Salesforce Nonprofit Cloud Consultant

1. A nonprofit organization wants a cost-effective solution to generate and send donation acknowledgements automatically to donors via email.
Which Salesforce solution should the consultant recommend?

A. Nonprofit Success Pack

B. Commerce Cloud

C. Pardot

D. Marketing Cloud

Answer(s): A

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2. A nonprofit organization created a custom Opportunity name for all organization donations. Which two considerations should the consultant discuss with the organization? Choose 2 answers

- [ ] A. The organization should change existing Opportunities to the new naming convention through an upsert.
- [ ] B. The organization should only change existing Opportunities to the new naming convention by using the "Refresh Name" action.
- [ ] C. The organization should change existing Opportunities to the new naming convention by using the "Refresh All Opportunity Names" button in Bulk Data Processes.
- [ ] D. The custom naming convention only applies to new Opportunities of matching record types; it is not retroactive.

Answer(s): B C

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3. A nonprofit organization provides case management to its clients. There is a requirement for a score to be automatically assigned to each client based on several factors such as age, income and number of health conditions. The nonprofit also wants to automate the creation and assignment of follow up tasks related to the client.
Which combination of functions should the consultant recommend?

A. Activities and Customizable Rollups

B. Volunteer Recurrence and Customizable Rollups

C. Engagement Plans and Levels

D. Volunteer Wizard and Reports

Answer(s): C

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4. A nonprofit organization wants to designate its donors into three categories, Gold, Silver, and Bronze, based on the total gift amount for that year. How can this be accomplished using NPSP?

A. Create a picklist field that will display the categories based on the Total Gifts This Year field.

B. Create a custom field on the Opportunity that will display the categories and a process in Process Builder to populate the value based on the Total Gifts This Year field.

C. Set up NPSP Levels for the categories based on Total Gifts This Year.

D. Create a custom field on the Opportunity that will display the categories and a custom trigger to populate the value based on the Total Gifts This Year field.

Answer(s): C

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5. A system administrator encounters an error at run time that a record couldn't be updated when a Customizable Rollup ran. What should the consultant check?

A. If the Target Field exists

B. If the Target Field is a NPSP field

C. If the Target Field has a validation rule

D. If the Target Object is a custom object

Answer(s): C

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6. A consultant is installing NPSP in an existing Salesforce org for a nonprofit organization that plans to use the memberships feature in NPSP.
Which action should a consultant take?

A. Create a Membership Opportunity record type.

B. Add a value in the Type field on Opportunity for Membership.

C. Create a Membership Affiliation record type.

D. Add a checkbox field on the Opportunity called "Membership".

Answer(s): A

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7. An international nonprofit organization added a translated relationship picklist value, however the reciprocal relationship record is not displaying correctly. What is the cause of this error?

A. The system administrator did not enable the Translation Workbench.

B. The language is not supported in NPSP.

C. The current user does not have the correct locale.

D. The system administrator did not add the reciprocal relationship value in the NPSP Settings tab.

Answer(s): D

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8. A finance associate needs to track specific funds associated with gifts from individuals and organizations. Gifts may be received as either single amounts associated with one or more funds, and totals by fund will need to be reported on for reconciliation with a finance system. How should the consultant accomplish this with NPSP?

A. Create Campaign records for each of the funds, create a custom Lookup to Campaigns on the Payment Object, and associate them with Payment records representing the amounts towards each fund.

B. Create General Accounting Unit records for each of the funds, and associate them with the Opportunity by GAU Allocation record amounts representing the amounts towards each fund.

C. Create a custom multi-select picklist on the Opportunity record to allow for choosing each of the funds towards which the gift is designated.

D. Create Campaign records for each of the funds, and associate them with the Opportunity Primary Campaign field on the Opportunity records representing the amounts towards each fund.

Answer(s): B

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9. A consultant is about to begin a data project with a nonprofit to clean up Opportunity data. Which opportunity data situation requires a consultant to temporarily disable NPSP Triggers for performance reasons?

A. Uploading 600,000 new Organization Accounts without addresses

B. Uploading 400,000 new records to a custom object

C. Uploading 100,000 new Task records

D. Uploading 1 million new Contact records

Answer(s): D

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10. How can a user differentiate between a Contact's Account and Primary Affiliation under the Household Account model?

A. A Contact's Account is the same as the Contact record, a Contact's Primary Affiliation is the Contact's Household.

B. A Contact's Account is where they live, a Contact's Primary Affiliation is where they work.

C. A Contact's Account is where they work, a Contact's Primary Affiliation is where they live.

D. A Contact's Account is the same as a "bucket" where all Contacts are associated, a Contact's Primary Affiliation is the Contact's Household.

Answer(s): B

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11. A nonprofit organization wants to automatically generate an Opportunity whenever a Lead is converted. What should the consultant do to meet this requirement?

A. Select the "Create an Opportunity on Lead Convert" checkbox in NPSP Settings.

B. Write a trigger that automatically generates an Opportunity on Lead conversion.

C. Install a third-party app from the AppExchange that converts leads to any other object.

D. Create a process using Process Builder that will automatically create an Opportunity on Lead Conversion.

Answer(s): A

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12. A nonprofit organization wants to use a multi-channel marketing tool for its email, social, and text messaging engagement.
Which solution should the consultant recommend?

A. Marketing Cloud

B. Pardot

C. Community Cloud

D. Service Cloud

Answer(s): A

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13. During the Build phase of a project, one line of business requests the addition of a new field that is essential for its business process. A different line of business objects to the request and says that this field is unnecessary and will result in duplicate data. How should the consultant handle this?

A. Fulfill the request and add the field, but create a separate page layout so the field is only visible to the line of business that made the request.

B. Use the established governance committee for discussion and resolution.

C. Work quickly to negotiate between the two groups and resolve the issue before it escalates to the executive sponsors.

D. Add the field into a sandbox to test and validate expected outcomes.

E. Remove themselves from the discussion and suggest that the two business line leaders meet to make a decision.

Answer(s): A

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14. A nonprofit organization wants the 15th of the month listed as the Close Date for all recurring donations and has selected the 15th in the Day of the Month picklist. In reviewing Recurring Donation Opportunities it is found that some of the Opportunities have close dates at the end of the month.
Which action should the consultant take to troubleshoot this issue?

A. Check the Recurring Donation batch size.

B. Check the Error Log.

C. Check if the "Always use last day of the month" field is selected.

D. Check if the Custom Installment record was modified

Answer(s): B

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15. A nonprofit organization has been using Salesforce without NPSP. The organization is now interested in the NPSP functionality and wants the consultant to recommend if NPSP should be used in the same Salesforce environment or if they should start over in a new environment. Which tool should the consultant use to help evaluate and recommend the best course of action?

A. Salesforce Optimizer

B. Lightning Experience Migration Assistant

C. Setup Audit Trail

D. NPSP Health Check

Answer(s): A

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16. A Household Account has Contacts with Recurring Donations, Relationships, and closed/won donations associated with it. What happens when a system administrator attempts to delete this Household Account record?

A. There is an error message because there are closed/won donations associated with the Account record.

B. There is an error message because there are recurring donations associated with the Contacts in this Account.

C. There is an error message because there are relationships associated with the Contacts in this Account.

D. The Household Account record is deleted.

Answer(s): A

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17. A nonprofit organization is using Volunteers for Salesforce and wants its volunteers to be able to log their own volunteer hours.
Which two solutions should a consultant propose to meet this need? Choose 2 answers

- [ ] A. Set up a workflow rule with a weekly email alert sent to all volunteers asking them to reply back and report their hours for the week and then a user will manually enter the hours in Salesforce.

- [ ] B. Set up a Chatter Group for each volunteer job, add volunteers who are assigned to that job, and have the volunteers log their hours in the Chatter Group.

- [ ] C. Set up the Volunteers Personal Site and direct the volunteer to record hours on the tab there.

- [ ] D. Set up a Log Volunteer Hours section on a page on your website and direct volunteers there to log their hours to the volunteer job or shift they worked on.

Answer(s): C D

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18. A consultant is assisting a nonprofit organization in its data integration and data mapping between the two systems. The consultant is unsure when a particular field was introduced by NPSP. How should the consultant find the NPSP version number for the field?

A. Click on "Setup" and navigate to "Schema Builder".

B. Install a third-party app from the AppExchange to extract the metadata.

C. Reference the NPSP Public Data Dictionary.

D. Click on "Setup" and navigate to "Objects and Fields".

Answer(s): C

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19. A nonprofit organization wants to automate some of its routine activities.
Which declarative Salesforce solution is designed for process automation?

A. Einstein

B. Pardot

C. Lightning Flow

D. NPSP TDTM

Answer(s): C

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20. A local community center provides health care services to eligible local residents. Staff currently triage patients through of a series of qualifying questions that drive additional qualification questions. The center wants to extend triage capabilities to its volunteers to determine whether residents qualify for services. Service decisions need to be made immediately while the patient is interacting with the staff or volunteer.
Which solution should the consultant recommend?

A. Use Case records, Validation Rules and Process Builder to post case details to the central volunteer Chatter Group so all volunteers can collaborate on eligible services.

B. Create a Flow to guide volunteers on triage screens, capture accurate data and generate a services decision.

C. Use a Standard Lightning Component to displaying custom fields from several objects and generate a services decision.

D. Use a Workflow Rule with Field Updates and Case Assignment Rules to triage and assign the case to the proper services queue.

Answer(s): B
