Important Note
This installation guide contains basic information about S-Drive installation. Refer to the S-Drive Advanced Configuration Guide for advanced installation/configuration topics and S-Drive User Guide for more information about using S-Drive product and S-Drive API calls.
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A. Installation

1. Go to S-Drive Website (sdriveapp.com). Click "Get S-Drive" button. S-Drive Product Page will be opened. And click "Get It Now" (Figure 1).

2. Click "Login to the AppExchange" to login using your Salesforce credentials. If you don't have a login, click "I don't have a login" to continue as a guest and apply for a free trial Salesforce account. Note that "even if you plan to install S-Drive into your sandbox, first you need to login to the AppExchange using your production credentials" (Figure 2).

3. After login you'll be asked where to install: "Install in production" or "Install in sandbox". Select the appropriate option based on your needs (Figure 3).
4. Review "What You Are Installing" and "Where You Are Installing" sections in the next screen. Read the "terms and conditions" and then check "I have read and agree to the terms and conditions" checkbox and click "Confirm and Install!" button. (Figure 4).

```
       Almost there!

       [Image of screen with terms and conditions checkbox]

       Confirm and install | Back to previous step
```

Figure 4

5. Login to your production (or sandbox organization based on your previous selections) account again in the next screen.

6. Review the "Package Installation Details" and "Package Components". Click "Continue" (Figure 5).

```
       Package Installation Details

       Package Name: SDrive
       Version Name: 1.24
       Version Number: 1.24
       Publisher: CyanGate
       Description: S-Drive is an easy, secure and unlimited file storage and distribution platform. No more attachments or FTP, just send a link. Collect your company knowledge securely on Amazon S3 Cloud Storage. Access anywhere, anytime.

       Continue | Cancel
```

Figure 5

7. Approve third-party access by checking “Yes, grant access to these third-party web sites” option and clicking "Continue" button (Figure 6).
8. Review "Approve Package API Access" details and click "Next" (Figure 7).

9. If you're installing S-Drive to a Salesforce Enterprise or Unlimited organization you'll see security level options screen (Professional organization users will not see this screen). Select "Grant access to all users" for the "Choose security level" step and click "Next" (Figure 8).

10. Select "Install" for the last step (Figure 9).
11. If you see "Install Complete" screen, installation is completed (Figure 10). You can continue with the 'Displaying "S-Drive" and "S-Drive Configuration" Tabs' section.

If you see "Processing" screen, you need to wait for the notification email for a few minutes and once you get the email S-Drive is installed successfully (Figure 11).
B. Displaying "S-Drive" and "S-Drive Configuration" Tabs

1. To display "S-Drive" and "S-Drive Configuration" tabs in your custom app (e.g. "Sales" app), go to "Setup -> Personal Setup -> My Personal Information -> Change My Display". Click "Customize My Tabs" button (Figure 12).

2. Select your custom app from the "Custom App" drop down menu (e.g. "Sales" app). Move "S-Drive" and "S-Drive Configuration" tabs from "Available Tabs" box to "Selected Tabs" box by selecting and clicking the right arrow as shown below. Click "Save" (Figure 13).
C. Activating S-Drive

After completing installation and S-Drive tab configuration, click on the "S-Drive" tab.

1. **Step 1: Configure Remote Sites:** If Remote Site Settings are configured correctly (see Figure 6), you'll see "Your remote site settings are configured correctly" message under the "Step 1: Configure Remote Sites" section (Figure 14Error! Reference source not found.). If you see an error message in Step 1, resolve the issue by following the on-screen instructions (Figure 15).

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**Welcome to S-Drive**

Thank you for installing S-Drive.

**Step 1: Configure Remote Sites**

Your remote site settings are configured correctly.

**Step 2: Configure Amazon S3 Credentials**

Access Key: [Blank]  
Secret Key: [Blank]  
Configure Amazon S3 Credentials

**Step 3: Configure Amazon S3 Bucket Name**

You have to complete Step 2.

**Step 4: S-Drive Authorization**

In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on https://portal.sdriveapp.com
See "S-Drive Portal Guide" for more information.

---

**Welcome to S-Drive**

Thank you for installing S-Drive.

**Step 1: Configure Remote Sites**

You haven't configured your Remote Sites Settings.

Go to Setup > Administration Setup > Security Controls > Remote Site Settings and add the following three remote sites:
- https://it1.amazonaws.com
- https://s3.amazonaws.com
See "Installation Guide" for more information.

**Step 2: Configure Amazon S3 Credentials**

You have to complete Step 1.

**Step 3: Configure Amazon S3 Bucket Name**

You have to complete Step 2.

**Step 4: S-Drive Authorization**

In order to start using S-Drive you need to create a free S-Drive account and authorize S-Drive to access your Salesforce organization on https://portal.sdriveapp.com
See "S-Drive Portal Guide" for more information.
2. **Step 2: Configure Amazon S3 Credentials:** This step is required to connect your Amazon S3 account with S-Drive. You need to type valid "Amazon Secret Key" and "Access Key". After providing keys, click "Configure Amazon S3 Credentials" button (Figure 14). If you see "Amazon S3 Credentials are configured correctly." message under "Step 2: Configure Amazon S3 Credentials" section (Figure 16), you can continue with "Step 3: Configure Amazon S3 Bucket Name".

3. **Step 3: Configure Amazon S3 Bucket Name:** This is the bucket that will be used to store your files in your Amazon S3 account. Bucket name must be unique and must comply with DNS naming conventions.

   You can select "Use my bucket" or "Create a new bucket" option.

   If you select "Create a new bucket" option (Figure 16), you need to provide a valid bucket name.

   If you select "Use my bucket" option (Figure 17), you must select one of the bucket names from the list (that is retrieved from your Amazon S3 account).

   If you don’t have any S3 bucket or you want to use a newly created bucket, you can create a new bucket using this screen. To do this, select "Create a new bucket" option and type the new bucket name.

   Click "Configure Amazon S3 Bucket Name" button (Figure 16) (Figure 17). If you see "Amazon S3 Bucket Name is configured correctly." message under "Step 3: Configure S3 Bucket Name" section (Figure 18), you can continue with "Step 4: S-Drive Authorization".
4. **Step 4: S-Drive Authorization**: You need to go to [portal.sdriveapp.com](http://portal.sdriveapp.com) to complete this step (Figure 18). Go to [portal.sdriveapp.com](http://portal.sdriveapp.com) and create a free S-Drive account and authorize S-Drive to connect to your organization. For more information about creating free S-Drive account and connecting your organization to S-Drive, please refer to "S-Drive Portal Guide" document.
D. S-Drive Attachments for Accounts, Cases, Contacts and Opportunities

Account, Case, Contact and Opportunity standard object files and override pages are bundled with the S-Drive installation. If you’ll use S-Drive attachments for these standard objects as override, you can use bundled objects and/or pages where appropriate. If you are planning to use S-Drive Attachments for other standard/custom objects or as override/inline please refer to the "S-Drive Advanced Configuration Guide" document.

“Overriding the view of the object” means that the page will be used as an override to the standard object page. In this case, 'S-Drive Attachments' will be a section at the end of the standard page layout.

1. Go to Setup -> App Setup -> Customize -> Accounts (or Cases or Contacts or Opportunities - the label of the object that you want to enable S-Drive Attachments for) -> Buttons, Links, and Actions. Click the Edit action next to the View label (Figure 19).

2. Then select Visualforce Page for Override With section and pick related Visualforce page (AccountFilePage for Accounts, CaseFilePage for Cases, ContactFilePage for Contacts, OpportunityFilePage for Opportunities) from the drop-down box. Click Save button to complete the override (Figure 20).
3. Now it will display **View** as **Overridden** in the **Buttons, Links, and Actions** section (Figure 21).

![Figure 21](image1.png)

4. After creating an account object you should see “Account Files” (similar screens for Cases, Contacts and Opportunities once you configure) page block at the end of the object detail page (Figure 22). See “User Guide” for more information on how to use the buttons and functions in this page block.

![Figure 22](image2.png)
E. Upgrading S-Drive

Upgrading to S-Drive 1.24 is not possible. This version is only for new customers. S-Drive 1.25 will be released for migrating and upgrading previous versions.
F. S-Drive Advanced Configuration

Everything you need to start using S-Drive is in "S-Drive Installation Guide" and advanced topics for installation/configuration are in "S-Drive Advanced Configuration Guide".

Here is the list of topics that you can find in S-Drive Advanced Configuration Guide:

- Activating S-Drive
- Configuring S-Drive Attachments for All Standard/Custom Objects
- Allowing Customer Portal Users to Upload Case Files from Customer Portal
- S-Drive Configuration
- Attachment Sync
- S-Drive Reports
- Applying Sharing Rules to S-Drive Files/Folders
- Applying Permissions to S-Drive Files/Folders through Profiles
G. Troubleshooting Tips

   **[Solution]** You forgot to set or deleted Remote Site Settings. Go to Setup -> Security -> Remote Site Settings and add this site: https://ls.amazonaws.com

   **[Solution]** You forgot to set or deleted Remote Site Settings. Go to Setup -> Security -> Remote Site Settings and add this site: https://s3.amazonaws.com

3. **[Problem]** My mail message contains “?????” for some language-specific characters in email clients (Outlook, Thunderbird etc.).
   **[Solution]** Go to Setup -> Personal Setup -> My Personal Information -> Personal Information. Edit User Detail and set Email Encoding to Unicode (UTF-8).

4. **[Problem]** Salesforce sharing is not working.
   **[Solution]** In version 1.24 sharing is only supported for S-Drive Folders. Both, S-Drive Folders and S-Drive Attachments are sharing-aware that means they will respect the sharing rules applied on S-Drive objects.

5. **[Problem]** Percent character (%) is replaced with an underscore character (_) while downloading.
   **[Solution]** This is a technical limitation.

6. **[Problem]** Some special characters (e.g. ğ, ş, ĩ) can’t be typed into text fields on Apple Macintosh.
   **[Solution]** This is a limitation related to Flash Player’s Macintosh version. This issue will be addressed in later releases.

7. **[Problem]** Special characters in file names are URL encoded for Firefox browser.
   **[Solution]** This is a limitation of Firefox.

8. **[Problem]** If a sub folder is deleted parent folder's (+) sign stays there until clicked Home and refreshed.
   **[Solution]** You need to refresh the S-Drive tab.

9. **[Problem]** If folder has no sub folders, tree's folder icon is closed whether we click on it or not.
   **[Solution]** This is only a visual problem and it will not affect the operation of the application.
You can contact S-Drive Support team for any questions or problems that you couldn't solve using S-Drive documents:

1. Open a Ticket at Support Site: sdriveapp.com/support
2. Email: sdrive@sdriveapp.com

You can find up-to-date product information, documents, tutorial videos, tools in our web page: www.sdriveapp.com