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.

Video Tutorial

Your browser does not support HTML5 video.

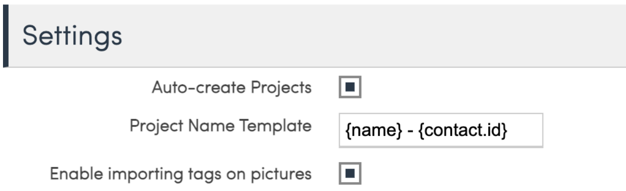
Settings and Navigation

Connect Your Accounts

1. Navigate to **Control Panel > Integrations > Other > Connect to CompanyCam**
2. Sign into your CompanyCam account to authorize the connection.

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 service**minder** knows exactly where to sync them, resulting in the most reliable and consistent photo matching.

Matching Up Users

CompanyCam and service**minder** 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 service**minder**.

How Syncing Works

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

- **Project ID Match:** If the Project ID was created by service**minder** (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.
  - 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**
  - If there is no match via project or appointment:
    - We use the **coordinates** of the photo to find the **nearest contact** in service**minder**.

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 service**minder** follow these steps:

1. **Start** the appointment in service**minder** before taking photos.
2. Use the **auto-created Project** in CompanyCam (or one tied to the appointment).
3. Upload photos/videos **during** the appointment.
4. **Finish** the appointment after uploading.

> 🔔 **Don't:** Upload photos before starting or after finishing an appointment. This breaks the live connection.
>
> If media doesn't sync, you can manually upload it to service**minder** from CompanyCam later.

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 ServiceMinder

☑ Photos/videos are taken/uploaded **during** the appointment

✕ Photos added **before or after** the appointment won't sync automatically

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.**