the 'Salesforce Mobile and Lightning Experience Actions' section is visible, showing the 'Create as Project in CompanyCam' button. In the 'Account Detail' section, the 'Create as Project in CompanyCam' button is also visible, highlighted with a blue arrow. At the bottom, the 'Account Information' section shows the 'CompanyCam Project ID' field highlighted with a blue arrow.

Buttons	Quick Find	Button Name
Add to Call List	Check for New Data	Delete
Add to Campaign	Clean	Edit
Change Owner	Company Hierarchy	Get Contacts
Change Record Type	Create as Project	Get Status Inva...
		Sharing

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

The screenshot shows the Salesforce Object Classic Setup interface. On the left, the 'Fields' sidebar is expanded, and the 'Fields' section is selected. In the main area, a grid of fields is displayed. The 'CompanyCam Project ID' field is highlighted with a blue arrow. Below the grid, the 'Account Information' section is visible, showing the 'CompanyCam Project ID' field highlighted with a blue arrow.

Fields	Quick Find	Field Name
Section	Account Owner	Annual Revenue
Blank Space	Account Site	Billing Address
Account Name	Account Source	Clean Status
Account Number	Active	CompanyCam Projec...

Account Information (Header visible on edit only)

Account Owner Sample Text

Account Name Sample Text

Parent Account Sample Text

Account Number Sample Text

Account Site Sample Text

Type Sample Text

Industry Sample Text

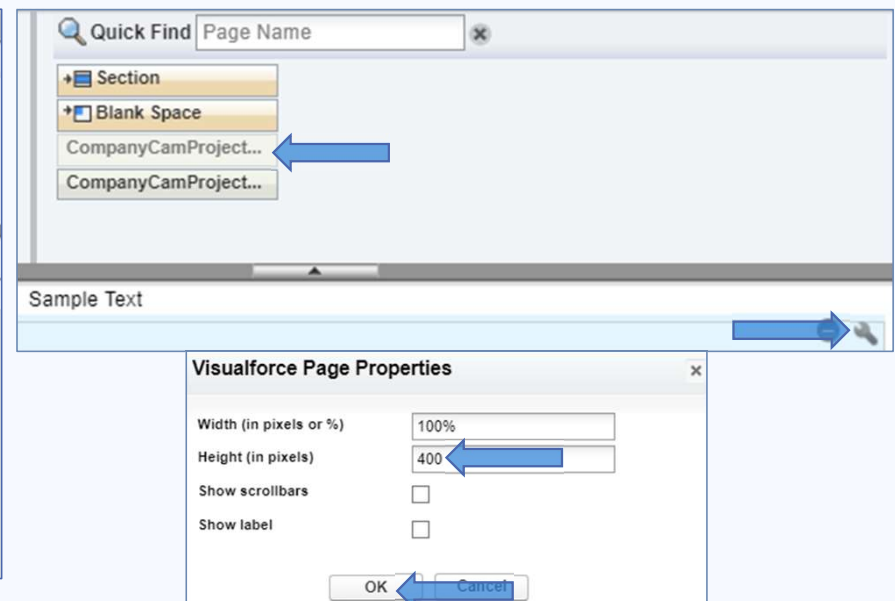
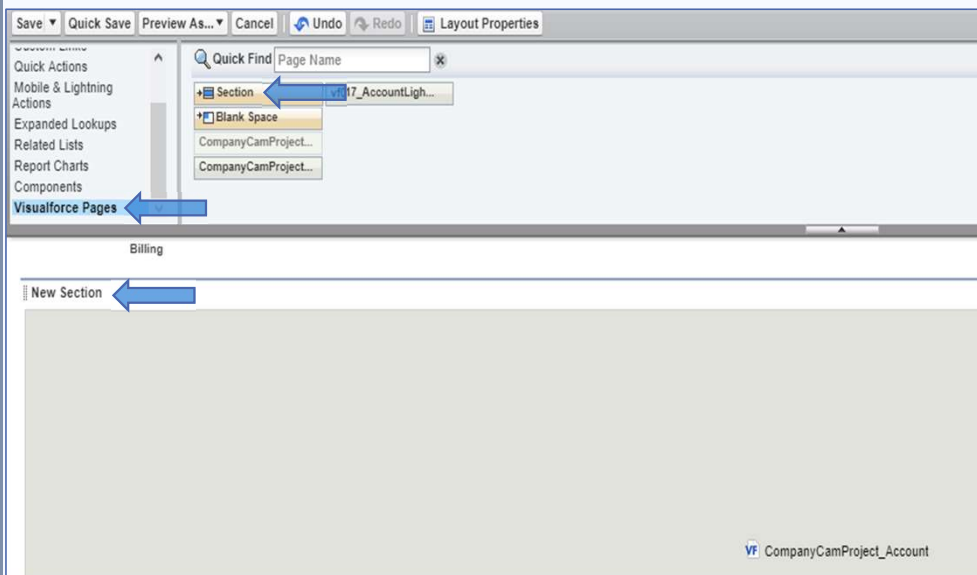
Annual Revenue \$123.45

CompanyCam Project ID Sample Text

# 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.



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# INSTALLING FOR FSL

**NOTE:**  
App packages 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=04t3looooooKnGS**

Our example would be:  
**Companycam.my.salesforce.com/packaging/installPackage.apexp?po=04t3looooooKnGS**

**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 **Companycam.my.salesforce.com**

**My Domain Settings** [Edit](#)

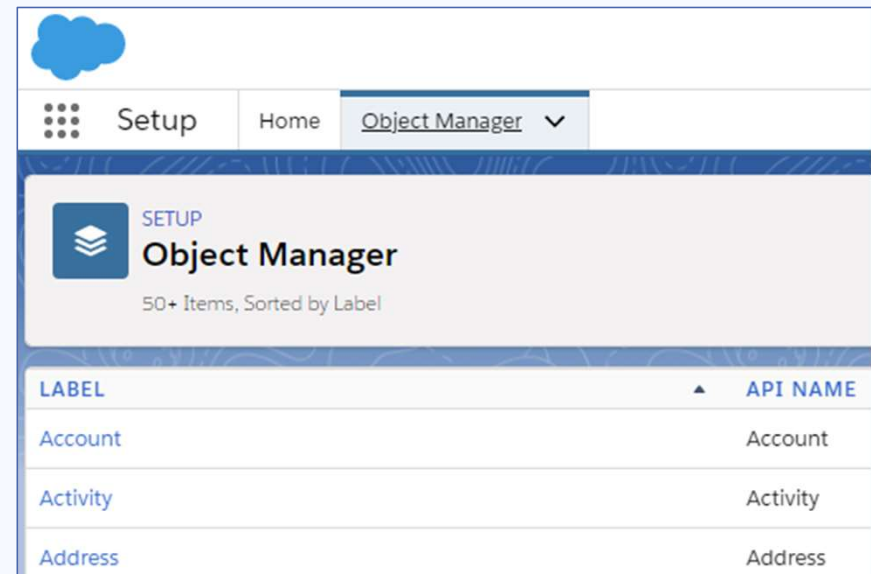
**Login Policy** ☐ Prevent login from <https://login.salesforce.com>

**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.



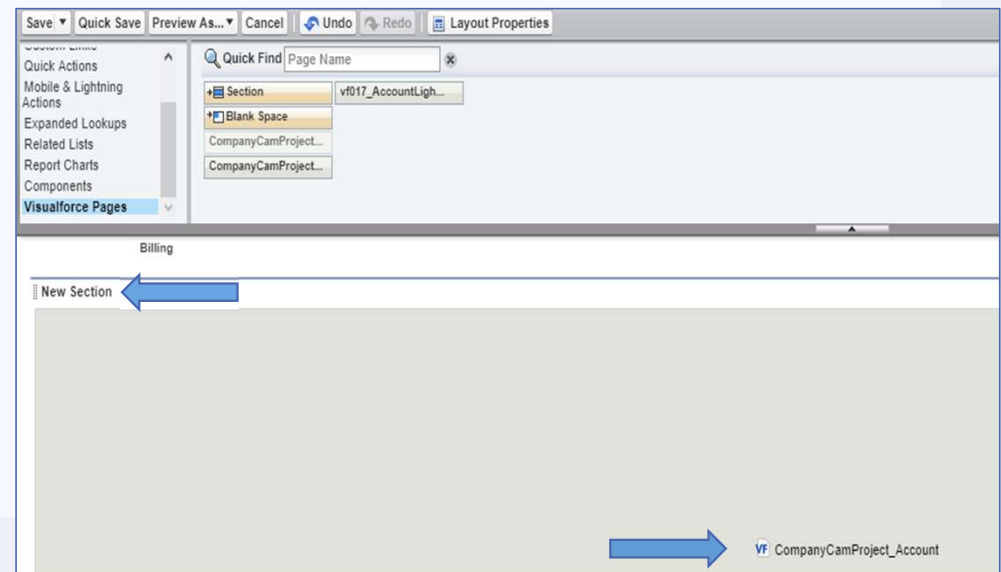
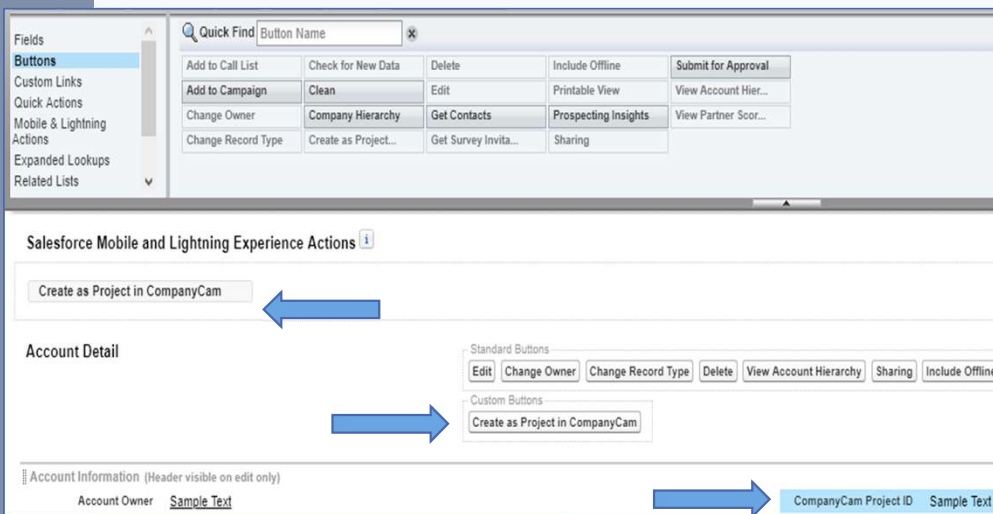
The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with a cloud icon, a grid icon, and tabs for 'Setup', 'Home', and 'Object Manager' (which is selected and has a dropdown arrow). Below the navigation bar, there is a header section with a blue icon, the word 'SETUP' in blue, and 'Object Manager' in bold. Below this, it says '50+ Items, Sorted by Label'. The main content area is a table with two columns: 'LABEL' and 'API NAME'. The table contains three rows of data: 'Account', 'Activity', and 'Address'.

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.



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## 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	<b>Lightning Record Pages</b> 1 Items, Sorted by Label	
Fields & Relationships	<b>LABEL</b>	<b>ORG DEFAULT</b>
Page Layouts	Work Order Record Page	Desktop
<b>Lightning Record Pages</b>		

**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...
- CompanyCamLightningComponent
- Crews Management
- EnhancedMatchRule

Work Order  
00000001

Owner	Case	Status	Start Date	End Date	Subject
Alex Pickens		New			Test

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](mailto: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 CompanyCam Support & Alex Pickens will respond promptly.