CompanyCam

Questions?

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CoCam + I360 Integration

- Install Package & Authorization
- Add Custom Fields & VisualForce Pages
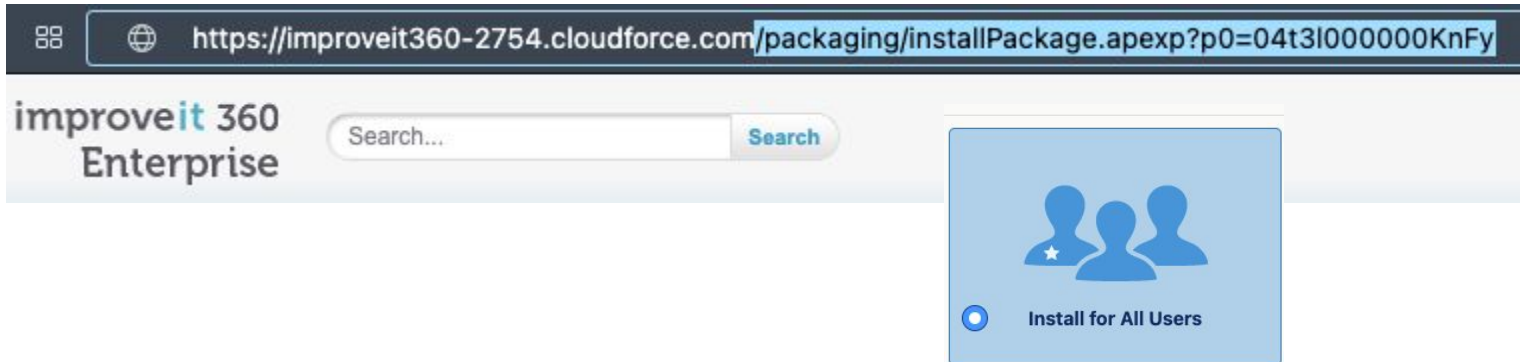- Add to i360 Field Set & run First Time Setup
- Test

Package Link

Append your org site with:

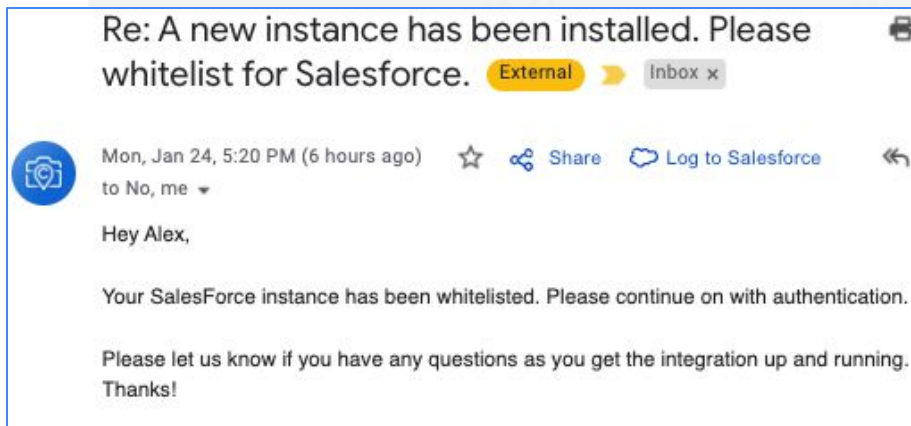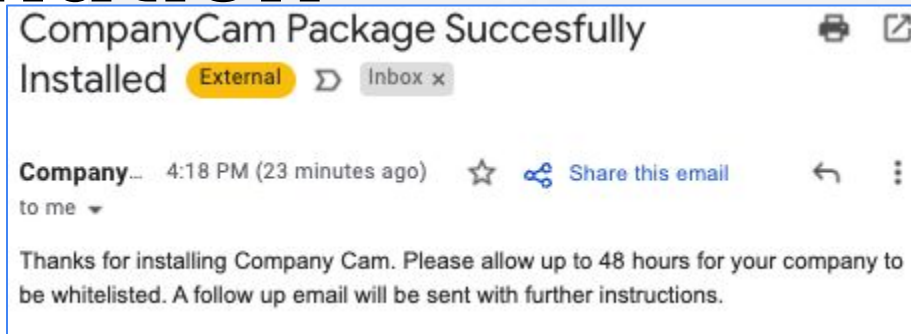/packaging/installPackage.apexp?p0=04t3l000000KnFy

Install for all users

Allowlist Confirmation

You will receive an email notice when the package is installed, and a second notice when your org has been added as an approved connection.

CompanyCam Package Succesfully Installed [External] ⅀ Inbox × 🖶 ⬀

Company... 4:18 PM (23 minutes ago) ☆ ⰻ Share this email ↩ ⋮

to me ▾

Thanks for installing Company Cam. Please allow up to 48 hours for your company to be whitelisted. A follow up email will be sent with further instructions.

Re: A new instance has been installed. Please whitelist for Salesforce. [External] ➤ Inbox × 🖶

Mon, Jan 24, 5:20 PM (6 hours ago) ☆ ⰻ Share ☁ Log to Salesforce «

to No, me ▾

Hey Alex,

Your SalesForce instance has been whitelisted. Please continue on with authentication.

Please let us know if you have any questions as you get the integration up and running. Thanks!

CompanyCam

Edit Credentials

After receiving your allowlist notification:

From **Setup**, type **Named** into the quick find bar and click the option for **Named Credentials**.

Click **EDIT** on the **CompanyCam** option, then click **Save** to be directed to the Authorization screen and then the CompanyCam login screen.

We strongly recommend you login with an Administrator role, so you have access to all the permissions needed.

CompanyCam

Add Custom Field

From SETUP:

Choose the object you want to use in i360 & add a custom field

App Setup

▶ Customize
▼ Create
    Apps
    Custom Labels
    Objects

Custom Object
Prospect (Managed)

This Custom Object Definition is managed, meaning that you may only

Standard Fields [4] | Custom Fields & Relationships [113] | Validation Rules [8]

Custom Fields & Relationships   New
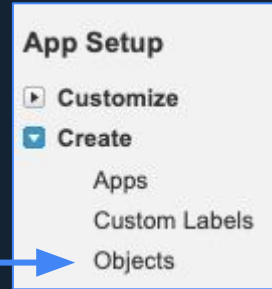
Add Custom Field

- Text Field

- Choose Label and Length (100 characters is more than enough); the *Field Name* will auto-populate for you.

Add Custom Field

- Set Field Security for Admin access, and use permission sets for additional access

Step 3. Establish field-level security   Step 3 of 4

Previous   Next   Cancel

Field Label   CompanyCam Project ID
Data Type   Text
Field Name   Project
Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	☐ Visible	☐ Read-Only
Basic User	☐	☐
Contract Manager	☐	☐
Dept Call Center User	☐	☐
Dept Data Entry	☐	☐
Dept Finance	☐	☐
Dept Production & Installation	☐	☐
Dept Sales & Marketing	☐	☐
i360 Administrator	☑	☐
Identity User	☐	☐
Marketing User	☐	☐
Minimum Access - Salesforce	☐	☐
Mobile Only	☐	☐
Power User	☐	☐
Read Only	☐	☐
Solution Manager	☐	☐
Standard Platform User	☐	☐
Standard User	☐	☐
System Administrator	☑	☐

Add Custom Field

- Add to Layouts if desired now, and then Save
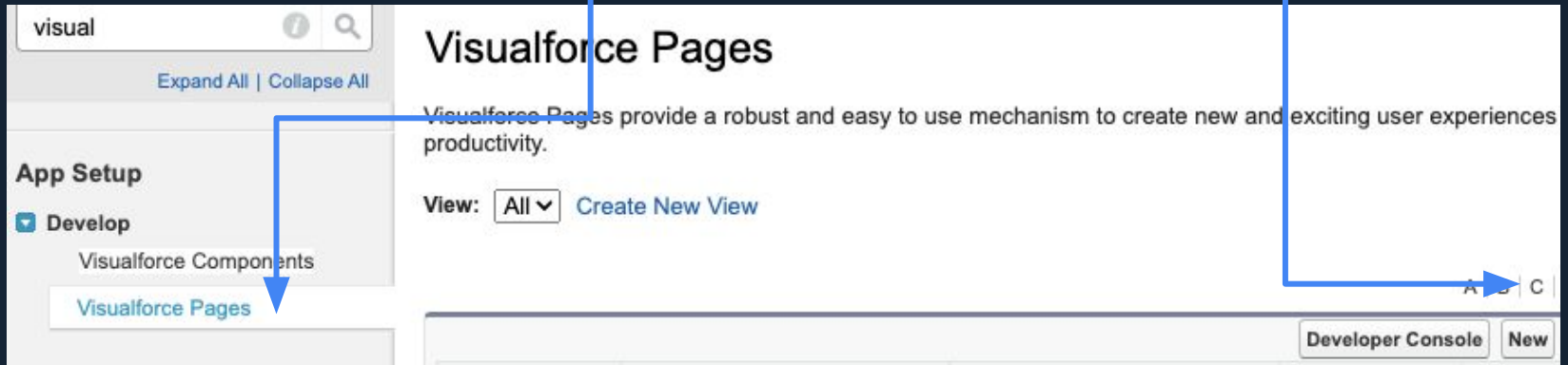
Custom VisualForce Pages

- Open VisualForce Pages, and sort by "C"

Custom VisualForce Pages

- Open VisualForce Pages, and sort by "C"

visual

Expand All | Collapse All

Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences productivity.

App Setup

View: [All ▾] Create New View

Develop

Visualforce Components

Visualforce Pages

A | B | C

Developer Console | New
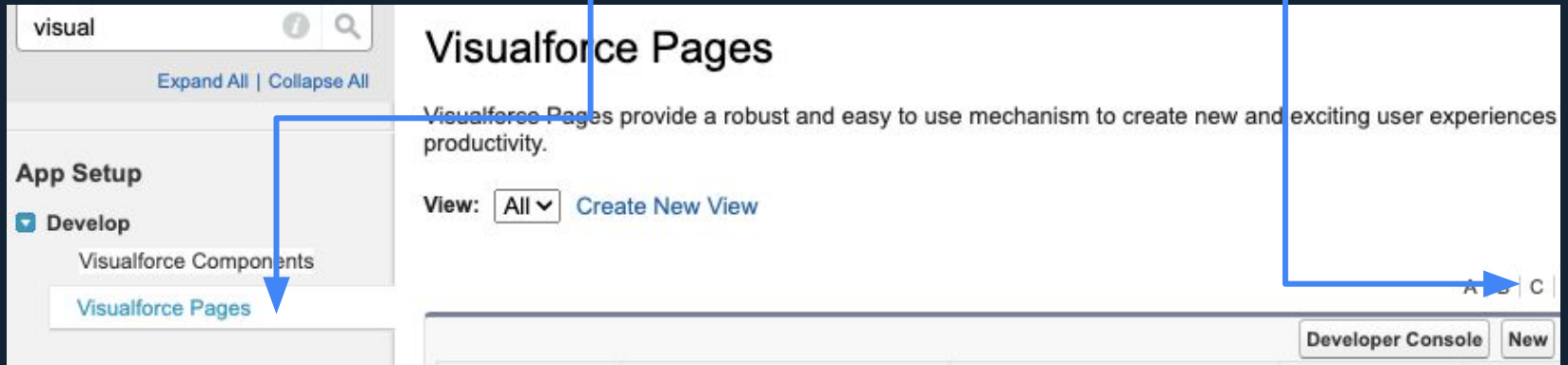
Custom VisualForce Pages

- Open the two ACCOUNT pages in new tabs

Custom VisualForce Pages

- Create a NEW page by copying the format from the CompanyCamProject_Account page.
- Update the LABEL to reflect your custom object.
- Copy & Paste existing APEX code to reflect your custom object and custom ProjectID field.
- SAVE after making the below changes.


```
<apex:page standardController="i360__Prospect__c" >
  <companycam:CompanyCamProjectComponent
ProjId="{!i360__Prospect__c.CompanyCam_Project_ID__c}" />
</apex:page>
```
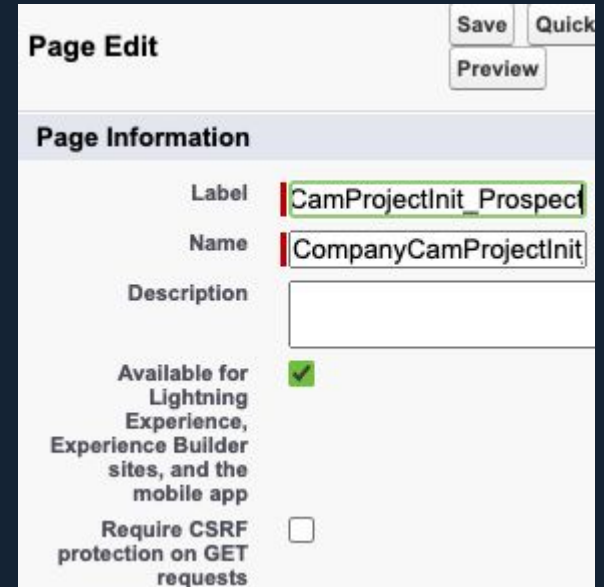
Custom VisualForce Pages

- Create a NEW page by copying the format from the CompanyCamProjectInit_Account page.
- Update the LABEL to reflect your custom object.
- Copy & Paste existing APEX code to reflect your custom object.
- SAVE after making the below changes.

```
<apex:page standardController="i360__Prospect__c">
   <companycam:CompanyCamInitiationComponent
objType="i360__Prospect__c" objId="{!i360__Prospect__c.Id}" />
</apex:page>
```

New Formula Field

From your OBJECT page:

- Create a new Custom Field.
- DATA TYPE will be Formula.
- Set your Label and the API Name will auto-populate; the RETURN TYPE is Text

CompanyCam

Field Label CompanyCam Link

Auto add to custom report type   ☑ Add this field to existing

Formula Return Type

- ○ None Selected
- ○ Checkbox
- ○ Currency
- ○ Date
- ○ Date/Time
- ○ Number
- ○ Percent
- ◉ Text

Step 1. Choose the field type

Specify the type of information that the custom

Data Type

- ○ None Selected   Select one of
- ○ Auto Number   A system-gen automatically
- ◉ Formula   A read-only fi field is update

Calculate a
Example:

Create a te
Example:

New Formula Field

Add in the below formula, replacing API names as needed:

```
IF(
  ISBLANK(CompanyCam_Project_ID__c) ,
    HYPERLINK(

"https://improveit360-2754--c.visualforce.com/apex/CompanyCamProjectInit_Prospect?id=
" + Id ,
    "Create Project in CompanyCam",
    "_blank"
    ),
 HYPERLINK(
    "https://improveit360-2754--c.visualforce.com/apex/CompanyCamProject_Prospect?id="
+ Id ,
    "See CompanyCam Photos",
    "_blank"
  )
)
```

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Step 3. Enter formula

Enter your formula and click Check Syntax to che
Formula subtab to use additional fields, operators,

Example: Full Name = LastName & ", " & FirstN

Simple Formula   Advanced Formula

Select Field Type

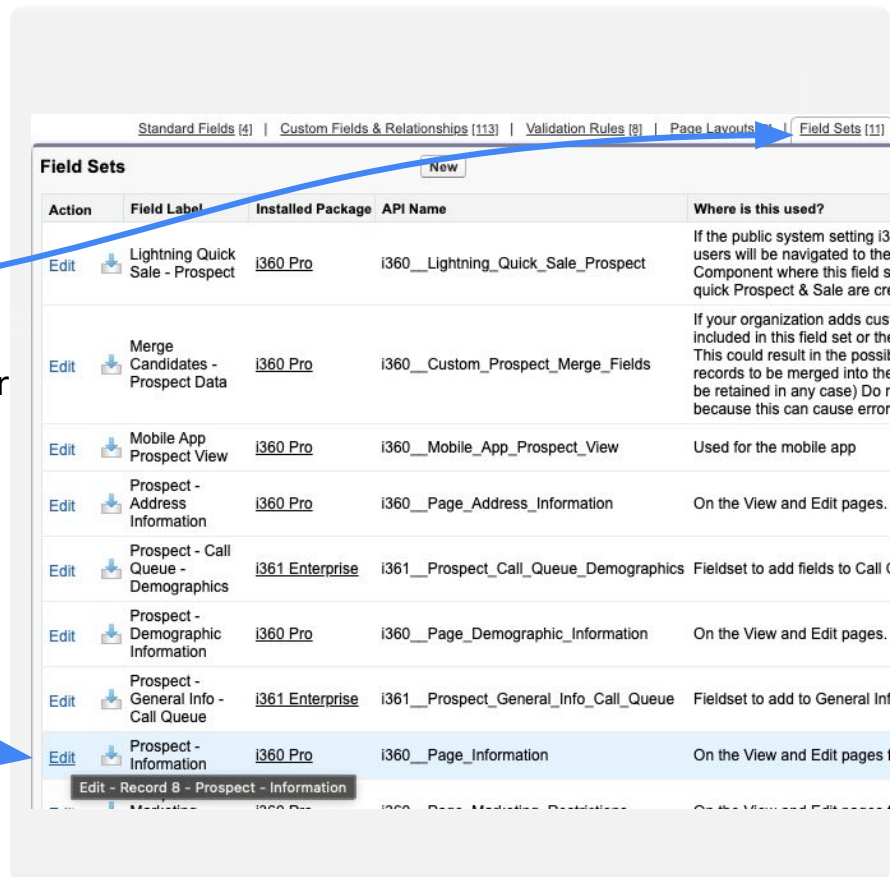Prospect

CompanyCam Links (Text) =

Add to Field Set

From SETUP for your object,

Hover over Field Sets and EDIT the set where you want to add the new fields for Project ID and your Link formula.

Standard Fields [4] | Custom Fields & Relationships [113] | Validation Rules [8] | Page Layouts | Field Sets [11]

Field Sets

New

Action	Field Label	Installed Package	API Name	Where is this used?
Edit	Lightning Quick Sale - Prospect	i360 Pro	i360__Lightning_Quick_Sale_Prospect	If the public system setting i3 users will be navigated to the Component where this field s quick Prospect & Sale are cre
Edit	Merge Candidates - Prospect Data	i360 Pro	i360__Custom_Prospect_Merge_Fields	If your organization adds cus included in this field set or the This could result in the possi records to be merged into the be retained in any case) Do n because this can cause error
Edit	Mobile App Prospect View	i360 Pro	i360__Mobile_App_Prospect_View	Used for the mobile app
Edit	Prospect - Address Information	i360 Pro	i360__Page_Address_Information	On the View and Edit pages.
Edit	Prospect - Call Queue - Demographics	i361 Enterprise	i361__Prospect_Call_Queue_Demographics	Fieldset to add fields to Call (
Edit	Prospect - Demographic Information	i360 Pro	i360__Page_Demographic_Information	On the View and Edit pages.
Edit	Prospect - General Info - Call Queue	i361 Enterprise	i361__Prospect_General_Info_Call_Queue	Fieldset to add to General Inf
Edit	Prospect - Information	i360 Pro	i360__Page_Information	On the View and Edit pages t
	Edit - Record 8 - Prospect - Information			
Edit	Marketing	i360 Pro	i360__Page_Marketing_Restrictions	On the View and Edit pages

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Add to Field Set

Drag and drop the new fields into your Field Set where desired, and SAVE.

Prospect - Information

Save | Cancel | Undo | Redo | Field Set Properties

Prospect
Company

Quick Find: Prospect Name

Available to Call...	Billing City	Bill to Company
Available to Call...	Billing Name	Company
Available to Call...	Billing State	Company (Text)
Billing Address	Billing Zip	CompanyCam Link

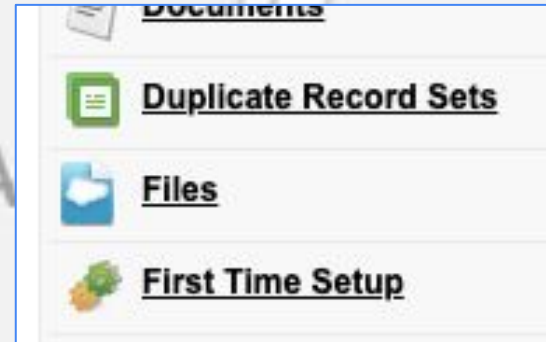Drag any of the fields above into the list below.

In the Field Set ⓘ

Correspondence Name
Company
Contact
Contact Phone
Bill to Company
CompanyCam Link
CompanyCam Project ID

CompanyCam

Run First Time Setup

Find the tab for FIRST TIME SETUP and open it.

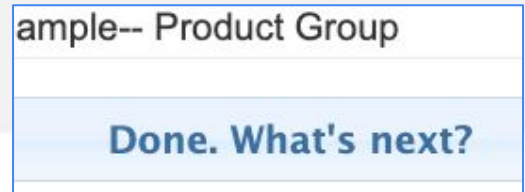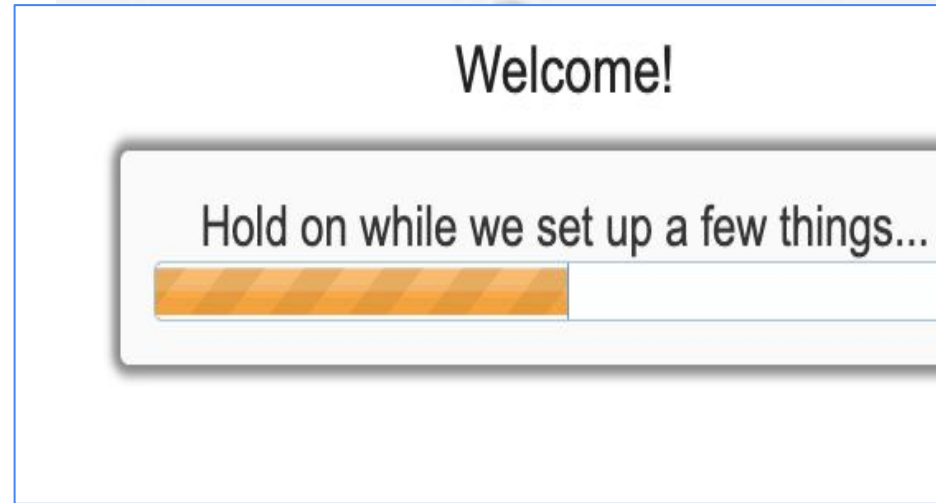You may need to click the '+' in order to find the tab in the list.

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Run First Time Setup

Wait for the setup to finish, and then click through the "What's next" buttons until complete.

Welcome!

Hold on while we set up a few things...

ample-- Product Group

Done. What's next?

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Create Custom Field Mapping

From SETUP, type **companycam** into the search bar and run the search.

Click the COMPANY CAM MAPPING object.

CompanyCam Mapping	1/24/2022	CompanyCam Admin User
Prospect	1/24/2022	CompanyCam Admin User
Prospect	1/24/2022	CompanyCam Admin User
Opportunity	1/24/2022	CompanyCam

CompanyCam

Create Custom Field Mapping

Click the MANAGE button at the top of the page, and then click the NEW button.

Standard Fields [6] | Custom Fields [9] | Validat

Custom Metadata Type Detail

Manage CompanyCam Mapping

Singular Label   CompanyCam Mapping

CompanyCam Mappings

View: [All ▾]   Create New View

New

Action	Label ↑	CompanyCam Mapping Na
Edit	Account	Account

CompanyCam

Create Custom Field Mapping

Enter the API field information as needed, and then SAVE the new mapping.

CompanyCam Mapping Edit | Save | Save & New | Cancel

Information

Label	Prospect
CompanyCam Mapping Name	Prospect [i]
Object	i360__Prospect__c
CompanyCam Project ID Field	CompanyCam_Project_I
Street 1 Field	i360__Home_Address__
Street 2 Field	
City Field	i360__Home_City__c
State Field	i360__Home_State__c
PostalCode Field	i360__Home_Zip_Postal
Name Field	Name
Auto-initiate	✅

Protect
Compone

Namespace Pref

CompanyCam

Permission Set

From SETUP, type **permission** into the search bar and run the search.

Click the PERMISSION SETS object and then click the CLONE action for the **CompanyCam User** permissions.

Name your new permission set **CompanyCam [YOUR OBJECT]**

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Permission Sets

On this page you can create, view, and manage per

In addition, you can use the SalesforceA mobile app the App Store or Google Play: iOS | Android

permission

Expand All | Collapse All

App Setup

Develop

Custom Permissions

Administration Setup

Manage Users

Permission Sets

Permission Set Groups

All ∨   Edit | Delete | Create New View

New   A|B|C|D|E|F|G|H|I|

Action	Permission Set Label ↑	D
Del	Clone	Admin	
Clone	Administrator	T
Clone	Basic User	
Clone	CRM User	D
Clone	CompanyCam User	

Permission Set

Open your new permission set, and click the option for OBJECT SETTINGS.

Open your object, and then click the EDIT button to give Read / Edit permissions to the new *Project ID* field.

SAVE your changes and then click the dropdown arrow next to OBJECT SETTINGS, and click on VISUALFORCE PAGE ACCESS.

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Permission Set

EDIT the page, and move the custom VisualForce pages created over the right-side.

SAVE the changes.

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Items per page: 50 Items

View: All

Visualforce Page Access   Edit

Visualforce Page Name
companycam.CompanyCamProject_Account

Visualforce Page Access   Save Close

Available Visualforce Pages

i360.About
i360.AlertMessageRendering
i360.AppointmentCancelationHTML
i360.AppointmentCancelationText

Enabled Visualforce Pages

CompanyCamProjectInit_Prospect
CompanyCamProject_Prospect
companycam.CompanyCamProjectInit_
companycam.CompanyCamProjectInit_

Permission Set

Click the MANAGE ASSIGNMENTS button to see all users currently assigned this permission set.

Use the ADD ASSIGNMENTS button to add new users, remembering to SAVE any changes.

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Celebrate!

You're done!

Run a test to double-check that your setup is working, and reach out to Alex with any questions or issues.

Questions?

Alex Pickens
alex.pickens@companycam.com
615-601-1412