

START HERE

# Connect PSAI and CompanyCam to Claude

## Turn job photos into past projects on your website.

This setup lets Claude read CompanyCam job photos and create or update past projects on your PSAI site. Plan on about **10 minutes** for the connection setup.

- 01** Create an API key in your PSAI platform account.
- 02** Add PSAI to Claude as a custom connector using that key.
- 03** Connect CompanyCam in Claude and sign in.

## Before you begin

Have admin access to your PSAI account and a CompanyCam login for the **same company**. Confirm the PSAI account name at the top right, next to PSAI Agent.

### One company at a time

Only one client can be connected at a time. Confirm the connected company before making changes. To switch clients, disconnect and connect the new client using a new API key.

## In this guide

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Scope: These instructions follow the supplied Claude setup screenshots. They are not ChatGPT setup instructions. Screen labels and examples reflect the supplied source.

## STEP 1 / PSAI

# Create your API key

The key belongs to one PSAI customer account. Sign in to the correct account before creating it.

**01** Click **Settings** at the bottom of the left navigation.

**02** Under **Integrations**, open **API Keys**.

**03** Click **Create API Key** at the top right.

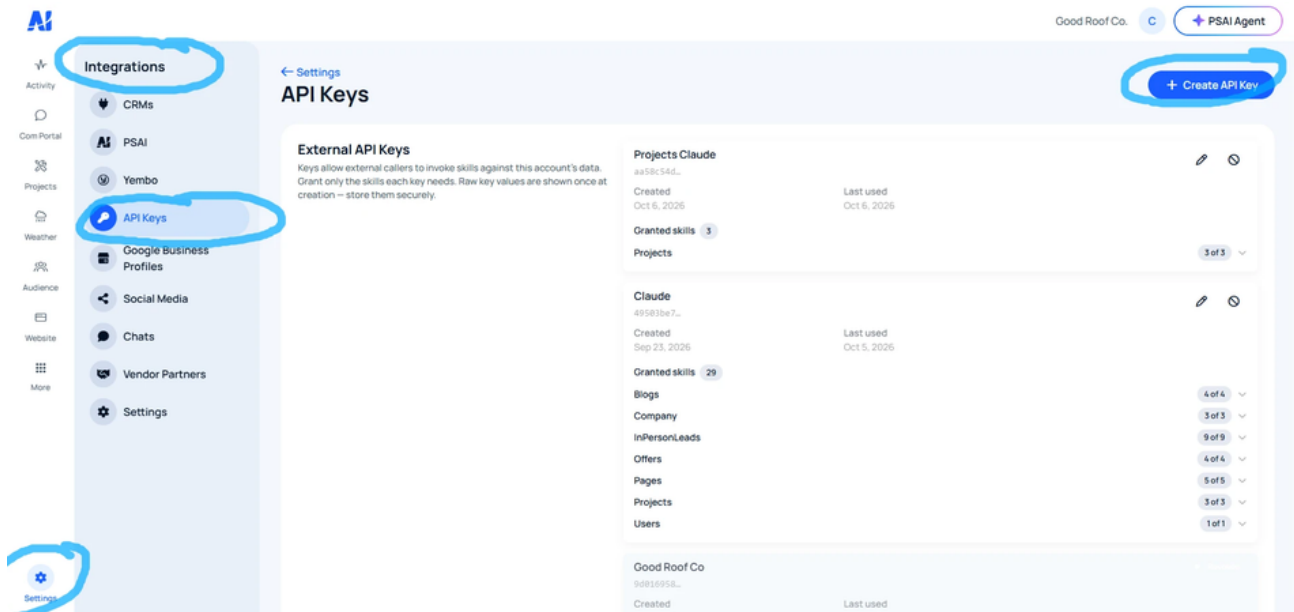
**04** In **Name**, enter a descriptive label, such as **Projects2Claude**.

**05** Under **Granted Skills**, check **Projects**. This enables all three skills: **create\_project**, **get\_project**, and **update\_project**. Leave everything else unchecked.

**06** Click **Create**.

**07** Click **Copy** and save the key somewhere secure for the next step. It is shown only once.

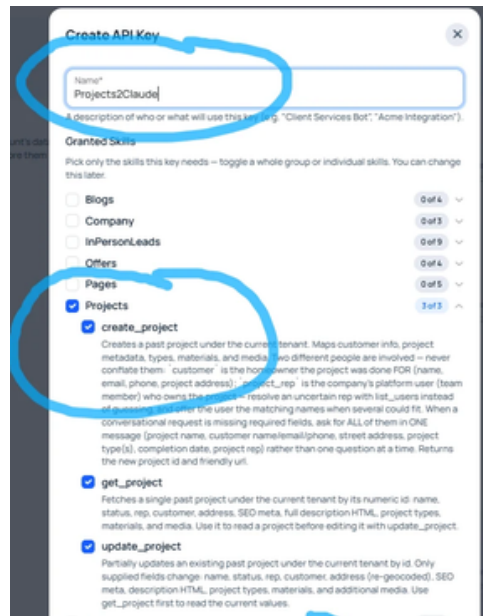
**08** Click **I've copied my key**.



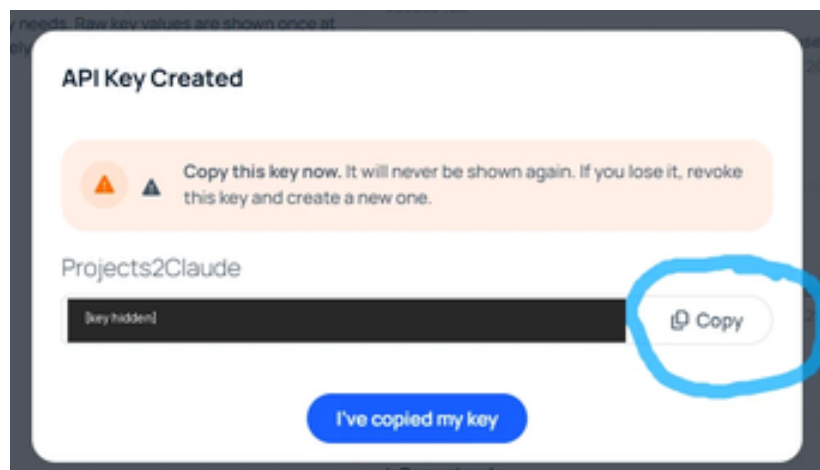
PSAI: Settings > Integrations > API Keys. The annotations identify the navigation and Create API Key button.

## STEP 1 / VISUAL REFERENCE

# Choose permissions. Save the key securely.



Name the key and select only the three Projects skills. Detail cropped from the supplied screenshot.



Copy the key before closing the confirmation. The source screenshot hides the key.

## If the key is lost

Revoke it using the circle-slash icon on its API key card, then create a new key. Reconnect Claude with the replacement key.

## STEP 2 / CLAUDE

# Add the PSAI connector

**01** In Claude, open **Settings**, then **Connectors** under Customize.

**02** Click **Add** at the top right, then **Add custom connector**.

**03** Enter a name. This is the label in your connector list; use your company name, for example **Good Roof Co - Projects**.

**04** Enter this URL exactly, without angle brackets:

```
https://developers.predictivesalesai.com/v1/mcp
```

**05** Click **Continue**.

**06** Under **Authentication**, choose **No sign-in** (the third option). Do not choose **Sign in now**, even if it is marked Detected.

**07** Under **Request headers**, set the header name to **authorization**.

**08** In the value box, type **Bearer**, then one space, then paste your API key from Step 1. The value is sent exactly as entered.

```
Bearer YOUR_API_KEY
```

Replace YOUR\_API\_KEY with your actual key. Do not include brackets or quotation marks.

**09** Leave **Required** checked.

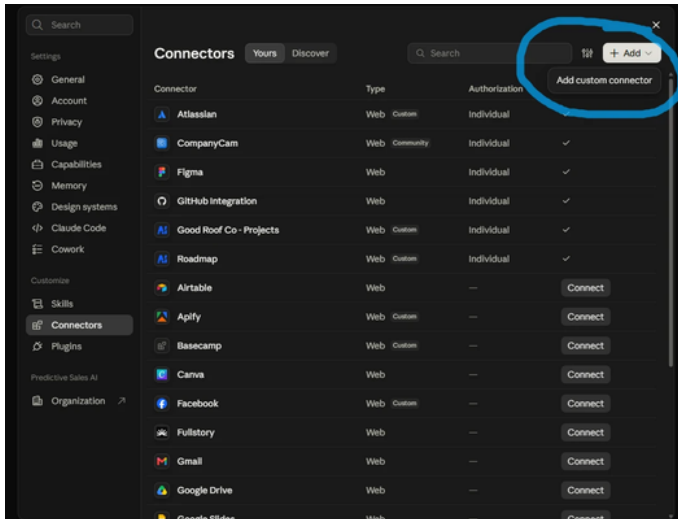
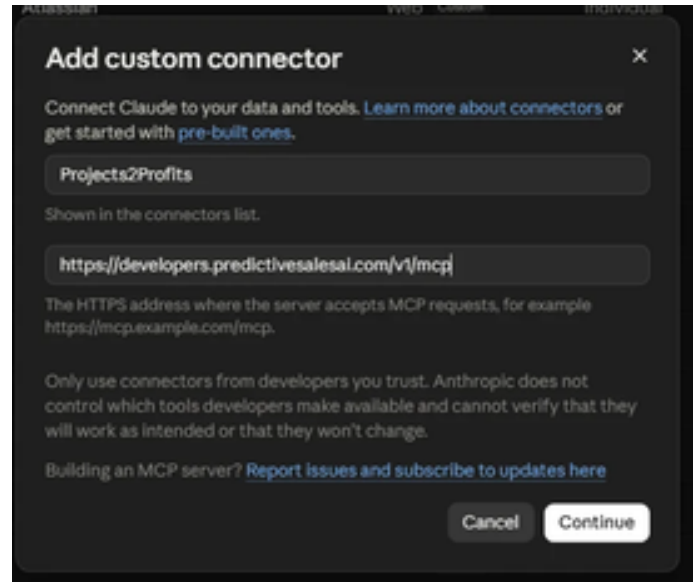
**10** Click **Add**. The connector should appear in your list with a check mark under **Status**.

## Exact formatting matters

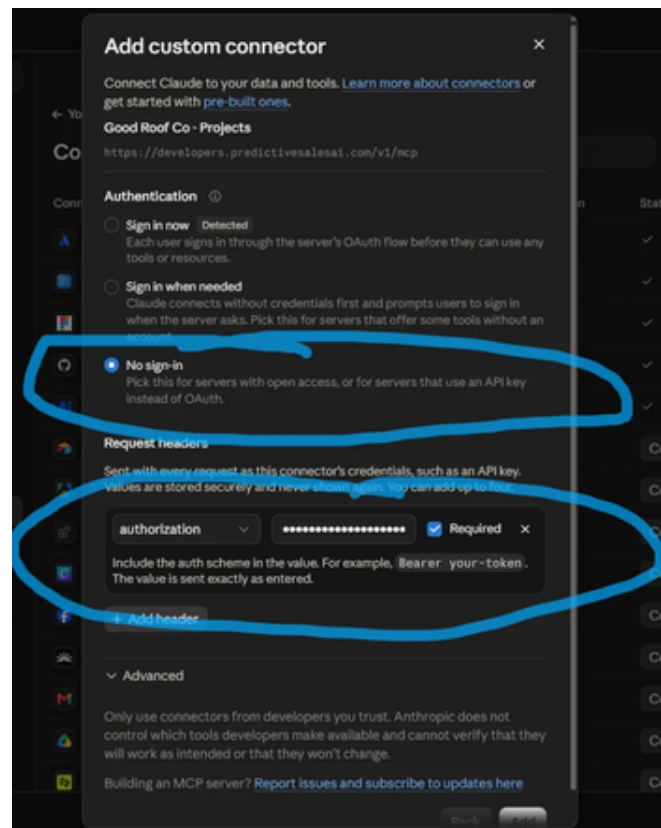
Use the header name **authorization** and the value **Bearer** followed by a space and your key. The **No sign-in** option still uses your API key through this request header.

## STEP 2 / VISUAL REFERENCE

# Check the connector settings



Left: Add > Add custom connector. Right: enter the label and URL, then Continue.



Select No sign-in; add the authorization header; leave Required checked. The key is masked in the source screenshot.

## STEP 3 / CLAUDE

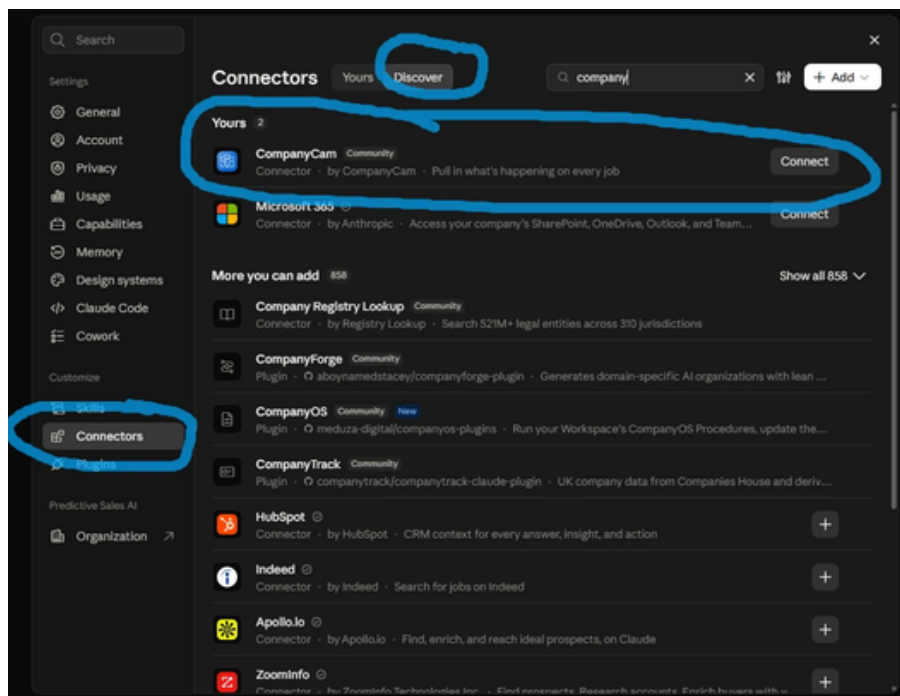
# Connect CompanyCam

**01** Still in **Settings > Connectors**, click the **Discover** tab.

**02** Search for **companycam**.

**03** Find **CompanyCam** (Connector, by CompanyCam) and click **Connect**.

**04** Sign in with the CompanyCam account for the **same company** you created the PSAI API key for, then approve access.



CompanyCam appears in the Yours tab with a check mark after connection.

## Check that both connections work

Start a new chat in Claude. In the chat's tools menu, make sure both connectors are switched on. Ask Claude to retrieve a project, for example:

### Test prompt

List my recent CompanyCam projects, then get past project 123 from the PSAI platform.

Replace 123 with an existing PSAI past-project ID for your company.

## TROUBLESHOOTING

# Resolve common connection issues

| Problem / likely cause                                                                   | What to do                                                                                             |
|------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| PSAI authentication error. The header may be missing Bearer or may contain only the key. | Remove the connector and add it again with the exact value: Bearer followed by one space and your key. |
| PSAI calls worked before but now fail. The key may have been revoked.                    | Create a new key (Step 1) and re-add the connector (Step 2).                                           |
| Claude can read projects but cannot create them. The key is missing create_project.      | Edit the key using the pencil icon and check all three Projects skills.                                |
| Projects land on the wrong customer site. The key was created under another account.     | Create the key while logged into the correct customer account, then connect that key.                  |
| CompanyCam shows the wrong jobs or no jobs. Another company account is connected.        | Disconnect CompanyCam and sign in with the correct account.                                            |

## Protect your API key

Treat the key like a password. Store it in an approved password manager or secret store. Enter it only in the connector's request-header field; do not paste it into chats, emails, shared documents, or screenshots.

Grant only the Projects skills needed here. If a key is lost or exposed, revoke it, create a replacement, and update the connection. Verify the company before each workflow.

## USE CASE 1 / NEW PROJECTS

# Import recent CompanyCam jobs

**For exterior contractors**

These source workflows are for exterior contractors. The prompts must be updated appropriately before using them for interior contractors.

Use this when jobs are not on your website yet. With the supplied import prompt, Claude selects finished-work photos and creates past projects with photos, a short write-up, and SEO details. It aims for **10 projects per run**, saved as **unpublished** for review.

**Before you start:** Set up both connectors. Have the name or email of the team member to credit, exactly as shown in your website admin. Obtain **companycam\_import\_prompt.md**, the separate prompt file referenced in the source.

**01** Open **companycam\_import\_prompt.md** and copy everything below the line in that file.

**02** Start a new Claude chat and turn on both the CompanyCam and PSAI connectors in the tools menu.

**03** Paste the prompt and send it.

**04** Answer Claude's setup questions: confirm your company, who to credit, the type of work, and whether you have run the import before.

**05** If Claude asks for missing customer emails or phone numbers, fill in what you have. Jobs left blank are skipped.

## Save the results

You receive a table of created projects with page links, a list of skipped jobs and reasons, and a **list of CompanyCam job numbers**. Save the job-number list and provide it next time Claude asks, to avoid duplicate imports.

## Review, then publish

In PSAI, open each new project. Check the photos and text, add missing details such as materials used, and publish when ready.

Required file: The source references the import prompt as a separate attachment. Its full contents were not supplied and are not recreated in this guide. Obtain the approved file from your PSAI contact before running this workflow.

## USE CASE 2 / EXISTING PROJECTS

# Schedule weekly photo updates

With the supplied task instructions, Claude adds photos to about **10 existing projects each week**. It copies finished-work photos to matching past projects that have **no media**. This workflow does not create projects, change customer details, or touch projects that already have photos.

## Prepare two files

1. **Task instructions:** `scheduled_task_companycam_weekly.md`, the separate file referenced in the source.
2. **Project export:** Export all past projects from PSAI and keep the file unchanged. The task reads **ProjectId**, customer name, address, and project type.

The source leaves the export location as [EXPORT PATH]. Confirm the correct export location with your PSAI contact and obtain the approved task-instruction file before proceeding. Neither the export path nor the missing file is invented here.

## Create the task in Claude

- 01 Click **Scheduled** in the left navigation.
- 02 Click **New task**, then **Create with Claude**.
- 03 Upload both the .md instructions and your project export.
- 04 Tell Claude the weekly schedule. Example: **Run this every Monday at 8 AM using the attached instructions and project export**. Confirm the intended time zone when reviewing the task.
- 05 Review the task Claude creates and save it.



Claude: Scheduled > New task > Create with Claude.

## Keep the results and inputs current

Each run produces `companycam_match_log.csv`, a running record of projects checked and outcomes. Keep the latest copy; later runs use it to continue. You also receive a short report of projects updated, skipped jobs and reasons, and items needing review.

When you add past projects, export again and replace the task's export file. The first run checks that CompanyCam matches your company before making changes; if it does not match, it stops and asks.