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Practice Materials & Tests

DEMO VERSION

Salesforce

Nonprofit-Cloud-Consultant Exam

Salesforce Certified Nonprofit Cloud Consultant Exam

Exam Latest Version: 17.0

Question 1. (Single Select)

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

Correct Answer: A

Explanation:

Install NPSP:

Ensure that NPSP is installed in your Salesforce instance. You can download it from the AppExchange or install it directly from the NPSP Installer page

Configure Acknowledgement Settings:

Navigate to NPSP Settings.

Under "Donations," find the "Acknowledgements" settings.

Configure the settings to define when and how acknowledgements should be sent.

Set Up Email Templates:

Go to Setup > Classic Email Templates.

Create a new email template or modify an existing one to suit your acknowledgment needs.

Ensure the template includes merge fields to personalize the emails with donor information.

Create Automation with Process Builder:

Use Process Builder to automate the sending of acknowledgment emails.

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Create a new process on the Opportunity object.

Set criteria to trigger the process when a new donation is recorded.

Add an action to send an email using the previously created template.

Testing:

Test the process by creating a test donation record and verifying that the acknowledgment email is sent automatically.

Monitoring and Refinement:

Monitor the process to ensure it is working correctly.

Refine the email templates and automation rules based on feedback and evolving needs.

By utilizing the NPSP, nonprofits can streamline their donation acknowledgment process, ensuring timely and personalized communications with donors, ultimately enhancing donor satisfaction and retention.

Question 2. (Multi Select)

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.

Correct Answer: B, C

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Explanation:

When a nonprofit organization creates a custom Opportunity name for all organization donations, the consultant should discuss the following considerations:

Using the "Refresh Name" Action (B):

The organization should use the "Refresh Name" action to change existing Opportunities to the new naming convention. This action ensures that the custom naming convention is applied correctly.

Navigate to the Opportunity record.

Click on the "Refresh Name" button to update the Opportunity name according to the new naming convention.

Using the "Refresh All Opportunity Names" Button in Bulk Data Processes (C):

For bulk updates, the organization should use the "Refresh All Opportunity Names" button available in Bulk Data Processes.

Go to NPSP Settings.

Under Bulk Data Processes, find the "Refresh All Opportunity Names" button.

Click on it to update all existing Opportunities to the new naming convention in bulk.

These methods ensure that the custom naming convention is applied consistently across all existing Opportunity records, maintaining data integrity and consistency within the Salesforce org .

Question 3. (Single Select)

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.

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C: Create a Membership Affiliation record type.
D: Add a checkbox field on the Opportunity called "Membership".

Correct Answer: A

Explanation:

When installing NPSP (Nonprofit Success Pack) in an existing Salesforce org for a nonprofit organization that plans to use the memberships feature, the consultant should create a Membership Opportunity record type. This step is crucial because it allows the organization to effectively track and manage membership-related opportunities distinctly from other types of opportunities.

Steps:

Log in to Salesforce: Access the Salesforce org where NPSP will be installed.

Navigate to Object Manager: Go to Setup and search for "Object Manager".

Select Opportunity Object: From the Object Manager, select the Opportunity object.

Create a New Record Type:

Click "Record Types" under the Opportunity object.

Click "New" to create a new record type.

Enter "Membership" as the Record Type Label.

Provide a description such as "Record type for tracking membership opportunities".

Select the existing record type to clone from (e.g., "Master").

Assign this record type to appropriate profiles.

Click "Save".

Customize Page Layouts: Assign and customize page layouts for the new Membership record type as needed.

Verify and Test: Ensure that the Membership record type is correctly set up by creating a test membership opportunity.

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Question 4. (Single Select)

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.

Correct Answer: D

Explanation:

When an international nonprofit organization adds a translated relationship picklist value, and the reciprocal relationship record is not displaying correctly, it is typically due to the system administrator not adding the reciprocal relationship value in the NPSP Settings tab.

Steps:

Log in to Salesforce: Access the Salesforce org with NPSP installed.

Navigate to NPSP Settings: Go to the App Launcher, search for "NPSP Settings", and select it.

Find Relationship Settings: In the NPSP Settings, expand "People" and then "Relationships".

Add Reciprocal Relationship:

Click "Reciprocal Method Settings".

Ensure that the new reciprocal relationship values are added and correctly configured.

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Check both the primary and reciprocal relationship values to ensure they are set correctly.

Save and Test: Save the settings and test to confirm that the reciprocal relationships display correctly.

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Question 5. (Single Select)

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.

Correct Answer: B

Explanation:

To track specific funds associated with gifts from individuals and organizations in NPSP, the consultant should create General Accounting Unit (GAU) records for each of the funds and associate them with the Opportunity by GAU Allocation record amounts.

Steps:

Log in to Salesforce: Access the Salesforce org with NPSP installed.

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Create GAU Records:

Navigate to the App Launcher and search for "General Accounting Units".

Click "New" to create a new GAU record for each fund.

Fill in the necessary details such as GAU Name, Description, and any other relevant information.

Save the GAU records.

Associate GAUs with Opportunities:

Navigate to the Opportunity related to the donation.

In the Opportunity record, find the "GAU Allocations" related list.

Click "New" to create a new GAU Allocation.

Select the appropriate GAU record from the lookup field.

Enter the allocation amount and any other necessary details.

Save the GAU Allocation record.

Reporting: Use standard or custom reports to track and report on GAU Allocations for reconciliation with the finance system.

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