CompanyCam

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Overview

CompanyCam is a photo and video documentation app that organizes content into job-specific projects. Integrating CompanyCam with service**minder** enables automatic syncing of photos and videos to the correct contact or appointment within your system.

Once connected, photos and videos taken in CompanyCam are evaluated based on project and location data to determine where they should be stored in service**minder**. This makes it easy to keep visual job records tied directly to appointments and contacts.

This article will review:

- Settings and Navigation
- How Syncing Works
- Best Practices for Successful Syncing
- FAQs

Video Tutorial

Your browser does not support HTML5 video.

Settings and Navigation

Connect Your Accounts

- 1. Navigate to Control Panel > Integrations > Other > Connect to CompanyCam
- $2. \ \ Sign into your Company Cam \ account to \ authorize the \ connection.$

CompanyCam

Learn More

https://companycam.com

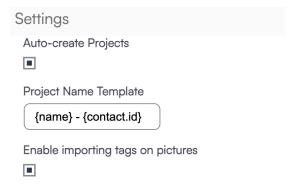
Connect

Settings... | Disconnect...

Your connection to CompanyCam is currently active.

Enable Automatic Project Creation

- 1. After connecting, click the **Settings** link.
- 2. Turn on Auto-Project Creation.
- 3. Define your project name template using shortcodes
 - a. For example, {name} {contact.id} would produce the project name John Smith 12345.





Recommended Setup: Enable automatic project creation and use a consistent naming template. This provides technicians with a clear, designated place to take photos in CompanyCam and ensures that serviceminder knows exactly where to sync them, resulting in the most reliable and consistent photo matching.

Matching Up Users

CompanyCam and serviceminder users should have matching email addresses. This ensures:

- Accurate appointment matching
- User-level audit tracking
- Proper syncing behavior

Double-check that your CompanyCam users use the same email addresses they use in serviceminder.

How Syncing Works

When photos or videos are uploaded to CompanyCam, serviceminder uses the following logic to determine where to store them:

- Project ID Match: If the Project ID was created by serviceminder (via auto-creation), we know exactly where to store the content.
- Active Appointment Check: If the Project ID is missing or unrecognized:
 - We check if the user has an active appointment (started in the past 24 hours but not yet finished) at the moment of sync. If we find one, then we attach the photos to the contact on that appointment.

- If multiple active appointments are found, we use the **most recent** one.
- o If no active appointment is found, or appointments aren't properly started/stopped, the content may not sync or may sync to the wrong contact.

Location-Based Fallback

o If there is no match via project or appointment, we use the coordinates of the photo to find the nearest contact in serviceminder.



Relying on open appointments or location can be difficult in dense areas like apartments or office buildings, where multiple appointments could be active simultaneously or contacts share similar geolocation data. This is why we recommend always using Auto-Project Creation for the most reliable syncing.

Best Practices for Successful Syncing

For the best success when taking photos in CompanyCam during an appointment and syncing them to serviceminder follow these steps:

- 1. Start the appointment in serviceminder before adding media.
- 2. Find the auto-created Project in CompanyCam (or one tied to the appointment).
- 3. Add photos/videos to CompanyCam during the appointment.
- 4. **Finish** the appointment.



You can continue to add media to the project in CompanyCam after the appointment has been finished and it will sync over to serviceminder. However, we still recommend adding media to the project during the appointment as a best practice.

FAQs

Why aren't my pictures syncing over from CompanyCam?

Double-check the following:

- ☑ Integration is active in Control Panel > Integrations > Other
- ☑ Auto-project creation is enabled in **Settings**
- ☑ Appointment is **started** in service**minder**

If content doesn't sync, download it from CompanyCam and upload it manually to ServiceMinder.

How can my customers see the photos in the contact portal?

Contacts can view the photos from an appointment via an Appointment Report link that will populate next to the applicable appointment. To generate an Appointment Report, you will need to set up a template in Control Panel > Miscellaneous Templates > Appointment Report.