MoneyThumb Salesforce Installation, Configuration, and User Guide

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1. Overview

This guide shows you how to:

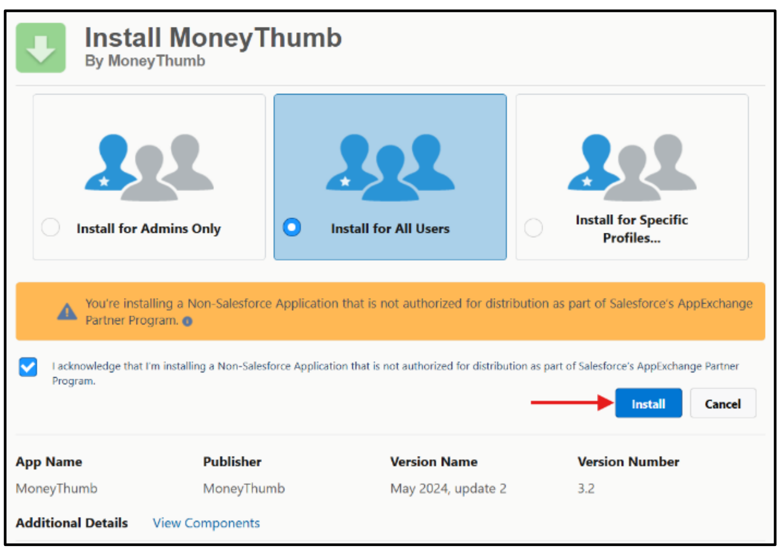
- Install the MoneyThumb package on Salesforce.
- Configure MoneyThumb in Salesforce.
- Use MoneyThumb from Salesforce.

2. Installing the MoneyThumb Package

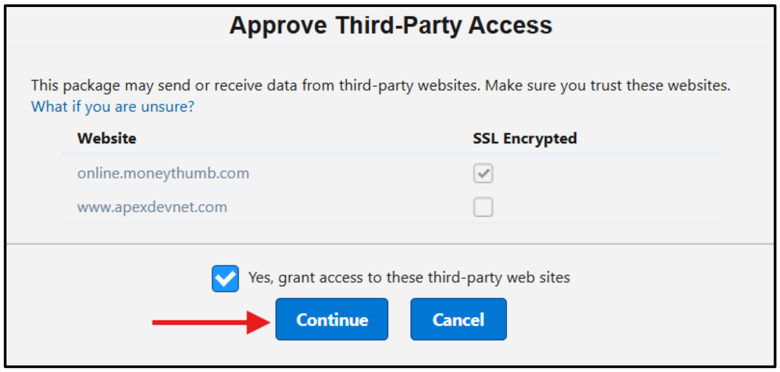
⚠ **Warning:** Always test the installation in a Sandbox environment first.

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**.



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.



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.

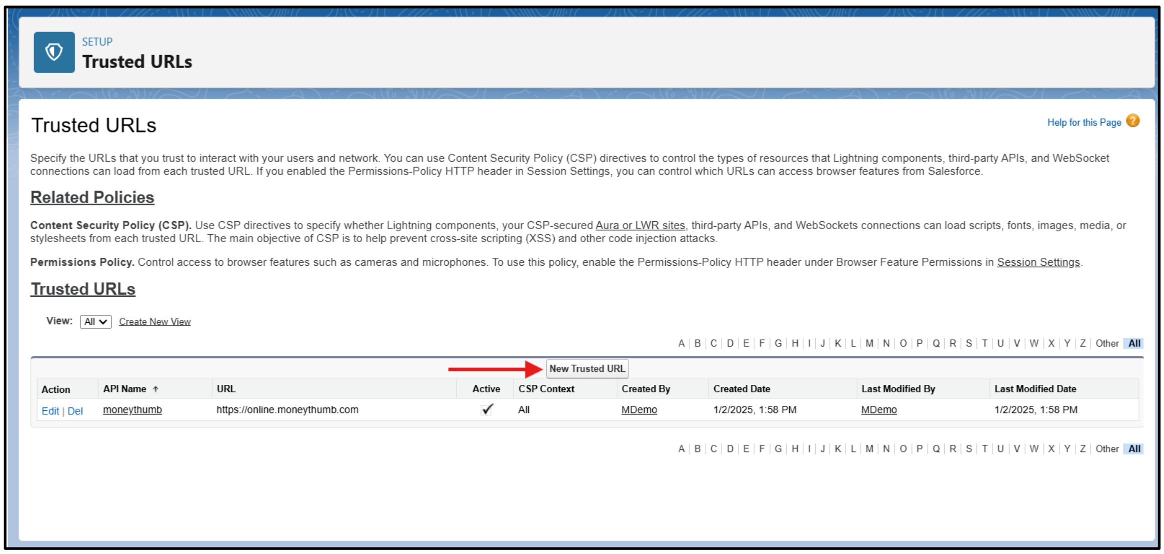
3. Configuring MoneyThumb in Salesforce

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

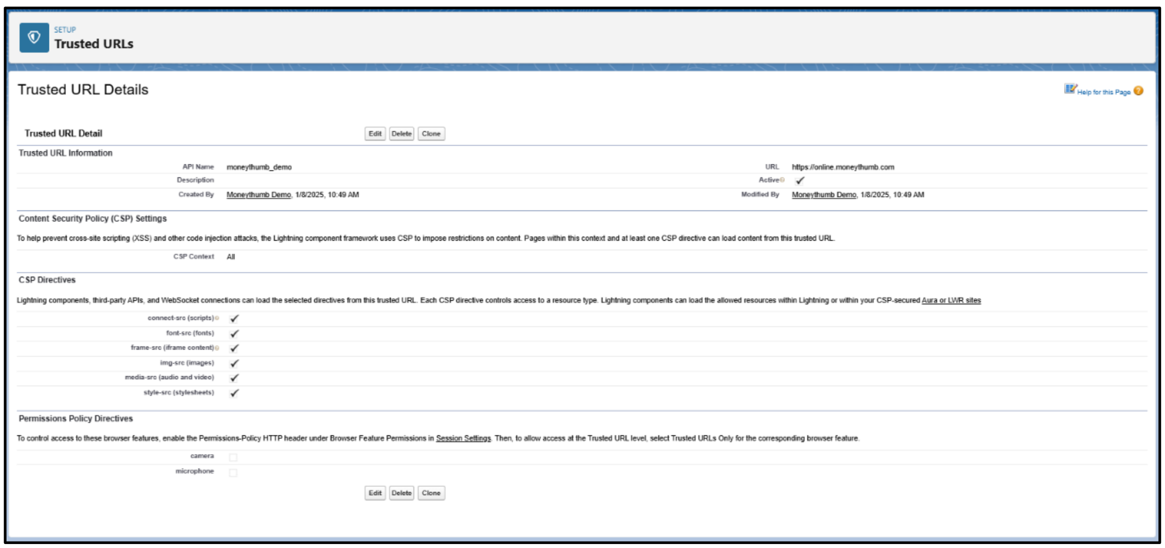
1. Do a Quick Find for Trusted URLs.
2. Click the **New Trusted URL** button.



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.

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

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



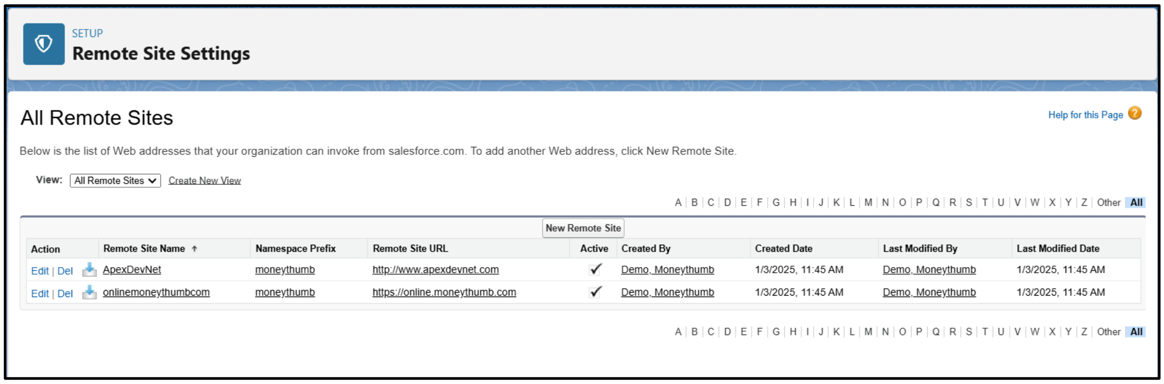
6. Repeat the steps above, adding the following URLs:

- `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

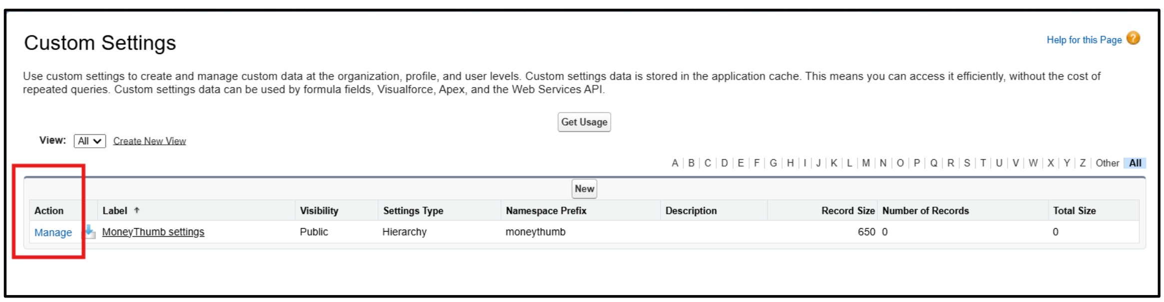
Do a Quick Find for Remote Site Settings. If you did the installation and configuration correctly up to this point, it should look like the following.



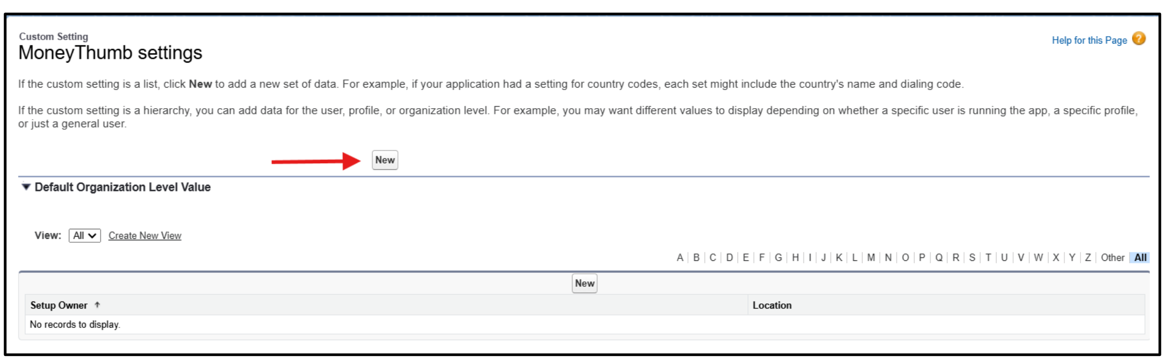
3.3. Editing MoneyThumb Custom Settings

1. Do a Quick Find for Custom Settings.

2. In the Custom Setting screen, click **Manage**.



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



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**:

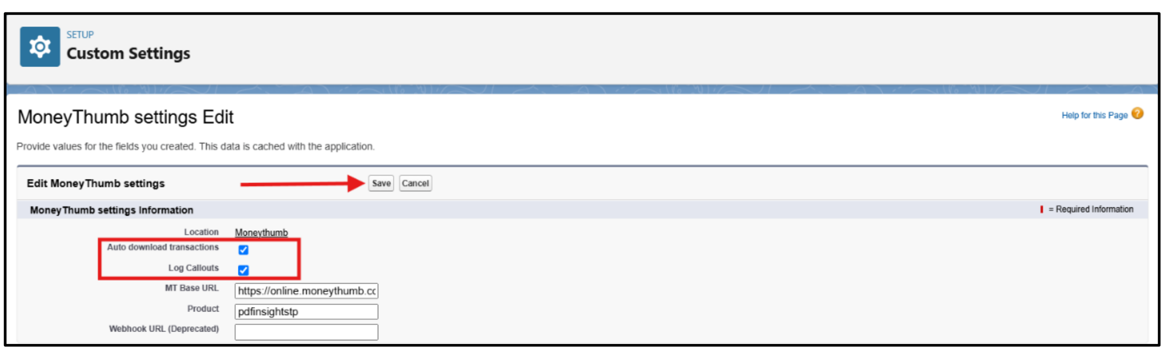
    - **pdfinsights** – if you don't have Insights with ThumbPrint.
    - **pdfinsightstp** – if you do have Insights with ThumbPrint.

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

5. Click **Save**.

The MoneyThumb Settings Details screen will appear.

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.



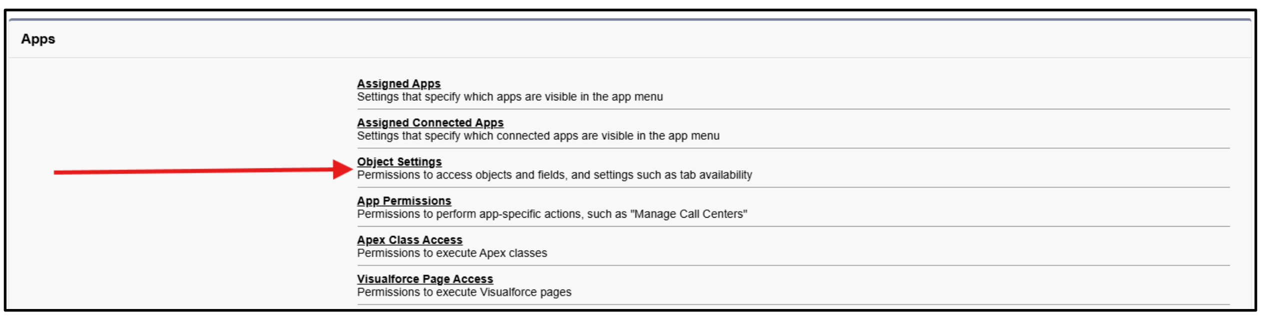
3.4. Verify Access to MoneyThumb Objects

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.

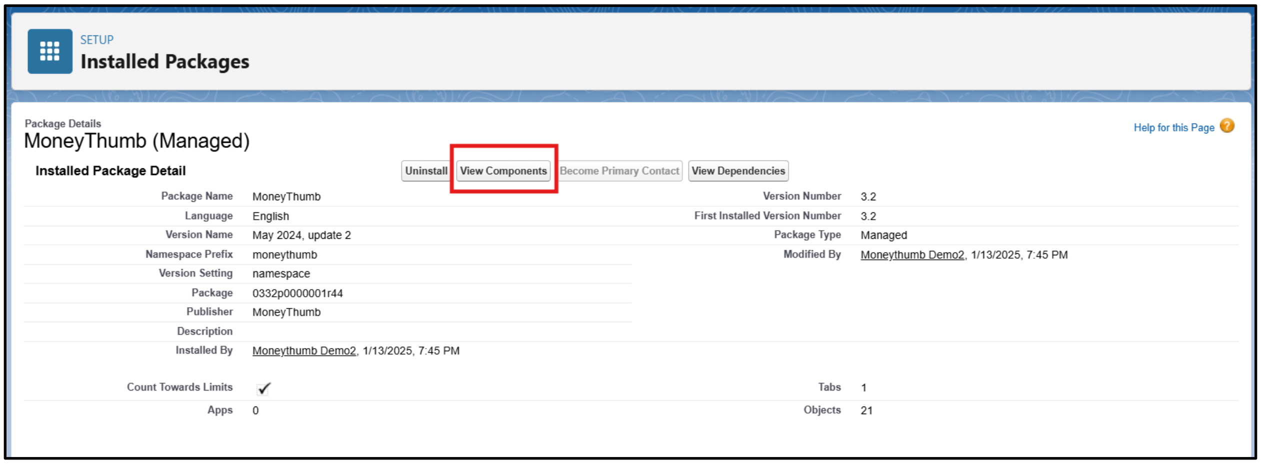
4. Under Apps, click **Object Settings**. See the red arrow below.



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.

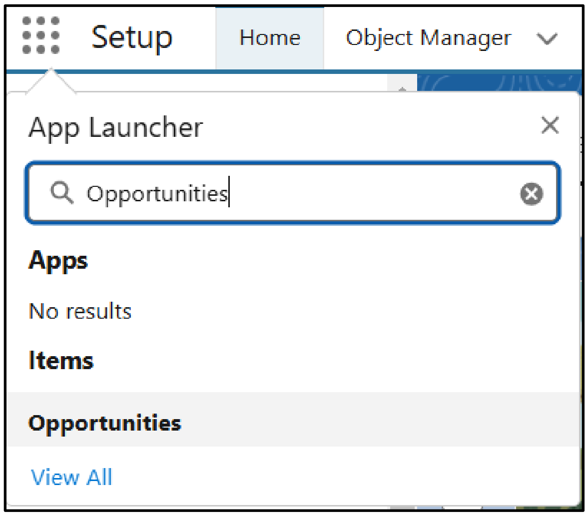
MoneyThumb Components	
Component	**Description**
Scorecard	Shows the data from the Scorecard page in the MoneyThumb UI.
MoneyThumbButton	Launches the MoneyThumb UI.
MoneyThumbLogoffButton	Logs you out of MoneyThumb UI.

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

4.1. For Salesforce Lightning

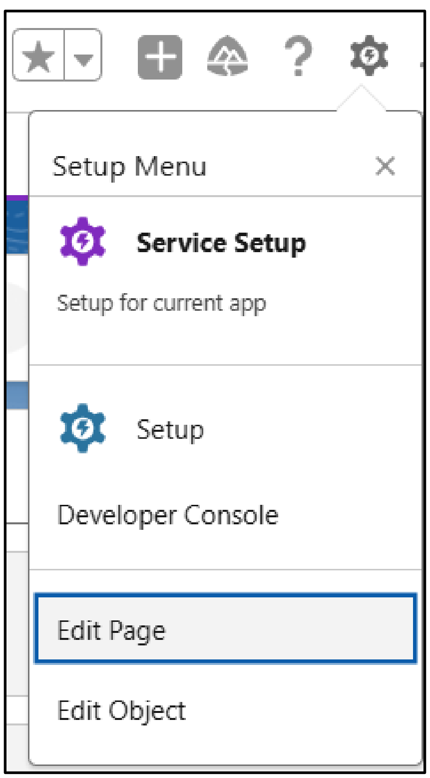
To add the MoneyThumb components:

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**.

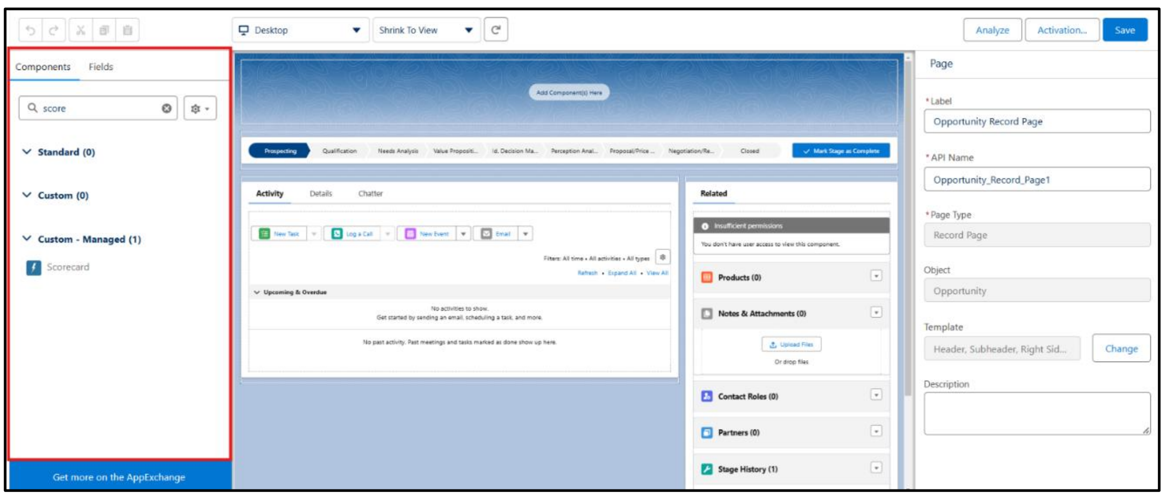


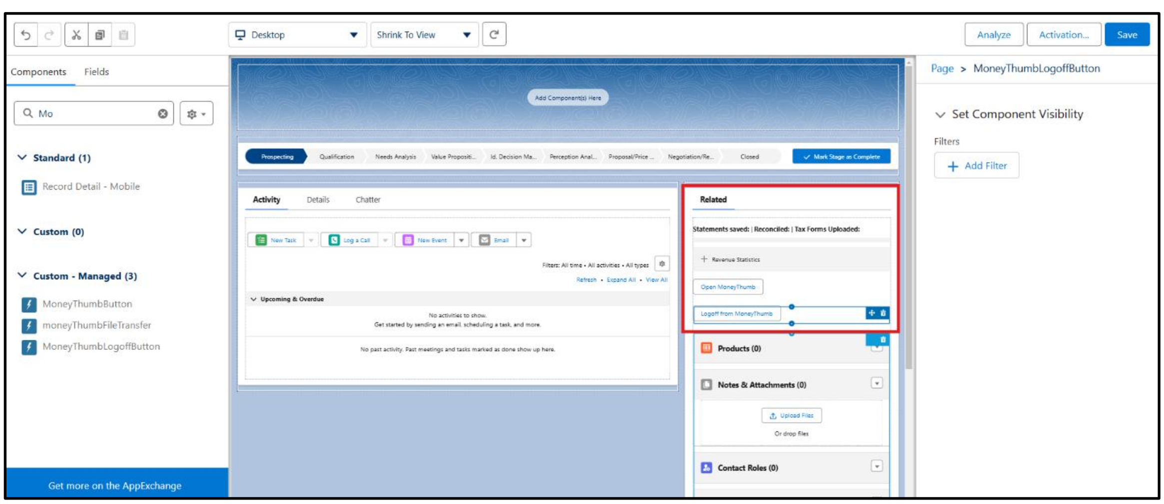
Note: Alternatively, you can add components by selecting the **Object Manager →Opportunity→Page layouts**. Then, choose the page layout you would like to add components to.

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

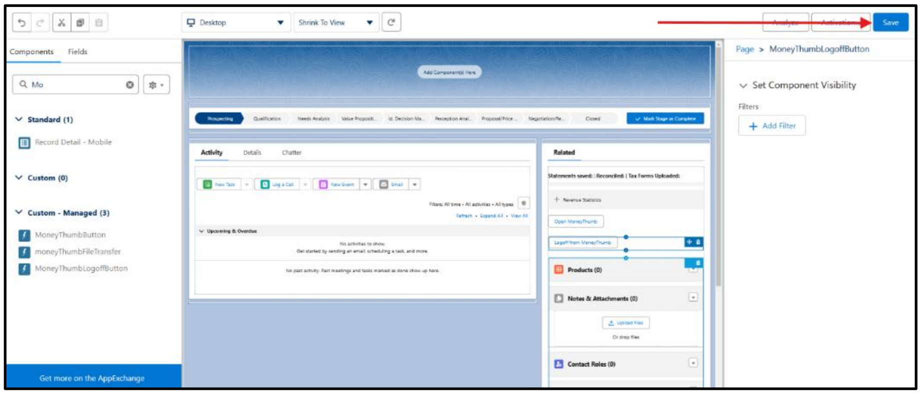
    - Scorecard
    - MoneyThumbButton
    - MoneyThumbLogoffButton

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



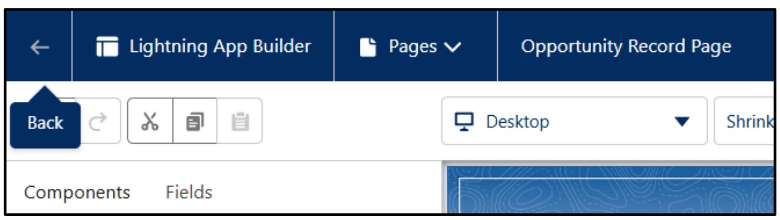


5. In the upper right, click **Save**.



6. (If needed) Click **Activate**. Then, click **Assign as Org Default**. Select the form factor and click **Next**. Click **Save**.

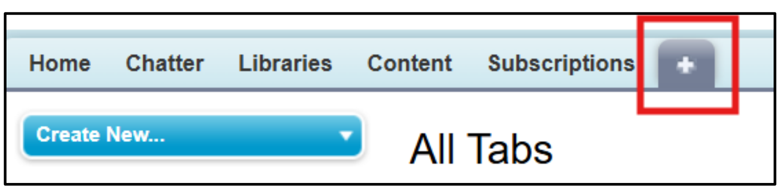
7. Click the **Back** button at the top-left of the screen.



4.2. For Salesforce Classic

To add the MoneyThumb components:

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

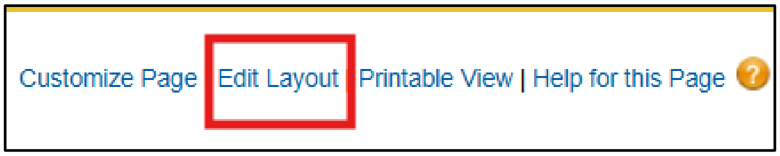


2. Go to **Opportunities**. To find it, scroll down the page or use Ctrl+F (Command+F).

3. Click **Opportunities**.

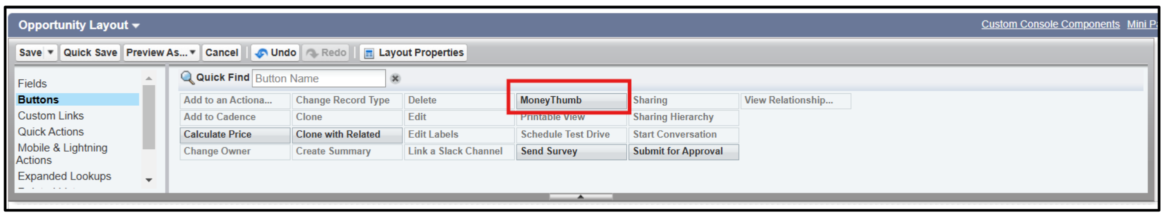
4. Click on any Opportunity listed.

5. On the top-right of the screen, click **Edit Layout**. See below.



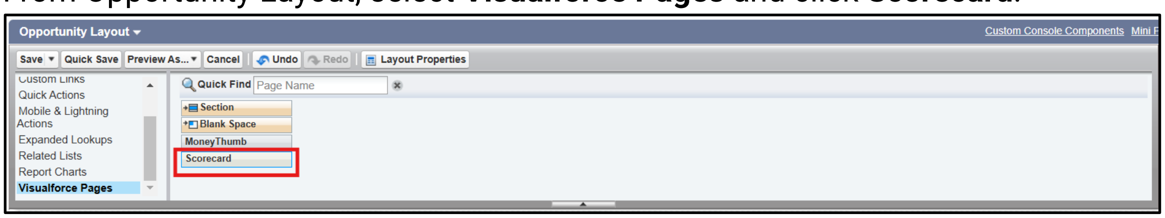
This opens the Opportunity Layout box.

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

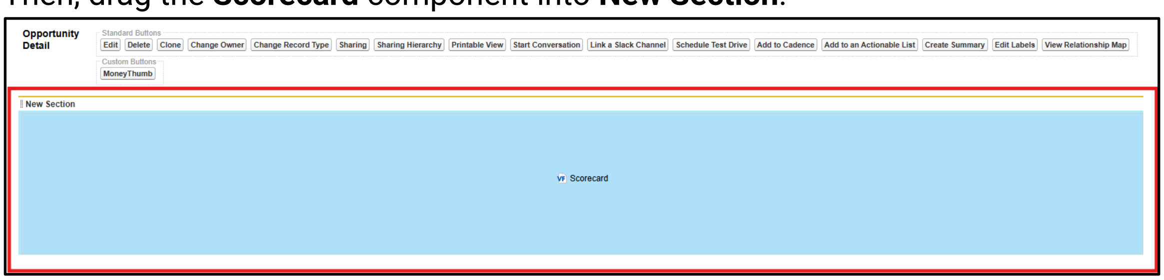


7. Drag the **MoneyThumb** component into the **Opportunity Detail** section under **Custom Buttons**.

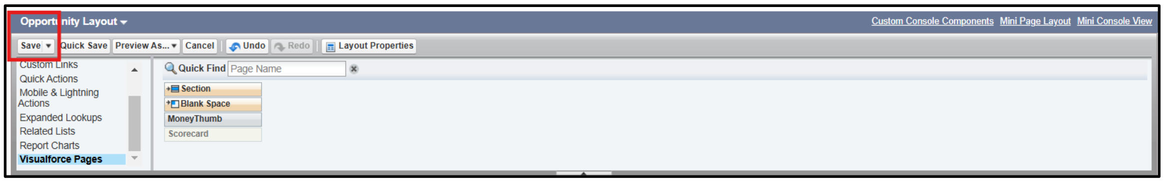
8. From Opportunity Layout, select **Visualforce Pages** and click **Scorecard**.



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



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

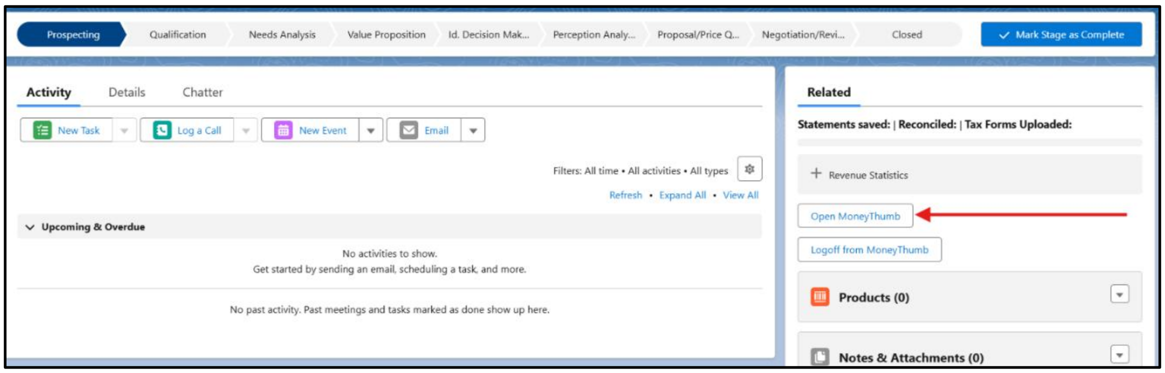


5. Using MoneyThumb in Salesforce

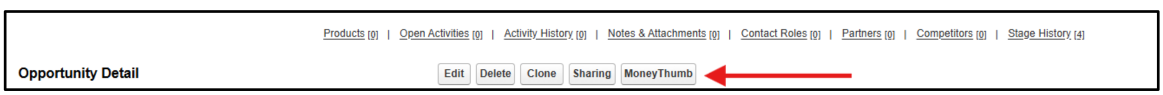
Note: Verify that you have set the object permissions for all users needing access to MoneyThumb.

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

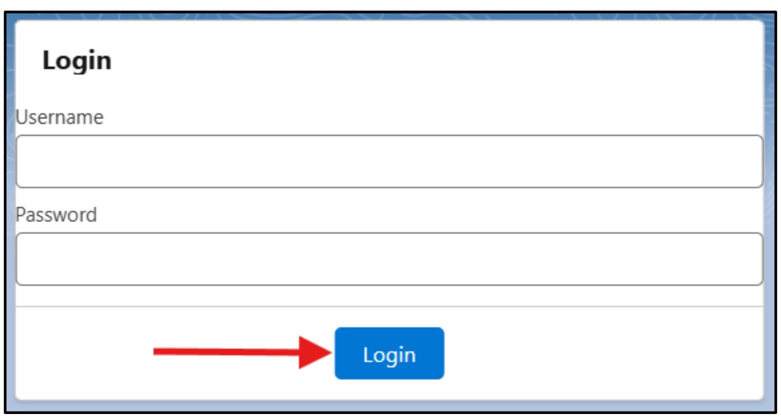
1. In Salesforce Lightning, click the **Open MoneyThumb** button in your opportunity.



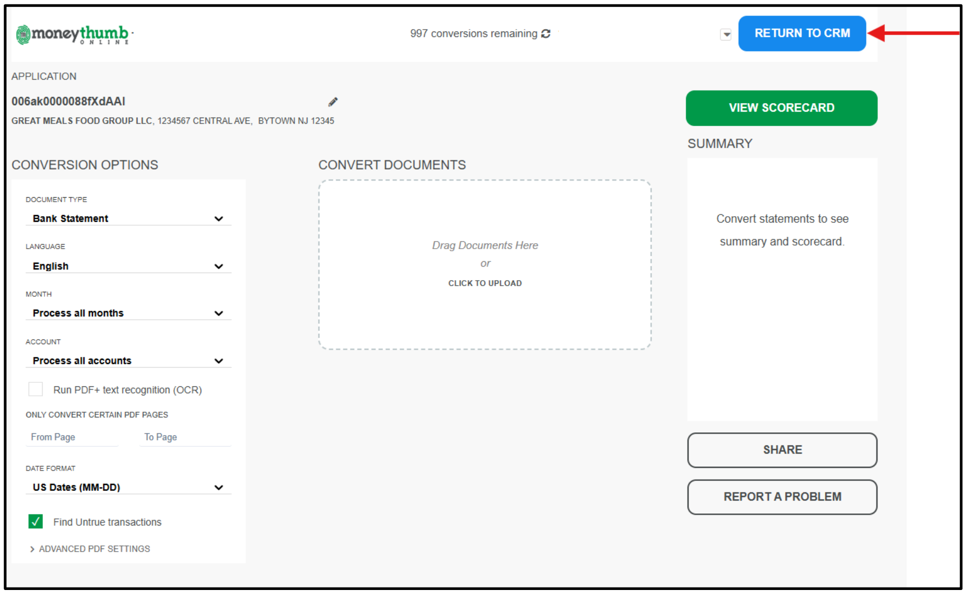
In Salesforce Classic, click the **MoneyThumb** button under **Opportunity Detail**.



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

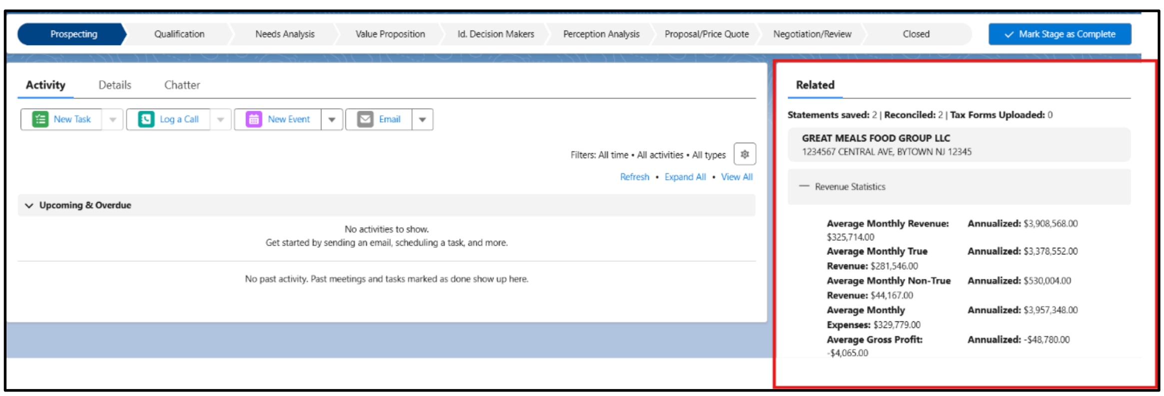


3. In MoneyThumb, upload the documents for this application. To bring the data to Salesforce, click the **Return to CRM** button.

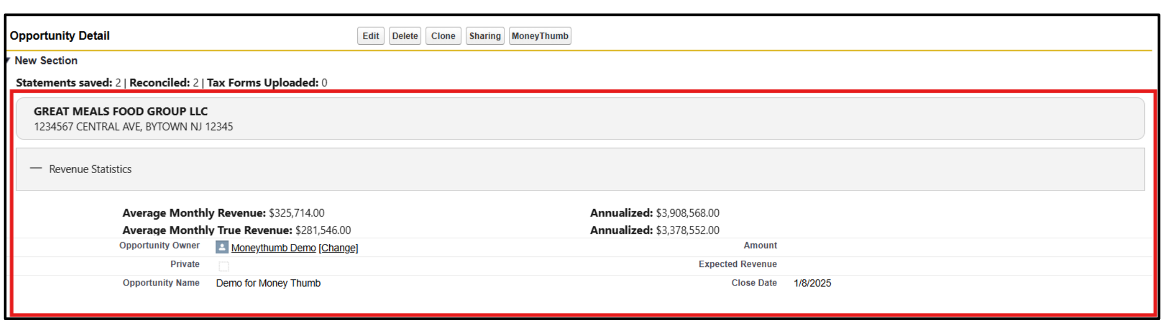


4. Once you return to Salesforce, you will see the Scorecard results in your opportunity. If you don't, try refreshing the page. The following examples show the Scorecard in Salesforce Lightning and Salesforce Classic.

Salesforce Lightning



Salesforce Classic



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.

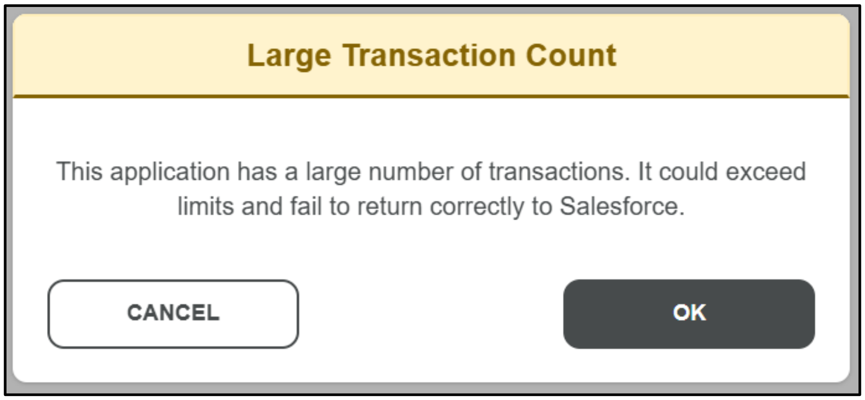
6.1. MoneyThumb Hanging After Logging In

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.

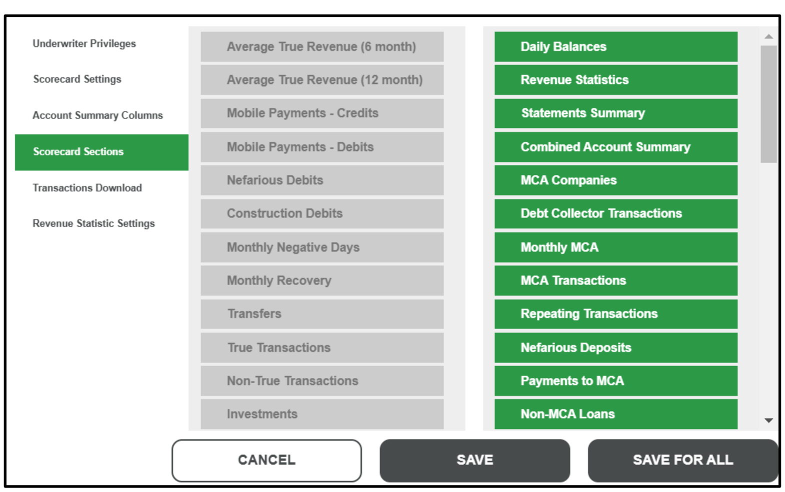
6.2. Large Transaction Count Message

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:

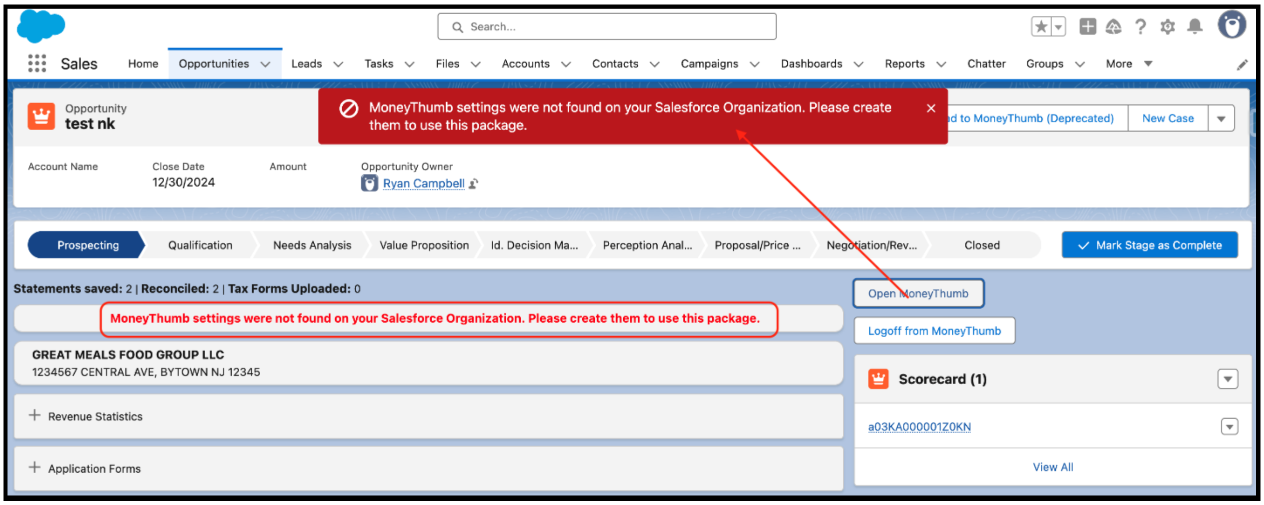
1. Click on your username and choose **Underwriter Settings.**
2. Click **Edit** next to your username.
3. Click **Scorecard Sections**.

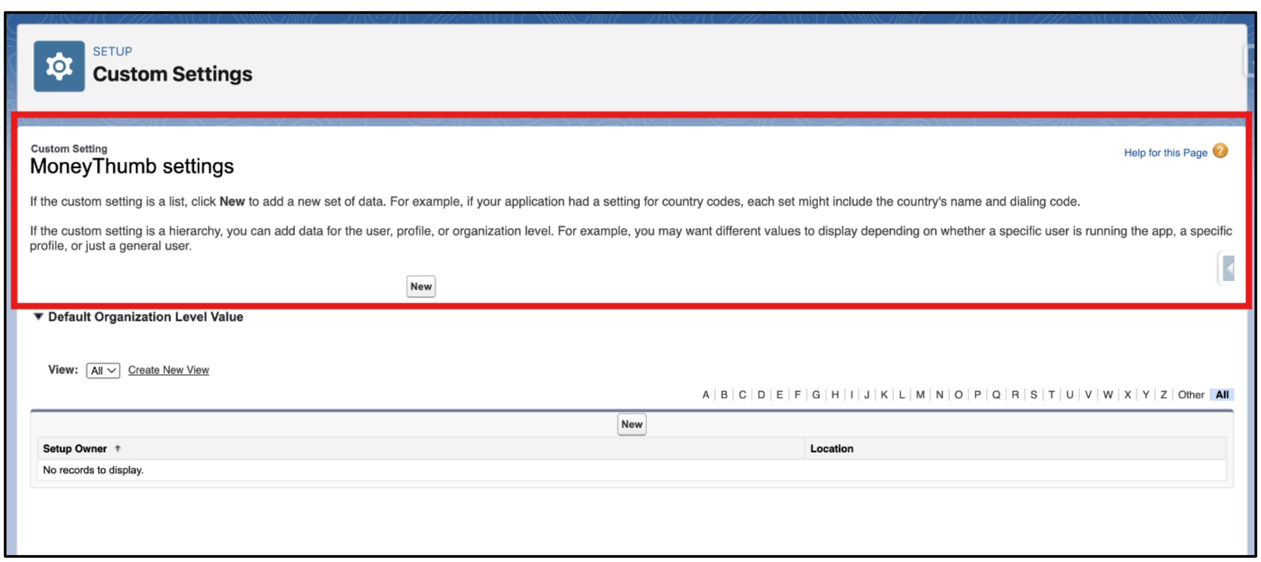


4. Drag from the right to the left sections you want to remove.
5. Click **Save**.

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.

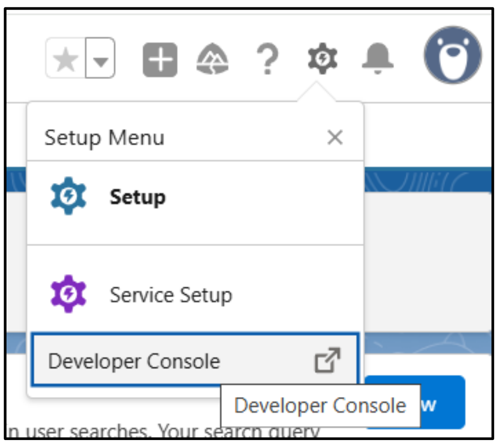
6.4. Freeing Up Space in Salesforce

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:

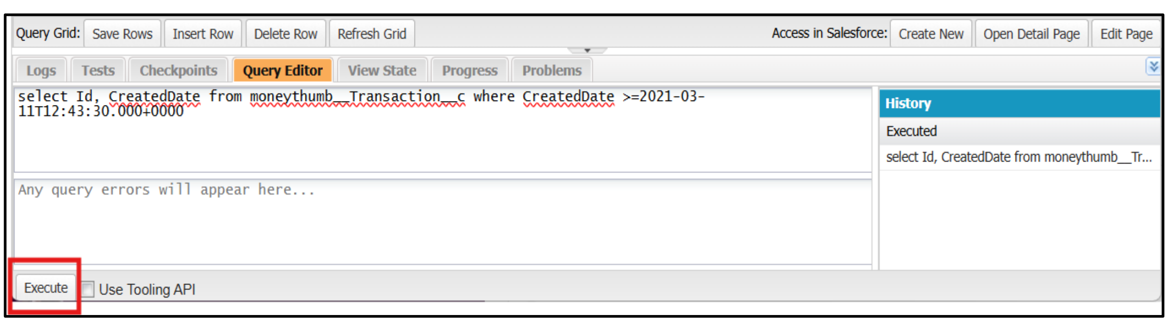
1. Go to the Developer Console.



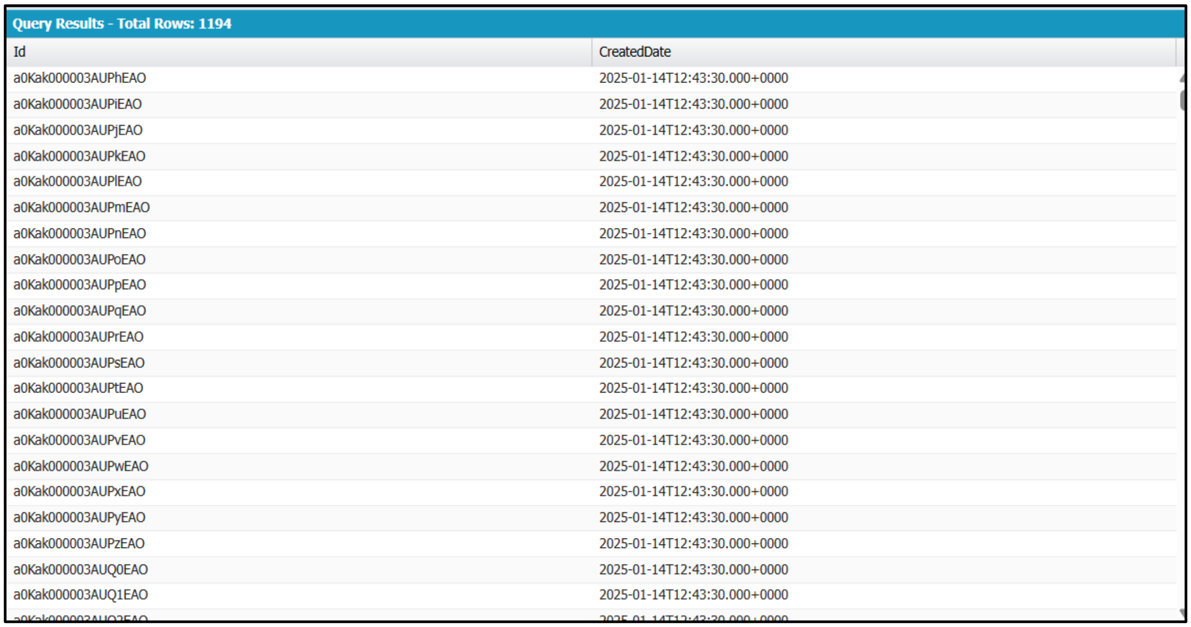
2. Do a query on what you would like to delete in the Query Editor. Make sure you use the following format.

```
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.



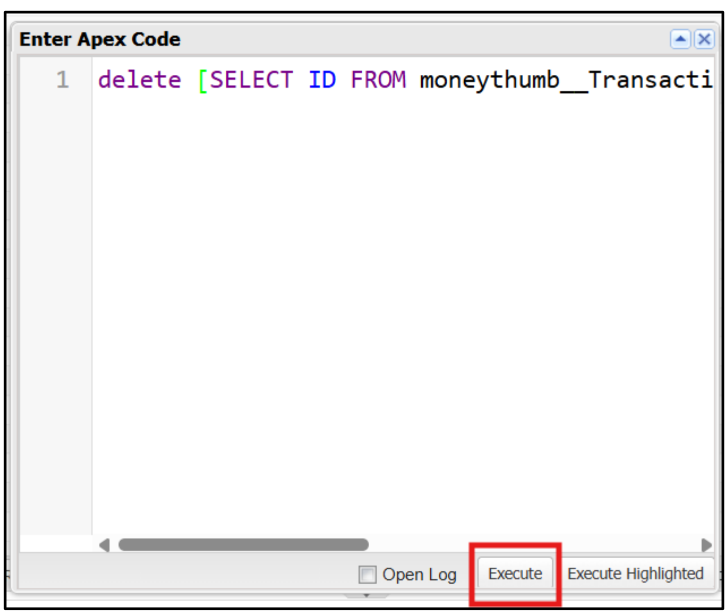
Id	CreatedDate
a0Kak000003AUPhEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPiEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPjEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPkEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPlEAO	2025-01-14T12:43:30.000+0000
a0Kak000003AUPmEAO	2025-01-14T12:43:30.000+0000
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

5. Once confirmed, either select **Debug→Open Execute Anonymous Window** or type Ctrl+E.

6. 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]
```

7. 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=04tKA000000gOaU
5.X	5.0	May 1, 2026	https://login.salesforce.com/packaging/installPackage.apexp?p0=04tKA000000gO84&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.