

CompanyCam

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Overview

CompanyCam is an app that lets you take pictures and video and group them together in Projects. By integrating serviceminder with CompanyCam, you can seamlessly sync photos to appointments in our system.

Once you've connected your accounts, new content is sent over to serviceminder by looking at the user who created the content and finding in-progress appointments nearby to attach the content to.

If no appointment is found, serviceminder looks for any contact that is nearby, and will use that. If the project was created from the serviceminder side (see under Settings below), the content will be applied to the correct contact/appointment based on the project rather than the coordinates.



Note that we only store a link to the videos (not a copy), so if you cancel or close your CompanyCam account, you will lose access to the videos from within serviceminder.

Video Tutorial

Your browser does not support HTML5 video.

Settings and Navigation

Connecting the Accounts

- To connect to your CompanyCam account, click through to **Control Panel > Integrations > Other > Connect to CompanyCam**
- Once you click this, you'll be prompted to log into CompanyCam to allow the two accounts to talk to each other.
- Next, you'll see a **Settings** link. Visit this page to turn on CompanyCam project creation as well as define how you want the projects named.
 - If Auto-project Creation is enabled, we'll either look for or create a project when you start an appointment. From then on, CompanyCam will prompt you to put content in that Project when you're near that location.
 - You can use any contact shortcodes to set up the template name including address, name, etc. The example below uses the shortcode {name} - {contact.id} which will name the project with the contacts name and unique serviceminder contact ID (i.e., John Smith - 12345)

Settings

Auto-create Projects ☒

Project Name Template {name} - {contact.id}

Enable importing tags on pictures ☒



It is our recommended method to enable projects to auto-create and use a project name template for the most consistency when taking photos in CompanyCam and syncing them with serviceminder because it gives the technician a clear place to take the photos in CompanyCam and tells the serviceminder system exactly where to put them when they sync over.

Matching Up Users

CompanyCam and serviceminder users both have email addresses associated with them. This is what we use for additional validation and linking of CompanyCam activity into serviceminder. If you have CompanyCam users taking pictures or videos, the email address for those users should match the email address for the same users in serviceminder. This is used to enable us to link the content to the correct appointments and for auditing purposes.

Syncing Photos and Video

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

1. Make sure the appointment has been **started** in serviceminder.
2. Use the Project in CompanyCam that was auto-created by the integration.
3. Take/Upload *all* photos and videos while the appointment is still in progress, and then finish the appointment in serviceminder like normal.



The most common reason that photos do not sync over to serviceminder from CompanyCam is that the appointment has not yet been started or has already been completed. This ends the "live" connection for CompanyCam to know it needs to send the photos over to our system.

If the photos do not sync over while the appointment is in progress, the best option is to manually upload them to the serviceminder system at a later time.

FAQs

Why aren't my pictures syncing over from CompanyCam?

Review this checklist to set yourself up for success!

- My integration is active in **Control Panel > Integrations > Other**

Learn More <https://companycam.com>

Connect [Settings...](#) | [Disconnect...](#)

Your connection to CompanyCam is currently active.

- I have projects set to auto create in Company Cam by clicking on **Settings...**

Settings

Auto-create Projects

☒

Project Name Template

Enable importing tags on pictures

☒

- I have **started the appointment** and taken/uploaded all photos to the CompanyCam project while the appointment is **in progress**
 - Anything added before the appointment is started or after the appointment is finished will have to be downloaded from CompanyCam and manually uploaded into 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**.
