



2023-06-20



CompanyCam



Questions?

Support@companycam.com



CoCam + I360 Integration

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



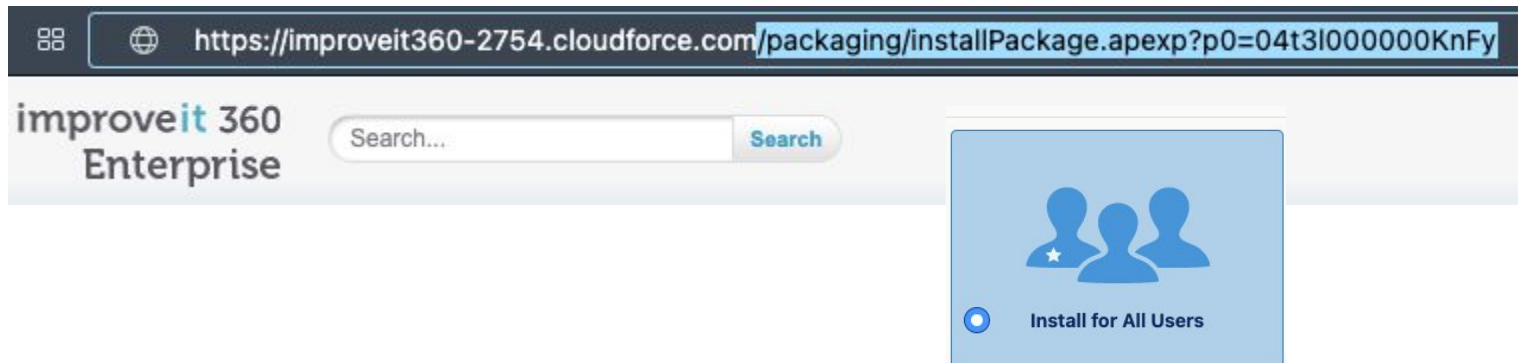


Package Link

Append your org site with:

`/packaging/installPackage.apexp?p0=04t3I000000KnFy`

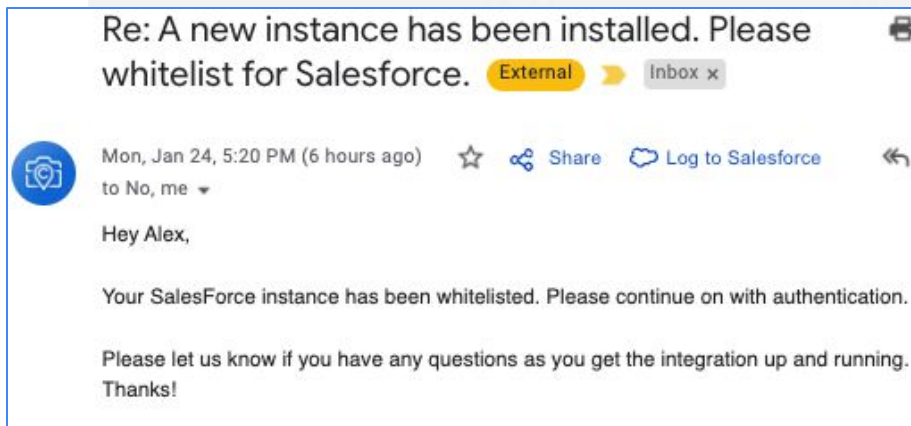
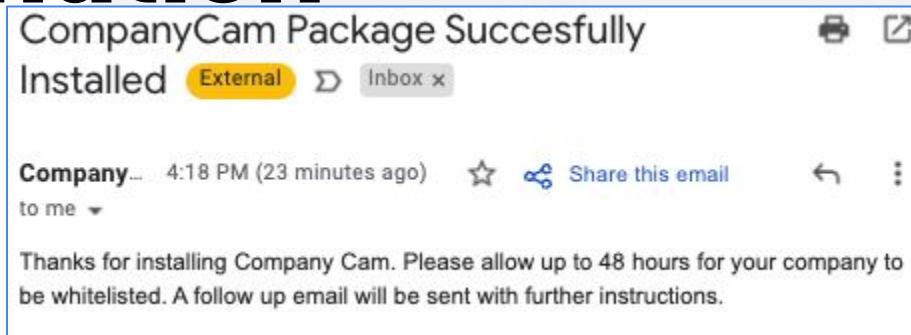
Install for all users





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.





Edit Credentials

After receiving your allowlist notification:

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

Match Consumer Secret -
sk_JomJZqjLyF5wJHUZq6ETnpUX73KUCB9RhGjF

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.



The screenshot shows the Salesforce Setup interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'named'. Under the 'Security' section, 'Named Credentials' is highlighted. Below it, a message says 'Didn't find what you're looking for? Try using Global Search.' On the right, a sidebar titled 'SETUP Named Credentials' shows a list of 'Named Credentials' with 'companycam' selected. Below this, a 'Credential Edit: companycam' dialog box is open, showing fields for 'Label', 'Name', and 'URL'. The 'URL' field contains 'https://api.companycam.com/v2'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Label	External Credentials
companycam	

Credential Edit: companycam

out endpoint's URL and the authentication settings that are required for Salesforce

Save Cancel

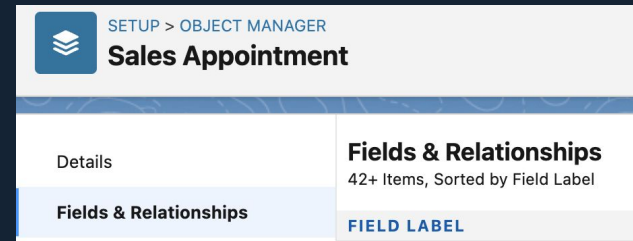
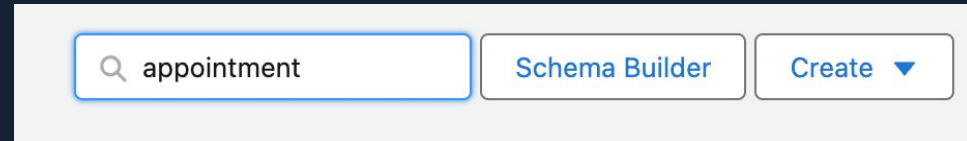
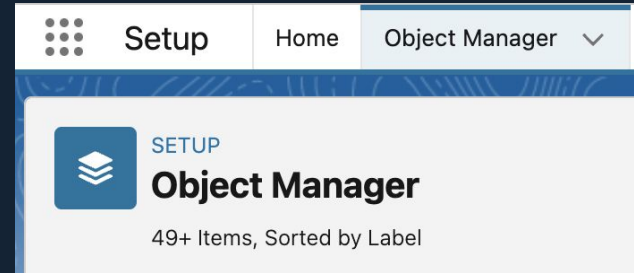
Label	companycam
Name	companycam
URL	https://api.companycam.com/v2

Add Custom Field

From SETUP:

Click Object Manager then select the object you want to use in i360 & add a custom field

*This is needed to host the Project ID for the CompanyCam project locations



Add Custom Field

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

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

Text Allows users to enter any combination of letters and numbers.

Step 2. Enter the details

Field Label ⓘ

Length Please enter the maximum length for a text field below.

Field Name ⓘ

Description

Help Text ⓘ



Add Custom Field

- Set Field Security for Admin access, and use permission sets for additional access
 - Details for creating a custom Permission Set start on Slide 18

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	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Basic User	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input type="checkbox"/>	<input type="checkbox"/>
Dept. Call Center User	<input type="checkbox"/>	<input type="checkbox"/>
Dept. Data Entry	<input type="checkbox"/>	<input type="checkbox"/>
Dept. Finance	<input type="checkbox"/>	<input type="checkbox"/>
Dept. Production & Installation	<input type="checkbox"/>	<input type="checkbox"/>
Dept. Sales & Marketing	<input type="checkbox"/>	<input type="checkbox"/>
1360 Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
Mobile Only	<input type="checkbox"/>	<input type="checkbox"/>
Power User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Add Custom Field

- Add to Layouts if desired now, and then Save

Step 4. Add to page layouts Step 4 of 4

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

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

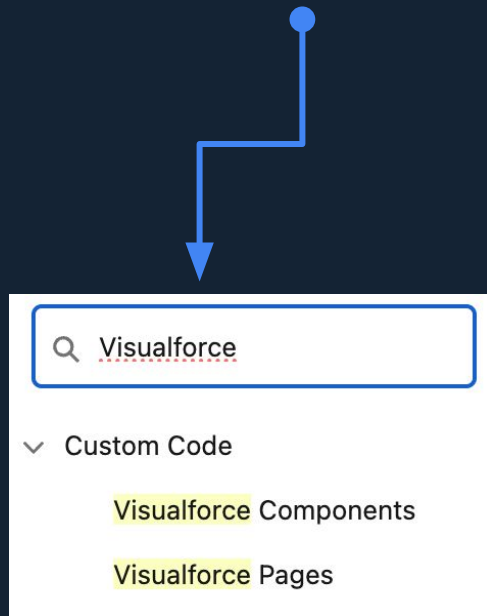
To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Mobile
<input checked="" type="checkbox"/>	Prospect Ent 14



Custom VisualForce Pages

- Open VisualForce Pages, and sort by “C”



A screenshot of the Salesforce Visualforce Pages list. The page title is "Visualforce Pages". Below the title, there is a description: "Visualforce Pages provide a robust and easy to use mechanism for creating custom pages in Salesforce." A "View:" dropdown menu is set to "All" with a "Create New View" link next to it. Below this is a table with two columns: "Action" and "Label". The table contains 12 rows of data, each representing a Visualforce page. A blue arrow points from the top of the slide down to the table.

Action	Label ↑
Security [icon]	AnswersHome
Security [icon]	BandwidthExceeded
Security [icon]	ChangePassword
Security [icon]	CompanyCamProject_Account
Security [icon]	CompanyCamProject_Lead
Security [icon]	CompanyCamProject_Opportunity
Security [icon]	CompanyCamProject_Order
Security [icon]	CompanyCamProjectInit_Account
Security [icon]	CompanyCamProjectInit_Lead
Security [icon]	CompanyCamProjectInit_Opportunity
Security [icon]	CompanyCamProjectInit_Order



Custom VisualForce Pages

- Open the two ACCOUNT pages in new browser tabs to make for easy copy/pasting



The screenshot shows a list of Salesforce page layouts. A blue line with a dot at the top left points to the 'Security' column of the first row. Another blue line with a dot at the top right points to the 'CompanyCamProjectInit_Account' link of the first row. A third blue line with a dot at the top left points to the 'Security' column of the last row. A fourth blue line with a dot at the top right points to the 'CompanyCamProject_Account' link of the last row. The last row is highlighted in light blue.

Security 	 CompanyCamProjectInit_Account
Security 	 CompanyCamProjectInit_Lead
Security 	 CompanyCamProjectInit_Opportunity
Security 	 CompanyCamProjectInit_Order
Edit Del Security 	CompanyCamProjectInit_Prospect
Security 	 CompanyCamProject_Account



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.

Page Information

Label	CompanyCamProject_A
Name	CompanyCamProject_A
Description	
Available for Lightning Experience, Experience Builder sites, and the mobile app	<input checked="" type="checkbox"/>
Require CSRF protection on GET requests	<input type="checkbox"/>

```
<apex:page standardController="{!360core__Sales_Appointment__c}" >  
  <companycam:CompanyCamProjectComponent  
    ProjId="{!360core__Sales_Appointment__c.CompanyCam_Project_ID__c}" />  
</apex:page>
```

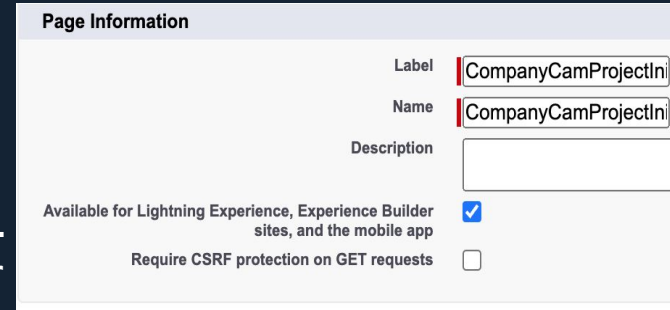
This is an example and does not reflect your specific object/field



Custom VisualForce Pages

- Create a second 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="i360core__Sales_Appointment__c">  
  <companycam:CompanyCamInitiationComponent  
objType="i360core__Sales_Appointment__c"  
objId="{!i360core__Sales_Appointment__c.Id}" />  
</apex:page>
```



Page Information

Label

Name

Description

Available for Lightning Experience, Experience Builder sites, and the mobile app

Require CSRF protection on GET requests

← This is an example and does not reflect your specific object/field



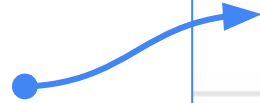


Create Custom Field Mapping

For this step switch to classic by clicking your profile in the top right corner.

From SETUP in classic, 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.

The screenshot shows the CompanyCam interface. At the top, there are tabs for 'Standard Fields (6)', 'Custom Fields (9)', and 'Validation'. Below the tabs is the 'Custom Metadata Type Detail' page for 'CompanyCam Mapping'. A blue arrow points from the 'MANAGE' button in the text to the 'Manage CompanyCam Mapping' button in the interface. Below this is the 'CompanyCam Mappings' section, which includes a 'View:' dropdown set to 'All' and a 'Create New View' link. A blue arrow points from the 'NEW' button in the text to the 'New' button in the interface. Below the view controls is a table with the following content:

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.

This image is simply an example, and you will need to open your targeted object and pull the specific API field names for each field reference.

Formula fields can be used, but the address information does need to be split out for each separate line.

If you are replacing the existing mappings included in the package for the same object, be sure to **uncheck** the Auto-initiate box on the original mapping.



CompanyCam

	Label	Sales Appointment
CompanyCam Mapping Name		Sales_Appointment
	Object	i360core__Sales_Appointment__c
CompanyCam Project ID Field		CompanyCam_Project_ID__c
	Street 1 Field	i360core__Address__c
	Street 2 Field	
	City Field	i360core__City__c
	State Field	i360core__State_Province__c
	PostalCode Field	i360core__Zip_Postal_Code__c
	Name Field	Name
	Auto-initiate	<input checked="" type="checkbox"/>



Permission Set

Switch back to lightning by clicking the Lightning option top right in classic

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]**



CompanyCam

Permission Sets

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

All [Edit](#) | [Delete](#) | [Create New View](#)

New

<input type="checkbox"/>	Action	Permission Set Label ↑
<input type="checkbox"/>	Clone	C360 High Scale Flow Integration User
<input type="checkbox"/>	Clone	CRM User
<input type="checkbox"/>	Clone	Code Builder User
<input type="checkbox"/>	Clone	CompanyCam User

Add a photo here.

Label |

API Name |



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**.



CompanyCam

Permission Set Overview > Object Settings

Object Settings

Object Name

[About](#)

[Accounts](#)

[Alert Messages](#)

Permission Set Overview > Object Settings > Sales Appointments

Sales Appointments

Save Cancel

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Account	i360core__Account__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address	i360core__Address__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Appointment Date/Time	i360core__Appointment_Date_Time__c	<input type="checkbox"/>	<input type="checkbox"/>
Appointment End Date/Time	i360core__Appointment_End_Date_Time__c	<input type="checkbox"/>	<input type="checkbox"/>
Assigned By	i360core__Assigned_By__c	<input type="checkbox"/>	<input type="checkbox"/>
Assigned On	i360core__Assigned_On__c	<input type="checkbox"/>	<input type="checkbox"/>
Cancellation Email Sent On	i360core__Cancellation_Email_Sent_On__c	<input type="checkbox"/>	<input type="checkbox"/>
Canceled	i360core__Canceled__c	<input type="checkbox"/>	<input type="checkbox"/>
City	i360core__City__c	<input type="checkbox"/>	<input type="checkbox"/>
CompanyCam Project ID	CompanyCam_Project_ID__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Permission Set

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

SAVE the changes.



The screenshot shows the Salesforce configuration interface for a Permission Set. At the top, there are settings for 'Items per page' (set to 50) and 'View' (set to All). Below this is a section titled 'Visualforce Page Access' with an 'Edit' button. A table lists the Visualforce Page Name as 'companycam.CompanyCamProject_Account'. At the bottom, there are 'Save' and 'Close' buttons. Below the main configuration area, there are two columns: 'Available Visualforce Pages' and 'Enabled Visualforce Pages'. The available pages include 'i360core.AnswersHome' and 'i360core.BandwidthExceeded'. The enabled pages include 'CompanyCamProjectInit_Appointment' and 'CompanyCamProject_Appointment'.

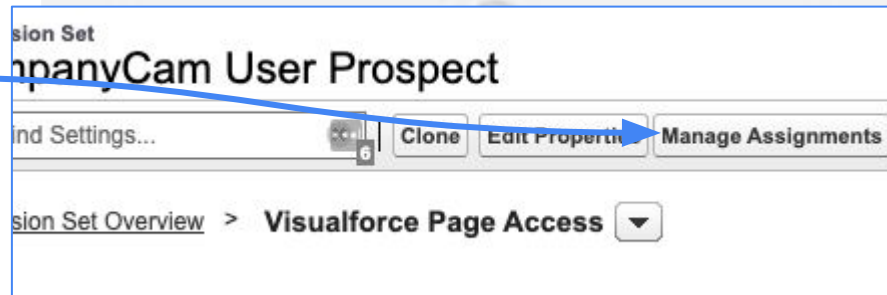
Available Visualforce Pages	Enabled Visualforce Pages
i360core.AnswersHome	CompanyCamProjectInit_Appointment
i360core.BandwidthExceeded	CompanyCamProject_Appointment



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.





Celebrate!

You're done!

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

