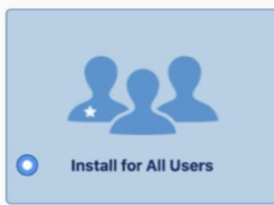
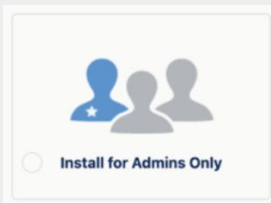


- 1 Visit the Mergechart [Appexchange Listing](#)
- 2 Click **“Get it Now”** and login as an Administrator or as a user with the “Download Appexchange Packages” permission ([more info](#))
- 3 Choose “Install in Production” or “Install in Sandbox”. After pressing “Confirm and Install”, you may be prompted to login again.
- 4 Enter the installation key provided.
- 5 Choose “Install for All Users” or “Install for Admins Only”...



No permission set assignments are needed, and you still have the power to grant access to users individually.



If you choose “Install for Admins Only”, extra steps are required to enable non-admin users:

One-time:

- 5.1** Create a permission set named **additionalMergechart**.

Select the **OpportunityDetail** object, enable Read permissions for the object and all of its fields. (See image on next page)

Then, for each user:

- 5.2** Assign the **additionalMergechart** permission set you created.
- 5.3** Also assign the **mergechartStandard** permission set.

- 6 Under **Setup -> Apps -> Packaging -> Installed Packages**, select the **mergechart-package** and assign user licenses as needed.

Permissions details for step 5.1

Your permissions for Step 5.1 should look like this:

Permission Set

additionalMergechart

Find Settings...

Clone

Edit Properties

Manage Assignments

View Summary (Beta)

Permission Set Overview

 >

Object Settings

OpportunityDetails

OpportunityDetails

Edit

Object Permissions

Permission Name	Enabled
Read	☒
Create	☐
Edit	☐
Delete	☐
View All	☐
Modify All	☐

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Amount	highgatens__amount__c	☒	☐
closedate	highgatens__closedate__c	☒	☐
Created By	CreatedById	☒	☐
forecastcategory	highgatens__forecastcategory__c	☒	☐
Last Modified By	LastModifiedById	☒	☐
Opportunity	highgatens__Opportunity__c	☒	☒
OpportunityDetail Name	Name	☒	☒
stagename	highgatens__stagename__c	☒	☐
systemmodstamp_artificial	highgatens__systemmodstamp_artificial__c	☒	☐