Free Questions for Nonprofit-Cloud-Consultant

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Question 1

Question Type: MultipleChoice

A human services nonprofit needs to track client goals and action items related to those goals. The nonprofit is unsure whether Program Management Module alone will meet Its requirements. The nonprofit is considering whether to implement Nonprofit Cloud Case Management.

What should the consultant discuss with the nonprofit?

Options:

A- Program Management Module has custom objects for calendars and activities.

B- Program Management Module can track Case Plans and Action Items.

C- Case Management has a custom object for tracking goals.

D- Case Management requires Experience Cloud licenses.

Answer:

C

Explanation:

check the entity relationship diagram

When evaluating whether to use Program Management Module (PMM) or Nonprofit Cloud Case Management, it is important to consider the specific requirements of the nonprofit. While PMM can track programs, services, and the impact of those services, Nonprofit Cloud Case Management offers additional functionality tailored to human services nonprofits. Case Management includes custom objects specifically designed to track client goals and action items, making it more suitable for organizations needing detailed goal tracking.

Steps:

Assess the specific requirements for tracking client goals and action items.

Compare the features of PMM and Case Management.

Highlight that Case Management has a custom object for tracking goals and action items.

Discuss the benefits and potential limitations of implementing Case Management, including the need for Experience Cloud licenses if applicable.

CertGod Nonprofit Cloud Consultant Guide: Provides an overview of the features of both PMM and

Case Management.

Salesforce Nonprofit Cloud Case Management Documentation: Details on custom objects and functionalities available in Case Management.

Question 2

Question Type: MultipleChoice

Which two objects in the Program Management Module are directly connected to objects in Nonprofit Cloud Case Management?

Choose 2 answers

Options:

A- Client Alert
B- Case
C- Service Delivery
D- Program

Answer:

B, C

Explanation:

The PMM has two main objects ---Programs and Services--- and several objects that connect those objects together with contacts and household accounts

In the Program Management Module (PMM), the objects that are directly connected to objects in Nonprofit Cloud Case Management are:

Case:

Cases in Nonprofit Cloud Case Management are used to track client issues and support needs.

They can be directly related to program participants and services provided, allowing for comprehensive case management.

Service Delivery:

Service Deliveries represent the specific services provided to clients, such as counseling sessions, classes, or other forms of assistance.

They are essential for tracking the outcomes and effectiveness of the nonprofit's programs and are directly connected to case management processes.

Salesforce Nonprofit Cloud Case Management Guide

Salesforce Program Management Module (PMM) Documentation

Question 3

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 4

Question Type: MultipleChoice

A consultant is tasked with implementing NPSP for a UK-based nonprofit. One of their requirements is to localize the US-focused labels of some NPSP fields, such as replacing all references to Organization with Organisation.

What should the consultant do to meet the requirement?

Options:

A- Create a support case to change the label.
B- Activate English (UK) In Language Settings.
C- Override the default English labels in Translation Workbench.
D- Reword the field label in Setup.

Answer:

B

Explanation:

To localize the US-focused labels of some NPSP fields for a UK-based nonprofit, such as replacing 'Organization' with 'Organisation,' the consultant should activate English (UK) in Language Settings. Here's why:

Activate English (UK):

Salesforce supports multiple languages and localizations, including English (UK), which provides localized labels for standard fields and objects.

By activating English (UK), the system will automatically use British English conventions, replacing US-centric terms with UK equivalents.

This is a straightforward and efficient method to localize field labels without the need for custom development or manual label changes.

Salesforce Language Settings Documentation

Salesforce Localization and Translation Guide

Question 5

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

Question 6

Question Type: MultipleChoice

A nonprofit wants to migrate millions of Contact records from a legacy system. Most records fail to import with the following error: "npsp.TDTM_Address: System.LimitException: Apex CPU time limit exceeded".

Which three actions could a consultant take to successfully import this data?

Choose 3 answers

Options:

A- Enable 'Simple Address Change Treated as Update' in Address Settings.
B- Check 'User Managed' on the Address TDTM record.
C- Disable all automation and load the Address object separately.
D- Disable 'ADDR_Addresses_TDTM' Handler in Trigger Configuration.
E- Reduce the batch size significantly when addresses are included.

Answer:

C, D, E

Explanation:

When migrating millions of Contact records and encountering the error 'npsp.TDTM_Address: System.LimitException: Apex CPU time limit exceeded,' you can take the following actions:

Disable Automation:

Go to NPSP Settings.

Navigate to 'TDTM' (Table Driven Trigger Management).

Disable all automation triggers temporarily to ensure they do not interfere with the data load process.

Load Address Object Separately:

Split the data load into two parts: first load Contacts without address data, then load address data separately.

This reduces the complexity and processing required for each batch.

Disable ADDR_Addresses_TDTM Handler:

In NPSP Settings, go to 'Trigger Configuration.'

Locate the 'ADDR_Addresses_TDTM' handler.

Disable this specific handler to prevent it from executing during the data import process.

Reduce Batch Size:

When using Data Loader or any import tool, set the batch size to a significantly lower number (e.g., 100 or 200 records per batch).

This helps in managing CPU limits and ensures smoother processing.

By following these steps, you can mitigate the Apex CPU time limit issue and successfully import large volumes of data into NPSP.

Salesforce documentation on managing Apex CPU time limits.

Nonprofit Success Pack (NPSP) documentation on Trigger Management and Data Import.

Question 7

Question Type: MultipleChoice

A nonprofit receives a check that includes donations from several donors for a specific program the nonprofit runs.

Which two features should a consultant configure to track this gift?

Choose 2 answers

Options:

A- GAU Allocations

B- Recurring Donations

C- Partial Soft Credits

D- Multiple Payments

Answer:

A, C

Explanation:

To track a check that includes donations from several donors for a specific program, the consultant should configure GAU Allocations and Partial Soft Credits in NPSP. Here's why:

GAU Allocations:

General Accounting Unit (GAU) Allocations are used to track how donations are allocated across different programs or funds.

This feature allows the nonprofit to specify which portion of the check is designated for the specific program, providing clear tracking and reporting.

Partial Soft Credits:

Partial Soft Credits can be used to attribute portions of a single donation to multiple donors.

This feature allows the nonprofit to recognize each donor for their contribution while keeping the accounting of the total donation intact.

Salesforce NPSP Documentation on GAU Allocations

Salesforce NPSP Documentation on Soft Credits

Question 8

Question Type: MultipleChoice

A nonprofit has a large volume of data across multiple objects in Salesforce and external databases. The nonprofit needs to quickly query data across its systems to get insights on any device about the impact it is having.

Which solution should the consultant recommend?

Options:

A- Salesforce Connect
B- Salesforce Reports & Dashboards
C- External Objects
D- CRM Analytics

Answer:

D

Explanation:

To quickly query data across multiple systems and get insights on any device about the impact the nonprofit is having, the consultant should recommend:

CRM Analytics (formerly known as Tableau CRM or Einstein Analytics):

CRM Analytics allows for advanced data analysis, visualization, and reporting. It can integrate data from multiple Salesforce objects and external sources, providing comprehensive insights across systems. It is designed to work seamlessly on various devices, ensuring accessibility and usability.

Question 9

Question Type: MultipleChoice

Donations made by nonprofit volunteers are captured on a spreadsheet monthly. The nonprofit utilizes NPSP and Volunteers for Salesforce.

Which two NPSP Data Import features will streamline the import of these donations?

Choose 2 answers

Options:

A- Create a Batch and map Opportunity Primary Contact on First and Last Name.
B- Schedule a Batch by updating the NPSP Scheduled Batches.
C- Create a Batch and match Contact on First and Last Name.
D- Schedule a Batch by checking the Process Using Scheduled Job checkbox.

Answer:

A, C

Explanation:

To streamline the import of donations made by nonprofit volunteers using NPSP Data Import features, the following steps are recommended:

Create a Batch and Map Opportunity Primary Contact on First and Last Name:

When creating a data import batch, you can map the Opportunity Primary Contact based on the First and Last Name. This ensures that the donation is linked to the correct contact in Salesforce.

Create a Batch and Match Contact on First and Last Name:

During the import process, create a batch and use the matching criteria based on the Contact's First and Last Name. This helps in accurately matching the donations to the existing contacts in Salesforce, reducing duplicate records and maintaining data integrity.

Steps to Implement:

Navigate to NPSP Data Import.

Create a new Batch.

Map the fields appropriately, ensuring the Opportunity Primary Contact and Contact matching criteria are based on First and Last Name.

Validate the mapping and run the batch to import the donation data.

These features help automate and streamline the data import process, ensuring accurate and efficient data management.

Nonprofit Success Pack (NPSP) Documentation: Data Import

Salesforce Help: Managing Batches and Data Import

Question 10

Question Type: MultipleChoice

A nonprofit receives many tribute gifts and wants to ensure that the person being honored by the gift consistently receives the proper soft credit.

How should the consultant advise them to configure this in NPSP?

Options:

A- Set up Automatic Opportunity Contact Roles and enter Honoree for Honoree Opportunity Contact Role.
B- In the New Donation entry screen populate the Honoree lookup field.
C- Set the Contact Role for individual Opportunities to Honoree.
D- Enable Advanced Mapping and map the Honoree to Honoree Opportunity Contact Role.

Answer:

A

Explanation:

https://trailhead.salesforce.com/en/content/learn/modules/opportunity-settings-in-nonprofit-success-pack/set-up-soft-credits-npsp

https://trailhead.salesforce.com/en/content/learn/modules/donation-soft-credit-management-with-nonprofit-success-pack/create-and-manage-soft-credits

To ensure that the person being honored by a tribute gift consistently receives the proper soft credit, the nonprofit should set up Automatic Opportunity Contact Roles in NPSP and configure the Honoree role. This automation ensures that the honoree is always credited appropriately without manual intervention.

Steps:

Navigate to NPSP Settings > Donations > Automatic Opportunity Contact Roles.

Add a new Contact Role with the role type 'Honoree.'

Set the role to be automatically assigned to Opportunities that meet the criteria for tribute gifts.

Test the configuration by creating a new tribute gift and verifying that the Honoree Contact Role is correctly assigned.

Train staff on how to use the new setup to ensure consistency in data entry.

CertGod Nonprofit Cloud Consultant Guide: Advises on configuring Automatic Opportunity Contact Roles for managing soft credits in tribute gifts.

Salesforce Documentation on NPSP Automatic Opportunity Contact Roles: Provides instructions on setting up and managing contact roles for Opportunities.

Question 11

Question Type: MultipleChoice

A nonprofit wants a report that shows Opportunity and General Accounting Unit (GAU) custom field data for gifts to the "General Fund' GAU. The nonprofit wants to add filters so only the gifts connected to the 'Annual Campaign' are shown.

Which report should the consultant implement?

Options:

A- GAU Allocations with Opportunity report type and filter on the Opportunity object for the Primary Campaign Source = 'Annual Campaign' and filter on the GAU Allocation object for General Accounting Unit = 'General Fund'

B- Opportunity report type with cross filter for Opportunities with GAU Allocations with filter on the cross filter for Campaign = 'Annual Campaign' and General Accounting Unit = 'General Fund'

C- Opportunity report type with cross filter for Opportunities with GAU Allocations and filter on Opportunity object for the Primary Campaign Source = 'Annual Campaign' and on the GAU Allocations object for General Accounting Unit 'General Fund'

D- GAU Allocations with Opportunity report type and filter on the GAU Allocation object for Campaign = 'Annual Campaign' and General Accounting Unit = 'General Fund'

Answer:

A

Explanation:

To create a report that shows Opportunity and General Accounting Unit (GAU) custom field data for gifts to the 'General Fund' GAU and adds filters to show only the gifts connected to the 'Annual Campaign,' the consultant should use the 'GAU Allocations with Opportunity' report type. This report type allows for filtering on both Opportunity and GAU Allocation fields.

Steps to Create the Report:

Select Report Type:

Go to the Reports tab and create a new report using the 'GAU Allocations with Opportunity' report type.

Add Filters:

Filter on the Opportunity object for the Primary Campaign Source = 'Annual Campaign.'

Filter on the GAU Allocation object for General Accounting Unit = 'General Fund.'

Customize Report:

Add the necessary fields from both the Opportunity and GAU Allocation objects to the report layout.

Save and run the report to view the desired data.

Salesforce Nonprofit Success Pack Documentation

Salesforce Trailhead: Create and Customize Reports in Salesforce

Question 12

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.