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. <u>Please note</u>:
   Only Salesforce users with System Administrator privileges are able to install application packages.

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.

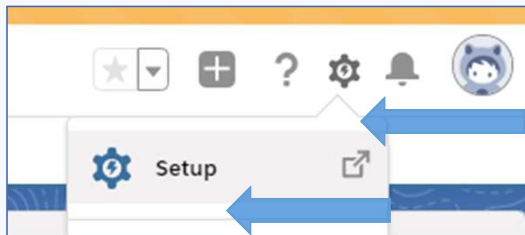Choose which object to add the CompanyCam projects to in Salesforce.

Lightning Setup

Classic Setup

Field Service Lightning

Common questions related to the install.

INSTALLING

(1) Open the Setup homepage.

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

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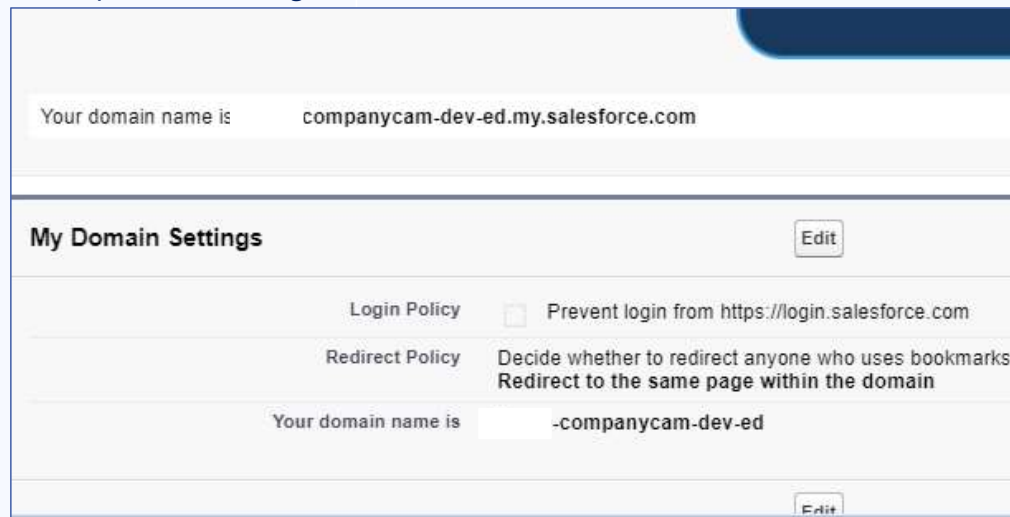
INSTALLING

After setting up a custom domain name, add the below to the link and GO.
/packaging/installPackage.apexp?p0=04t3l000000Kn Fy

Our example would be:
Companycam.my.salesforce.com/packaging/installPa ckage.apexp?p0=04t3l000000KnFy

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

ⓘ Installation Complete!

Done

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.

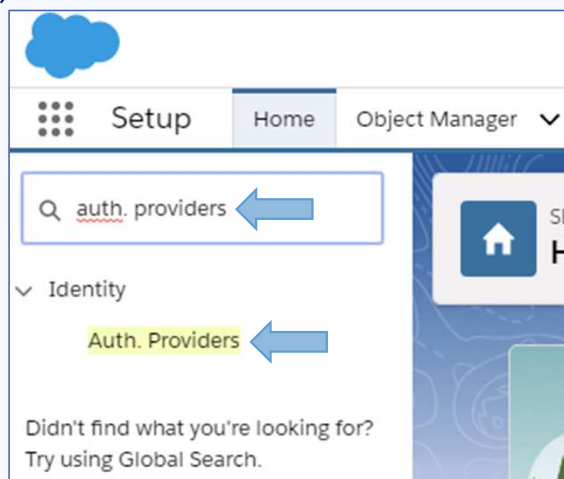To confirm the package is installed, look for CompanyCam on the page.

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

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

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.

(2) Find the Doorkeeper item on the page.

Auth. Providers

Action	Name ↑
Edit	Del	Doorkeeper
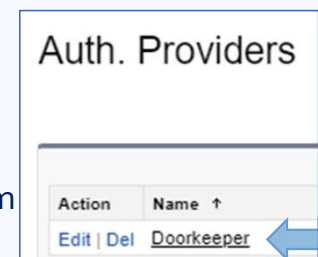
Copy the OAuth-Only URL into your browser and GO

Salesforce Configuration

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

(4) Login 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
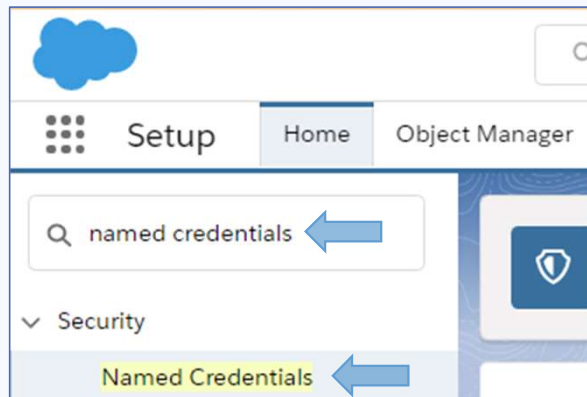
(2) Click Edit on the CompanyCam credentials
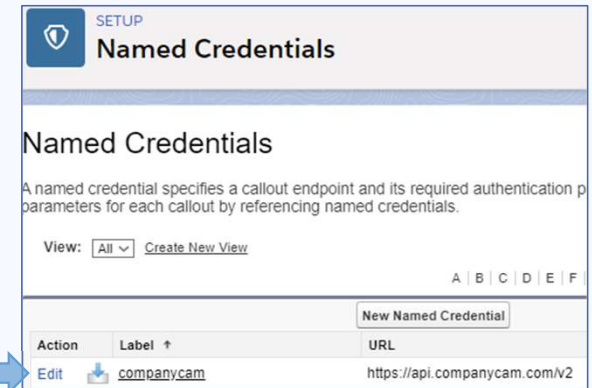
(3) Ensure the Doorkeeper option is selected.
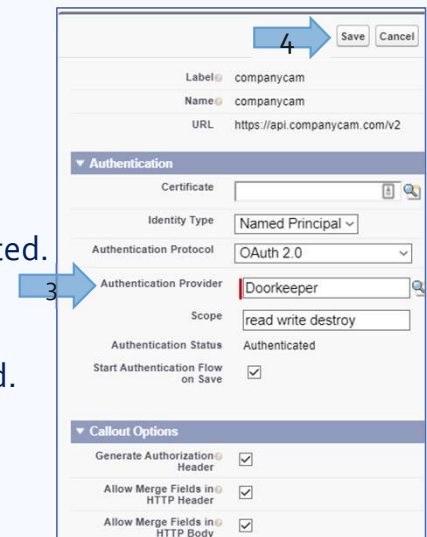
(4) Click the **Save** button when completed.

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.
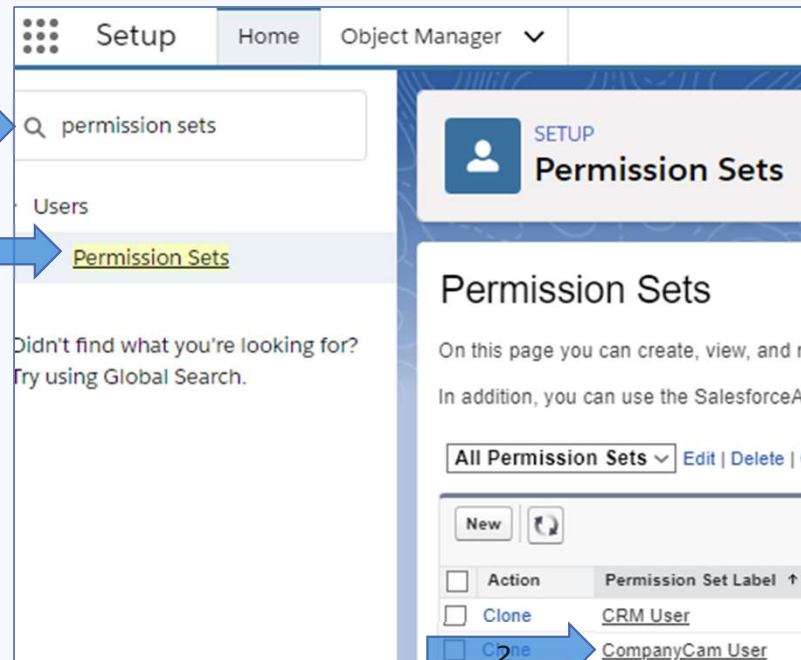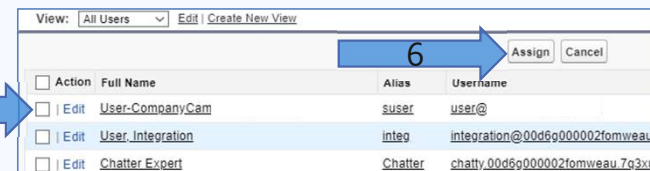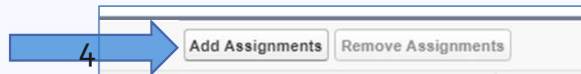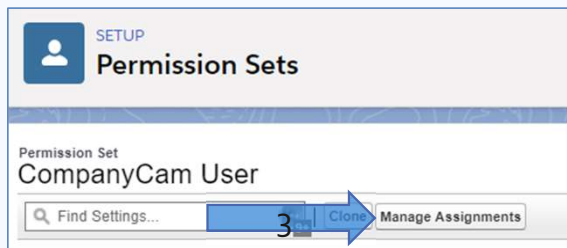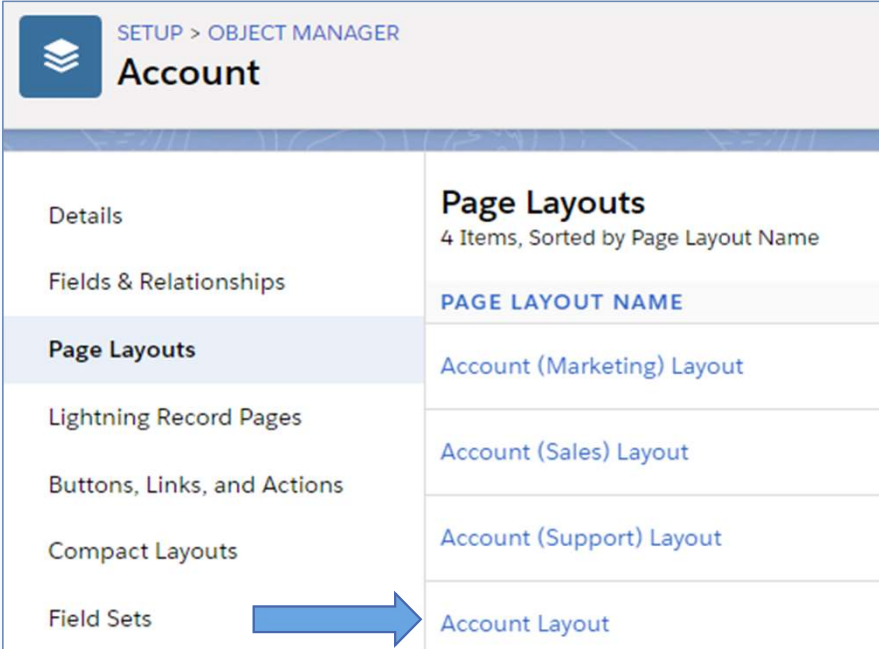
OBJECT-LIGHTNING SETUP

- The objects available by default are:
Account
Lead
Opportunity

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

-
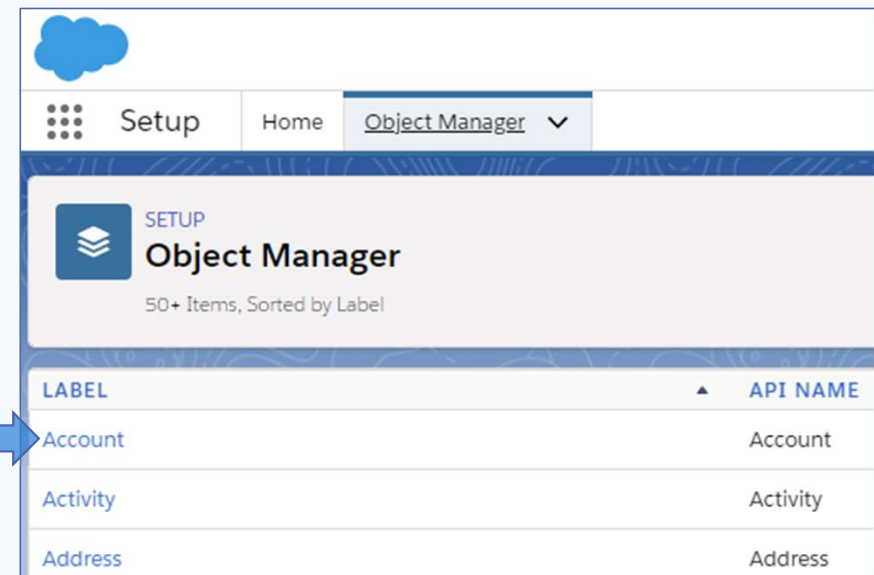
OBJECT-LIGHTNING SETUP

Select the appropriate <u>Page Layout</u> you want to use for the CompanyCam details.
You can add the details to multiple Page Layouts on the same object.

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 <u>Section</u> 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.
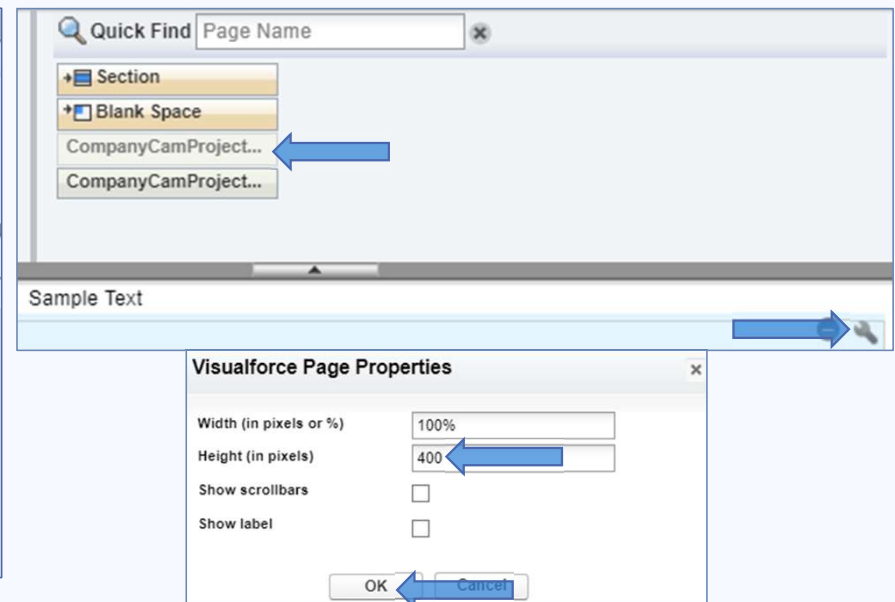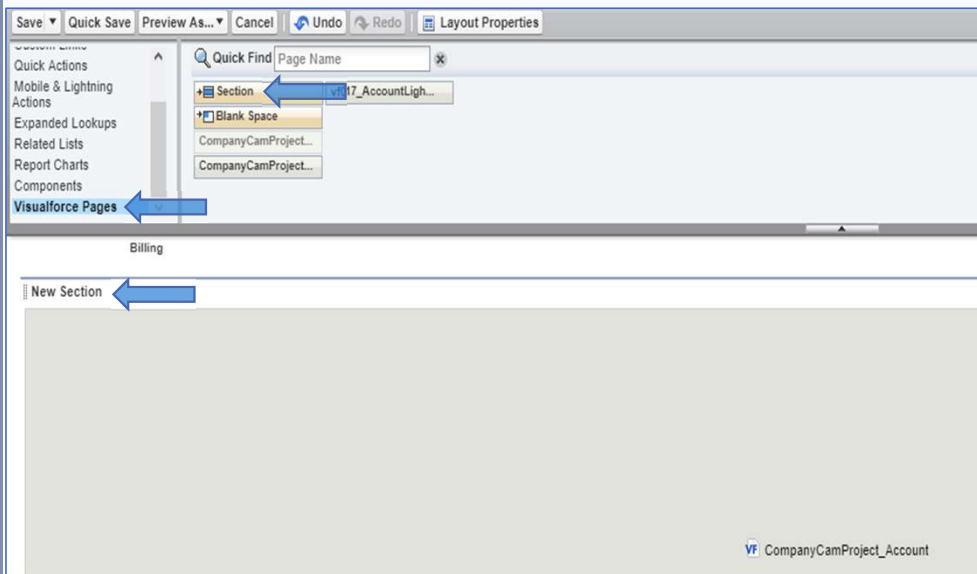
OBJECT-LIGHTNING SETUP (OPTION 2)

- 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
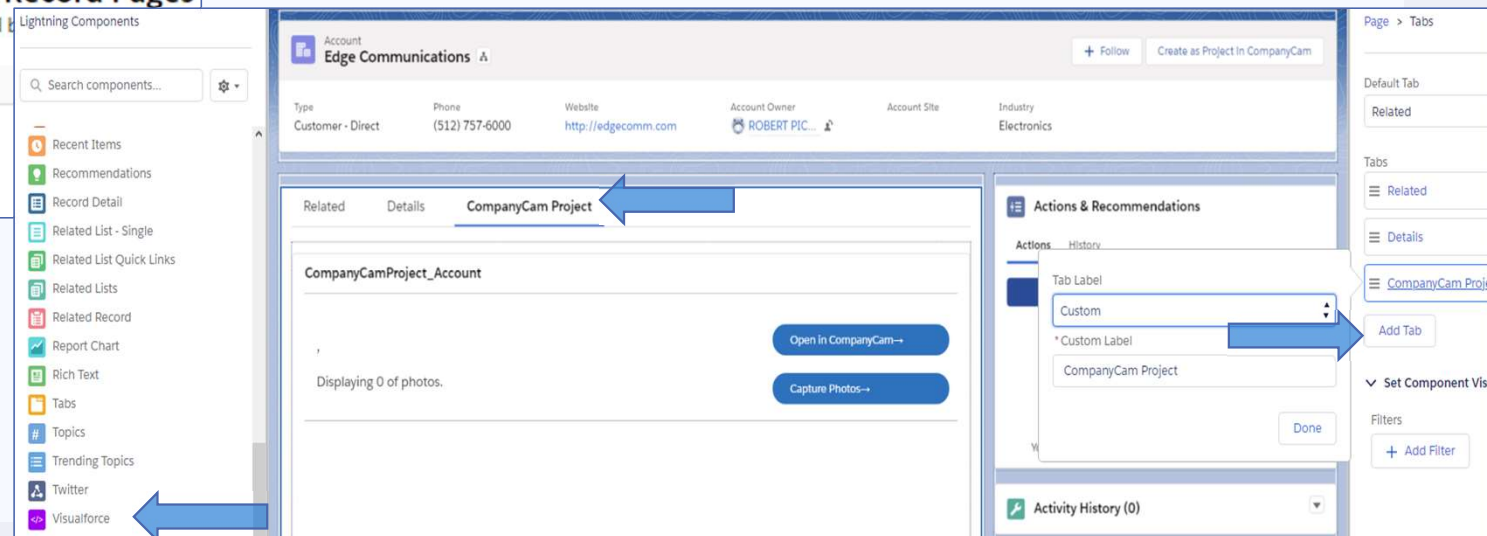
OBJECT-CLASSIC SETUP

- From the Setup page,

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

  Open the appropriate Page Layout for that Object.
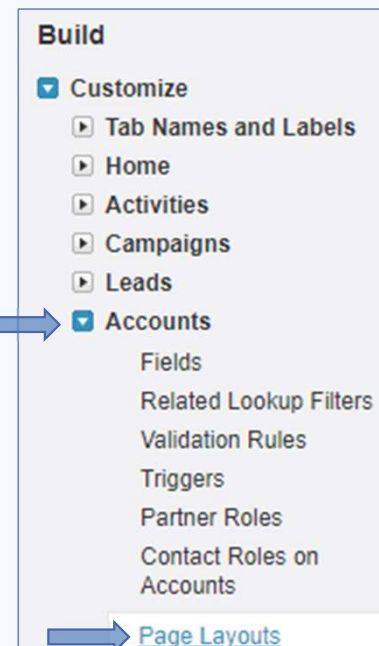
OBJECT-CLASSIC SETUP

- 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.
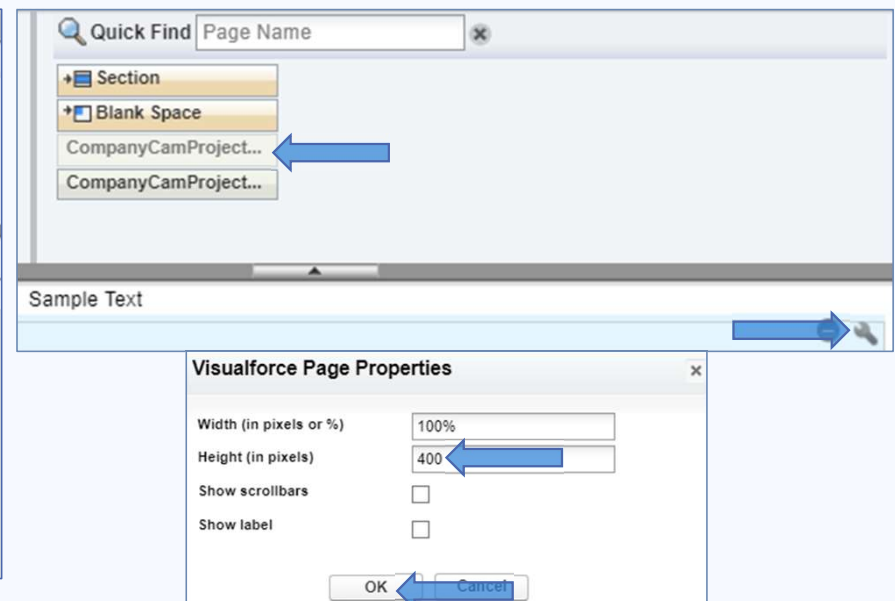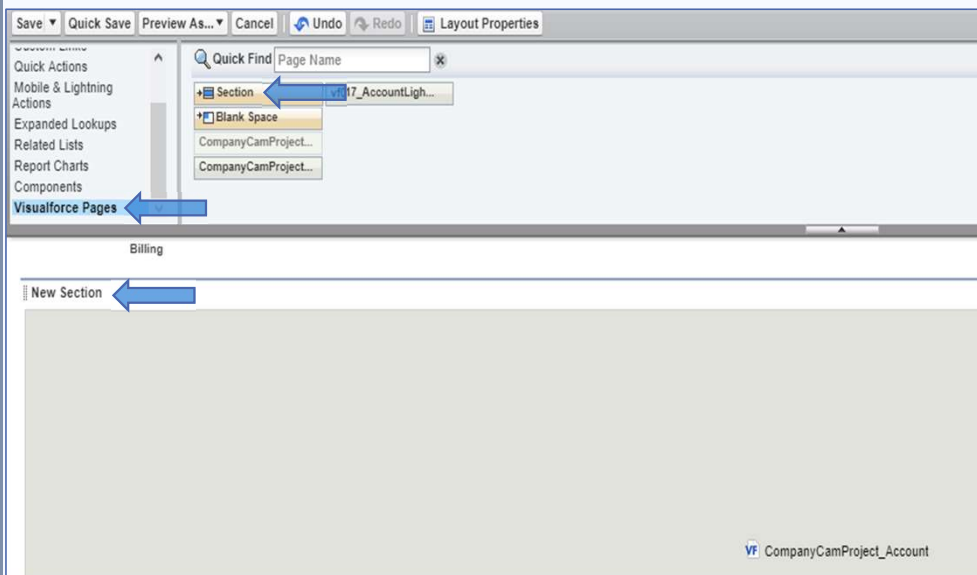
INSTALLING FOR FSL

NOTE:
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=04t3loooo ooKnGS

Our example would be:
Companycam.my.salesforce.com/packaging/ins tallPackage.apexp?po=04t3loooooooKnGS

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.

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.
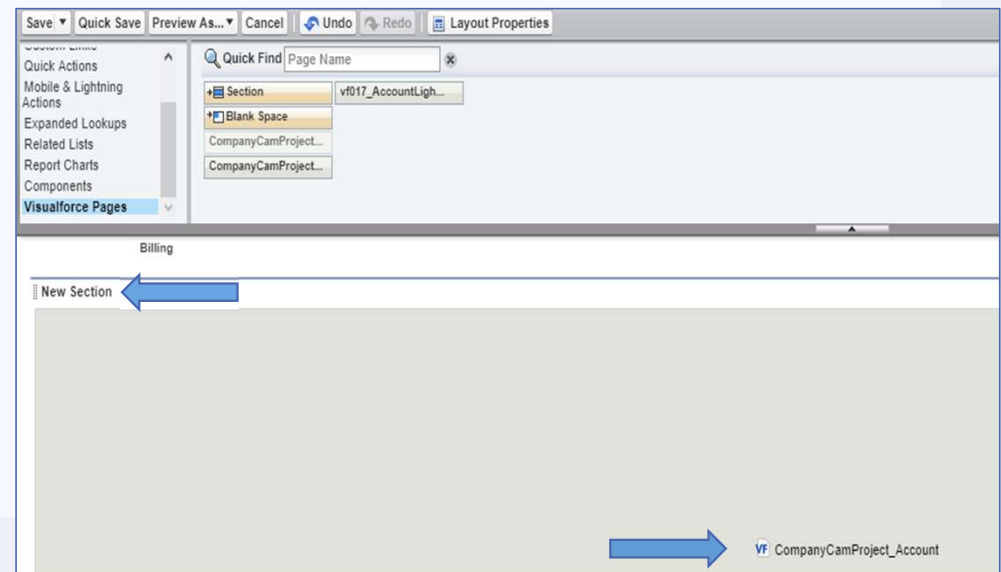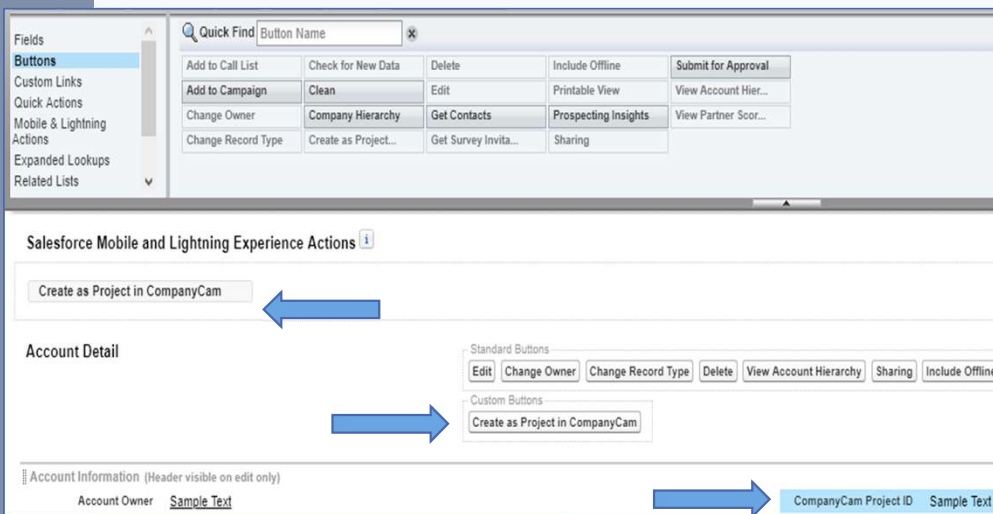
OBJECT-FSL SETUP (OPTION 2)

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 CompanyCam Support & Alex Pickens will respond promptly.