



# 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.

[Lightning Setup](#)

[Classic Setup](#)

[Field Service Lightning](#)

Common questions related to the install.

# 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 displays the Salesforce 'My Domain' setup page. At the top, it says 'SETUP My Domain'. Below that, 'My Domain Step 4' is indicated. 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.' A progress bar shows four steps: 'Choose Domain Name', 'Domain Registration Pending', 'Domain Ready for Testing', and 'Domain Deployed to Users'. A blue arrow points from the 'Domain Deployed to Users' step to the 'Your domain name is' field, which contains 'Companycam.my.salesforce.com'. Below this, the 'My Domain Settings' section is visible, including an 'Edit' button, a 'Login Policy' checkbox for 'Prevent login from https://login.salesforce.com', and a 'Redirect Policy' section with the instruction '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'. The 'Your domain name is' field in this section shows 'Companycam'.

# INSTALLING

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

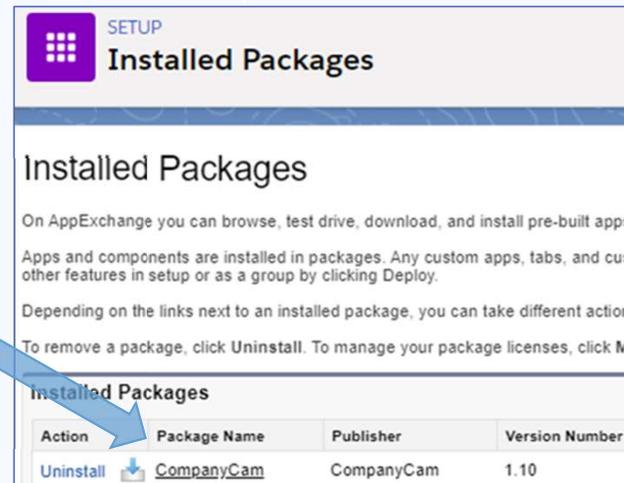
Because this package is governed at the instance level, and individual access to the package is provided through permission sets; (1) select the Install for All Users option, and then (2) click Install.



# 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.

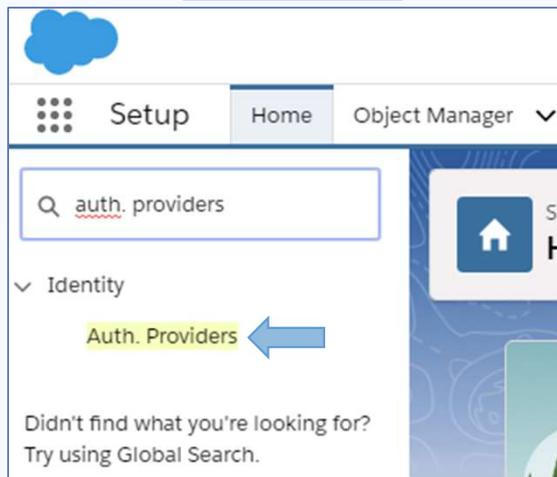
To confirm the package is installed, look for CompanyCam on the page.



# AUTHORIZE

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

From Setup,  
Search for auth. Providers

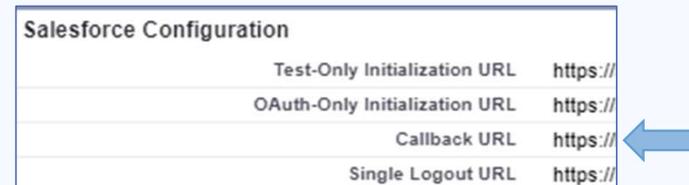


**Note:**  
It could take up to 48 hours  
to receive Whitelisting  
email.

Find the Doorkeeper item.



Copy the OAuth-Only URL into your browser and GO



Login to CompanyCam (you must have a CompanyCam account)

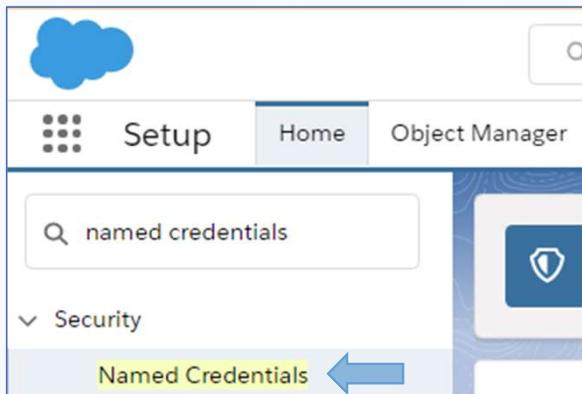
Click the **Authorize** button when it appears

Back to Roadmap

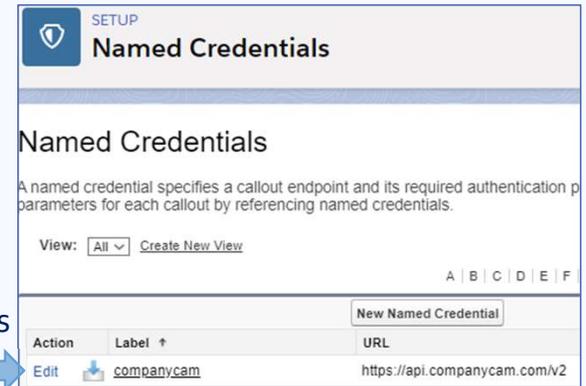
# AUTHORIZE

To ensure Credentials are setup:

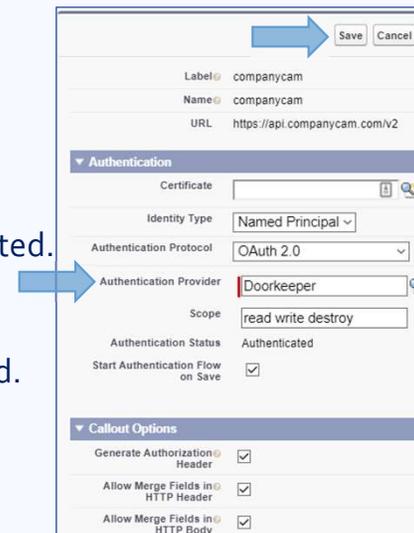
From Setup,  
Search for Named Credentials



Click Edit on the  
CompanyCam credentials



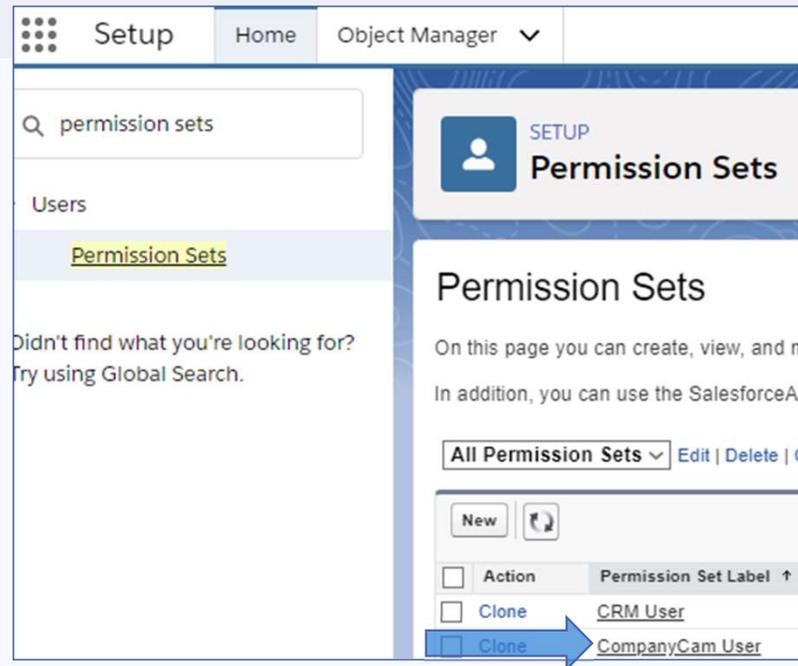
Ensure the Doorkeeper option is selected.



Click the Save button when completed.

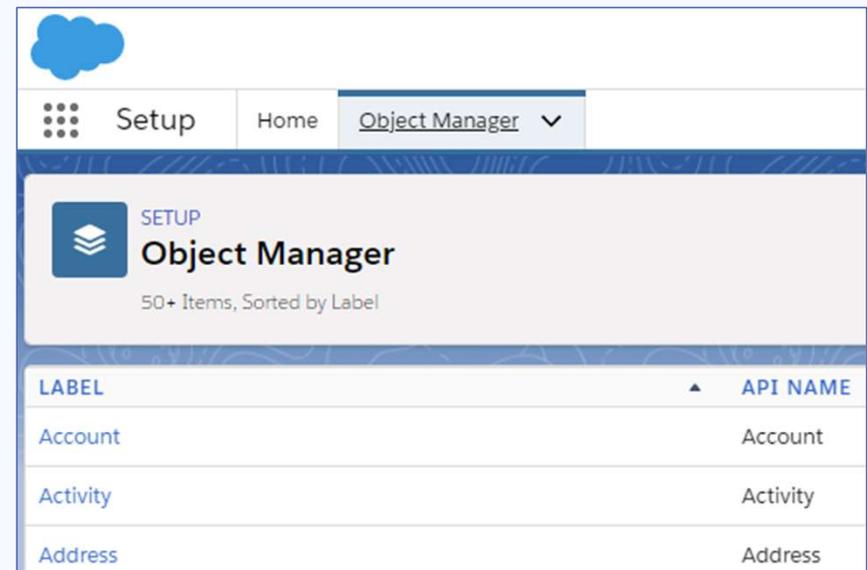
# PERMISSIONS

- 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.



# OBJECT-LIGHTNING SETUP

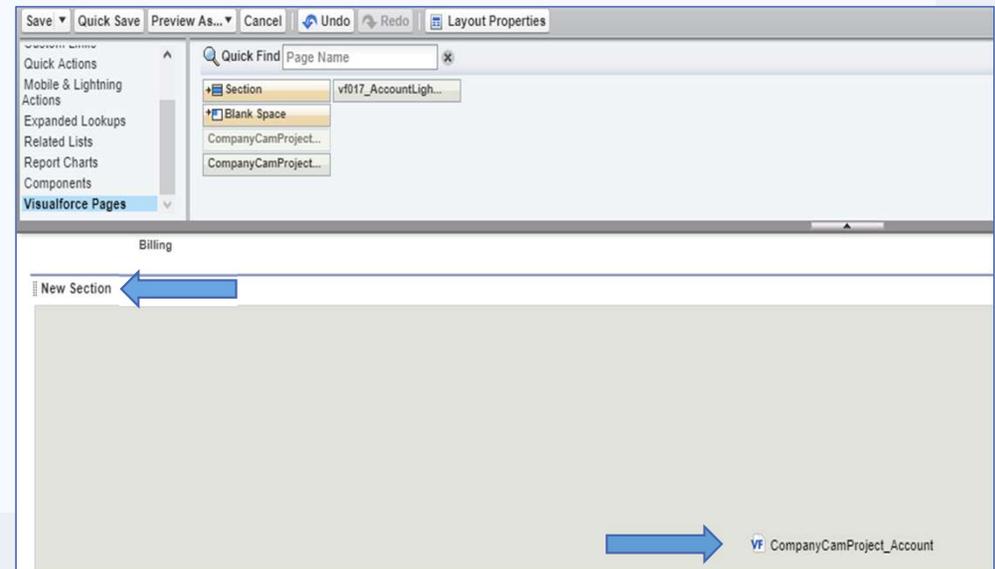
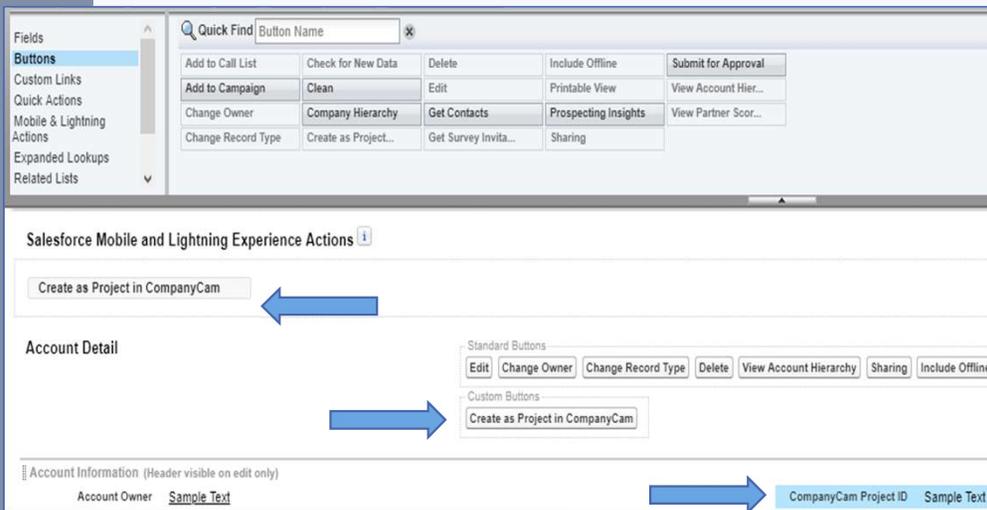
- The objects available by default are:  
Account  
Lead  
Opportunity
- From Setup, click Object Manager and choose which object will store your CompanyCam projects.
- Add the CompanyCam Project ID field somewhere to the Page Layout.



# 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.

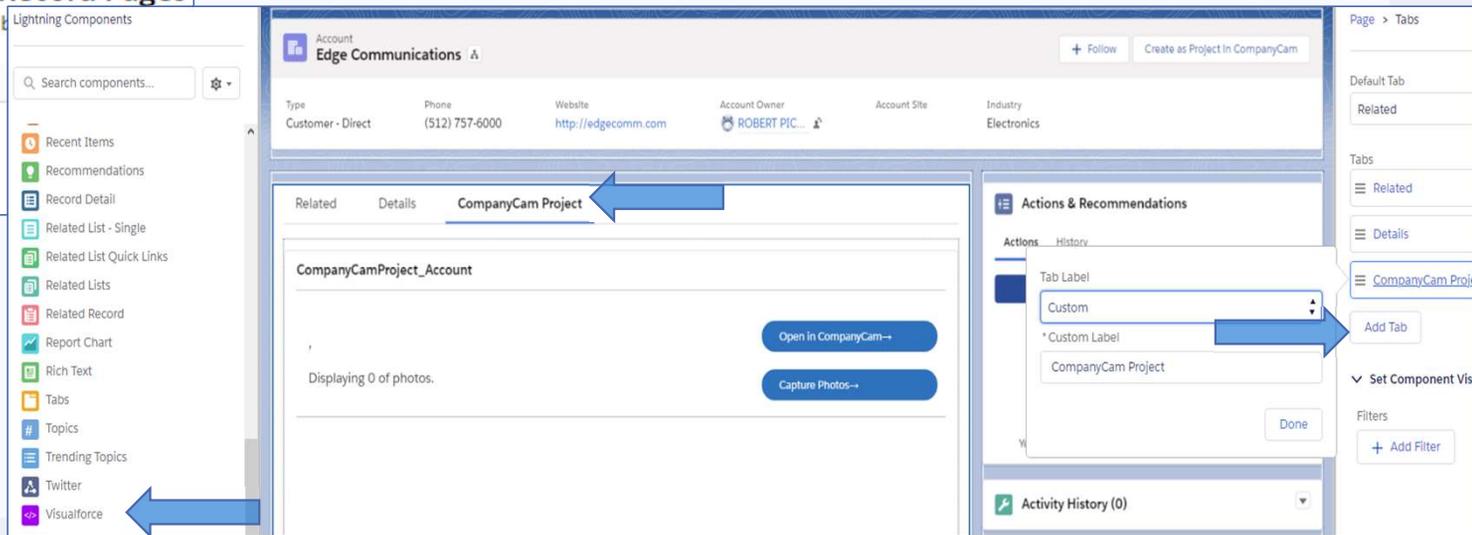


# OBJECT-LIGHTNING SETUP (OPTION 2)

Create (or edit an existing) Lightning Record Page.

Add a Visualforce component somewhere to your Layout.

Example below:

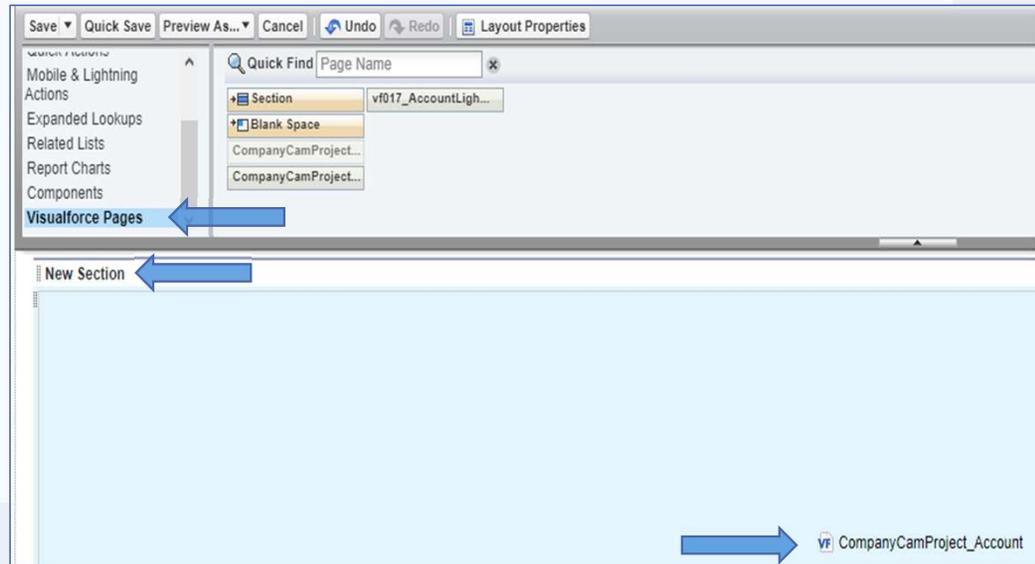
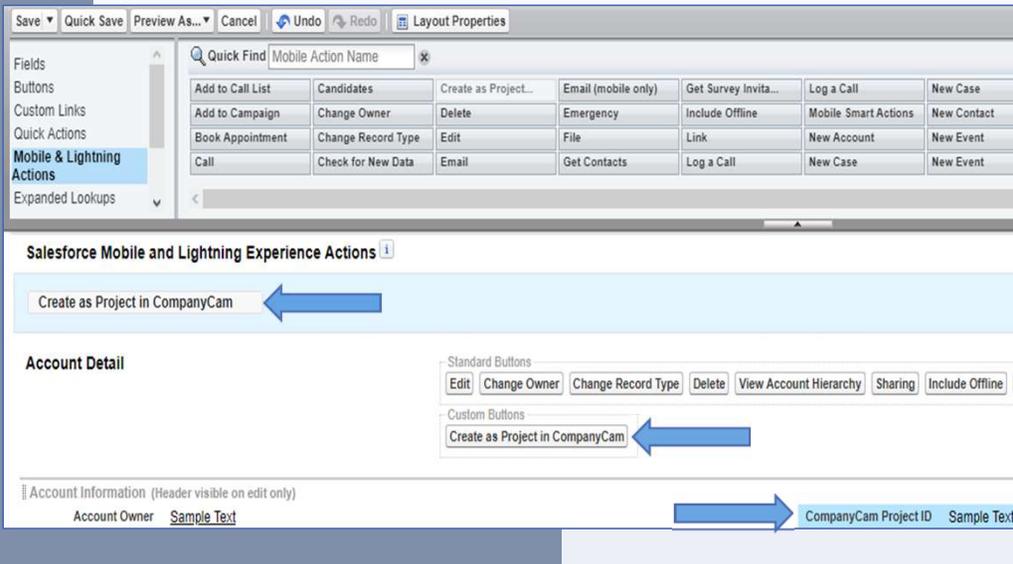


Note:  
A MyDomain is required  
to use Lightning  
Components

# 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.



[Back to Roadmap](#)

# INSTALLING FOR FSL

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

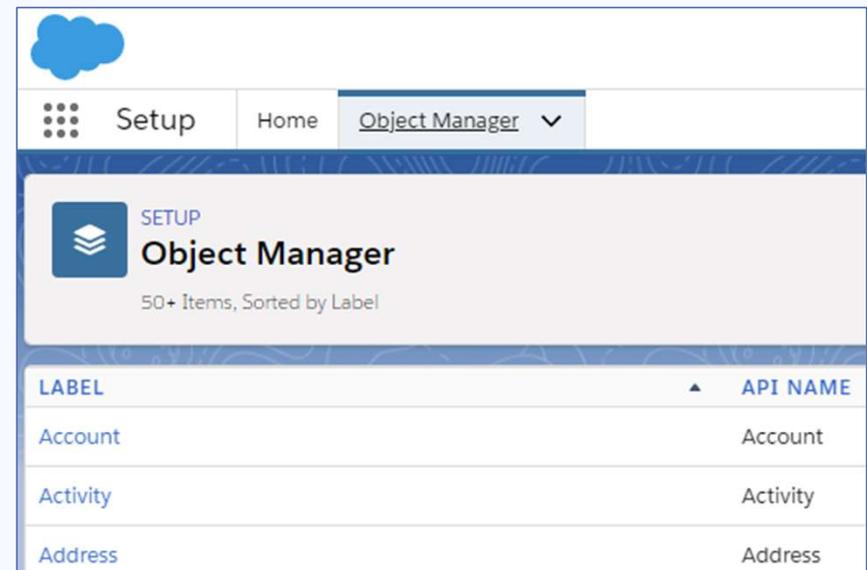
After setting up a custom domain name, add the below to the link and GO.  
`/packaging/installPackage.apexp?po=04t3l0000ooKnGS`

Our example would be:  
`Companycam.my.salesforce.com/packaging/installPackage.apexp?po=04t3l0000ooKnGS`

The screenshot shows the 'My Domain' setup page in Salesforce. At the top, it says 'SETUP My Domain'. Below that, 'My Domain' is displayed. The main section is 'My Domain Step 4', which includes a progress indicator and a flow diagram. The flow diagram shows four steps: 'Choose Domain Name', 'Domain Registration Pending', 'Domain Ready for Testing', and 'Domain Deployed to Users'. The 'Domain Deployed to Users' step is highlighted in blue. Below the flow diagram, it says 'Your domain name is Companycam.my.salesforce.com'. At the bottom, there is a 'My Domain Settings' section with an 'Edit' button. A blue arrow points from the 'My Domain Settings' section to the 'Companycam' domain name in the 'Your domain name is' 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.



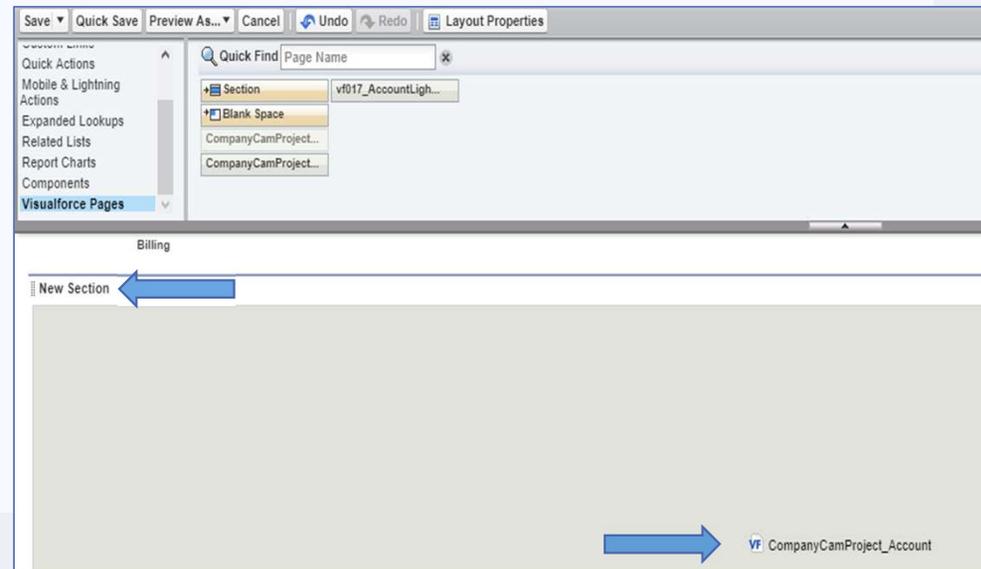
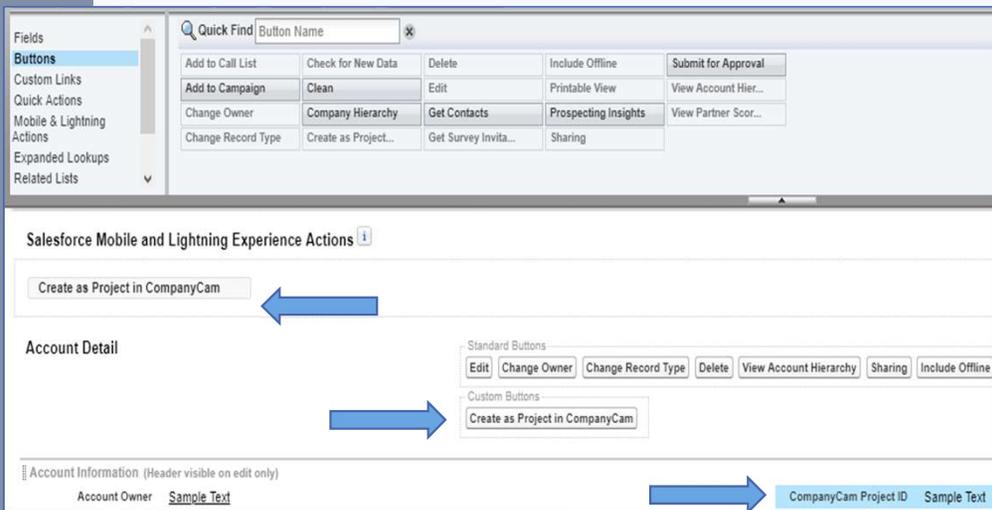
The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with a blue cloud icon, a grid icon, and three tabs: 'Setup', 'Home', and 'Object Manager' (which is selected and has a dropdown arrow). Below the navigation bar, there is a header section with a blue icon of stacked boxes, the word 'SETUP' in blue, and 'Object Manager' in bold black. 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.



# 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	LABEL	ORG DEFAU
Page Layouts	Work Order Record Page	Desktop
<b>Lightning Record Pages</b>		

**NOTE:**  
A MyDomain is required to use Lightning Components

Components

Search components... [Settings]

- > Standard (29)
- ▼ Custom (0)  
No components available.
- ▼ Custom - Managed (4)
  - Appointment Booking Communi...
  - CompanyCamLightningComp... ←
  - 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.