



Free Questions for Nonprofit-Cloud-Consultant

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Question 1

Question Type: MultipleChoice

A nonprofit is moving from a legacy donor management system to NPSP. The nonprofit wants to retain the legacy system's 150 donation appeal source codes as historical data.

What should the consultant recommend?

Options:

- A- Create a custom object 'Legacy Source Code' and map a lookup field on Contacts and Opportunities when importing donations.
- B- Create a custom text field 'Legacy Source Code' on Contact and Opportunity to store the legacy system's source codes.
- C- Insert a Campaign for each Legacy Source code and, when importing Contacts and Opportunities, relate them to the Campaign.
- D- Add each legacy source code to the Lead Source picklist and set the code when inserting Contacts and Opportunities.

Answer:

C

Explanation:

To retain the legacy system's 150 donation appeal source codes as historical data in NPSP, you should follow these steps:

Create Campaigns for Each Legacy Source Code:

Navigate to the Campaigns tab in Salesforce.

Create a new Campaign for each of the 150 legacy source codes.

Name the Campaigns according to the source codes for easy identification.

Prepare Your Import Data:

Ensure that your import data includes a column for Campaigns, where you can map each donation to the corresponding legacy source code Campaign.

Import Contacts and Opportunities:

Use the Data Import Wizard or Data Loader to import your Contacts and Opportunities.

During the import process, map the source code field in your data to the appropriate Campaign in Salesforce.

Relate Contacts and Opportunities to Campaigns:

Ensure that each Contact and Opportunity record is related to the correct Campaign representing the legacy source code.

By organizing your legacy source codes into Campaigns and mapping your import data accordingly, you can effectively retain and manage historical donation appeal source codes in NPSP.

Nonprofit Success Pack (NPSP) Data Import documentation.

Salesforce documentation on Campaigns and data import processes.

Question 2

Question Type: MultipleChoice

A nonprofit has a membership program it wants to manage in Salesforce.

What are two items the consultant needs to configure so the membership rollups in NPSP work properly?

Options:

- A- Create a custom field for Membership Amount and select it for membership rollups.
- B- Select the membership record type for membership rollups.
- C- Create an Opportunity record type for memberships.
- D- Set a grace period for memberships.

Answer:

B, C

Explanation:

To ensure that the membership rollups in NPSP (Nonprofit Success Pack) work properly for managing a membership program, the consultant needs to configure the following items:

Select the membership record type for membership rollups:

This involves defining which Opportunity record types are used for membership donations. This configuration allows the NPSP to properly identify and roll up membership donations.

Create an Opportunity record type for memberships:

Opportunity record types allow different types of opportunities (such as donations, memberships, etc.) to be tracked and managed separately. Creating a specific Opportunity record type for memberships ensures that these are properly categorized and can be used in rollup calculations.

Question 3

Question Type: MultipleChoice

A nonprofit is using Nonprofit Cloud Case Management. Case managers need to share the initial, midterm, and final client assessments; updates or notes on the client; and pertinent alerts about the client with other staff within the nonprofit who also provide services to the client.

Which two approaches should a consultant recommend to meet the requirement?

Choose 2 answers

Options:

- A- Create Sharing Rules for Assessments, Client Notes, and Client Alerts that share these with the public group.
- B- Create a Public Group of staff that need access to this information.
- C- Create a permission set that grants Read/Write access to Assessments, Client Notes, and Client Alerts objects.
- D- Create a Private Group of staff that need access to this information.

Answer:

A, B

Explanation:

To meet the requirement of sharing client assessments, notes, and alerts among staff within the nonprofit using Nonprofit Cloud Case Management, the following approaches are recommended:

Create a Public Group:

Create a Public Group that includes all staff members who need access to the client information.

This group will be used to grant shared access to the relevant records.

Steps to Create a Public Group:

Go to Setup.

Enter 'Public Groups' in the Quick Find box and select it.

Click 'New Group' and add the necessary staff members.

Create Sharing Rules:

Set up sharing rules for the Assessments, Client Notes, and Client Alerts objects to share these records with the Public Group.

This ensures that any updates or new records created within these objects are automatically shared with the staff group.

Steps to Create Sharing Rules:

Go to Setup.

Enter 'Sharing Settings' in the Quick Find box and select it.

Select the relevant object (e.g., Assessments).

Click 'New' under Sharing Rules and define the criteria and target group (Public Group created earlier).

These steps ensure that relevant client information is shared with the appropriate staff, enhancing collaboration and service delivery.

Salesforce Help: [Creating Public Groups](#)

Salesforce Help: [Defining Sharing Rules](#)

Question 4

Question Type: MultipleChoice

A nonprofit needs to load approximately 3 million records into Salesforce.

Which API will load the data in the most efficient manner?

Options:

A- Bulk API

- B- SOAP API
- C- REST API
- D- Streaming API

Answer:

A

Explanation:

For loading a large volume of records, such as approximately 3 million records, into Salesforce, the Bulk API is the most efficient method. The Bulk API is designed to handle large data sets by processing records asynchronously in batches, which reduces the load on Salesforce servers and ensures efficient data transfer. This API is optimized for data loading and extraction, making it ideal for high-volume data operations.

Salesforce Bulk API Developer Guide

Salesforce Nonprofit Cloud Data Import Best Practices

Question 5

Question Type: MultipleChoice

A nonprofit fundraiser notices that some of the NPSP calculated donation summary fields on the Contact and Account records are displaying incorrect values when compared to the donations recorded for each donor.

What are three items the consultant should review to troubleshoot the issue?

Choose 3 answers

Options:

- A- Customizable Rollups
- B- Opportunity Stages
- C- NPSP Health Check
- D- Salesforce Optimizer report
- E- Campaign Hierarchy

Answer:

A, B, C

Explanation:

To troubleshoot incorrect values in the NPSP calculated donation summary fields on Contact and Account records, the consultant should review the following:

Customizable Rollups:

Verify the settings and configuration of Customizable Rollups in NPSP. Incorrect configurations or mappings can lead to inaccurate summary values.

Ensure that the rollups are set up correctly to calculate totals based on the desired criteria.

Opportunity Stages:

Check the Opportunity stages to ensure they are correctly defined and assigned. Only certain stages (e.g., 'Closed Won') should be included in donation summaries.

Misconfigured or incorrect stages can result in inaccurate summary calculations.

NPSP Health Check:

Run the NPSP Health Check to identify any potential configuration issues or data integrity problems.

The Health Check provides insights and recommendations to address common issues within NPSP.

[Salesforce Nonprofit Success Pack Documentation on Customizable Rollups](#)

[Salesforce Opportunity Stages Configuration Guide](#)

[NPSP Health Check Documentation](#)

Question 6

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 7

Question Type: MultipleChoice

Which Salesforce resource should an admin use to search for nonprofit user groups in a particular region or state?

Options:

- A- AppExchange
- B- Trailhead

- C- Trailblazer Community
- D- Salesforce Help

Answer:

C

Explanation:

To search for nonprofit user groups in a particular region or state, an admin should use the Trailblazer Community:

Access Trailblazer Community:

Go to the Trailblazer Community website: trailblazer.salesforce.com.

Search for User Groups:

Use the search functionality to look for user groups. You can enter keywords related to your region, state, or specific interests such as 'nonprofit user groups.'

You can also filter search results by location to find groups relevant to your area.

Join Relevant Groups:

Review the list of user groups and join the ones that are most relevant to your needs.

Engaging with these groups allows you to connect with other nonprofit Salesforce users, share best practices, and stay informed about local events and meetups.

The Trailblazer Community is a valuable resource for finding and connecting with regional nonprofit user groups.

Trailblazer Community: trailblazer.salesforce.com

Salesforce Help: Community User Groups

Question 8

Question Type: MultipleChoice

A nonprofit needs to track key information for grants it applies for and receives, such as deadline dates, activity completion dates, and descriptions. In addition, the nonprofit wants to track actions completed and view the next deadline date on the Opportunity.

Which feature should the consultant recommend?

Options:

- A- Engagement Plans
- B- Cases
- C- Deliverables
- D- Tasks and Events

Answer:

C

Explanation:

<https://trailhead.salesforce.com/en/content/learn/modules/nonprofit-success-pack-administration-basics/understand-the-npsp-data-model>

For nonprofits needing to track key information related to grants, such as deadline dates, activity completion dates, and descriptions, Deliverables within Salesforce are the recommended feature. Deliverables allow nonprofits to create and manage detailed records of grant-related activities, set deadlines, and monitor progress directly on the Opportunity object.

Steps:

Enable Deliverables in Salesforce.

Create Deliverable records to track grant-related tasks, deadlines, and activities.

Configure Deliverables to display the next deadline date on the Opportunity.

Use reports and dashboards to monitor the status and progress of grant-related activities.

CertGod Nonprofit Cloud Consultant Guide: Recommends using Deliverables for tracking detailed grant information and deadlines.

Salesforce Documentation on Deliverables: Provides setup instructions and usage guidelines.

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 nonprofit is getting ready to go live with its Nonprofit Cloud implementation.

Which two sandbox configuration options can the consultant create to ensure effective user acceptance testing and training?

Choose 2 answers

Options:

- A- Partial Data Sandbox
- B- Developer Sandbox
- C- Developer Pro Sandbox
- D- Full Data Sandbox



Answer:

A, D

Explanation:

To ensure effective user acceptance testing and training before going live with its Nonprofit Cloud implementation, a nonprofit can use the following sandbox configuration options:

Partial Data Sandbox:

This sandbox type includes a subset of the production data, which is useful for testing with realistic data without the need for a full copy of the production environment. It provides a balance between data availability and cost.

Full Data Sandbox:

This sandbox is a complete copy of the production environment, including all data and metadata. It is ideal for thorough testing and training, as it replicates the production environment exactly. This ensures that users are trained on an environment that mirrors the live system.

Question 11

Question Type: MultipleChoice

A consultant is training a system admin to prepare for a new release of a particular open source Nonprofit Cloud product.

Where are two places the system admin should look for release notes on the product?

Choose 2 answers

Options:

- A- The Nonprofit Hub group in the Trailblazer Community.
- B- The Salesforce Trust website.
- C- The product's GitHub repository release page.
- D- The Nonprofit Cloud release announcement group in the Trailblazer Community.

Answer:

A, C

Explanation:

To prepare for a new release of an open-source Nonprofit Cloud product, the system admin should check the following sources for release notes:

Nonprofit Hub Group in the Trailblazer Community:

The Trailblazer Community is a rich resource for Salesforce users, including non-profits. The Nonprofit Hub group frequently posts updates, discussions, and release notes related to Nonprofit Cloud products.

This group can be accessed by logging into the Trailblazer Community and searching for 'Nonprofit Hub.'

GitHub Repository Release Page:

For open-source products, the official GitHub repository is a primary source for release notes. The release page on GitHub will have detailed notes about new features, bug fixes, and enhancements.

To access, navigate to the product's GitHub repository and click on the "Releases" tab.

Trailblazer Community: Nonprofit Hub Group

GitHub: Product's repository release page

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