



MoneyThumb Salesforce Installation, Configuration, and User Guide

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1. Overview

This guide shows you how to:

- Install the MoneyThumb package on Salesforce.
- Configure MoneyThumb in Salesforce.
- Use MoneyThumb from Salesforce.

2. Installing the MoneyThumb Package

⚠ Warning: Always test the installation in a Sandbox environment first.

To install the MoneyThumb package:

1. Use the appropriate link from **Supported Versions**.
2. Enter your Salesforce username and password.
3. Select the group of users you want to install the package for, check the acknowledge box, and click **Install**.

Install MoneyThumb
By MoneyThumb

☐ Install for Admins Only ☒ Install for All Users ☐ Install for Specific Profiles...

Warning: You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install **Cancel**

App Name	Publisher	Version Name	Version Number
MoneyThumb	MoneyThumb	May 2024, update 2	3.2

[Additional Details](#) [View Components](#)

4. In the Approve Third-Party Access screen, check the **Yes, grant access to these third-party web sites** box. Then, click **Continue**. See below.

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites.
[What if you are unsure?](#)

Website	SSL Encrypted
online.moneythumb.com	☒
www.apexdevnet.com	☐

☒ Yes, grant access to these third-party web sites



Once it says Installation Complete, click **Done**.

Notes:

- If “This app is taking too long to install” appears, click **Done**. The package will still be installed.
- If you don’t see the installed MoneyThumb package, refresh your browser. If you still don’t see it, close out Salesforce and log back in. Then, do a Quick Find for Installed Packages to see it.

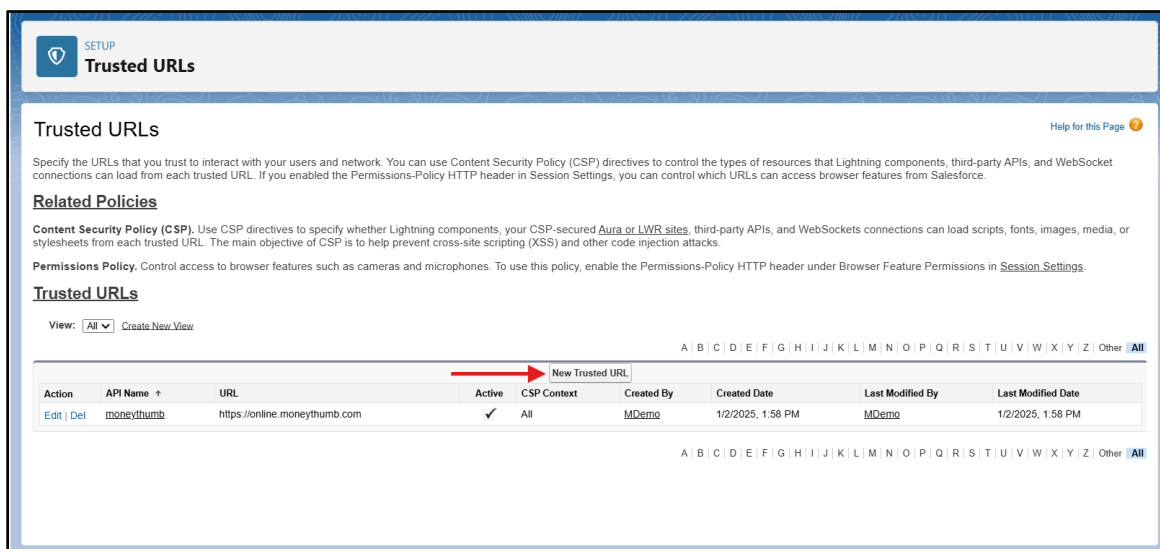
3. Configuring MoneyThumb in Salesforce

Learn how to configure MoneyThumb into Salesforce below.

Note: If you experience issues while configuring these steps, click refresh on your browser. This is a common Salesforce issue.

3.1. Adding Trusted URLs

1. Do a Quick Find for Trusted URLs.
2. Click the **New Trusted URL** button.



Trusted URLs

Specify the URLs that you trust to interact with your users and network. You can use Content Security Policy (CSP) directives to control the types of resources that Lightning components, third-party APIs, and WebSocket connections can load from each trusted URL. If you enabled the Permissions-Policy HTTP header in Session Settings, you can control which URLs can access browser features from Salesforce.

Related Policies

Content Security Policy (CSP). Use CSP directives to specify whether Lightning components, your CSP-secured [Aura](#) or [LWR sites](#), third-party APIs, and WebSockets connections can load scripts, fonts, images, media, or stylesheets from each trusted URL. The main objective of CSP is to help prevent cross-site scripting (XSS) and other code injection attacks.

Permissions Policy. Control access to browser features such as cameras and microphones. To use this policy, enable the Permissions-Policy HTTP header under Browser Feature Permissions in [Session Settings](#).

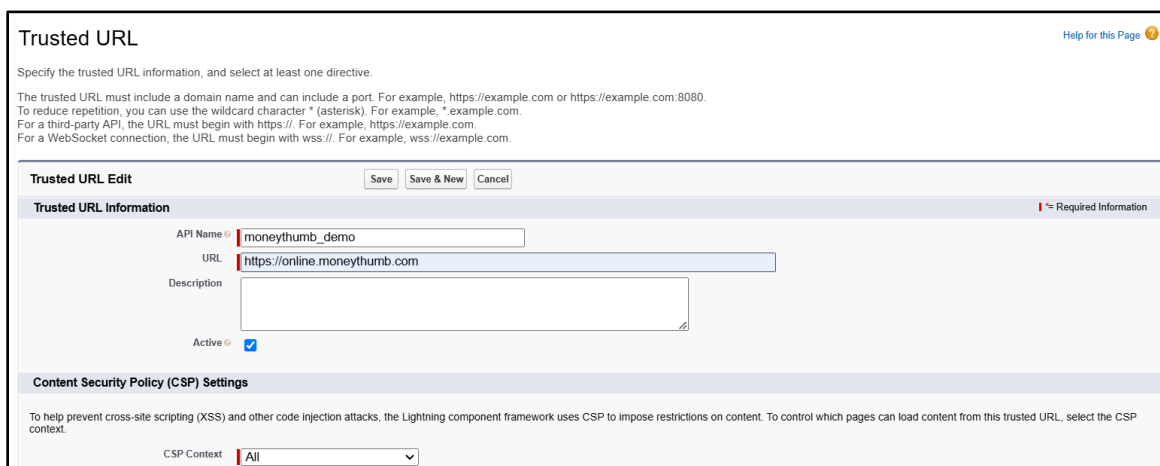
Trusted URLs

View: All Create New View

Action	API Name	URL	Active	CSP Context	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	moneythumb	https://online.moneythumb.com	✓	All	MDemo	1/2/2025, 1:58 PM	MDemo	12/2/2025, 1:58 PM

[New Trusted URL](#)

3. Enter the **API Name** and **URL**. You may choose any name for the API, such as moneythumb. For the URL, you must use <https://online.moneythumb.com>.



Trusted URL

Specify the trusted URL information, and select at least one directive.

The trusted URL must include a domain name and can include a port. For example, <https://example.com> or <https://example.com:8080>. To reduce repetition, you can use the wildcard character * (asterisk). For example, https://*.example.com. For a third-party API, the URL must begin with <https://>. For example, <https://example.com>. For a WebSocket connection, the URL must begin with <wss://>. For example, <wss://example.com>.

Trusted URL Edit Save Save & New Cancel

Trusted URL Information Required Information

API Name

URL

Description

Active ☒

Content Security Policy (CSP) Settings

To help prevent cross-site scripting (XSS) and other code injection attacks, the Lightning component framework uses CSP to impose restrictions on content. To control which pages can load content from this trusted URL, select the CSP context.

CSP Context All

4. Verify that the CSP Directives are checked as shown below.

CSP Directives

Select the directives that Lightning components, third-party APIs, and WebSocket connections can load from this trusted URL. Each CSP directive controls access to a resource type. Lightning components can load the resources within Lightning or within your CSP-secured [Aura or LWR sites](#).

To use the [Salesforce Console Integration Toolkit](#) from within this trusted URL, select the connect-src (scripts) directive. Then add the trusted URL in the Security settings of Experience Builder for your [Visualforce sites](#). When you select that directive, connections from Lightning to this trusted URL can use the Javascript methods in the toolkit. Otherwise, you can't load JavaScript resources from a third-party, even if it's a trusted URL. To use a JavaScript library from a third-party, add the third-party URL to a static resource, and then add the static resource to your component.

connect-src (scripts) ☒

font-src (fonts) ☒

frame-src (frame content) ☒

img-src (images) ☒

media-src (audio and video) ☒

style-src (stylesheets) ☒

Permissions Policy Directives

To control access to these browser features, enable the Permissions-Policy HTTP header under Browser Feature Permissions in [Session Settings](#). Then, to allow access at the Trusted URL level, select Trusted URLs Only for the corresponding browser feature.

camera ☐

microphone ☐

Save Save & New Cancel

5. Click **Save**. The Trusted URL Detail screen appears.

Trusted URL Details

Trusted URL Detail

Trusted URL Information

API Name: moneythumb_demo URL: https://online.moneythumb.com

Description: MoneyThumb Demo Active: ☒

Created By: MoneyThumb Demo, 1/9/2025, 10:49 AM Modified By: MoneyThumb Demo, 1/9/2025, 10:49 AM

Content Security Policy (CSP) Settings

To help prevent cross-site scripting (XSS) and other code injection attacks, the Lightning component framework uses CSP to impose restrictions on content. Pages within this context and at least one CSP directive can load content from this trusted URL.

CSP Context: All

CSP Directives

Lightning components, third-party APIs, and WebSocket connections can load the selected directives from this trusted URL. Each CSP directive controls access to a resource type. Lightning components can load the allowed resources within Lightning or within your CSP-secured [Aura or LWR sites](#).

connect-src (scripts) ☒

font-src (fonts) ☒

frame-src (frame content) ☒

img-src (images) ☒

media-src (audio and video) ☒

style-src (stylesheets) ☒

Permissions Policy Directives

To control access to these browser features, enable the Permissions-Policy HTTP header under Browser Feature Permissions in [Session Settings](#). Then, to allow access at the Trusted URL level, select Trusted URLs Only for the corresponding browser feature.

camera ☐

microphone ☐

Edit Delete Clone

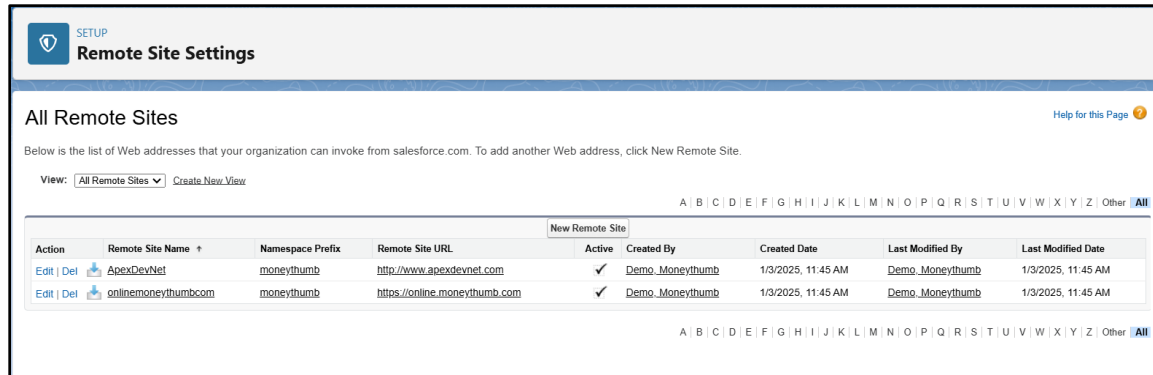
6. Repeat the steps above, adding the following URLs:

- https://<your_instance_name>--moneythumb.vf.force.com
- <https://www.moneythumb.com>

Replace `<your_instance_name>` with your organization's instance name.

3.2. Verify Remote Site Settings

Do a Quick Find for Remote Site Settings. If you did the installation and configuration correctly up to this point, it should look like the following.

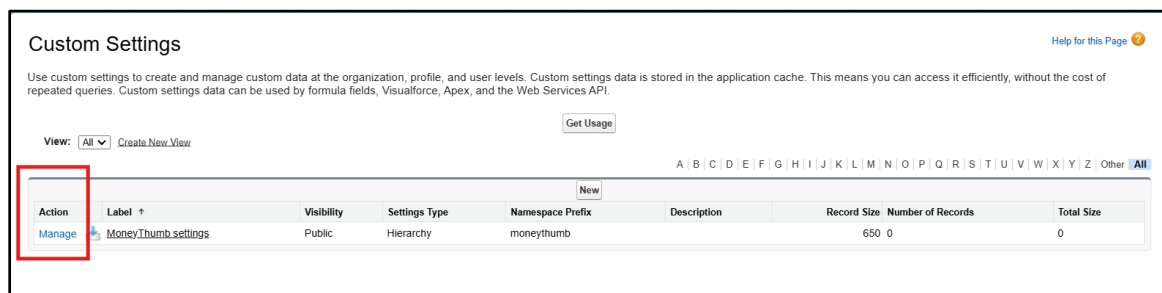


The screenshot shows the 'Remote Site Settings' page in Salesforce Setup. The page title is 'Remote Site Settings' with a 'SETUP' icon. Below the title, it says 'All Remote Sites' and provides instructions on how to add a new remote site. A table lists the existing remote sites. The table has columns: Action, Remote Site Name, Namespace Prefix, Remote Site URL, Active, Created By, Created Date, Last Modified By, and Last Modified Date. There are two entries: 'ApexDevNet' and 'online.moneythumb.com', both with a 'moneythumb' namespace prefix and active status.

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	ApexDevNet	moneythumb	http://www.apexdevnet.com	✓	Demo_Moneythumb	1/3/2025, 11:45 AM	Demo_Moneythumb	1/3/2025, 11:45 AM
Edit Del	online.moneythumb.com	moneythumb	https://online.moneythumb.com	✓	Demo_Moneythumb	1/3/2025, 11:45 AM	Demo_Moneythumb	1/3/2025, 11:45 AM

3.3. Editing MoneyThumb Custom Settings

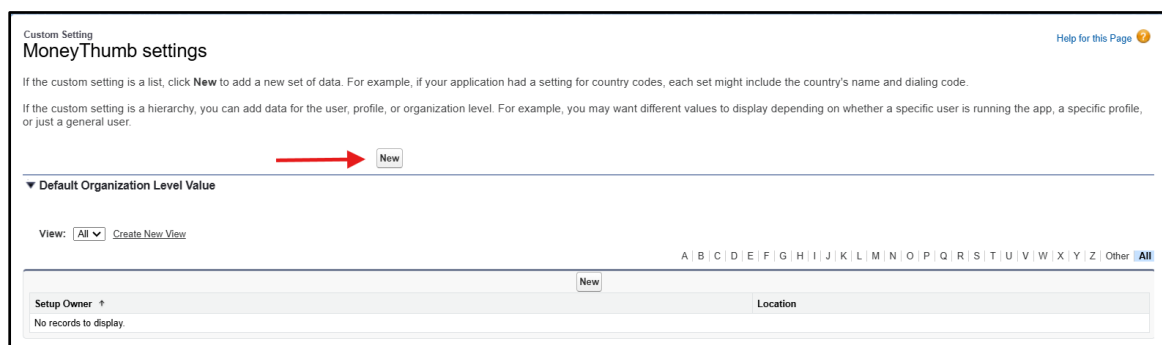
1. Do a Quick Find for Custom Settings.
2. In the Custom Setting screen, click **Manage**.



The screenshot shows the 'Custom Settings' page in Salesforce Setup. The page title is 'Custom Settings' with a 'Help for this Page' link. Below the title, it provides instructions on how to use custom settings. A table lists the existing custom settings. The table has columns: Action, Label, Visibility, Settings Type, Namespace Prefix, Description, Record Size, Number of Records, and Total Size. There is one entry: 'MoneyThumb.settings' with a 'Public' visibility and 'Hierarchy' settings type. A red box highlights the 'Manage' link in the 'Action' column.

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	MoneyThumb.settings	Public	Hierarchy	moneythumb		650	0	0

3. Click the top **New** button on the MoneyThumb Settings screen. See the red arrow below.



The screenshot shows the 'MoneyThumb settings' edit screen in Salesforce Setup. The page title is 'MoneyThumb settings' with a 'Help for this Page' link. Below the title, it provides instructions on how to add new data. A 'New' button is highlighted with a red arrow. Below the 'New' button, there is a section for 'Default Organization Level Value' with a 'View' dropdown and a 'Create New View' link. At the bottom, there is a table with columns: Setup Owner and Location. The table is currently empty.

Setup Owner	Location
No records to display.	

The MoneyThumb Settings Edit screen appears.

4. Enter <https://online.moneythumb.com> as the **MT Base URL**. Then, depending on the product you have a license for, enter either one of the following as the **Product**:

- **pdfinsights** – if you don't have Insights with ThumbPrint.
- **pdfinsightstp** – if you do have Insights with ThumbPrint.

If you're unsure, please ask your Account Manager.

5. Click **Save**.

MoneyThumb settings Edit

Provide values for the fields you created. This data is cached with the application.

Edit MoneyThumb settings Save Cancel

MoneyThumb settings Information ! = Required Information

Location

Auto download transactions ☐

Log Callouts ☐

MT Base URL

Product

Webhook URL (Deprecated)

The MoneyThumb Settings Details screen will appear.

MoneyThumb settings Detail

[Back to List](#) Help for this Page

Edit

Location **Moneythumb**

Auto download transactions ☐

Log Callouts ☐

MT Base URL <https://online.moneythumb.com>

Product **pdfinsightstp**

Webhook URL (Deprecated)

6. (Optional) To download transactions into CSV, check the **Auto download transactions** box and click **Save**. To get all callout log information, check the **Log Callouts** box.

SETUP Custom Settings

MoneyThumb settings Edit

Provide values for the fields you created. This data is cached with the application.

Edit MoneyThumb settings Save Cancel

MoneyThumb settings Information ! = Required Information

Location **Moneythumb**

Auto download transactions ☒

Log Callouts ☒

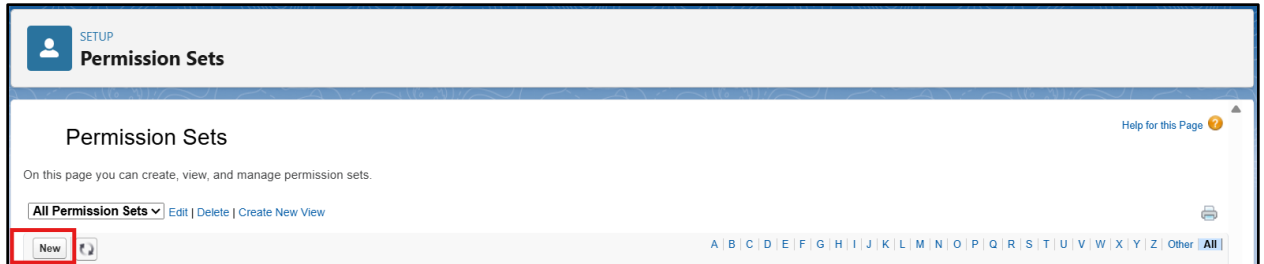
MT Base URL

Product

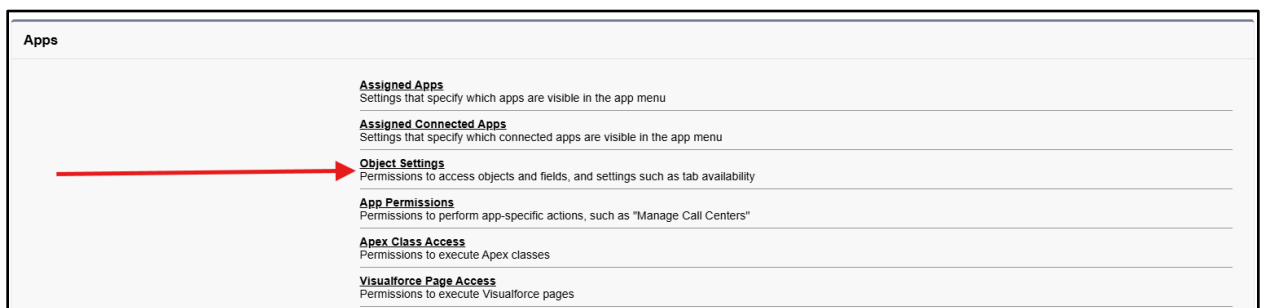
Webhook URL (Deprecated)

3.4. Verify Access to MoneyThumb Objects

1. Do a Quick Find for Permission Sets.
2. Click **New** and create a new permission set with an appropriate name.

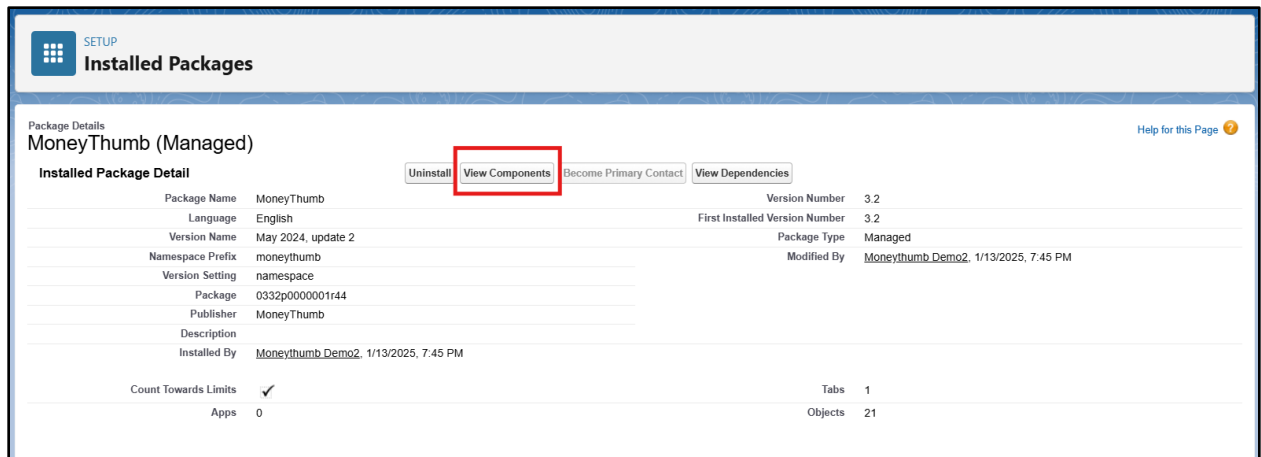


3. Assign this permission set to the users that need access for MoneyThumb.
4. Under Apps, click **Object Settings**. See the red arrow below.



5. Under **Object Settings**, click on a MoneyThumb Custom Object Name and select the options for **View All Records** and **Modify All Records**.
6. Repeat this for each MoneyThumb Custom Object.

Note: To find a list of all the MoneyThumb Custom Objects, do a Quick Find for Installed Packages. Then, click **Package Name** and click **View components**. See below.



4.Editing Page Layout in Salesforce

To use MoneyThumb from Salesforce, add the necessary components to your Opportunity page. The following table explains these components.

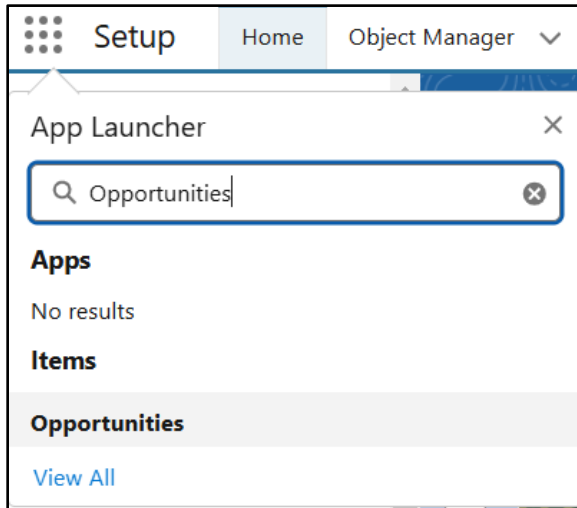
MoneyThumb Components	
Component	Description
Scorecard	Shows the data from the Scorecard page in the MoneyThumb UI.
MoneyThumbButton	Launches the MoneyThumb UI.
MoneyThumbLogoffButton	Logs you out of MoneyThumb UI.

The steps to complete this in Salesforce Lightning and Salesforce Classic are below.

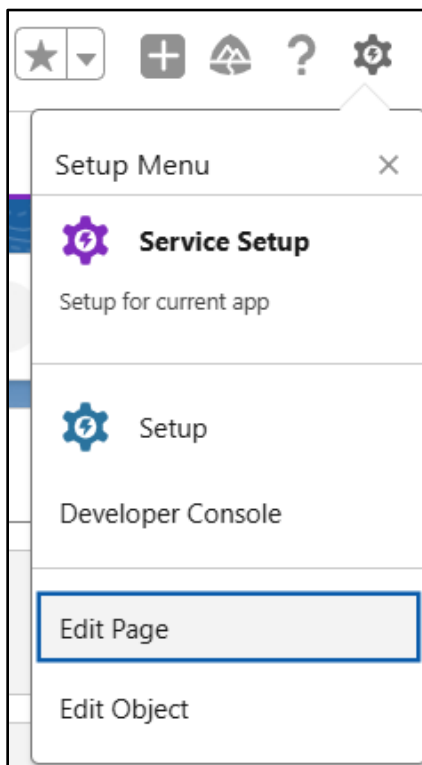
4.1. For Salesforce Lightning

To add the MoneyThumb components:

1. Click the App Launcher and search for Opportunities.



2. Click on any existing opportunities.
3. Click the Setup Menu (gear icon) and click **Edit Page**.

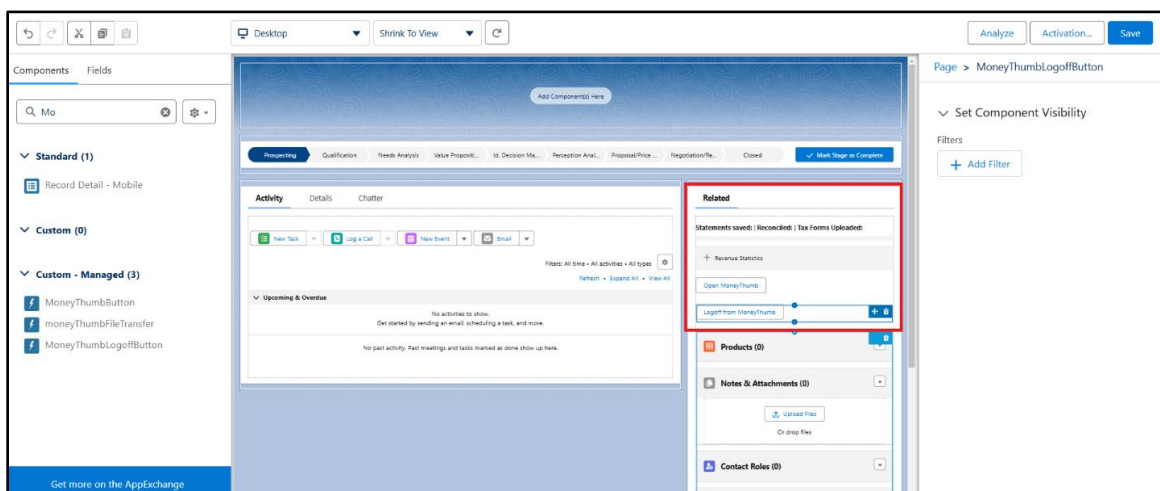
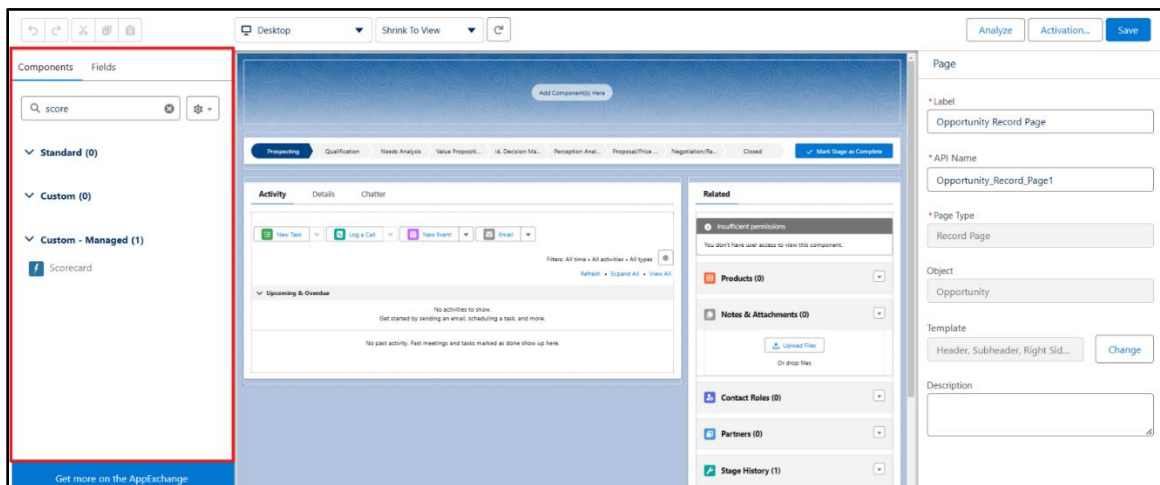


Note: Alternatively, you can add components by selecting the **Object Manager** → **Opportunity** → **Page layouts**. Then, choose the page layout you would like to add components to.

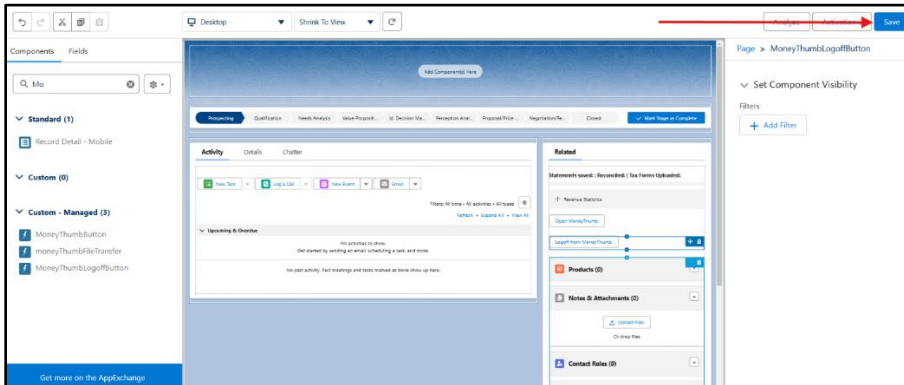
4. Search on the left for the components below and drag them to your desired location on the Opportunity page.

- Scorecard
- MoneyThumbButton
- MoneyThumbLogoffButton

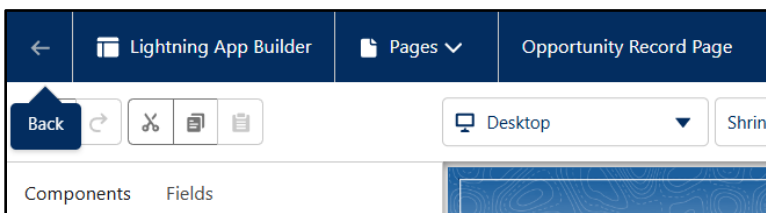
The examples below show before and after adding the MoneyThumb components to your opportunity.



5. In the upper right, click **Save**.



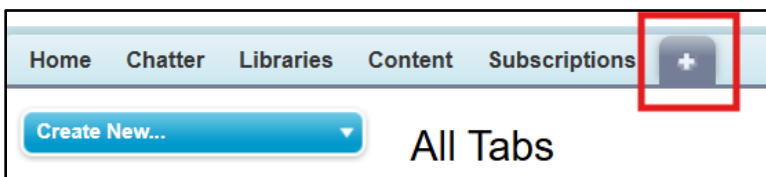
6. (If needed) Click **Activate**. Then, click **Assign as Org Default**. Select the form factor and click **Next**. Click **Save**.
7. Click the **Back** button at the top-left of the screen.



4.2. For Salesforce Classic

To add the MoneyThumb components:

1. Click on the plus button at the top of the screen.

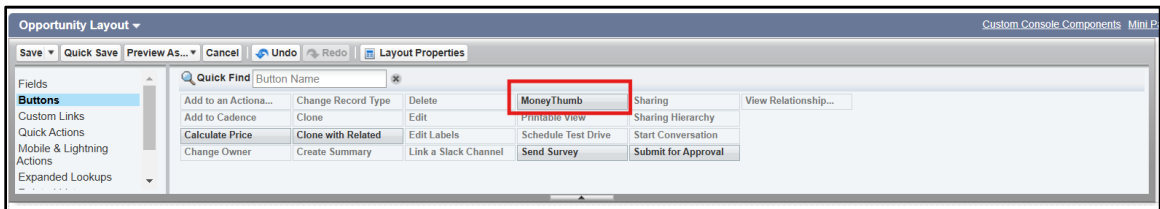


2. Go to **Opportunities**. To find it, scroll down the page or use Ctrl+F (Command+F).
3. Click **Opportunities**.
4. Click on any Opportunity listed.
5. On the top-right of the screen, click **Edit Layout**. See below.

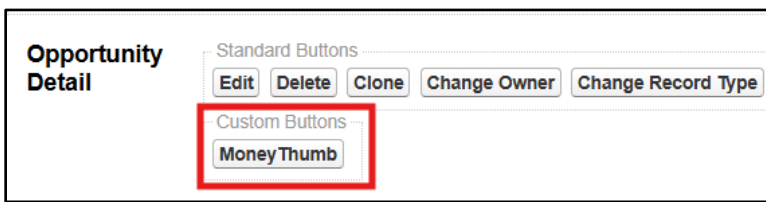


This opens the Opportunity Layout box.

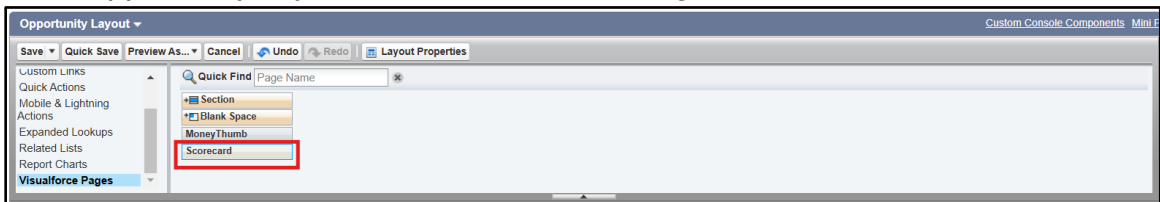
6. Select **Buttons** and click **MoneyThumb**.



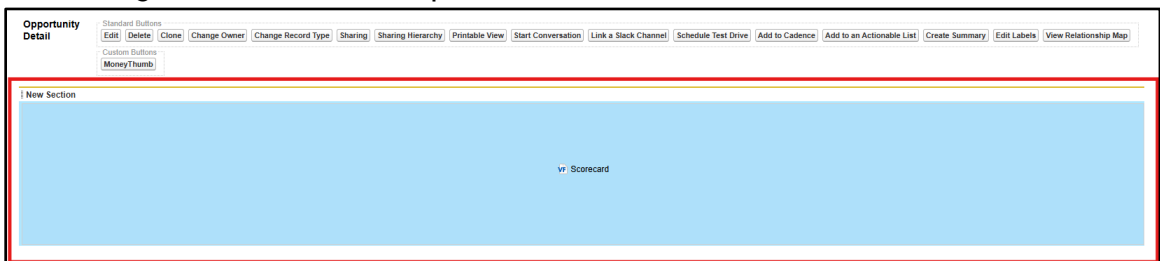
7. Drag the **MoneyThumb** component into the **Opportunity Detail** section under **Custom Buttons**.



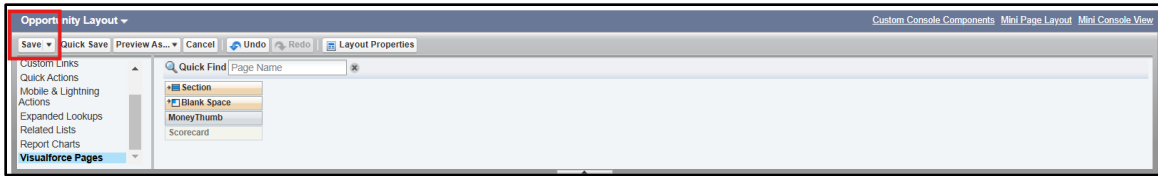
8. From Opportunity Layout, select **Visualforce Pages** and click **Scorecard**.



9. Then, drag the **Scorecard** component into **New Section**.



10. From Opportunity Layout, click **Save**.

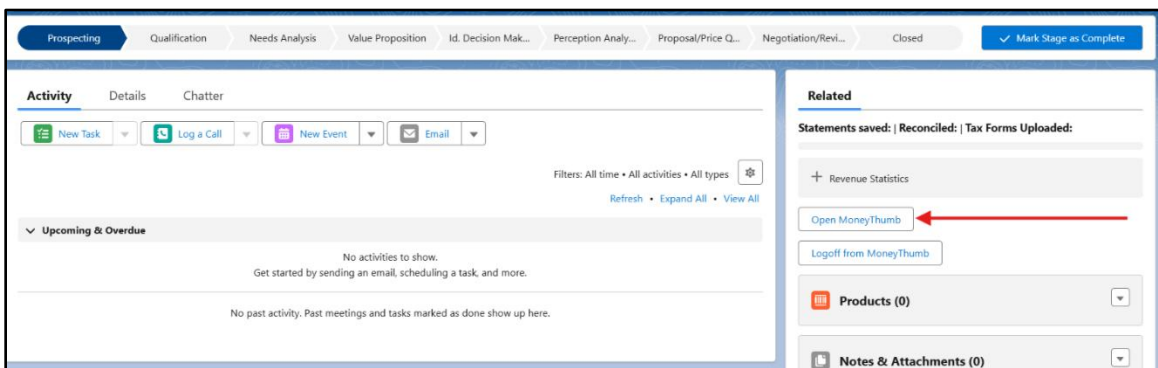


5. Using MoneyThumb in Salesforce

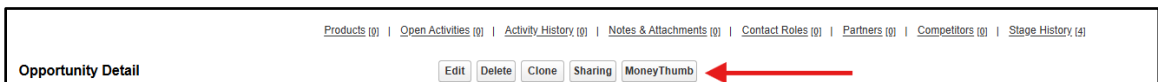
Note: Verify that you have set the object permissions for all users needing access to MoneyThumb.

Now that you've added the components to your opportunity, you can launch MoneyThumb from Salesforce using these steps.

1. In Salesforce Lightning, click the **Open MoneyThumb** button in your opportunity.



In Salesforce Classic, click the **MoneyThumb** button under **Opportunity Detail**.



2. From the Login screen, enter your MoneyThumb credentials and click **Login**.

3. In MoneyThumb, upload the documents for this application. To bring the data to Salesforce, click the **Return to CRM** button.

4. Once you return to Salesforce, you will see the Scorecard results in your opportunity. If you don't, try refreshing the page. The following examples show the Scorecard in Salesforce Lightning and Salesforce Classic.

Salesforce Lightning

Revenue Statistics	
Average Monthly Revenue:	Annualized: \$3,908,568.00
Average Monthly True Revenue:	Annualized: \$3,378,552.00
Average Monthly Non-True Revenue:	Annualized: \$530,004.00
Average Monthly Expenses:	Annualized: \$3,957,348.00
Average Gross Profit:	Annualized: -\$48,780.00

Salesforce Classic

Revenue Statistics	
Average Monthly Revenue:	Annualized: \$3,908,568.00
Average Monthly True Revenue:	Annualized: \$3,378,552.00

5.1. Programmatic Hooks

You can programmatically trigger the **Return to CRM** functionality that transfers an application's scorecard data from PDFInsights to Salesforce. To do this, you need both the PDFInsights AppId and the Salesforce OpportunityId. Then, execute this in your code:

```
moneythumb.MoneyThumbGlobal.saveScorecard('<app id>','<opportunity id>');
```

We recommend using this scenario:

1. Send PDFs to PDFInsights using our public /makecsv or /uploadpdfs API calls. (See <https://www.moneythumb.com/swagger/pdfinsights/>)
2. Receive the webhook response from PDFInsights and grab the AppId from it.
3. Call `saveScorecard` using that AppId.

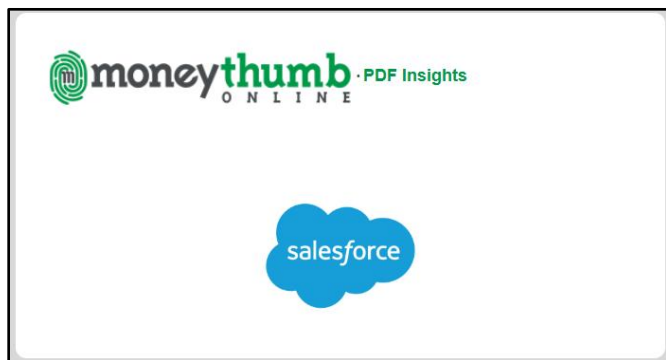
6. Troubleshooting

Below are some common issues you may encounter after setting up MoneyThumb in Salesforce. If you run into any other problems, the first step you take should be to upgrade to the latest bug-fix release, see **Error! Reference source not found.**

If you need further assistance, contact our Support team using our secure [Support Portal](#) or email support@moneythumb.com.

6.1. MoneyThumb Hanging After Logging In

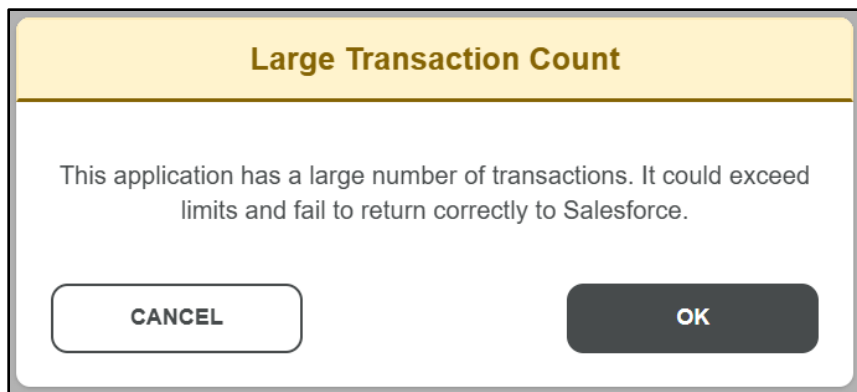
If you're stuck at this screen after opening and logging into MoneyThumb, it likely means you entered the wrong product when you configured MoneyThumb to Salesforce.



To fix this issue, return to step 4 of [Editing MoneyThumb Custom Settings](#).

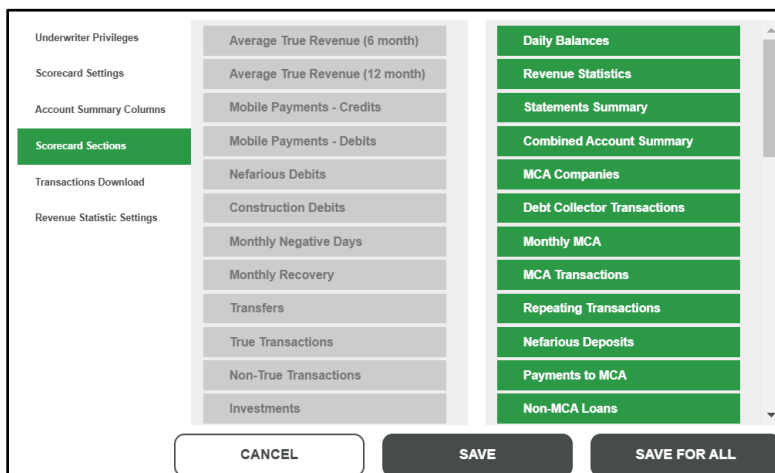
6.2. Large Transaction Count Message

After clicking **Return to CRM**, if you receive the message below and click **OK**, you will likely receive an Error message in Salesforce.



This is due to a known limitation by Salesforce on CPU, RAM, and processing time. The workaround we suggest is to reduce the amount of data you are returning to Salesforce from Insights. The most effective way to do this would be to remove Scorecard sections that bring back long lists of transactions, such as Credit Transactions, Large Transactions, or Transfers. You can do this within PDF Insights using these steps:

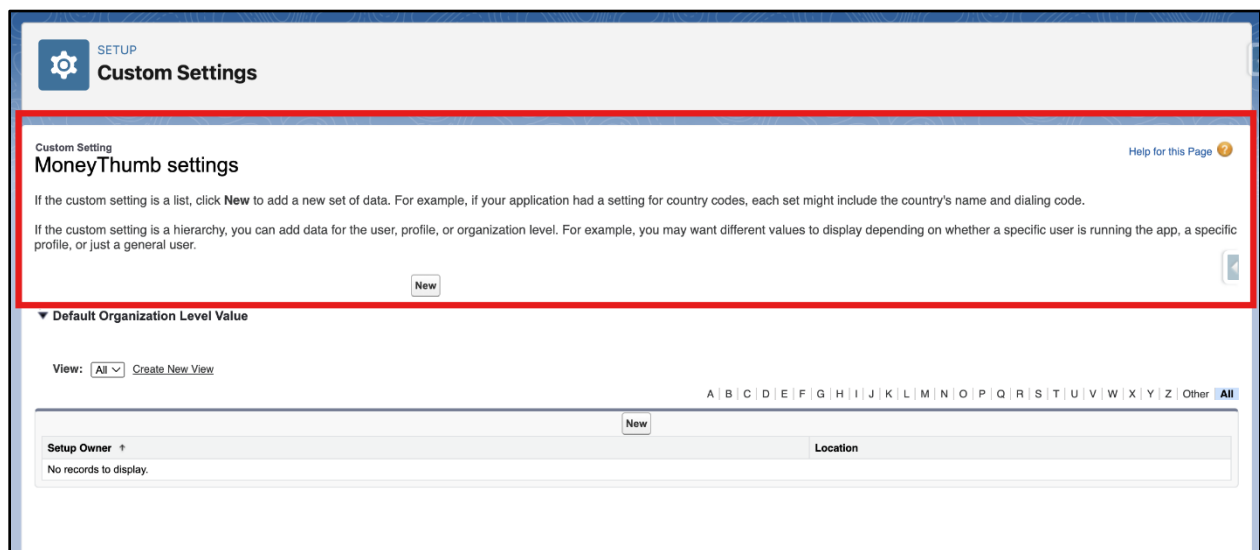
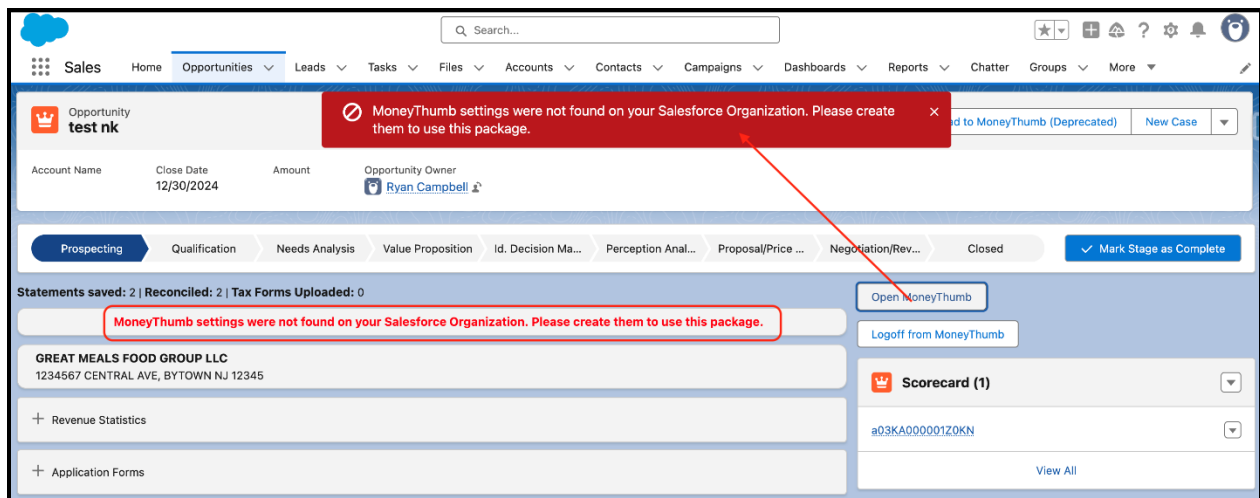
1. Click on your username and choose **Underwriter Settings**.
2. Click **Edit** next to your username.
3. Click **Scorecard Sections**.



4. Drag from the right to the left sections you want to remove.
5. Click **Save**.

6.3. MoneyThumb Settings Were Not Found

If you click **Open MoneyThumb** in an opportunity and this error appears, it means a record wasn't created under the **MoneyThumb settings** in **Custom Settings**. This error also appears in the Scorecard component UI. See below.



To resolve this error, create the record in MoneyThumb settings as shown in **Editing MoneyThumb Custom Settings**.

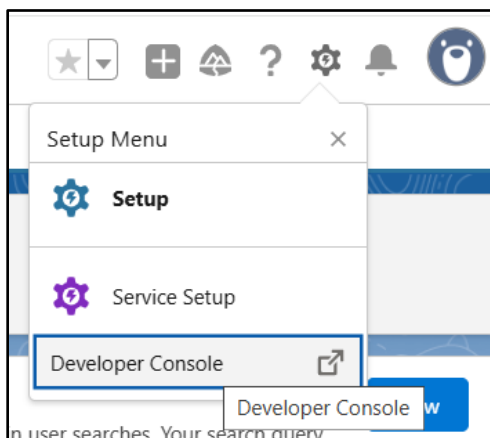
6.4. Freeing Up Space in Salesforce

If you have too much data returned when running MoneyThumb in Salesforce, there are two ways to free up space. One way is to reduce the number of sections in Scorecard, particularly the transaction sections. Another way is to schedule a time to purge data, particularly transaction data.

6.4.1. Deleting MoneyThumb Data

To delete the data in Salesforce:

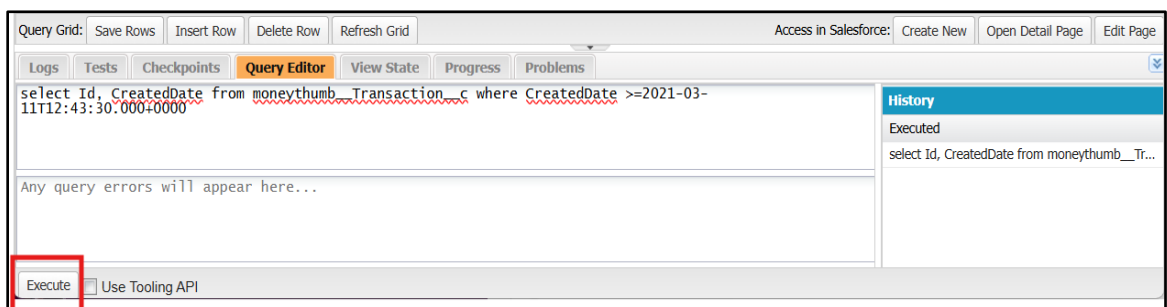
1. Go to the Developer Console.



2. Do a query on what you would like to delete in the Query Editor. Make sure you use the following format.

```
select Id, CreatedDate from moneythumb__Transaction__c where CreatedDate  
>=YYYY-MM-DDTHH:MM:SS.000+0000
```

3. Click **Execute**. See the example below.



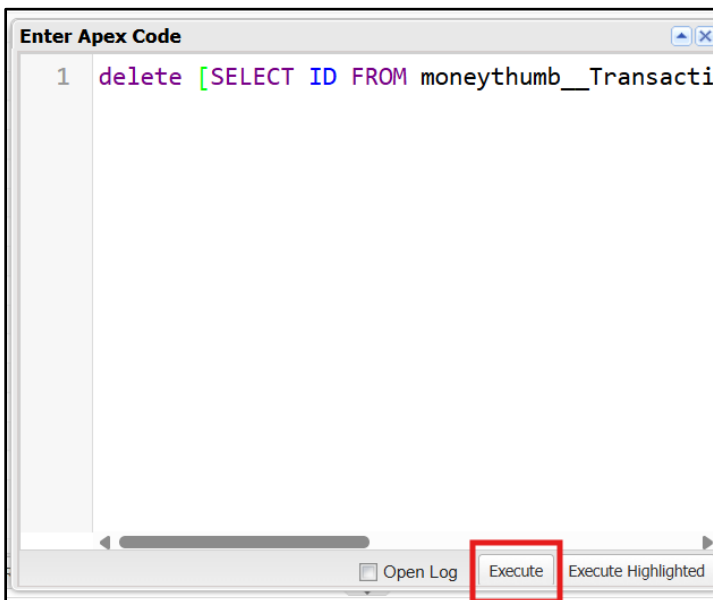
4. Look at the Query Results and confirm these are the records you want to remove. See the example below.

Query Results - Total Rows: 1194	
Id	CreatedDate
a0Kak000003AUPhEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPIEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPJEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPKEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPIEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPmEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPnEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPoEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPpEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPqEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPrEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPsEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPtEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPuEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPvEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPwEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPxEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPyEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPzEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUQ0EAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUQ1EAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUQ2EAO	2025-01-14T12:43:30.000+0000

- Once confirmed, either select **Debug**→**Open Execute Anonymous Window** or type Ctrl+E.
- Put in the code to remove the selected records. Make sure you use the following format:

```
delete [SELECT ID FROM moneythumb__Transaction__c where
CreatedDate >=YYYY-MM-DDTHH:MM:SS.000+0000]
```

- Click **Execute**. This deletes the records. See the example below.



Note: Please update the query and codes above based on your specific needs. Removing the transactions, which make up the bulk of the storage, will not remove the scorecard values that you've saved.

6.4.2. Query Examples

Here are other example queries to purge data.

⚠ Warning: These queries delete all the data. Please use filters on `CreatedDate` to delete only required data.

```
List<moneythumb__Transaction__c> lstTransactions=[Select Id from moneythumb__Transaction__c];
```

```
delete lstTransactions;List<moneythumb__MCA_Transaction__c> lstMCATransactions=[Select Id from moneythumb__MCA_Transaction__c];
```

```
delete lstMCATransactions;List<moneythumb__MCA_Companies__c> lstMCACompanies=[Select Id from moneythumb__MCA_Companies__c];
```

```
delete lstMCACompanies;List<moneythumb__Monthly_MCA__c> lstMonthlyMCA=[SELECT Id from moneythumb__Monthly_MCA__c];
```

```
delete lstMonthlyMCA;List<moneythumb__Balance__c> lstBalance=[SELECT Id from moneythumb__Balance__c];
```

```
delete lstBalance;List<moneythumb__Cash_Flow__c> lstCashFlow=[SELECT Id from moneythumb__Cash_Flow__c];
```

```
delete lstCashFlow;List<moneythumb__Average_Revenue__c> lstAverageRevenue=[SELECT Id from moneythumb__Average_Revenue__c];
```

```
delete lstAverageRevenue;List<ContentDocument> cdlist = [Select Id, Title from ContentDocument];
```

```
delete cdlist;List<moneythumb__Combined_Summary__c> lstCS=[Select Id from moneythumb__Combined_Summary__c];
```

```
delete lstCS;List<moneythumb__Log__c> lstLog = [select Id from  
moneythumb__Log__c];
```

```
delete lstLog;
```

7. Supported Versions

MoneyThumb provides a new feature release version of our Salesforce package approximately every 3 months. These major versions are then supported with bug fixes for the next 12 months.

Note: Older versions are no longer supported and could break at any moment without warning. We won't be able to assist further until you **upgrade** to a supported version.

Here are the currently supported versions.

Major Version	Latest Minor Version	Supported Through	Package URL
6.X	6.0	Sept 30, 2026	https://login.salesforce.com/packaging/installPackage.apexp?p0=04tKA000000g0aU
5.X	5.0	May 1, 2026	https://login.salesforce.com/packaging/installPackage.apexp?p0=04tKA000000g084&isdtp=p1
4.X	4.0	Jan 31, 2026	https://login.salesforce.com/packaging/installPackage.apexp?p0=04tKA000000gNhr&isdtp=p1

7.1. Upgrading to Newer Versions

Warning: Always test the installation in a Sandbox environment first.

If you need a newer version, go through the steps as shown in **Installing the MoneyThumb Package**. During installation, it will ask whether to upgrade to a newer version. Click **Upgrade**. See the example below.

**Upgrade MoneyThumb**
By MoneyThumb

**An earlier version is installed. It can be upgraded while preserving the existing data.**
Installed: May 2024, update 2 (3.2) New Version: May 2024, update 2 (3.2)


☐ **Install for Admins Only**


☒ **Install for All Users**


☐ **Install for Specific Profiles...**

**You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.**

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

 **Upgrade**

 **Cancel**

App Name	Publisher	Version Name	Version Number
MoneyThumb	MoneyThumb	May 2024, update 2	3.2

Additional Details [View Components](#)