# Free Questions for Nonprofit-Cloud-Consultant

## Shared by Lloyd on 20-10-2022

For More Free Questions and Preparation Resources

Check the Links on Last Page

# Question 1

Question Type: MultipleChoice

A consultant needs to load a large volume of data for a nonprofit.

Which two steps should the consultant take before the data loads to speed up the process?

Choose 2 answers

## Options:

A- Add record owners to Role Hierarchy.
B- Defer Sharing Rule Calculation.
C- Disable related Apex classes in TDTM.
D- Recalculate Sharing Rules.

## Answer:

B, C

## Explanation:

When loading a large volume of data for a nonprofit, the following steps can significantly speed up the process:

Defer Sharing Rule Calculation:

Defer the sharing rule calculations during the data load process. This prevents Salesforce from recalculating sharing rules for each record as it is loaded, which can slow down the process considerably.

After the data load is complete, you can manually trigger the sharing rule recalculations.

Steps to Defer Sharing Rule Calculation:

Go to Setup.

Enter 'Defer Sharing Calculations' in the Quick Find box.

Enable the deferment option before starting the data load.

Disable Related Apex Classes in TDTM:

Temporarily disable Apex triggers and classes in the TDTM (Table Driven Trigger Management) framework to reduce processing overhead during the data load.

This ensures that the system doesn't execute complex Apex code for each record being loaded.

Steps to Disable Related Apex Classes in TDTM:

Go to NPSP Settings.

Navigate to TDTM (Table Driven Trigger Management).

Identify and disable the relevant triggers and classes temporarily.

These steps help streamline the data loading process by minimizing the processing and recalculations that Salesforce would otherwise perform on each record.

Salesforce Help: Defer Sharing Rule Calculation

Nonprofit Success Pack (NPSP) Documentation: Managing TDTM Settings

# Question 2

Question Type: MultipleChoice

A volunteer with a nonprofit works at Universal Containers. The volunteer is recorded in Salesforce as part of the Household's account record, but Universal Containers needs to be entered into the Salesforce system.

How should a consultant track the volunteer's relationship with Universal Containers?

## Options:

A- Create a Universal Containers Organization Account and create a Relationship record between the volunteer and Universal Containers.
B- Create a Universal Containers Organization Account and create an Affiliation record between the volunteer and Universal Containers.
C- Create a Lead for the volunteer at Universal Containers and create a Relationship record between the volunteer Lead and the volunteer Contact.
D- Create a Lead for the volunteer at Universal Containers and create an Affiliation record between the volunteer Lead and Universal Containers.

## Answer:

B

## Explanation:

To track the volunteer's relationship with Universal Containers, the consultant should create an Affiliation record. Here's why:

Affiliation Record:

In NPSP, Affiliation records are used to track the relationship between Contacts (individuals) and Accounts (organizations).

Creating an Affiliation record between the volunteer (who is a Contact) and Universal Containers (an Organization Account) effectively captures the volunteer's association with the company.

This method aligns with NPSP best practices for managing relationships and affiliations within the nonprofit's Salesforce instance.

Salesforce Nonprofit Success Pack Documentation on Affiliations

Salesforce NPSP Account and Contact Management Guide

# Question 3

Question Type: MultipleChoice

A nonprofit has implemented Program Management Module to satisfy the reporting requirements of a new grant. The funder expects to see a report that segmen&s services according to location.

Which object will allow the nonprofit to satisfy the reporting requirements?

## Options:

A- Program
B- Service
C- Program Engagement
D- Program Cohort

## Answer:

D

## Explanation:

https://powerofus.force.com/s/article/PMM-Overview https://trailhead.salesforce.com/en/content/learn/modules/program-management-with-nonprofit-cloud/manage-nonprofit-programs-with-salesforce?trail_id=manage-programs-with-nonprofit-cloud

To meet the reporting requirements of a new grant that expects services to be segmented according to location, the nonprofit should use the Program Cohort object. The Program Cohort object allows tracking and reporting of services provided in specific locations, making it possible to generate detailed reports that meet funder requirements.

Steps:

Configure the Program Management Module to include the necessary fields for tracking service locations within the Program Cohort object.

Ensure that all relevant data is accurately entered into the Program Cohort records, including location details.

Create custom reports and dashboards that segment services based on the location data stored in the Program Cohort object.

Regularly review and update the data to ensure accurate and up-to-date reporting for the funder.

CertGod Nonprofit Cloud Consultant Guide: Discusses the use of Program Cohorts for detailed tracking and reporting of services.

Salesforce Documentation on Program Management Module: Provides information on the functionality and use of Program Cohorts.

# Question 4

Question Type: MultipleChoice

A nonprofit trade association sells research papers, certifications, and other products online to its existing members who are primarily universities and companies.

What should a consultant recommend to sell these items?

## Options:

A- Salesforce Experience Cloud
B- Salesforce B2B Commerce
C- Salesforce B2C Commerce
D- Salesforce Billing

## Answer:

B

## Explanation:

For a nonprofit trade association that sells research papers, certifications, and other products online to its existing members who are primarily universities and companies, Salesforce B2B Commerce is the most suitable solution:

Salesforce B2B Commerce:

Salesforce B2B Commerce is designed for business-to-business transactions, making it ideal for organizations that sell products and services to other businesses, such as universities and companies.

It provides features for managing complex pricing, bulk orders, and accounts, which are essential for a trade association dealing with institutional members.

Features and Benefits:

B2B Commerce offers personalized buying experiences, self-service portals for customers, and streamlined order management processes.

It integrates seamlessly with Salesforce CRM, allowing the nonprofit to manage member relationships, sales, and order histories within a single platform.

Salesforce B2B Commerce Documentation

Salesforce Trailhead: Salesforce B2B Commerce Basics

# Question 5

Question Type: MultipleChoice

A nonprofit, who does a lot of mail appeals to donors, asks their consultant for the best solution to keep their constituents' addresses formatted properly to ensure the mail reaches them.

What should the consultant recommend?

## Options:

A- Insights Platform Data Integrity

B- Sender Authentication Package

C- Customer Data Platform
D- NPSP Address Management

## Answer:

D

## Explanation:

For a nonprofit that does a lot of mail appeals to donors and wants to ensure addresses are formatted correctly, the consultant should recommend:

NPSP Address Management:

NPSP Address Management helps ensure that addresses are standardized and formatted correctly. It includes tools and processes to manage and validate addresses, thus reducing errors in mailings and improving delivery rates.

# Question 6

Question Type: MultipleChoice

A data administrator at a small nonprofit has 3 profile that allows them to Read, Create, Edit, and Delete on all objects. The staff member receives an error when attempting to merge three duplicate contacts.

What should the consultant recommend to resolve this issue?

## Options:

A- Tell the staff member to select only two instead of three contacts when using Contact Merge.
B- Make the staff member a system admin.
C- Create a Permission Set with Modify All on Contacts and Accounts and assign it to the staff member.
D- Tell the staff member to merge Contacts from the View Duplicates component.

## Answer:

C

## Explanation:

https://powerofus.force.com/s/article/NPSP-Merging-Contacts

When a staff member receives an error while attempting to merge duplicate contacts, it is often due to insufficient permissions. Creating a Permission Set with 'Modify All' on Contacts and Accounts and assigning it to the staff member will grant the necessary permissions to perform merges. This Permission Set will override the default profile permissions and provide the required access to manage and merge contacts.

Steps:

Go to Setup > Permission Sets.

Click 'New' to create a new Permission Set.

Name the Permission Set appropriately (e.g., 'Contact Merge Permissions').

In the Permission Set, navigate to Object Settings.

Select Contacts and Accounts.

Check the 'Modify All' checkbox for both objects.

Save the Permission Set.

Assign the Permission Set to the staff member by navigating to the user's profile and adding the Permission Set.

CertGod Nonprofit Cloud Consultant Guide: Discusses the importance of appropriate permissions for merging records.

Salesforce Documentation on Permission Sets: Details the steps for creating and assigning Permission Sets.

# Question 7

Question Type: MultipleChoice

The requirements for a Salesforce implementation have been gathered, but there are teams with competing priorities and the overall project goals are undefined.

What are two reasons a project team must define goals?

Choose 2 answers

## Options:

A- Goals guarantee executive engagement.
B- Goals provide a way to measure and prove results.
C- Goals define a clear purpose for the project.
D- Goals catalog all of the teams' pain points.

## Answer:

B, C

## Explanation:

Defining goals is crucial for any project, including Salesforce implementations. Goals help ensure that the project has a clear direction and measurable outcomes. Here are the reasons:

Measure and Prove Results (B):

Setting clear goals allows the project team to measure progress and success. It provides a benchmark against which results can be compared, helping to demonstrate the project's impact and value.

Define a Clear Purpose (C):

Goals help articulate the purpose of the project, providing clarity and focus. This ensures that all team members understand the objectives and work towards a common aim, reducing confusion and aligning efforts.

Salesforce Project Management Best Practices

Salesforce Trailhead: Define Project Goals and Objectives

# Question 8

Question Type: MultipleChoice

A nonprofit using NPSP wants to track all donations that go to a designated fund.

How should a consultant meet this requirement?

## Options:

A- Create an Opportunity record type called 'Funds'.

B- Create a General Accounting Unit record for the designated fund.
C- Create a custom object to track fund accounts.
D- Create a GAU Allocation record for the designated fund.

### Answer:

D

### Explanation:

To track all donations that go to a designated fund, the consultant should create a GAU Allocation record for the designated fund. Here's why:

GAU Allocation Record:

General Accounting Units (GAUs) are used in NPSP to allocate portions of donations to specific funds or purposes.

Creating a GAU Allocation record allows the nonprofit to specify the amount of each donation that should be allocated to the designated fund, ensuring accurate tracking and reporting.

Salesforce NPSP Documentation on General Accounting Units (GAUs)

Salesforce Nonprofit Success Pack GAU Allocation Guide

## Question 9

Question Type: MultipleChoice

A member of the donation processing team wants to set up different batch data input configurations for different donation types.

Which feature should the consultant recommend to make processing different donation batches consistent?

### Options:

A- Gift Entry Templates
B- Advanced Mapping
C- Data Import Wizard
D- Engagement Plan Templates

## Answer:

A

## Explanation:

https://powerofus.force.com/s/article/NPSP-Configure-Gift-Entry

Gift Entry Templates in NPSP allow for the configuration of different batch data input settings for various types of donations. This feature ensures consistency and efficiency in processing different donation batches.

Steps:

Access the Gift Entry Templates in NPSP.

Create a new template for each type of donation batch that needs to be processed.

Configure the fields and layout for each template to match the specific data requirements of each donation type.

Save and publish the templates.

Use the templates when processing donation batches to ensure consistent data entry and processing.

CertGod Nonprofit Cloud Consultant Guide: Recommends using Gift Entry Templates for managing different donation types and ensuring consistent data processing.

Salesforce Documentation on Gift Entry Templates: Provides detailed instructions on creating and using Gift Entry Templates in NPSP.

# Question 10

Question Type: MultipleChoice

A large nonprofit has chapters in multiple locations that want to operate under one central brand. The nonprofit wants the ability to customize user roles, processes, and messaging unique to each location.

Which two Salesforce tools include the ability to segment data and functionality using business units?

Choose 2 answers

## Options:

A- Datorama

B- Marketing Cloud

C- Pardot

D- Digital Engagement

## Answer:

B, C

## Explanation:

Both Marketing Cloud and Pardot offer the capability to segment data and functionality using business units. This is particularly useful for large nonprofits with multiple chapters operating under a single brand but needing customized roles, processes, and messaging.

Marketing Cloud:

Business Units: Allows organizations to separate data, user permissions, and content based on different parts of the organization, such as chapters or departments. Each business unit can have its own data and customizations, enabling localized marketing while maintaining centralized control.

Pardot:

Business Units: Pardot Business Units enable marketing teams to partition data and customize marketing efforts for different segments within the organization. This ensures that each chapter can tailor its marketing automation processes to its specific needs while maintaining brand consistency.

Salesforce Marketing Cloud Documentation

Salesforce Pardot Documentation

Salesforce Trailhead: Get Started with Marketing Cloud Business Units