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NEW QUESTION: 1
A nonprofit admin needs to import lists of Contacts into Salesforce Campaigns regularly from CSV files using the NPSP Data Import too\.
What should the consultant consider when setting up this process for the nonprofit?
Choose 2 answers
A. NPSP Data Import will automatically create the Campaign Member with the default Member Status.
B. Respect Duplicate Matching Rules' should be checked in NPSP Settings.
C. NPSP Data Import Dry Run will validate Campaign Member Status.
D. Existing Campaigns are matched by exact Name.
Answer: A,D (LEAVE A REPLY)
When setting up the process for importing lists of Contacts into Salesforce Campaigns using the NPSP Data Import tool, it is essential to consider how Campaign Members are created and matched.
Key Considerations:
Automatic Campaign Member Creation (A):
The NPSP Data Import tool will automatically create Campaign Member records for the imported Contacts with the default Member Status. This helps streamline the process of adding members to campaigns.
Exact Name Matching (D):
Existing Campaigns in Salesforce are matched by exact Name. This means that the names in the CSV files must match the names of the Campaigns in Salesforce exactly for the import process to associate Contacts with the correct Campaigns.
Steps to Set Up:
Prepare CSV Files:

Ensure that the Campaign names in the CSV files exactly match the names of the Campaigns in Salesforce.
Include all necessary fields to map Contacts to Campaign Members.
Configure NPSP Data Import:
Navigate to NPSP Settings -> Data Import.
Ensure the settings align with the import requirements, including handling duplicates and respecting duplicate matching rules if enabled.
Perform Dry Run:
Use the NPSP Data Import Dry Run feature to validate the import configuration and ensure that the Campaign Member Status and other settings are correctly applied.
Reference:
Salesforce Nonprofit Success Pack Documentation
Salesforce Trailhead: Import Data for Nonprofits

NEW QUESTION: 2
A nonprofit organization needs to frequently import membership renewal data and daily donation data and needs a different configuration for each.
Which tool should the consultant recommend?
A. Salesforce Import Wizard
B. NPSP Data Import Batch
C. NPSP Data Importer
D. Salesforce Data Loader
Answer: (SHOW ANSWER)

NEW QUESTION: 3
An international nonprofit organization works across six different countries in Europe and Afric
a. The organization relies heavily on volunteers in each country to support its work and wants volunteers to be able to sign up for volunteer jobs on its website.
What is a consideration when setting up Volunteers for Salesforce given this context?
A. Set the Volunteer Job's Website Time Zone field value to the time zone in which the job will take place when creating Volunteer Jobs.
B. Add text to the Volunteers for Salesforce website informing all volunteers that all time for volunteer jobs and shifts is shown in the time zone of the headquarters and they need to convert the time to their local time zone.
C. Remove the Start Time and End Time fields from the website template and put the times in the description in the local time zone.
D. Set up a different Site in Volunteers for Salesforce for each country and set the time zone for the Site to the local time zone so all events will appear as the correct time for the time zone.
Answer: A (LEAVE A REPLY)

NEW QUESTION: 4
A nonprofit has engaged a consultant to help export detailed accounting transactions to its existing external financial system using Accounting Subledger. The nonprofit requires export of all pledges when they are booked.
Which solution should the consultant recommend?
A. Upgrade Accounting Subledger from Starter Edition to Growth Edition.
B. Set "Pledged" stage to "Committed" in Stage to State Mapping.
C. Set "Pledged" stage to "Finalized" m Stage to State Mapping.
D. Use Process Builder to create Ledger Entries on Opportunity update.
Answer: B (LEAVE A REPLY)
https://powerofus.force.com/s/article/ASL-Automate-Stage-to-State-Mappings To export detailed accounting transactions, including pledges, to an external financial system using Accounting Subledger, the consultant should set the "Pledged" stage to "Committed" in Stage to State Mapping. Here's why:
Stage to State Mapping:
In Accounting Subledger, the Stage to State Mapping feature allows you to map Opportunity stages to accounting states.
By setting the "Pledged" stage to "Committed," you ensure that all pledges are recognized and exported as committed transactions in the accounting system.
This setting helps in accurately reflecting the financial commitments of the nonprofit organization.
Reference:
Salesforce documentation on Accounting Subledger: Accounting Subledger

NEW QUESTION: 5
A nonprofit using Volunteers for Salesforce on their website wants their volunteers to be able to update their contact information.
What does the consultant need to configure to make this possible?
A. Change Organization-Wide Sharing setting for Contacts to Public
B. Create a criteria-based sharing rule
C. In Setup, check Grant Guest Users Update Access
D. Create and assign a new profile
Answer: C (LEAVE A REPLY)
To allow volunteers to update their contact information on the nonprofit's website using Volunteers for Salesforce (V4S), follow these steps:
Access Setup:
Navigate to Setup in Salesforce.
Enable Guest User Permissions:
Go to Sites and Domains > Sites.
Click on the site label for your volunteer portal.

Click on Public Access Settings.
Under Field Permissions, make sure the necessary fields (like Contact fields) have the correct read and write permissions for the guest user profile.
Grant Guest Users Update Access:
Ensure that "Grant Guest Users Update Access" is checked. This setting allows guest users, typically those who access your site without logging in, to update certain fields like their contact information.
Test the Configuration:
As a volunteer, navigate to the relevant page on the nonprofit's website.
Test updating the contact information to ensure that the changes are correctly reflected in Salesforce.
This configuration allows volunteers to update their contact details directly from the website, ensuring that the information in Salesforce is always up-to-date.
Reference:
Salesforce Help Documentation: Sites and Public Access Settings.

NEW QUESTION: 6
A nonprofit has employed a contract developer for work involving objects that contain personal and personally identifiable information. The contractor is working in a full copy sandbox.
What should the consultant recommend to ensure the contractor is unable to access this sensitive data?
A. Encrypt all fields containing sensitive data with Classic Encryption.
B. Configure the contractor's Profile to prevent access to the sensitive data.
C. Implement Salesforce Data Mask and mask the sensitive data.
D. Implement Salesforce Shield and apply it to the sensitive data.
Answer: C (LEAVE A REPLY)
https://trailhead.salesforce.com/en/content/learn/modules/salesforce-data-mask/understand-the-importance-of-data-privacy

NEW QUESTION: 7
The event manager for a nonprofit organization periodically imports a cleaned, structured list of event registrations. Now should the consultant set up the TDTM Trigger Handlers?
A. Disable Opportunity Contact Role trigger handlers.
B. Disable TDTM for specific users.
C. Disable the Trigger Handler using Apex instead of TDTM.
D. Disable TDTM for all users.
Answer: B (LEAVE A REPLY)
https://powerofus.force.com/s/article/NPSP-Disable-Trigger-Handlers#ariaid-title3 When periodically importing a structured list of event registrations, it is crucial to ensure that the

process is efficient and does not trigger unnecessary automation. Disabling TDTM (Table-Driven Trigger Management) for specific users is a recommended approach.
TDTM Overview:
TDTM allows for managing and controlling the execution of triggers in NPSP.
It provides flexibility to disable specific triggers or exclude certain users from trigger execution during bulk data imports.
Disabling TDTM for Specific Users:
By disabling TDTM for specific users, the import process can be streamlined without triggering unnecessary automation.
This approach ensures that data imports are efficient and reduces the risk of hitting system limits or performance issues.
Steps to Implement:
Navigate to NPSP Settings -> System Tools -> TDTM.
Add the usernames of the users who will be performing the imports to the "Usernames to Exclude" field.
Save the changes to ensure that TDTM triggers are disabled for these users during the import process.
Benefits:
Efficiency: Reduces the load on the system during bulk imports, ensuring faster and more reliable data processing.
Control: Maintains control over which triggers are executed, preventing unintended automation from affecting the imported data.
Additional Considerations:
Ensure that other necessary validations and processes are manually checked or re-enabled after the import if needed.
Monitor the data import process to ensure that it completes successfully without triggering unnecessary automation.

NEW QUESTION: 8
A consultant needs to configure Salesforce to track relationships between individuals.
How should the consultant configure Nonprofit Claud to meet the requirement?
A. Enable Person Accounts, create Contact Contact Relationships, assign Record Types and Page Layouts, and then create Party Role Relationships.
B. Enable Person Accounts, assign Record Types and Page Layouts, enable Group Membership, create Party Role Relationships, and then create Contact Contact Relationships.
C. Assign Record Types and Page Layouts, enable Group Membership, enable Person Accounts, create Contact Contact Relationships, and then create Party Role Relationships.
Answer: A (LEAVE A REPLY)

NEW QUESTION: 9

A nonprofit needs to clean up large amounts of Contact address data from its street canvassing and telemarketing operations on a monthly basis.
What should the consultant use to standardize addresses in NPSP?
A. Batch Data Import
B. Address Verification
C. NPSP Data Importer
D. Seasonal Addresses
Answer: B (LEAVE A REPLY)
To standardize addresses in NPSP, especially when dealing with large amounts of Contact address data from street canvassing and telemarketing operations, the consultant should use Address Verification:
* Enable Address Verification:
* In Salesforce, navigate to the NPSP Settings.
* Under "Address Management," enable Address Verification.
* Configure the Address Verification settings according to the needs of the nonprofit.
* Use Address Verification Service:
* Utilize the integrated Address Verification service to standardize and validate addresses.
* The service checks addresses against a reliable database, ensuring they are accurate and properly formatted.
* Batch Processing:
* For large amounts of data, set up batch processing to regularly verify and standardize addresses.
* This can be scheduled to run monthly or as needed to keep the address data clean and accurate.
* Review and Correct:
* After verification, review any addresses flagged as incorrect or incomplete and make necessary corrections.
Using Address Verification helps ensure the nonprofit's address data is accurate and standardized, improving the quality of their data management.
References:
Salesforce Nonprofit Success Pack (NPSP) Documentation: Address Management
Salesforce Help: Configuring Address Verification

NEW QUESTION: 10
A nonprofit organization has a large volume of contacts, organizations, and address records. The organization wants to migrate all of its data into its NPSP org.
What are two considerations? Choose 2 answers
A. Address verification only works with the one-to-one and individual ("Bucket") Account models.
B. Tracking addresses with the Address object may introduce more complexity.
C. Migrating all historical address information impacts system data storage.

D. There is a limit of three addresses per contact or organization that can be migrated into NPSP.

Answer: (SHOW ANSWER)

When migrating a large volume of contacts, organizations, and address records into NPSP, it is essential to consider the following:

* Complexity with the Address Object:
* Using the Address object to track addresses can introduce complexity, especially if multiple addresses per contact or organization need to be managed. This complexity arises from the need to ensure all address records are correctly linked and maintained.
* Impact on Data Storage:
* Migrating all historical address information can significantly impact system data storage. Salesforce has storage limits, and large volumes of data can quickly consume available storage. It is important to plan for data storage needs and consider archiving or summarizing historical data to manage storage usage effectively.

Steps for Migration:

* Data Preparation:
* Clean and standardize the data before migration to ensure consistency.
* Identify and remove duplicates to avoid data redundancy.
* Data Mapping:
* Map the fields from the legacy system to the corresponding fields in NPSP, including custom fields if necessary.
* Data Import Tools:
* Use Salesforce Data Loader or the NPSP Data Importer for the migration process.
* Import data in batches, starting with Accounts, followed by Contacts, and then address information.
* Testing and Validation:
* Test the migration in a sandbox environment to identify and resolve any issues.
* Validate the imported data to ensure accuracy and completeness.

"Data Import Strategies for Nonprofits" from Salesforce Help: Data Import Strategies
"Address Management in NPSP" from Salesforce.org: Address Management

NEW QUESTION: 11

A nonprofit using Case Management wants to avoid visually identifying a subset of clients. How should a consultant configure the view of Contact records to meet the requirement?

A. Remove Client Photo Component from the Lightning Record Page.
B. Set Component Visibility for the Client Card Component.
C. Remove Client Card Component from the Lightning Record Page.
D. Set Component Visibility for the Client Photo Component.

Answer: D (LEAVE A REPLY)

To configure the view of Contact records to avoid visually identifying a subset of clients, the consultant should set the component visibility for the Client Photo Component:

* Navigate to Lightning App Builder:
* In Salesforce Setup, go to "Lightning App Builder."
* Select the Lightning Record Page for Contacts that you wish to modify.
* Configure Component Visibility:
* Locate the Client Photo Component on the page.
* Click on the component to open its properties.
* Set Component Visibility Rules:
* In the properties panel, set visibility rules for the Client Photo Component.
* Define criteria to control when the component is visible. For instance, you can use field values or user profiles to determine visibility.
* Save and activate the changes.
* Test and Deploy:
* Test the Lightning Record Page to ensure the visibility rules work as expected.
* Deploy the updated page to users.
By setting the component visibility for the Client Photo Component, you can ensure that the subset of clients is not visually identified, meeting the nonprofit's requirements.
References:
Salesforce Documentation: Lightning App Builder
Trailhead Module: Build and Customize Lightning Experience Pages

NEW QUESTION: 12
A nonprofit admin notices the nightly NPSP batch jobs are suddenly taking significantly longer to complete than they did a month earlier.
What are two factors the consultant should tell the system admin to consider?
Choose 2 answers
A. A new Process Builder process was activated.
B. A new standard roll-up summary field was added to an object.
C. A new node tree was added to the role hierarchy.
D. A new customizable rollup was added in NPSP Settings.
Answer: (SHOW ANSWER)

NEW QUESTION: 13
A nonprofit wants to implement an external email platform that integrates with Salesforce. The integration will record every email sent to a subscriber, as well as which recipients open the email, click a link, or unsubscribe.
Which two storage considerations should the consultant take into account before recommending an email platform?
Choose 2 answers
A. Campaign Member records use less storage space than custom object records.
B. Email subscribers' activities can be retained for a certain length of time.
C. Unsubscribed Leads should be deleted from Salesforce immediately.

D. Subscribers must be synced as Leads and Campaign Members In NPSP.
Answer: A,B (LEAVE A REPLY)
When integrating an external email platform with Salesforce, it's important to consider storage implications and retention policies. Here are the steps to take into account these considerations:
* Evaluate Storage Requirements:
* Campaign Member records are used to track email interactions within Salesforce. These records typically consume less storage compared to creating a custom object for the same purpose.
* Custom objects can lead to higher storage usage, especially if tracking detailed interaction data.
* Retention Policies:
* Understand the email platform's data retention policies. Some platforms allow you to specify how long subscriber activity data (such as opens, clicks, and unsubscribes) should be retained.
* Configure the retention settings to align with your organization's data retention policies and compliance requirements.
* Integration Setup:
* Set up the integration to ensure that Campaign Members are created or updated with each email interaction.
* Use the external email platform's API to push data into Salesforce, ensuring that Campaign Members are updated in real-time or through scheduled syncs.
* Monitor and Optimize:
* Regularly monitor storage usage in Salesforce and optimize data retention settings to balance between having sufficient historical data and managing storage costs.
Salesforce Storage Usage Best Practices: Detailed best practices for managing storage in Salesforce.
Salesforce Help.
Email Platform Integration Guides: Specific guides for integrating popular email platforms with Salesforce (e.
g., Mailchimp, Pardot).

NEW QUESTION: 14
A nonprofit organization uses Nonprofit Cloud. Donors are assigned to different portfolios based on specific criteria, such as giving history, geographic area, and engagement history. Each portfolio is assigned to a Major Gift Officer.
The Major Gift Officers want a single view of all the donors in the portfolios from which they can access records and perform actions.
Which Nonprofit Cloud feature should be used?
A. Actionable Lists
B. Donor Gift Summaries

C. Donor Profiles
Answer: (SHOW ANSWER)

NEW QUESTION: 15
A nonprofit admin needs to import lists of Contacts into Salesforce Campaigns regularly from CSV files using the NPSP Data Import too\.
What should the consultant consider when setting up this process for the nonprofit?
Choose 2 answers
A. NPSP Data Import will automatically create the Campaign Member with the default Member Status.
B. Respect Duplicate Matching Rules' should be checked in NPSP Settings.
C. NPSP Data Import Dry Run will validate Campaign Member Status.
D. Existing Campaigns are matched by exact Name.
Answer: A,D (LEAVE A REPLY)
When setting up the process for importing lists of Contacts into Salesforce Campaigns using the NPSP Data Import tool, it is essential to consider how Campaign Members are created and matched.
Key Considerations:
* Automatic Campaign Member Creation (A):
* The NPSP Data Import tool will automatically create Campaign Member records for the imported Contacts with the default Member Status. This helps streamline the process of adding members to campaigns.
* Exact Name Matching (D):
* Existing Campaigns in Salesforce are matched by exact Name. This means that the names in the CSV files must match the names of the Campaigns in Salesforce exactly for the import process to associate Contacts with the correct Campaigns.
Steps to Set Up:
* Prepare CSV Files:
* Ensure that the Campaign names in the CSV files exactly match the names of the Campaigns in Salesforce.
* Include all necessary fields to map Contacts to Campaign Members.
* Configure NPSP Data Import:
* Navigate to NPSP Settings -> Data Import.
* Ensure the settings align with the import requirements, including handling duplicates and respecting duplicate matching rules if enabled.
* Perform Dry Run:
* Use the NPSP Data Import Dry Run feature to validate the import configuration and ensure that the Campaign Member Status and other settings are correctly applied.
References:
Salesforce Nonprofit Success Pack Documentation
Salesforce Trailhead: Import Data for Nonprofits

NEW QUESTION: 16
A nonprofit organization collects data on program participants, monthly donors, and corporations that provide in-kind gifts.
Which types of Account records should be used to track these different datasets in Nonprofit Cloud?
A. Person Accounts and Business Accounts
B. Household Accounts and Organization Accounts
C. Individual Accounts and Business Accounts
Answer: A (LEAVE A REPLY)

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NEW QUESTION: 17
During requirements gathering with a nonprofit, the consultant discovers that the customer only works with individual contributors and volunteers (not companies or organizations). The consultant considers using Person Accounts with NPSP so that the customer can track its individual's as accounts. What is the best practice regarding Person Accounts?
A. Person Accounts were not designed to work with NPSP, and is not supported for use with NPSP
B. Person Accounts should be tested in NPSP, and can be turned off if it does not work as intended
C. Ensure that the Person Account record type is set as the default record type for the profile of the user who is converting the lead if the customer is planning to do lead conversion
D. Ensure the Person Account record type is selected as the Household record type in NPSP Settings
Answer: A (LEAVE A REPLY)

NEW QUESTION: 18
A nonprofit organization provides direct care services to clients based on their individual needs. The process for clients to begin receiving services includes meeting with a caseworker for an intake evaluation that includes a series of questions to determine the

client's needs and assets. Which Salesforce Industries feature can be used to create an efficient intake process?

A. Actionable Lists

B. Interaction Summaries

C. Dynamic Assessments

Answer: C (LEAVE A REPLY)

For organizations delivering personalized social services, the intake evaluation is the most critical touchpoint.

To manage this efficiently, Salesforce Nonprofit Cloud utilizes Dynamic Assessments, a feature built upon the Discovery Framework and OmniStudio (specifically OmniScript).

Unlike a static form, a Dynamic Assessment allows a caseworker to navigate a "branching" path of questions.

If a client answers "Yes" to a question about housing instability, the system can automatically trigger a sub- section of questions regarding shelter history. If they answer "No," those questions remain hidden, reducing

"form fatigue" and ensuring the intake is as fast and relevant as possible.

Step-by-Step Implementation for the Consultant:

* Define Assessment Questions: Using the Discovery Framework, the consultant creates a library of individual questions (e.g., "Do you have dependable transportation?"). These questions are modular and can be reused across different intake forms.
* Build the OmniScript: The consultant uses the OmniScript Designer to arrange these questions. This is where the Conditional Logic is applied (e.g., "Set Element Visibility" based on prior answers).
* Map to Objects: Through DataRaptors or Integration Procedures, the consultant ensures that the data captured during the assessment is automatically pushed into the correct Salesforce objects, such as Person Accounts, Case Proceedings, or Life Events.
* Action Plan Integration: Often, the completion of a Dynamic Assessment is linked to an Action Plan, which might automatically generate a "Welcome Kit" task or a "Referral" based on the needs identified during intake.

By using Dynamic Assessments, the nonprofit ensures a standardized, compliant, and data-driven intake process that captures a 360-degree view of the client's assets and barriers to success without requiring the caseworker to navigate through irrelevant fields.

NEW QUESTION: 19

A nonprofit organization partners with several departments of a government agency.

What should be used to represent the government agency departments in Nonprofit Cloud?

A. Programs and Benefits

B. Business Accounts and an account hierarchy

C. Account Contact Relationships

Answer: B (LEAVE A REPLY)

NEW QUESTION: 20
The system administrator at a nonprofit wants to use Advanced Mapping for regular data imports of constituent and donation data. What is an important consideration of Advanced Mapping?
A. The target fields can only be text, currency, number, date or address fields.
B. The target objects must directly relate to Accounts, Contacts, or Opportunities.
C. Checkbox fields are unavailable to map to as target fields.
D. The target objects must be NPSP objects.
Answer: B (LEAVE A REPLY)
Advanced Mapping in the Nonprofit Success Pack (NPSP) is a powerful tool that allows admins to customize how data from the NPSP Data Import staging object is pushed into target records. However, it operates within a specific architectural framework.
Key Architectural Considerations:
* Object Relationships: Advanced Mapping is designed to handle the core "Nonprofit Triangle" of data:
Accounts, Contacts, and Opportunities. For any additional or custom object to be eligible as a target in Advanced Mapping, it must have a direct lookup or master-detail relationship to one of these three primary objects. This is because the NPSP Data Importer logic relies on these "anchor" records to establish context and maintain data integrity.
* Mapping Groups: The tool organizes mappings into Object Groups. When you create a new group for a custom object (e.g., "Volunteer Hours"), the system validates that the custom object is related to a Contact or Account so it knows which record to link the new data to.
* Field Type Support: Contrary to Option A and C, Advanced Mapping supports a wide variety of field types, including Checkboxes, Picklists, and Lookups. The restriction isn't on the field type, but on the object's position in the data hierarchy.
* Custom Object Support: While the question asks about "NPSP objects" (Option D), Advanced Mapping can map to custom objects created by the organization, provided they follow the relationship rules mentioned above.
Understanding these relationship requirements is essential for a consultant during the data migration or integration design phase. It ensures that the staging file can successfully populate multiple related records in a single execution without custom Apex code.

NEW QUESTION: 21
A nonprofit wants its supporters to send advocacy messages to elected officials and then record which supporters sent the messages.
Which two solutions should the consultant recommend to meet the requirement?
Choose 2 answers
A. Set a new NPSP Engagement Level on a Contact every time a Contact sends an advocacy message.
B. Organize advocacy messages into Campaigns and add the Contacts who take action as Campaign Members.

C. Use an online advocacy platform from the AppExchange that syncs to Salesforce.
D. Configure Marketing Cloud to send advocacy messages from the supporters.
Answer: A,D (LEAVE A REPLY)

NEW QUESTION: 22
A nonprofit using NPSP has just implemented the Program Management Module. The nonprofit wants to migrate its client and program data.
Which two steps should the consultant use to import and deduplicate the data against existing records?
Choose 2 answers
A. Upload the program data using the NfSP Data Importer.
B. Upload the client data using the Data Import Wizard.
C. Upload the client information using the NPSP Data Importer.
D. Upload the program data using the Data Import Wizard.
Answer: C,D (LEAVE A REPLY)
https://powerofus.force.com/s/article/NPSP-BP-Getting-Started-Program-Management#week4 When migrating client and program data to the Program Management Module (PMM) in NPSP, it is important to use the appropriate tools for data import and deduplication to ensure data integrity and avoid duplication. The NPSP Data Importer is specifically designed for importing client information, including deduplication against existing records. The Data Import Wizard can be used for uploading program data, which may not require the same level of deduplication as client data.
Steps:
* Prepare the client data, ensuring all necessary fields are included and formatted correctly.
* Use the NPSP Data Importer to upload the client information, which includes built-in deduplication features to match against existing records.
* Prepare the program data similarly, ensuring proper formatting and completeness.
* Use the Data Import Wizard to upload the program data. This tool is suitable for handling bulk data uploads and does not inherently include deduplication, which is less critical for program data compared to client data.
References:
CertGod Nonprofit Cloud Consultant Guide: Discusses best practices for data migration and the tools available in NPSP for importing and deduplicating data.
Salesforce Documentation on NPSP Data Importer and Data Import Wizard: Provides detailed instructions on using these tools for data import.

NEW QUESTION: 23
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 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.
B. 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.
Answer: (SHOW ANSWER)

NEW QUESTION: 24
A nonprofit organization wants a report that compares giving at a consistent point in time from year to year.
Now should the consultant set this up?
A. Create a joined report showing the two years side by side.
B. Set up a Reporting Snapshot on Opportunities.
C. Create a matrix report bucketing the dates you wish to compare.
D. Run the NPSP Account SYBUNT and Contact SYBUNT reports.
Answer: D (LEAVE A REPLY)

NEW QUESTION: 25
The admin at a nonprofit is implementing Salesforce Shield in its org to enable field platform encryption.
What are three NPSP considerations when implementing Shield Platform Encryption? (Choose 3)
A. Fields on the NPSP Address object can be encrypted, but encryption is unavailable for address fields on the Account and Contact object.
B. The NPSP Data Import object supports encryption of all fields in the import batch.
C. If the Role Name field is encrypted on the NPSP Partial Soft Credit object, the nightly Soft Credit rollups fail.
D. The NPSP MergeContacts list button on Contact list views will fail if the Contact Name is encrypted.
E. NPSP Data Import is unable to perform Custom Unique Id matching on Accounts and Contacts with an encrypted field.
Answer: C,D,E (LEAVE A REPLY)
Salesforce Shield Platform Encryption provides high-level security, but it has significant "functional trade- offs" because the system cannot "read" encrypted data in the same way it reads plain text for certain automated processes.
Three Critical NPSP Considerations:
* Soft Credit Rollup Failure (C): NPSP's Customizable Rollups often use the Role Name on the Partial Soft Credit object to determine how to aggregate credits. Because encryption

prevents the database from performing "Group By" or "Where" queries on that field effectively, the nightly rollup jobs will fail to process those credits.
* Merge Contacts Failure (D): The NPSP Contact Merge tool relies on identifying and comparing names. If the Contact Name is encrypted, the SOSL/SOQL queries used by the "Merge" button cannot properly index or find the records, rendering the specialized NPSP merge interface unusable.
* Data Import Matching (E): The NPSP Data Importer relies heavily on "Matching Rules." If you are trying to match a legacy donor ID or a custom unique ID that has been encrypted, the system cannot perform the "Exact Match" check needed to prevent duplicates during the import process.
Why other options are incorrect:
* Option A: Standard address fields on Account/Contact can be encrypted with Shield, so this is not a limitation.
* Option B: The Data Import object does not support "all fields" for encryption; like most objects, it has specific supported field types and limits.

NEW QUESTION: 26
A nonprofit wants to use Customizable Rollups in its NPSP org.
What should the consultant advise1?
A. After Customizable Rollups are enabled, it is irreversible.
B. Advanced Currency Management is unsupported by Customizable Rollups.
C. Existing User Defined Rollups need to be re-created as Customizable Rollups.
D. Customizable Rollups can only be used in orgs using the Household Account model.
Answer: (SHOW ANSWER)
Customizable Rollups in NPSP provide a flexible way to manage rollup calculations for donations and other records. However, once Customizable Rollups are enabled, the action is irreversible. This means you cannot revert to the standard rollup settings after enabling Customizable Rollups.
Steps to Enable:
* Enable Customizable Rollups:
* Navigate to NPSP Settings -> Donations -> Customizable Rollups.
* Enable the Customizable Rollups feature.
* Configure Rollups:
* Set up the necessary rollup rules and configurations to match the nonprofit's data tracking and reporting needs.
References:
Salesforce Nonprofit Success Pack Documentation
Salesforce Trailhead: Configure Customizable Rollups in NPSP

NEW QUESTION: 27

Which resource should the consultant recommend to a non-profit organization to suggest new features in NPSP?

A. Power of Us Hub

B. Salesforce Help

C. Salesforce AppExchange

D. Trailblazer Community

Answer: A (LEAVE A REPLY)

For suggesting new features in NPSP, the recommended resource is:

Power of Us Hub: This is a community platform specifically for Salesforce.org customers. It includes forums, idea exchanges, and collaboration spaces where nonprofit users can suggest and discuss new features for NPSP.

The Power of Us Hub is the central place for engaging with the Salesforce nonprofit community and influencing future product development.

Reference:

Power of Us Hub

Salesforce Trailhead: Engaging with the Salesforce Nonprofit Community

NEW QUESTION: 28

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?

A. Salesforce B2C Commerce

B. Salesforce Experience Cloud

C. Salesforce Billing

D. Salesforce B2B Commerce

Answer: D (LEAVE A REPLY)

NEW QUESTION: 29

A consultant is working on a data migration to NPSP that includes tens of millions of records across many objects. The migration needs to take place over a weekend to minimize system downtime.

What should the consultant recommend?

A. SOAP API

B. NPSP DataImport

C. Bulk API

D. Data Import Wizard

Answer: C (LEAVE A REPLY)

For a data migration involving tens of millions of records to NPSP over a weekend, the Bulk API is recommended due to its ability to handle large volumes of data efficiently:

Prepare Data for Migration:

Ensure all data is cleaned and formatted correctly for import into Salesforce.

Segment the data into manageable batches to optimize the migration process.
Use Bulk API for Migration:
The Bulk API is designed for loading large data sets and operates asynchronously, allowing for high performance.
Create a Bulk API job to import the data.
Upload data batches and monitor the job status to ensure successful data import.
Minimize System Downtime:
Schedule the data migration to occur during a weekend to reduce the impact on users and minimize system downtime.
Inform stakeholders about the migration schedule and expected downtime.
Verify Data Integrity:
After the migration, run data integrity checks to ensure that all records have been accurately imported.
Compare source data with the imported data in Salesforce to verify completeness.
Using the Bulk API will ensure that the large volume of data is migrated efficiently within the limited timeframe, minimizing disruption to the organization's operations.
Reference:
Salesforce documentation on using the Bulk API for data migration
CertGod Nonprofit Cloud Consultant guide

NEW QUESTION: 30
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. Remove themselves from the discussion and suggest that the two business line leaders meet to make a decision.
C. Add the field into a sandbox to test and validate expected outcomes.
D. Work quickly to negotiate between the two groups and resolve the issue before it escalates to the executive sponsors.
E. Use the established governance committee for discussion and resolution.
Answer: A (LEAVE A REPLY)

NEW QUESTION: 31
A nonprofit organization recently completed a migration to a NPSP Salesforce org. The consultant wants to ensure that all the migrated Accounts use the same account model.
What action should the consultant take?
A. Run the Lightning Readiness Assessment
B. Run the Data Quality Analysis Dashboard

C. Run the Salesforce Optimizer
D. Run the NPSP Health Check Tool
Answer: (SHOW ANSWER)

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NEW QUESTION: 32
A nonprofit is implementing Accounting Subledger and wants to know how the data from Salesforce would be transferred to its accounting system.
Which three methods are possible?
Choose 3 answers
A. Integrate Salesforce with the accounting system using middleware.
B. Export data via Salesforce reports to upload to the accounting system.
C. Develop a custom integration solution.
D. Schedule a Data Export from Salesforce.
E. Configure Salesforce Connect to integrate with the accounting system.
Answer: A,B,C (LEAVE A REPLY)
To transfer data from Salesforce to an accounting system using Accounting Subledger, nonprofits can use several methods. Here are three possible methods:
* Integrate Salesforce with the Accounting System Using Middleware:
* Middleware can act as a bridge between Salesforce and the accounting system, facilitating data transfer.
* Tools like MuleSoft, Jitterbit, or Dell Boomi can be used to create integrations that sync data between Salesforce and the accounting system.
* This method ensures real-time or near-real-time data synchronization, reducing manual data handling.
* Export Data via Salesforce Reports to Upload to the Accounting System:
* Salesforce allows the creation of detailed reports which can be exported in various formats (e.g., CSV, Excel).
* These reports can be manually uploaded to the accounting system.
* This method is suitable for organizations with fewer transactions or where real-time integration is not critical.
* Develop a Custom Integration Solution:

* For organizations with specific needs that are not met by standard middleware solutions, a custom integration can be developed.
* This involves using Salesforce APIs (REST or SOAP) to programmatically extract data from Salesforce and load it into the accounting system.
* Custom integrations provide flexibility but require more technical expertise and maintenance.
Salesforce Integration Patterns and Best Practices: Salesforce Integration Guide.
Salesforce Reporting and Exporting: Salesforce Reporting.

NEW QUESTION: 33
A nonprofit organization wants to record the most recent Opportunity close date on Contact records. The nonprofit organization expects the field on the Contact to be overwritten every time a new Opportunity meets the criteri
a. Which feature should the consultant use to meet this requirement?
A. Formula Field
B. Roll-Up Summary Field
C. AppExchange App
D. NPSP Customizable Rollups
Answer: D (LEAVE A REPLY)

NEW QUESTION: 34
A nonprofit runs a large scholarship program for high-school graduates. It wants to use Salesforce to help with accepting external scholarship applications, reviewing processes, and tracking requirements.
Which two solutions should the consultant recommend to meet this requirement?
Choose 2 answers
A. NPSP Opportunities with GAU Allocation
B. Web-to-lead form
C. Experience Cloud
D. Outbound Funds Module
Answer: C,D (LEAVE A REPLY)
To help a nonprofit run a large scholarship program using Salesforce for accepting external scholarship applications, reviewing processes, and tracking requirements, the following solutions are recommended:
* Experience Cloud:
* Experience Cloud allows the nonprofit to create a community or portal where external applicants can submit their scholarship applications.
* It provides a user-friendly interface for applicants and reviewers to interact with the application process.
Steps to Implement Experience Cloud:
* Set up an Experience Cloud site and customize it to match the nonprofit's branding.

* Create forms and pages for application submission.
* Enable user roles and permissions to control access for applicants and reviewers.
* Outbound Funds Module:
* The Outbound Funds Module (OFM) is specifically designed to manage the distribution of funds, such as scholarships.
* It allows for tracking applications, managing review processes, and ensuring compliance with scholarship requirements.
Steps to Implement Outbound Funds Module:
* Install and configure the Outbound Funds Module from the AppExchange.
* Set up funding programs, grant types, and application criteria.
* Use OFM's built-in features to manage the review and approval workflows.
These solutions provide a comprehensive and integrated approach to managing the scholarship program within Salesforce.
References:
Salesforce Experience Cloud Documentation
Salesforce AppExchange: Outbound Funds Module
Nonprofit Success Pack (NPSP) Documentation

NEW QUESTION: 35
A nonprofit has employed a contract developer for work involving objects that contain personal and personally identifiable information. The contractor is working in a full copy sandbox.
What should the consultant recommend to ensure the contractor is unable to access this sensitive data?
A. Encrypt all fields containing sensitive data with Classic Encryption.
B. Configure the contractor's Profile to prevent access to the sensitive data.
C. Implement Salesforce Data Mask and mask the sensitive data.
D. Implement Salesforce Shield and apply it to the sensitive data.
Answer: (SHOW ANSWER)
https://trailhead.salesforce.com/en/content/learn/modules/salesforce-data-mask/understand-the-importance-of- data-privacy Salesforce Data Mask is the recommended solution to ensure the contractor is unable to access sensitive data in a full copy sandbox. Data Mask is designed to secure sensitive data in sandboxes by masking or obfuscating it, thereby preventing unauthorized access.
* Salesforce Data Mask Overview:
* Salesforce Data Mask allows you to obfuscate sensitive data in sandboxes, ensuring that real data is not exposed.
* It provides various masking options, including anonymization, pseudonymization, and deletion.
* Implementation Steps:
* Install Salesforce Data Mask from the Salesforce AppExchange.

* Configure the masking rules for the fields that contain sensitive information. You can choose the appropriate masking technique based on your needs (e.g., random characters, fixed characters, or deletion).
* Apply the masking rules to the full copy sandbox where the contractor will be working.
* Benefits of Using Data Mask:
* Security: Ensures sensitive data is not exposed in non-production environments.
* Compliance: Helps meet regulatory and compliance requirements by protecting personal and personally identifiable information.
* Flexibility: Allows you to define specific rules for different types of data and fields.
References:
CertGod Nonprofit Cloud Consultant study guide: "Implement Salesforce Data Mask and mask the sensitive data".

NEW QUESTION: 36
A consultant for a nonprofit needs to upload data that contains payments on existing opportunities in Salesforce using donation matching in the NPSP Data Importer.
After a gift is successfully matched to an existing record, which two updates may occur?
Choose 2 answers
A. The Stage of the Opportunity will change to Closed/Won.
B. The open Payment will be marked as Paid.
C. A Payment will be added to the Opportunity.
D. The Opportunity amount will include the new payment amount.
Answer: A,B (LEAVE A REPLY)
https://powerofus.force.com/s/article/NPSP-Configure-Data-Importer-Options

NEW QUESTION: 37
A consultant has implemented Outcome Management in Nonprofit Cloud for a nonprofit organization. The organization is struggling to understand how all the objects in Qutcome Management relate.
What should the consultant do to help the organization understand the outcomes, indicators, and associated objects?
A. Add the Relationships Viewer button to the Outcome and Indicator object pages.
B. Build an Actionable Relationship Center graph.
C. Enable the Scoring Framework feature in Nonprofit Cloud and set up analytics templates.
Answer: (SHOW ANSWER)

NEW QUESTION: 38
A consultant using CumulusCI has customized a nonprofit's org and wants them to validate these changes with the latest release of NPSP which will be pushed to production one week later.

What are two ways the consultant can deploy this for the nonprofit after the release is announced?
Choose 2 answers
A. Test customizations in an updated sandbox.
B. Compare the customizations to the NPSP roadmap and create a new trial org.
C. Install NPSP and test the customizations in a new Developer Edition org.
D. Configure a scratch org with NPSP dependency and test customizations.
Answer: A,D (LEAVE A REPLY)
When preparing for an upcoming NPSP release and wanting to validate customizations, the consultant can take the following approaches:
* Test Customizations in an Updated Sandbox (A):
* Update the sandbox to the latest release of NPSP.
* Deploy the customizations to the updated sandbox and thoroughly test them to ensure compatibility with the new release.
* Configure a Scratch Org with NPSP Dependency and Test Customizations (D):
* Set up a new scratch org using Salesforce DX and include the NPSP dependency.
* Deploy the customizations to the scratch org and test them to validate their functionality with the latest NPSP release.
Steps to Implement:
* Update Sandbox:
* Refresh the sandbox and ensure it is on the same version as the upcoming NPSP release.
* Deploy and test the customizations in the sandbox environment.
* Set Up Scratch Org:
* Use Salesforce DX to create a scratch org with the necessary NPSP configurations.
* Deploy the customizations to the scratch org and perform testing.
References:
Salesforce Developer Documentation on Sandboxes and Scratch Orgs
Salesforce Trailhead: Salesforce DX and Development Environments

NEW QUESTION: 39
What needs to be done before enabling Group Membership for Nonprofit Cloud households?
A. Turn on Contacts to Multiple Accounts. On the Contact object, set up field level secunty for the Name, Phone, and Email fields,
B. Create a public group, On the Contact object, set up field level security for the Name, Phone, and Email fields,
C. Enable Chatter Groups. On the Contact object, set up field-level security for the Mailing Address, Phone, and Email fields.
Answer: A (LEAVE A REPLY)

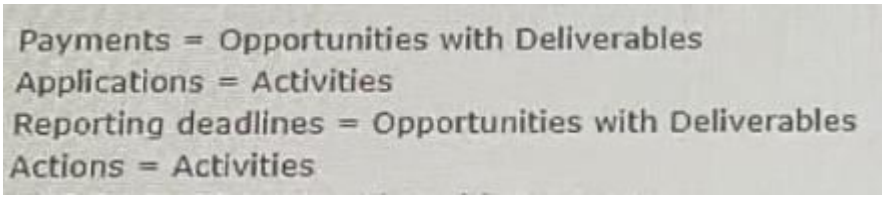
NEW QUESTION: 40

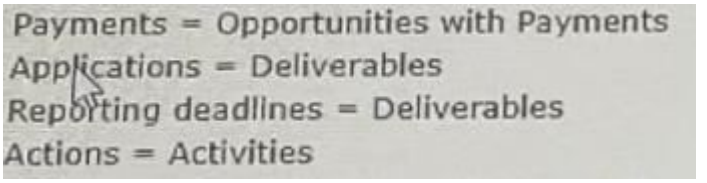
A nonprofit organization needs an audit trial of metadata changes over time and the ability to develop, test, and a release project independent of other projects in development. Which development model should be chosen?
A. Application development
B. Org development
C. Package development
D. Change Set development
Answer: C (LEAVE A REPLY)
For maintaining an audit trail of metadata changes over time and developing, testing, and releasing projects independently, the recommended development model is:
Package Development: This model supports modular development, allowing developers to create, test, and deploy packages independently. It provides version control and a clear audit trail of changes, ensuring that metadata changes are tracked and managed efficiently.
Independent Projects: Package development allows multiple projects to be developed in parallel without interference, making it ideal for complex environments with multiple ongoing initiatives.
Package development provides the structure and control needed for managing metadata and development processes effectively.
Reference:
Salesforce DX and Package Development Documentation
Salesforce Trailhead: Package Development

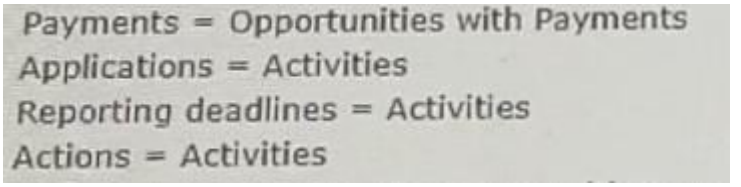
NEW QUESTION: 41
A nonprofit stores a government-issued personal identification number on each constituent's Contact record in an encrypted field.
What should a consultant enable on a Permission Set to ensure the personal identification number is fully accessible by a subset of org users'?
A. View Ail Contact object permission
B. View All Data system permission
C. Manage Encryptiorvieys system permission
D. View Encrypted Data system permission
Answer: D (LEAVE A REPLY)
To ensure that a subset of users can fully access the government-issued personal identification numbers stored in encrypted fields on Contact records, you must enable the "View Encrypted Data" permission in a permission set. This permission allows users to see the actual encrypted data instead of a masked value.
Steps to Enable:
Create or Edit a Permission Set:
Navigate to Setup -> Permission Sets.
Create a new permission set or edit an existing one.
Enable View Encrypted Data:

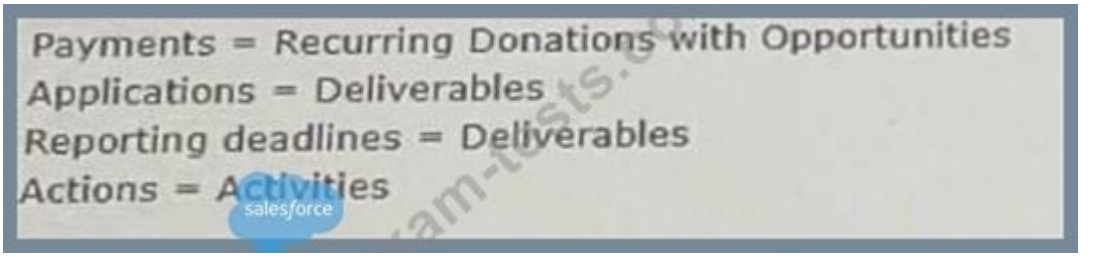
In the permission set, go to System Permissions.
Enable the "View Encrypted Data" permission.
Assign Permission Set:
Assign the permission set to the appropriate users who need to access the encrypted data.
Reference:
Salesforce Help: Encrypt Custom Fields
Salesforce Trailhead: Data Security and Encryption

NEW QUESTION: 42
The development director at a nonprofit needs to track grant lifecycles using NPSP, including assigning actions to staff members, tracking applications, reporting deadlines, and summarizing the total amount awarded with payments.
How should the consultant model payments, applications, reporting deadlines, and actions in NPSP for the grant seeking institution?

A.


B.


C.


D.


Answer: B (LEAVE A REPLY)
To track grant lifecycles using the Nonprofit Success Pack (NPSP), including assigning actions to staff members, tracking applications, reporting deadlines, and summarizing the total amount awarded with payments, the consultant should model the components as follows:
Payments = Opportunities with Payments:
Use the Opportunities object in Salesforce to track each grant awarded.
For each Opportunity, create related Payment records to track individual disbursements or installments of the grant amount.

Applications = Deliverables:
Utilize the Deliverables object to track the application process for grants.
Create Deliverable records to capture key details such as submission deadlines, requirements, and statuses.
Reporting Deadlines = Deliverables:
Similar to applications, use the Deliverables object to track reporting deadlines.
Create Deliverable records for each required report, specifying due dates and completion statuses.
Actions = Activities:
Use the Activities object to assign tasks and actions to staff members.
Create Task records for actions related to the grant, such as follow-ups, meetings, and communications.
This configuration ensures that all aspects of the grant lifecycle are tracked effectively within Salesforce, leveraging NPSP's capabilities to manage opportunities, payments, deliverables, and activities.
Reference:
Salesforce Nonprofit Success Pack Documentation: Detailed instructions on using Opportunities, Payments, Deliverables, and Activities in NPSP.
Salesforce Help Documentation: Opportunities, Activities, Payments, Deliverables.
Top of Form
Bottom of Form
https://www.freecram.com/question/Salesforce.Nonprofit-Cloud-Consultant.v2020-09-19.q37/the-development-director-at-a-nonprofit-needs-to-track-grant-lifecycles-using-the-npsp-including-assignin

NEW QUESTION: 43
A nonprofit organization needs an email marketing tool that will measure email engagement and evaluates the fit of prospective supporters. Which two factors should the consultant recommend?
A. Pardot Grading
B. Marketing Cloud Measures
C. Marketing Cloud Reporting
D. Pardot Scoring
Answer: A,D (LEAVE A REPLY)
For a nonprofit organization needing an email marketing tool to measure email engagement and evaluate prospective supporters:
Pardot Grading: This measures how well a prospect fits the ideal customer profile based on criteria such as job title, industry, and location.
Pardot Scoring: This tracks a prospect's engagement with marketing materials, assigning points based on interactions such as email opens, clicks, and form submissions.

Combining Pardot Grading and Scoring provides a comprehensive view of both the quality and engagement level of prospective supporters.
Reference:
Salesforce Pardot Documentation
Salesforce Trailhead: Pardot Scoring and Grading

NEW QUESTION: 44
A grantmaking organization needs to set up an application that will reside on its Grantmaking Experience Cloud site.
Which standard component should the organization use to display the application on the site?
A. Application Render Method
B. Individual Application
C. Form Overview
Answer: (SHOW ANSWER)

NEW QUESTION: 45
A nonprofit organization is retiring its legacy donor, donation, and payment processing systems. The organization wants to load 45,000 records into Salesforce from a single flat file.
Which tool should be used to create all of the records at once?
A. Data Loader
B. NPSP Data Import
C. Import Wizard
D. ETL Tool
Answer: B (LEAVE A REPLY)

NEW QUESTION: 46
Which one do you like?
A. Option 3
B. Option 4
C. Option 2
D. Option 1
Answer: (SHOW ANSWER)

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NEW QUESTION: 47
A consultant for a nonprofit needs to upload data that contains payments on existing opportunities in Salesforce using donation matching in the NPSP Data Importer.
After a gift is successfully matched to an existing record, which two updates may occur?
Choose 2 answers
A. The Stage of the Opportunity will change to Closed/Won.
B. The open Payment will be marked as Paid.
C. A Payment will be added to the Opportunity.
D. The Opportunity amount will include the new payment amount.
Answer: B,D (LEAVE A REPLY)
Explanation
https://powerofus.force.com/s/article/NPSP-Configure-Data-Importer-Options

NEW QUESTION: 48
A nonprofit organization has a large number of duplicate contacts the consultant needs to clean up. What should the consultant recommend to handle duplicate clean up in bulk?
A. Salesforce Duplicate Management
B. NPSP Contact Merge
C. Third party app from the AppExhange
D. Salesforce Data Loader
Answer: C (LEAVE A REPLY)
To handle duplicate cleanup in bulk for a nonprofit organization:
* Third Party App from the AppExchange: There are several apps available on the Salesforce AppExchange specifically designed for bulk duplicate management and cleanup. These apps offer advanced features for identifying and merging duplicate contacts efficiently.
* Ease of Use: These third-party apps provide user-friendly interfaces and automated processes to manage duplicates, making the cleanup process more efficient and less error-prone compared to manual methods.
Using a third-party app ensures a thorough and systematic approach to duplicate management.
References:
Salesforce AppExchange: Duplicate Management Apps
Salesforce Trailhead: Managing Duplicate Records in NPSP

NEW QUESTION: 49
A consultant is engaged by a nonprofit organization that has millions of records and receives hundreds of thousands of individual donations daily. The organization is struggling with its current system, which is unable to handle the volume of records being generated. The

organization wants to know if Nonprofit Cloud can handle this volume. Which Nonprofit Cloud feature can process this volume of records?

A. Stage Management

B. Batch Management

C. Data Consumption Framework

Answer: B (LEAVE A REPLY)

One of the most significant advantages of the new Nonprofit Cloud (NPC)-built on the Salesforce Industries (formerly Vlocity) core-is its ability to handle "Large Data Volumes" (LDV) that would often cause performance issues in traditional NPSP environments.

The Batch Management feature is the specific tool designed for processing hundreds of thousands or even millions of records efficiently.

How Batch Management Works:

* Chunking Data: Instead of trying to process a million donations in a single, massive transaction (which would hit Salesforce governor limits), Batch Management breaks the data into smaller
"chunks" or batches.
* Asynchronous Processing: These batches are processed in the background. This ensures that the user interface remains responsive and that the system can scale to handle high-frequency transaction periods, such as Giving Tuesday or year-end appeals.
* Integration with DPE: Batch Management often works hand-in-hand with the Data Processing Engine (DPE). The DPE aggregates and transforms the millions of records, and Batch Management manages the execution of those transformations to ensure they complete successfully without timing out.
* Error Handling: It provides a robust framework for tracking which records in a batch failed and why, allowing consultants to troubleshoot specific data issues without stopping the entire processing run.

For a consultant, recommending Batch Management is the key to solving the "performance struggle" mentioned in the prompt. It moves the organization from a "real-time" processing model (which is fragile at scale) to a robust "batch-driven" model designed for enterprise-level volume.

NEW QUESTION: 50

A nonprofit organization wants a report that compares giving at a consistent point in time from year to year.

Now should the consultant set this up?

A. Create a matrix report bucketing the dates you wish to compare.

B. Create a joined report showing the two years side by side.

C. Run the NPSP Account SYBUNT and Contact SYBUNT reports.

D. Set up a Reporting Snapshot on Opportunities.

Answer: D (LEAVE A REPLY)

To compare giving at consistent points in time from year to year, the best solution is to set up a Reporting Snapshot on Opportunities. A Reporting Snapshot allows you to capture data at specific points in time and then compare it across different periods. Here are the steps to set this up:
* Create the Report:
* Create a report on Opportunities that includes the relevant data you want to capture (e.g., donation amounts, dates).
* Ensure the report filters are set to capture data for the specific time frames you are interested in.
* Create a Custom Object:
* Create a custom object to store the snapshot data.
* Add fields to this custom object that correspond to the fields in your report.
* Set Up the Reporting Snapshot:
* Navigate to Setup.
* In the Quick Find box, type "Reporting Snapshots" and select "Reporting Snapshots".
* Click "New Reporting Snapshot".
* Name the snapshot and select the source report you created.
* Select the target object (the custom object you created).
* Map the fields from the report to the fields in the custom object.
* Schedule the Reporting Snapshot:
* Set up a schedule for when the snapshot should run (e.g., daily, weekly, monthly).
* Save and activate the schedule.
By capturing the data at regular intervals, you can generate historical reports that compare giving over different years at consistent points in time.
"Set Up Reporting Snapshots" from Salesforce Help: Reporting Snapshots
"Salesforce Reporting Snapshots for Nonprofits" from Salesforce.org: Salesforce.org Guide

NEW QUESTION: 51
A consultant wants to test out new Nonprofit Cloud features coming out in the upcoming Salesforce release in their customs..
Which action must the consultant take to do this?
A. Refresh a preview Instance sandbox just prior to sandbox preview period.
B. Create a preview instance sandbox during the sandbox preview period.
C. Create a new sandbox during the sandbox preview period.
D. Refresh a preview instance sandbox during the sandbox preview period.
Answer: A (LEAVE A REPLY)

NEW QUESTION: 52
A nonprofit organization has been informed of a deceased donor and wants to ensure that the donor no longer appears on any mailing lists. Which action should the nonprofit organization take on the donor's contact record?

A. Select the Do Not Email, Do Not Contact, and Email Opt Out fields
B. Delete the Contact record
C. Select the Deceased field
D. Delete the values in the phone and email fields
Answer: C (LEAVE A REPLY)
When a nonprofit organization is informed of a deceased donor and wants to ensure that the donor no longer appears on any mailing lists, the appropriate action is to select the "Deceased" field on the donor's contact record. Here's how to do it:
* Navigate to the Contact Record:
* Go to the Contacts tab in Salesforce.
* Search for the donor's contact record and open it.
* Select the Deceased Field:
* Locate the "Deceased" checkbox on the contact record.
* Check the box to mark the contact as deceased.
* Additional Actions:
* Ensure that any automated processes or workflows related to email and mailing lists exclude contacts marked as deceased.
* Update any relevant lists or segments to remove the deceased donor from future communications.
Implications of Marking a Contact as Deceased:
* The contact will no longer be included in email or direct mail campaigns.
* The contact record is retained in Salesforce for historical and reporting purposes, preserving donation history and other relevant information.
Salesforce NPSP Documentation: Managing Contact Records
Salesforce Trailhead: Nonprofit Success Pack (NPSP) Basics

NEW QUESTION: 53
A nonprofit wants to convert from Legacy Recurring Donations to Enhanced Recurring Donations.
What are two considerations the nonprofit should take into account before making the switch?
Choose 2 answers
A. Enhanced Recurring Donations introduces a new custom object.
B. An ETL tool is required to revert to Legacy Recurring Donations.
C. All existing integrations should be reviewed for compatibility.
D. Reverting to Legacy Recurring Donations is unsupported.
Answer: B,C (LEAVE A REPLY)
https://sfdo-docs.s3-us-west-2.amazonaws.com/npsp_rd_upgrade_guide.pdf

NEW QUESTION: 54

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?
A. Salesforce Reports & Dashboards
B. External Objects
C. CRM Analytics
D. Salesforce Connect
Answer: C (LEAVE A REPLY)

NEW QUESTION: 55
A nonprofit receives a lot of grants, many of which are renewals of previous grants from the same funder. The nonprofit wants to easily access the previous grant information. How should the consultant capture this in Salesforce?
A. Create a Campaign for the funder and add all Opportunities including the original grant and any renewal grants to the Campaign.
B. When naming the Opportunity for the renewal grant, ensure "Renewal" and the name of the funder are included.
C. Fill in the "Previous Grant/Gift Opportunity" lookup field on the Opportunity for the new grant and check the "Is Grant Renewal" field.
D. Create a child Opportunity for the renewal grant from the original grant using the Renewal Grant Opportunity record type.
Answer: C (LEAVE A REPLY)
Managing the "Grant Seeking" lifecycle in NPSP involves tracking multi-year relationships with funders. To provide the "easy access" to history that the nonprofit requires, NPSP provides specific, standard fields on the Opportunity object designed for this exact scenario.
The NPSP Standard Solution:
* Previous Grant/Gift Opportunity: This is a standard NPSP lookup field on the Opportunity. When a consultant creates a renewal grant, they should populate this field with the Original Grant record. This creates a direct "link" or "chain" between the two records, allowing a user to click from the current grant back to the previous one instantly.
* Is Grant Renewal: This is a checkbox field. Checking this box allows the nonprofit to run reports specifically on "Renewed Revenue" vs. "New Revenue," which is a key metric for many development directors.
* Data Integrity: Using a lookup field (Option C) is superior to naming conventions (Option B) because naming is prone to typos and does not provide a clickable link. It is also superior to Campaigns (Option A) because a campaign shows a "pool" of gifts but doesn't specifically define the chronological
"Renewal" relationship between two specific grants.

By utilizing these standard NPSP fields, the consultant ensures that the nonprofit can see the "Evolution of a Grant" over time, making it easy to reference past project descriptions, budgets, and reporting requirements from the previous funding cycle.

NEW QUESTION: 56
A nonprofit on Unlimited Edition uses direct mail extensively as a fundraising channel. The nonprofit wants to automate the search for duplicate contact records.
What should the consultant recommend implementing?
A. Duplicate Jobs
B. Matching Rules
C. Duplicate Rules
D. Scheduled Apex Jobs
Answer: B (LEAVE A REPLY)

NEW QUESTION: 57
A user has reported an error when trying to merge two contacts using NPSP Contact Merge tab.
Which two issues are the likely cause of the problem?
Choose 2 answers
A. A unique external Id was kept from the non-master contact.
B. The contacts must be in the same household to merge.
C. The user needs to have delete access to the contacts being merged.
D. The NPSP Duplicate Rule was set to Warn instead of auto-merge.
Answer: A,C (LEAVE A REPLY)
(https://trailhead.salesforce.com/en/content/learn/modules/contact-and-account-settings-in-nonprofit-success-pack/merge-duplicate-contacts-and-accounts-npsp) When encountering errors while trying to merge contacts using the NPSP Contact Merge tab, the following issues are likely causes:
Delete Access to Contacts:
The user needs to have delete access to the contacts being merged. Without the necessary permissions, the user will not be able to complete the merge operation.
Ensure that the user's profile or permission set includes delete permissions on the Contact object.
Unique External ID:
If a unique external ID is retained from the non-master contact, it can cause conflicts during the merge process. The system expects unique external IDs to remain unique, and retaining an ID from a record that is being merged (and effectively deleted) can create issues.
Reference:
Salesforce Nonprofit Success Pack Documentation
Salesforce Merge Contact Permissions Guide

NEW QUESTION: 58
A nonprofit is looking for an integrated tool that manages more than one channel for personalized journeys, triggers messages automatically to create stronger relationships, and links communications to donations it has received.
Which solution should the consultant recommend?
A. PSP and Experience Cloud
B. NPSP and Pardot
C. NPSP and Marketing Cloud
D. NPSP and Social Studio
Answer: C (LEAVE A REPLY)
https://www.salesforce.com/products/marketing-cloud/faq/

NEW QUESTION: 59
The admin at a nonprofit is implementing Salesforce Shield in its org to enable field platform encryption.
What are three NPSP considerations when implementing Shield Platform Encryption?
Choose 3 answers
A. The NPSP Data Import object supports encryption of all fields in the import batch.
B. If the Role Name field is encrypted on the NPSP Partial Soft Credit object, the nightly Soft Credit rollups fail.
C. The NPSP MergeContacts list button on Contact list views will fail if the Contact Name is encrypted.
D. Fields on the NPSP Address object can be encrypted, but encryption is unavailable for address fields on the Account and Contact object.
E. NPSP Data Import is unable to perform Custom Unique Id matching on Accounts and Contacts with an encrypted field.
Answer: (SHOW ANSWER)
When implementing Salesforce Shield Platform Encryption with NPSP, there are several key considerations:
* Role Name Field on Partial Soft Credit Object:
* If the Role Name field on the NPSP Partial Soft Credit object is encrypted, the nightly Soft Credit rollups will fail. This is because the rollup process relies on accessing this field, and encryption can interfere with its functionality.
* MergeContacts List Button:
* The NPSP MergeContacts list button on Contact list views will fail if the Contact Name is encrypted. The merging process requires access to the Contact Name to identify and merge records accurately, which encryption can prevent.
* Custom Unique Id Matching:
* NPSP Data Import cannot perform Custom Unique Id matching on Accounts and Contacts if the field used for matching is encrypted. This limitation arises because the encryption prevents the import process from accurately comparing and matching the encrypted values.

These considerations highlight the impact of encryption on certain NPSP functionalities, and it is important to plan accordingly when implementing Shield Platform Encryption.
References:
Salesforce Shield Platform Encryption Documentation
Nonprofit Success Pack (NPSP) Documentation on Data Import and Soft Credits

NEW QUESTION: 60
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 1 million new Contact records
C. Uploading 400,000 new records to a custom object
D. Uploading 100,000 new Task records
Answer: B (LEAVE A REPLY)

NEW QUESTION: 61
A nonprofit is loading 5 million donation history records into Salesforce from a payment processing system.
What should the consultant do to ensure the data load Is successful?
A. Create an Apex Test Class.
B. Temporarily disable TDTM Trigger Handlers.
C. Disable Data Validation Rules.
D. Deploy a Custom Apex Class with TDTM.
Answer: (SHOW ANSWER)
When loading a large volume of data, such as 5 million donation history records, into Salesforce, it is essential to temporarily disable TDTM (Trigger Handler Framework) to ensure the data load is successful. TDTM triggers can slow down or interrupt the data load process due to the large volume of records being processed.
Steps:
Go to Setup > Custom Metadata Types.
Select "Trigger Handlers."
For each trigger handler, uncheck the "Active" checkbox to temporarily disable it.
Perform the data load using Data Loader or another data import tool.
Once the data load is complete, re-enable the TDTM Trigger Handlers by checking the "Active" checkbox for each trigger handler.
Reference:
CertGod Nonprofit Cloud Consultant Guide: Advises on the importance of managing TDTM triggers during large data loads.
Salesforce Documentation on TDTM: Provides instructions on managing and disabling TDTM triggers.

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NEW QUESTION: 62
A nonprofit uses Volunteers for Salesforce. The nonprofit has volunteers who work the same schedule every week. The volunteer manager wants to avoid asking these ongoing volunteers to sign up for the same shift every time.
How should the consultant configure Salesforce to meet the requirement?
A. Use the Volunteer Recurrence Schedules in Volunteers for Salesforce to create the volunteers' schedules.
B. Enter all volunteer IDs and schedules on a spreadsheet and use an ETL tool to create volunteer hours records In Volunteers for Salesforce.
C. Install a grid app from the AppExchange to mass enter volunteer hours based on each volunteer's schedule.
D. Use the Job Recurrence Schedule functionality In Volunteers for Salesforce to create the volunteers' schedules.
Answer: A (LEAVE A REPLY)
To configure Salesforce to handle recurring volunteer schedules, the Volunteer Recurrence Schedules feature in Volunteers for Salesforce (V4S) is the ideal solution. Here's a step-by-step guide:
Install Volunteers for Salesforce: If not already installed, you need to install the Volunteers for Salesforce package from the Salesforce AppExchange.
Navigate to Volunteer Jobs: Go to the Volunteers tab and create or select a Volunteer Job that requires a recurring schedule.
Set Up Volunteer Recurrence Schedules:
In the Volunteer Job record, find the "Recurrence Schedules" related list.
Click "New Volunteer Recurrence Schedule."
Define the recurrence pattern, such as weekly, and specify the start and end times for the volunteer shifts.
Assign Volunteers to Recurrence Schedules:
Once the recurrence schedule is created, assign volunteers to this schedule.
Volunteers assigned to a recurrence schedule will automatically be registered for the specified shifts without the need to sign up repeatedly.

Review and Manage:
Periodically review the schedules to ensure they align with any changes in volunteer availability or job requirements.
By using Volunteer Recurrence Schedules, the nonprofit can efficiently manage volunteers who work on a regular basis without needing them to sign up for each shift manually. This feature ensures that the volunteer management process is streamlined and volunteers have a consistent schedule.
Reference:
Salesforce Volunteers for Salesforce Documentation: This official documentation provides detailed instructions on setting up and managing volunteer schedules. Salesforce V4S Documentation.

NEW QUESTION: 63
An Administrator at an organization has set up Program Management in Nonprofit Cloud. The organization wants users to be able to group participants into Program Cohorts. The Administrator turns on the Program Cohort feature im Setup, but users still cannot see the Program Cohorts object.
Which permission set should the Administrator assign to the users?
A. Group Membership
B. Program & Benefit Management
C. Advanced Program Management
Answer: C (LEAVE A REPLY)

NEW QUESTION: 64
A nonprofit organization uses Customizable Rollups and has a large volume of Recurring Donation Allocations for a specific fund. The system administrator notices a scheduled skew job, but does not remember scheduling it. What should the consultant advise the system administrator to do?
A. View the Setup Audit Trail
B. Keep the job
C. Run a debug log
D. Delete the job
Answer: A (LEAVE A REPLY)
When the system administrator notices a scheduled skew job but does not remember scheduling it, the best course of action is to view the Setup Audit Trail. This will help determine the origin and purpose of the job. Here's how to do it:
Navigate to Setup:
Click on the gear icon in the top right corner of Salesforce.
Select "Setup".
Access the Setup Audit Trail:
In the Quick Find box, type "Setup Audit Trail".

Click on "View Setup Audit Trail".
Review the Audit Trail:
The Setup Audit Trail logs changes made to your Salesforce configuration, including scheduled jobs.
Look for entries related to the creation or modification of scheduled jobs.
Identify who created the job, when it was created, and any additional details provided in the log.
Determine Next Steps:
Based on the information found in the audit trail, decide whether the job is necessary.
If the job is not needed, it can be deleted. If it is essential, ensure that it is documented and understood.
Reference:
Salesforce Documentation: Monitor Setup Changes
Salesforce Trailhead: Monitor Changes in Your Org

NEW QUESTION: 65
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: (SHOW ANSWER)
Under the Household Account model in Salesforce NPSP, a Contact's Account represents where they live, essentially their Household. The Primary Affiliation, on the other hand, indicates where they work or are affiliated professionally.
Household Account:
This is used to group individuals living at the same address into a single account.
All contacts associated with a Household share the same Account record, representing their home address and family unit.
Primary Affiliation:
This is a special relationship field in NPSP that links a Contact to an Organization or company where they work or have a significant relationship.
It allows nonprofits to track where their constituents are employed or connected professionally, separate from their residential information.
Reference:
CertGod Nonprofit Cloud Consultant Guide

NEW QUESTION: 66

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 current user does not have the correct locale.
B. The language is not supported in NPSP.
C. The system administrator did not enable the Translation Workbench.
D. The system administrator did not add the reciprocal relationship value in the NPSP Settings tab.
Answer: D (LEAVE A REPLY)

NEW QUESTION: 67
A nonprofit organization associates a Gift Commitment to a Gift Designation in Nonprofit Cloud.
What occurs when a Gift Transaction is added to the Gift Commitment?
A. The designation is inherited from the Gift Commitment, but the designation cannot be changed,
B. The designation is inherited from the Gift Commitment, and the designation can be changed,
C. The designation its not inherited, and the designation can be added.
Answer: B (LEAVE A REPLY)

NEW QUESTION: 68
A development director needs to understand which organizations have given to the nonprofit in some year prior to the current, but have not contributed to the nonprofit in the current year.
How should the consultant accomplish this task?
A. Customize the date range on the NPSP SYBUNT report for Accounts
B. Customize the date range on the NPSP SYBUNT report for Contacts
C. Create an Opportunity report that compares Contact donations from the previous fiscal year to the current
D. Customize the date range on the NPSP LYBUNT report for Accounts
Answer: A (LEAVE A REPLY)
To identify organizations that have donated to the nonprofit in some year prior to the current year but have not contributed in the current year, the NPSP SYBUNT (Some Year But Unfortunately Not This year) report can be customized. Here's how to do it:
* Navigate to the NPSP SYBUNT Report:
* Go to the Reports tab.
* Find and open the NPSP SYBUNT report template.
* Customize the Date Range:
* Click on the "Filters" pane.
* Adjust the date range filters to include donations from the desired prior years and exclude the current year.

* Modify Report Criteria:
* Ensure the report is filtering by Account to get the organization-level data.
* Add additional filters if necessary to refine the report (e.g., specific campaign or donation types).
* Run the Report:
* Save and run the report to get a list of organizations that have donated in previous years but not in the current year.
By customizing the date range on the NPSP SYBUNT report for Accounts, you can easily identify and target these lapsed donors for re-engagement campaigns.
"Using NPSP Reports" from Salesforce Help: NPSP Reports
"SYBUNT and LYBUNT Reports in NPSP" from Salesforce.org: SYBUNT and LYBUNT

NEW QUESTION: 69
A system admin is trying to figure whether the nonprofit's internal release schedule conflicts with either Salesforce.com or Salesforce.org major releases.
What are two facts about Salesforce.org major releases the consultant could share with the admin?
Choose 2 answers
A. The Salesforce.org release schedule can be found on the SFDO Major Release Announcements group.
B. Salesforce.org major releases follow the same schedule as Salesforce.com releases.
C. The Salesforce.org release schedule can be found on the Salesforce Trust website.
D. Salesforce.org major releases arrive approximately one month after Salesforce.com releases.
Answer: A,D (LEAVE A REPLY)
Salesforce.org major releases are typically scheduled to follow Salesforce.com releases by about one month. This staggered release schedule allows nonprofits to prepare for updates and ensures that they can address any potential conflicts with their internal release schedules. The Salesforce.org release schedule is available on the SFDO Major Release Announcements group, which provides detailed information on upcoming releases and related resources.
Steps:
Inform the system admin that Salesforce.org releases follow Salesforce.com releases by approximately one month.
Direct the system admin to the SFDO Major Release Announcements group for the latest release schedule information.
Encourage the admin to plan internal releases accordingly to avoid conflicts with major Salesforce updates.
Stay informed about upcoming releases and leverage available resources to ensure smooth transitions.
Reference:

CertGod Nonprofit Cloud Consultant Guide: Provides information on the release schedules and where to find them.
Salesforce.org Major Release Announcements Group: Source for detailed release schedules and updates.

NEW QUESTION: 70
A system admin used NPSP Contact Merge and notices the number of household accounts has changed from
12,345 to 12,300 and is concerned that accounts have been lost.
What is the likely cause for the missing accounts?
A. The merge automatically creates Household Accounts.
B. The merge converts Household Accounts to Household custom object records.
C. The merge automatically deletes any empty Household Accounts without Contacts or Opportunities.
D. The merge combines Household Accounts with Contacts.
Answer: C (LEAVE A REPLY)
https://powerofus.force.com/s/article/NPSP-Merging-Contacts
When using the NPSP Contact Merge functionality, any empty Household Accounts that do not have associated Contacts or Opportunities are automatically deleted. This is likely the cause of the reduction in the number of household accounts noticed by the system administrator.
Steps to Verify:
* Check Merge Settings:
* Review the settings and configuration of the NPSP Contact Merge process to understand its behavior regarding empty Household Accounts.
* Review Audit Logs:
* Check the Salesforce audit logs to see the details of the merge operations and confirm that empty Household Accounts were deleted.
* Restore if Necessary:
* If the deletion of empty Household Accounts was unintended, use data recovery options to restore any necessary records.
References:
Salesforce Nonprofit Success Pack Documentation
Salesforce Trailhead: Merge Duplicate Records in Nonprofit Success Pack

NEW QUESTION: 71
A nonprofit organization processed a gift batch, but the Gift Batch Status is updated to Partially Processed; Failed.
Which step should be performed to successfully process the batch?
A. Resolve the Gift Entry errors and process the batch again,
B. Process a dry run of the batch.

C. Manually set the Gill Gatch Status to Processed.
Answer: A (LEAVE A REPLY)

NEW QUESTION: 72
A nonprofit needs to clean up large amounts of Contact address data from its street canvassing and telemarketing operations on a monthly basis.
What should the consultant use to standardize addresses in NPSP?
A. Batch Data Import
B. Address Verification
C. NPSP Data Importer
D. Seasonal Addresses
Answer: B (LEAVE A REPLY)
Explanation
(https://powerofus.force.com/s/article/NPSP-Configure-Addresses#topic-2559)

NEW QUESTION: 73
Which two scenarios should be included in a Salesforce-recommended V2MOM?
A. Metrics
B. Virtues
C. Milestones
D. Vision
E. Objectives
Answer: A,D (LEAVE A REPLY)
V2MOM (Vision, Values, Methods, Obstacles, and Measures) is a framework used by Salesforce to align teams and ensure successful project outcomes. The recommended elements for a V2MOM include:
Vision:
Defines what you want to achieve.
It sets the direction and purpose of the project or initiative.
Example: "To increase donor engagement by 20% over the next fiscal year." Metrics (Measures):
Describes how you measure success.
Includes quantifiable indicators that help track progress toward the Vision.
Example: "Number of new donors acquired, donor retention rate, total funds raised." Values:
Although not explicitly listed as an answer option, values are an integral part of the V2MOM framework. They define what is important and guide the behaviors needed to achieve the Vision.
Methods:
Specifies the actions and steps needed to achieve the Vision.
Example: "Implement a new donor management system, conduct quarterly donor engagement surveys." Obstacles:

Identifies potential challenges and how to overcome them.
Example: "Limited staff resources, data migration issues."
Inclusion of Metrics and Vision:
Metrics and Vision are critical as they set the overall goal and how success will be measured, ensuring clarity and alignment across the team.

NEW QUESTION: 74
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. Lightning Experience Migration Assistant
B. Setup Audit Trail
C. NPSP Health Check
D. Salesforce Optimizer
Answer: (SHOW ANSWER)

NEW QUESTION: 75
A nonprofit organization is interested in a CRM that manages its constituents and has an integrated email marketing tool with built-in scoring and engagement tracking.
Which solution should the consultant recommend?
A. NPSP and Community Cloud
B. NPSP and Social Studio
C. NPSP and Marketing Cloud
D. NPSP and Pardot
Answer: C (LEAVE A REPLY)
For a nonprofit organization looking for a CRM with an integrated email marketing tool that includes built-in scoring and engagement tracking, the recommended solution is:
* NPSP (Nonprofit Success Pack): This provides the CRM functionality to manage constituents.
* Marketing Cloud: This offers advanced email marketing capabilities, including automation, scoring, and engagement tracking.
Marketing Cloud is designed to handle complex marketing needs and integrates seamlessly with NPSP to provide a comprehensive solution for nonprofits.
References:
Salesforce Nonprofit Success Pack Documentation
Salesforce Marketing Cloud Overview

NEW QUESTION: 76

The system administrator at a nonprofit wants to use Advanced Mapping for regular data imports of constituent and donation data.
What is an important consideration of Advanced Mapping?
A. The target fields can only be text, currency, number, date or address fields.
B. The target objects must be NPSP objects.
C. The target objects must directly relate to Accounts, Contacts, or Opportunities.
D. Checkbox fields are unavailable to map to as target fields.
Answer: B (LEAVE A REPLY)
Explanation
(wrong),b(wrong), a(if d is wrong then a is also wrong),So Option C
https://help.salesforce.com/s/articleView?id=000358792&type=1

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NEW QUESTION: 77
A nonprofit is migrating from a legacy donor management database. The database has donor contact information, donation history, and payment information. How should the consultant load the data from the database using a single file to create the related records?
A. Workbench
B. Data Import Wizard
C. Data Loader
D. NPSP Data Importer
Answer: D (LEAVE A REPLY)
When migrating data into the Nonprofit Success Pack (NPSP), the most efficient and robust tool is the NPSP Data Importer. This tool was specifically built to handle the "multi-object" nature of nonprofit data in a single pass.
Why NPSP Data Importer is the Correct Choice:
* Single File Processing: Standard Salesforce tools like Data Loader or the Data Import Wizard usually require separate files and separate "upserts" for each object. You would have to import Accounts, then export the IDs, then import Contacts, then export those IDs, then import Opportunities.
* Complex Logic in One Row: The NPSP Data Importer allows you to put the Contact Name, the Household address, and the Donation Amount on the same row of a CSV file.

* Automatic Relationship Management: When you process the file, the Importer automatically:
* Creates or finds the Contact.
* Automatically creates the Household Account.
* Creates the Opportunity (Donation) and links it to the Account.
* Creates the Payment record (if payment info is included).
* Handles GAU Allocations and Campaign Memberships.
* Dry Run Capability: It includes a "Dry Run" feature that validates the data and checks for duplicates before any actual records are created, which is vital for a clean migration.
While Workbench and Data Loader are powerful technical tools, they lack the specific NPSP business logic that makes the NPSP Data Importer the fastest and safest way to move a legacy database into Salesforce using a single flat file.

NEW QUESTION: 78
A fundraising associate needs to print mailing labels for the latest direct mail campaign to families who give to the nonprofit organization. The organization uses the Household Account model with Address Management.
Which object and address field should the associate use when building the report?
A. Account; Shipping Address
B. Account; Billing Address
C. Contact; Mailing Address
D. Contact; Other Address
Answer: (SHOW ANSWER)

NEW QUESTION: 79
A nonprofit plans to use the Program Management Module (PMM) to manage Its service delivery. Case managers must be able to create and edit service delivery records.
How can the consultant change the configuration to meet this requirement?
A. Permission Sets
B. Sharing Rules
C. License Type
D. Role Hierarchy
Answer: A (LEAVE A REPLY)
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 allow case managers to create and edit service delivery records in the Program Management Module (PMM), you should assign the appropriate permissions through Permission Sets. Permission Sets provide a way to grant specific permissions to users without changing their profiles, making it easier to manage access to certain functionalities.
Steps:

Create a Permission Set:
Navigate to Setup -> Permission Sets.
Click "New" to create a new permission set.
Grant Permissions:
In the new permission set, go to Object Settings.
Find and select "Service Deliveries."
Grant "Create" and "Edit" permissions.
Assign the Permission Set:
Assign the newly created permission set to the case managers who need access to create and edit service delivery records.
Reference:
Salesforce Nonprofit Success Pack Documentation
Salesforce Trailhead: Permission Sets

NEW QUESTION: 80
A developer needs to create a custom Apex class in the TDTM framework. Which sets of steps should the developer take?
A. Create the Visualforce page, test class, and a Trigger Handler record
B. Create the Apex class, test class, and Trigger Handler record
C. Create the Apex trigger, test class, and Trigger Handler record
D. Create the Lightning component, test class, and Trigger Handler record
Answer: (SHOW ANSWER)
To create a custom Apex class in the TDTM (Table Driven Trigger Management) framework, follow these steps:
Create the Apex Class:
In Salesforce, go to Setup.
Navigate to "Apex Classes" under "Custom Code".
Click "New" and create your custom Apex class.
Ensure the class implements the TDTM framework correctly.
Create the Test Class:
Create a corresponding test class to ensure your Apex class functions as expected.
This is essential for maintaining code coverage and passing Salesforce deployment requirements.
Create a Trigger Handler Record:
Go to the TDTM Trigger Handlers tab.
Create a new Trigger Handler record and link it to your custom Apex class.
Define the order of execution and the object the trigger applies to.
These steps ensure that your custom Apex class is correctly integrated into the TDTM framework, maintaining organized and manageable trigger logic.
Reference:
Salesforce NPSP Documentation: TDTM Overview

Salesforce Trailhead: Apex Basics & Database

NEW QUESTION: 81
A nonprofit organization on NPSP needs to be able to track the high school a student attended and track the enrollment of the student at college.
How should the consultant recommend tracking this?
A. Use NPSP Affiliations objects to connect the Contact to the Account for their high school and college, use the Status field there to indicate if they are currently enrolled or are former students there.
B. Turn on Field History Tracking for the Account lookup field on the Contact record, use the Account lookup to indicate where they are currently enrolled and change it as they move on.
C. Set up a Campaign for each high school and college and use Campaign Members to connect the Contact to the Campaign. Change the values in Campaign Member Status from Sent/Responded to Current/Former.
D. Install the Salesforce.org Higher Education Data Architecture (HEDA) managed package and use Affiliations.
Answer: A (LEAVE A REPLY)
To track the high school a student attended and their college enrollment, the consultant should recommend using the NPSP Affiliations objects:
NPSP Affiliations: This object is designed to connect Contacts to Accounts representing institutions like high schools and colleges.
Status Field: Use the Status field within the Affiliations object to indicate if the student is currently enrolled or a former student.
This approach allows the nonprofit to maintain a detailed history of the student's educational journey and easily track changes in their enrollment status.
Reference:
Salesforce Nonprofit Success Pack Documentation
Salesforce Trailhead: Affiliations and Relationships in NPSP

NEW QUESTION: 82
A development associate using NPSP wants to add the Check/Reference Number on a report but does not see that field in the Report Builder. What should the consultant advise?
A. Check if the report type includes Opportunities.
B. Check a custom field, "Check/Reference Number" on Payments
C. Check a custom field, "Check/Reference Number" on Opportunity
D. Check if the report type includes Payments
Answer: (SHOW ANSWER)

NEW QUESTION: 83
A nonprofit created a custom Opportunity Name for all In-kind gifts.
Which two considerations should the consultant discuss with the nonprofit?

Choose 2 answers
A. The nonprofit should change existing Opportunities to the new naming convention by running the Refresh All Opportunity Names utility.
B. The Opportunity Name Format will only be applied to new Opportunities of the matching record type,
C. The nonprofit should change existing Opportunities to the new naming convention through an upsert.
D. Click the Refresh Name button on one Opportunity record to update all relevant Opportunities.
Answer: A,B (LEAVE A REPLY)
When a nonprofit creates a custom Opportunity Name for all in-kind gifts, it is important to understand how this change impacts existing and new Opportunity records. The Refresh All Opportunity Names utility can be used to update the names of existing Opportunities to match the new naming convention. Additionally, the custom Opportunity Name Format will only apply to new Opportunities that match the specified record type.
Steps:
* Update the Opportunity Name Format settings to reflect the new naming convention for in-kind gifts.
* Use the Refresh All Opportunity Names utility to apply the new naming convention to existing Opportunities. This ensures consistency across all records.
* Inform users that the new naming convention will only be automatically applied to new Opportunities created with the matching record type going forward.
* Monitor the changes and verify that the updated names meet the nonprofit's requirements.
References:
CertGod Nonprofit Cloud Consultant Guide: Provides guidance on updating Opportunity names and using utilities for bulk updates.
Salesforce Documentation on Opportunity Name Formats: Details the steps for configuring and applying custom naming conventions.

NEW QUESTION: 84
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
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 (LEAVE A REPLY)

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.
Reference:
Salesforce documentation on managing Apex CPU time limits.
Nonprofit Success Pack (NPSP) documentation on Trigger Management and Data Import.

NEW QUESTION: 85
A nonprofit organization receives a number of donations from Donor Advised Funds where the check is written by the financial institution that houses the Donor Advised Fund. What should the consultant recommend to ensure that the Donor Advised Fund receives credit for the donation?
A. Add an Account lookup field on the Payment for the Opportunity for the Donor Advised Fund
B. Add an additional Account lookup field on the Opportunity for the Donor Advised Fund
C. Use a GAU allocation to credit the donation to the Donor Advised Fund
D. Use Account Soft Credits to credit the Donor Advised Fund
Answer: (SHOW ANSWER)

NEW QUESTION: 86

A membership organization needs to send out automated renewal emails on a 30/60/90 period. Each referenced email template needs to differ based on the members' web site visits. Which automation method should a consultant recommend?

A. Process Builder

B. Apex Trigger and Scheduler

C. Time-Based Workflow

D. Pardot

Answer: D (LEAVE A REPLY)

Pardot is the recommended automation method for sending out automated renewal emails on a 30/60/90 day schedule, with different email templates based on members' website visits. Pardot is a powerful marketing automation tool that integrates seamlessly with Salesforce, providing advanced capabilities for email marketing, lead nurturing, and segmentation. Here's how to set this up:

* Integrate Pardot with Salesforce:
* Ensure that Pardot is connected to your Salesforce instance. This allows seamless data synchronization between the two systems.
* Create Email Templates in Pardot:
* Design and create the different email templates in Pardot that you want to use for the 30, 60, and
90-day renewal reminders.
* Personalize the email content based on the members' interactions and website visits.
* Set Up Automation Rules:
* Use Pardot's automation rules to create rules that trigger emails based on the members' renewal dates and website activity.
* Define the criteria for each rule (e.g., 30 days before renewal date, 60 days before renewal date, etc.).
* Create Engagement Programs:
* Use Engagement Studio in Pardot to create automated drip programs that send out the renewal emails at the specified intervals.
* Add logic to the engagement program to select different email templates based on the members' website visits and interactions.
* Track and Analyze:
* Use Pardot's reporting and analytics features to track the performance of the email campaigns, monitor open rates, click-through rates, and engagement metrics.

By leveraging Pardot's advanced automation capabilities, the organization can efficiently manage and personalize its renewal email campaigns, improving member retention and engagement.

"Getting Started with Pardot" from Salesforce Help: Pardot Setup Guide

"Pardot Engagement Studio" from Salesforce Help: Engagement Studio

NEW QUESTION: 87

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?
A. Salesforce Connect
B. Salesforce Reports & Dashboards
C. External Objects
D. CRM Analytics
Answer: D (LEAVE A REPLY)
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.

NEW QUESTION: 88
A donor has committed to give a consistent amount every month. The nonprofit wants to update the schedule to reflect one-time adjustments to this amount.
What should the consultant recommend to record the regular donations correctly7
A. Implement Enhanced Recurring Donations.
B. Create scheduled Payments.
C. Create a process using Process Builder.
D. Clone Opportunities with Payments.
Answer: A (LEAVE A REPLY)
Enhanced Recurring Donations in NPSP allows nonprofits to manage recurring donations more flexibly, including making one-time adjustments to the donation amounts. This feature provides a robust way to handle scenarios where donors want to change their regular giving amounts temporarily.
Steps to Implement:
Enable Enhanced Recurring Donations:
Navigate to NPSP Settings -> Donations -> Recurring Donations.
Enable Enhanced Recurring Donations.
Set Up Recurring Donations:
Create a Recurring Donation record for the donor, specifying the regular donation amount and schedule.
Use the Enhanced Recurring Donations feature to adjust the schedule and amounts as needed.
Reference:
Salesforce Nonprofit Success Pack Documentation

Salesforce Trailhead: Manage Recurring Donations in NPSP

NEW QUESTION: 89
A nonprofit is rolling out a new implementation of Salesforce and NPSP containing custom code. The project go-live date is a few days before a Salesforce release. The project team has proposed developing in a sandbox on a preview instance to review new features and then deploy to production prior to the release date.
Which important consideration should the consultant discuss with the project team?
A. A support case is required to request a preview sandbox.
B. A preview sandbox is only available in the Unlimited Edition.
C. A preview sandbox has limited metadata storage.
D. The API version in the preview sandbox differs from Production.
Answer: D (LEAVE A REPLY)

NEW QUESTION: 90
i. A Salesforce admin changes an Engagement Plan Template as requested by the development team. The development manager expects to see the changes reflected on an existing Engagement Plan using that Template on a campaign.
Why is the development manager unable to see the Template changes?
A. The development manager requires additional permissions for the new Engagement Plan Template changes.
B. Changes to Engagement Plan Templates only affect new Engagement Plans.
C. Engagement Plan Template changes need to propagate through the platform.
D. Engagement Plan Template changes must be accepted by the user on the Template detail record first.
Answer: (SHOW ANSWER)
Changes to Engagement Plan Templates in Salesforce only affect newly created Engagement Plans. Here's why:
Template Changes Application:
When an Engagement Plan Template is modified, the changes are not retroactively applied to existing Engagement Plans. Only new plans created after the modification will reflect the changes.
Create New Engagement Plans:
For the development manager to see the changes, new Engagement Plans need to be created using the updated template. Existing plans will retain the configuration they had at the time of creation.
Communicate Changes:
Inform relevant stakeholders about this behavior to manage expectations and plan accordingly. Consider cloning existing Engagement Plans if updates are necessary, applying the new template configurations.
Review Documentation:

Refer to Salesforce documentation on Engagement Plans for detailed information on how templates and plan instances work.
Reference:
Salesforce Engagement Plan Documentation
Salesforce Nonprofit Success Pack (NPSP) Resources
Salesforce Trailhead: Configure Nonprofit Success Pack Engagement Plans

NEW QUESTION: 91
A volunteer manager at a nonprofit wants to search for volunteers with landscaping skills who are available at a given time and add them to a shift. The nonprofit is using Volunteers for Salesforce.
What should the consultant advise to meet this requirement?
A. Click the the Volunteers Wizard and enter landscaping skills in the search box. Click search and filter the results by entering the desired Volunteer Availability. Select an available volunteer.
B. Click the Find Volunteers tab and fill in the Volunteer Status, Volunteer Availability, and Volunteer Skills tabs with the desired values. Click search and select an available volunteer.
C. Create a report with the report type of Contacts with Volunteer Hours and Volunteer Jobs. Filter the Jobs by landscaping and Volunteer Availability for the given time. Select an available volunteer.
D. Create a list view on Contacts showing Volunteer Skills and Volunteer Availability. Add a filter for landscaping skills and sort the list to find volunteers who are available at the given time.
Answer: B (LEAVE A REPLY)

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NEW QUESTION: 92
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: C (LEAVE A REPLY)

When encountering an error at run time indicating that a record couldn't be updated during a Customizable Rollup operation, it is often due to validation rules on the target field that prevent the update.

Check the Target Field for Validation Rules:

Navigate to Setup > Object Manager.

Select the object that contains the target field.

Go to Fields & Relationships and find the target field.

Review any validation rules associated with this field to ensure they are not causing the update to fail.

Modify or Disable Validation Rules:

If a validation rule is causing the issue, consider modifying it to allow updates during the rollup operation.

Alternatively, temporarily disable the validation rule, perform the rollup operation, and then re-enable the validation rule.

Test the Rollup Operation:

After addressing any validation rules, rerun the Customizable Rollup operation to ensure that the error is resolved.

Monitor the operation to confirm that the updates are processed correctly without triggering validation errors.

By ensuring that validation rules on the target field do not interfere with the rollup operation, the consultant can resolve the error and ensure smooth data processing.

Reference:

CertGod Nonprofit Cloud Consultant Guide

NEW QUESTION: 93

A nonprofit organization has engaged a consultant to implement NPSP and has a large membership program it wants to manage in Salesforce. Which two things does the consultant need to set up to ensure that the membership rollups in NPSP will work properly?

A. Check that the membership record type is selected for membership rollups.

B. Ensure there is a custom field created for Membership Amount and selected for membership rollups

C. Check that the grace period is set up for memberships.

D. Ensure there is an Opportunity record type set up for memberships

Answer: (SHOW ANSWER)

NEW QUESTION: 94

A nonprofit is using NPSP with the default account model and settings. A user creates and saves a new Contact leaving the Account Name blank.

How does NPSP handle the Account?

A. The Contact is added to an existing Account.
B. An Account is created with a household name.
C. An Account is created with the same name as the Contact.
D. The Account Name remains blank.
Answer: B (LEAVE A REPLY)
When using NPSP (Nonprofit Success Pack) with the default account model and a new Contact is created without specifying an Account Name, NPSP automatically creates an Account with a household name.
Default Account Model in NPSP:
NPSP typically uses the Household Account Model by default.
This model groups individuals into households, making it easier to manage and report on donor families.
Automatic Account Creation:
If a Contact is created without an Account Name, NPSP automatically generates a Household Account.
The name of the Household Account is usually derived from the Contact's last name, formatted as "The [LastName] Household." Process:
Step 1: A user creates a new Contact record, leaving the Account Name field blank.
Step 2: Upon saving the Contact, NPSP checks for an existing Household Account.
Step 3: If no Household Account exists, NPSP creates a new Household Account using the Contact's last name.
Benefits:
Organization: Ensures that all Contacts are associated with an Account, maintaining data integrity.
Reporting: Facilitates household-level reporting and analytics.
Reference:
CertGod Nonprofit Cloud Consultant study guide: "An Account is created with a household name".

NEW QUESTION: 95
A nationally federated nonprofit is implementing a single Salesforce org to provide shared fundraising services to its four regional affiliates. Each affiliate and the national nonprofit must see only its own donor data.
Which Salesforce feature would enable this level of record access?
A. Divisions
B. Record Types
C. Role Hierarchy
D. Criteria-based sharing
Answer: (SHOW ANSWER)
To provide each affiliate and the national nonprofit the ability to see only its own donor data in a single Salesforce org, the consultant should use Criteria-based Sharing. Here's why:

Criteria-based Sharing:
This feature allows for defining sharing rules based on specific criteria, such as record ownership or certain field values.
By setting up criteria-based sharing rules, each affiliate and the national nonprofit can be restricted to viewing only the records that meet the specified criteria, such as records tagged with their specific region or affiliate identifier.
Reference:
Salesforce Sharing and Visibility Guide
Salesforce Criteria-based Sharing Rules Documentation

NEW QUESTION: 96
A nonprofit organization had enabled Person Accounts in its org and now wants to install NPSP. The nonprofit organization wants to completely remove all Person Account features.
What should the nonprofit organization consider?
A. Use the NPSP Conversion Utility Tool
B. Create a case in Salesforce to completely remove the Person Account record type
C. Apply for a new Salesforce organization and request a license transfer
D. Ensure the Person Account record type is selected as the Household record type in NPSP Settings
Answer: C (LEAVE A REPLY)

NEW QUESTION: 97
A nonprofit has asked a consultant to configure Lightning Record Pages to optimize the user interface.
Which two resources should the consultant use to ensure the nonprofit staff are up to date on the latest Salesforce platform features and best practices?
Choose 2 answers
A. Salesforce Known Issues
B. Trailhead
C. Salesforce Help
D. Power of Us Hub
Answer: C,D (LEAVE A REPLY)

NEW QUESTION: 98
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 trouWeshoot the issue?
Choose 3 answers
A. Customizable Rollups
B. Salesforce Optimizer report

C. Opportunity Stages
D. NPSP Health Check
E. Campaign Hierarchy
Answer: A,B,D (LEAVE A REPLY)

NEW QUESTION: 99
A nonprofit offers courses that grant teachers credit toward maintaining their teaching certification. Teachers can enroll in an annual cohort to complete the course modules together. The nonprofit needs to track the courses each teacher completes and the credits awarded to them.
Which solution should a consultant recommend?
A. Self-Service Portal
B. Program Management Module
C. Engagement Plans
D. Service Cloud
Answer: B (LEAVE A REPLY)
For a nonprofit offering courses that grant teachers credit toward maintaining their teaching certification, the Program Management Module (PMM) is the best solution to track course completions and credits awarded.
PMM allows the nonprofit to manage program enrollments, track progress, and report on outcomes effectively.
Steps:
* Set up the Program Management Module to include the specific courses offered and the credits awarded for each course.
* Create Program Engagement records for each teacher enrolling in the annual cohort, linking them to the relevant course modules.
* Track the completion of course modules and update the credits awarded to each teacher within their Program Engagement records.
* Use custom reports and dashboards to monitor progress, track completions, and generate reports on credits awarded to teachers.
References:
CertGod Nonprofit Cloud Consultant Guide: Recommends using PMM for tracking program enrollments, progress, and outcomes.
Salesforce Documentation on Program Management Module: Provides detailed instructions on setting up and using PMM for managing educational programs.

NEW QUESTION: 100
A nonprofit organization is evaluating Nonprofit Cloud. The organization has common focus areas, which are used to track programs, individuals, and grants to organize data across departments. Which Nonprofit Cloud feature can the organization use to organize the data in the same manner?

A. Data Pipelines
B. Interest Tags
C. Compliant Data Sharing
Answer: B (LEAVE A REPLY)
To organize data across different departments and objects using "focus areas" (e.g., "Youth Literacy,"
"Veterans Affairs," or "Sustainability"), a consultant should implement Interest Tags.
Interest Tags (built on the Salesforce Industry's Tagging framework) provide a flexible, "horizontal" way to categorize records regardless of their object type.
How to Implement Focus Areas with Interest Tags:
* Define Tag Categories: The consultant creates a Tag Category called "Focus Areas."
* Create Tags: Within that category, the consultant creates individual Interest Tags (e.g., "Environment," "Health," "Education").
* Cross-Object Application: Unlike a standard picklist which is tied to one object, Interest Tags can be added to almost any object in the Nonprofit Cloud. A consultant adds the "Interest Tags" component to:
* Programs: To show the focus of the service.
* Person Accounts: To show the interests of a donor or participant.
* Individual Applications: To show the focus of a grant request.
* Unified Reporting: Because all these records share the same tags, the organization can easily run a report to see "Everything related to Youth Literacy"-including the donors interested in it, the programs delivering it, and the grants funding it.
Why other options are incorrect:
* Data Pipelines (Option A): This is a tool for high-volume data transformation and aggregation, not for qualitative categorization.
* Compliant Data Sharing (Option C): This is a security feature for record-level visibility, not a data organization or tagging tool. Interest Tags are the architecturally correct choice for cross-departmental
"Focus Area" tracking.

NEW QUESTION: 101
A nonprofit wants to implement an external email platform that integrates with Salesforce. The integration will record every email sent to a subscriber, as well as which recipients open the email, click a link, or unsubscribe.
Which two storage considerations should the consultant take into account before recommending an email platform?
Choose 2 answers
A. Subscribers must be synced as Leads and Campaign Members In NPSP.
B. Unsubscribed Leads should be deleted from Salesforce immediately.
C. Email subscribers' activities can be retained for a certain length of time.
D. Campaign Member records use less storage space than custom object records.

Answer: (SHOW ANSWER)

NEW QUESTION: 102
For a Salesforce implementation project, what is the order of phases in a project lifecycle?
A. Initiate, Plan, Execute, Monitor and Control, Close
B. Plan, Initiate, Execute, Close, Monitor and Control
C. Plan, Initiate, Execute, Monitor and Control, Close
Answer: A (LEAVE A REPLY)
A consultant must follow a structured project management methodology to ensure a Nonprofit Cloud implementation is delivered on time and within budget. The standard lifecycle, aligned with the Project Management Institute (PMI) and Salesforce best practices, consists of five distinct phases.
* Initiate: This is the "Discovery" and "Alignment" phase. The consultant identifies the key stakeholders, defines the high-level project goals (the "Why"), and secures the project charter. For a nonprofit, this often involves the "Power of Us" application and licensing verification.
* Plan: In this phase, the consultant defines the "How." This includes gathering detailed requirements, creating the Solution Design Document (SDD), mapping the data migration strategy, and finalizing the project schedule.
* Execute: This is the "Build" phase. The consultant and developers configure the Nonprofit Cloud (Objects, Flows, DPE, etc.), perform data migrations, and build any necessary integrations.
* Monitor and Control: This phase runs concurrently with Execute. The consultant tracks progress against the plan, manages "Scope Creep," performs User Acceptance Testing (UAT), and handles quality assurance. It ensures that the project doesn't deviate from the organization's mission-critical needs.
* Close: The final phase involves the formal "Go-Live," end-user training, handing over documentation to the nonprofit's admin, and conducting a "Lessons Learned" session.
Why Option B and C are incorrect: You cannot "Plan" (Phase 2) effectively until you have "Initiated" (Phase 1) the project and identified who the stakeholders are and what the project charter entails. Furthermore,
"Monitor and Control" must happen before you can officially "Close" the project.

NEW QUESTION: 103
A nationally federated nonprofit is implementing a single Salesforce org to provide shared fundraising services to its four regional affiliates. Each affiliate and the national nonprofit must see only its own donor data.
Which Salesforce feature would enable this level of record access?
A. Divisions
B. Record Types
C. Role Hierarchy

D. Criteria-based sharing
Answer: A (LEAVE A REPLY)
Explanation
(Role hierarchy)
https://trailhead.salesforce.com/en/content/learn/modules/data_security/data_security_records
Role hierarchies ensure managers have access to the same records as their subordinates. Each role in the hierarchy represents a level of data access that a user or group of users needs.

NEW QUESTION: 104
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: B (LEAVE A REPLY)
When there is a conflict between business lines regarding the addition of a new field that one line of business deems essential and another objects to, the best approach is to use the established governance committee for discussion and resolution. This ensures a structured and balanced decision-making process.
* Governance Committee:
* The governance committee typically includes representatives from various departments and stakeholders.
* They oversee and manage changes, ensuring alignment with organizational goals and policies.
* Discussion and Resolution:
* Present the conflicting requirements to the governance committee.
* Facilitate a discussion to understand the needs and concerns of both business lines.
* Evaluate the impact of adding the field versus the potential for duplicate data and other issues.
* Decision Making:
* The committee will make an informed decision based on the overall benefit to the organization.
* This decision will be documented and communicated to all relevant parties.

By leveraging the governance committee, the consultant ensures that the decision is made transparently, with input from all stakeholders, and in alignment with organizational policies.
References:
CertGod Nonprofit Cloud Consultant Guide

NEW QUESTION: 105
The program manager of an after-school program wants to pull a report that shows all students in the program and their primary parent/guardian with the parent/guardian's cell phone and email. The nonprofit is using NPSP.
Which custom report type should the consultant use to create the report?
A. Program Engagements with or without Household Account
B. Service Participants with or without Program Engagement
C. Contacts with or without Relationships
D. Contacts with or without Service Participants
Answer: A (LEAVE A REPLY)
https://trailhead.salesforce.com/trailblazer-community/feed/0D54S00000A7atiSAB

NEW QUESTION: 106
A nonprofit is looking for an integrated tool that manages more than one channel for personalized journeys, triggers messages automatically to create stronger relationships, and links communications to donations it has received.
Which solution should the consultant recommend?
A. PSP and Experience Cloud
B. NPSP and Pardot
C. NPSP and Marketing Cloud
D. NPSP and Social Studio
Answer: C (LEAVE A REPLY)
Explanation
https://www.salesforce.com/products/marketing-cloud/faq/

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NEW QUESTION: 107

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?
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 (LEAVE A REPLY)
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.
References:
Salesforce Nonprofit Success Pack Documentation
Salesforce Trailhead: Create and Customize Reports in Salesforce

NEW QUESTION: 108
A system admin uploaded a .CSV file using the Data Import Wizard with the NPSP Data Importer. The Mailing Street address field was mapped, but the admin noticed the field was Wizard on all of the records after the import completed.

What is a likely cause?
A. The mapped Salesforce ID was inappropriate for the record type.
B. There were validation rules for the missing field.
C. There were more than 65 columns in the CSV file.
D. The column contained incomplete data.
Answer: B (LEAVE A REPLY)

NEW QUESTION: 109
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?
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 (LEAVE A REPLY)
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.
Reference:
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.

NEW QUESTION: 110
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
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 (LEAVE A REPLY)
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.
Reference:
Salesforce Help: Creating Public Groups
Salesforce Help: Defining Sharing Rules

NEW QUESTION: 111
A nonprofit has a large volume of contacts, accounts, and address records and wants to migrate all of its data into NPSP.
What are two considerations?
Choose 2 answers
A. Managing multiple addresses introduces more complexity.
B. Three addresses per contact or organization can be migrated into NPSP.
C. The default address is updated on a nightly basis.
D. Address records consume additional data storage.
Answer: A,D (LEAVE A REPLY)
When migrating a large volume of contacts, accounts, and address records into NPSP, the following considerations are important:
Managing Multiple Addresses:
NPSP allows for multiple addresses per contact or account, which can introduce additional complexity in managing and maintaining these records.
It is essential to have a clear strategy for handling primary, mailing, and other types of addresses to ensure data consistency and accuracy.
Data Storage Consumption:
Each address record consumes additional data storage in Salesforce.
Nonprofits should be aware of their data storage limits and plan accordingly to avoid running out of storage space.
Consider archiving old or inactive address records to manage storage usage efficiently.
These considerations help ensure a smooth data migration process and ongoing data management within NPSP.
Reference:
Salesforce Help: Managing Addresses in NPSP
Nonprofit Success Pack (NPSP) Documentation: Data Management and Storage

NEW QUESTION: 112
The admin at a nonprofit wants to delegate authority to two specific users to process gift entries.
Which three permissions should the consultant add to a permission set so the users can perform this work with only the necessary level of access?
Choose 3 answers
A. Grant create and edit access to all required objects and fields.
B. Grant visibility to the Gift Entry tab.
C. Grant access to BDI_BatchOvemde and BDI_DataImport Visualforce pages.
D. Grant the View All Data permission.
E. Grant create, edit and delete access to all required objects and fields.
Answer: A,B,C (LEAVE A REPLY)

NEW QUESTION: 113
A nonprofit stores a government-issued personal identification number on each constituent's Contact record in an encrypted field. What should a consultant enable on a Permission Set to ensure the personal identification number is fully accessible by a subset of org users?1
A. View All Data system permission2
B. Manage Encryption Keys system permission3
C. View Encrypted Data system permission4
D. View All Contact object permission5
Answer: (SHOW ANSWER)
In Salesforce, sensitive data like Social Security Numbers or Tax IDs is often protected using Classic Encryption or Shield Platform Encryption. When a field is encrypted, it appears as masked (e.g., XXXX- XX-1234) to most users, even if they have "Read" access to the Contact object.
To allow a specific subset of users (such as the HR Director or a high-level Compliance Officer) to see the actual, unmasked data, the View Encrypted Data system permission must be utilized.
Step-by-Step Implementation:
* Create a Permission Set: The consultant should create a specific Permission Set named "PII Access" or similar.
* Enable System Permission: Under the System Permissions section of the Permission Set, the consultant must locate and check the box for View Encrypted Data.
* Assign to Users: This Permission Set is then assigned only to the specific users who require access to the sensitive identification numbers.
* Security Principle: This follows the "Principle of Least Privilege." Users with this permission can see the data in plain text in reports, list views, and record pages, while all other users see the masked version.
Why other options are incorrect:
* View All Data (Option A): This is a very broad and dangerous permission that grants access to almost all data in the org, but even "View All Data" does not automatically unmask encrypted fields unless View Encrypted Data is also present.
* Manage Encryption Keys (Option B): This is a highly technical administrative permission for managing the security certificates and keys; it does not grant the ability to view field data.
* View All Contacts (Option D): This provides object-level visibility but respects field-level security and masking.

NEW QUESTION: 114
A nonprofit using NPSP performs m-person case management for new and existing clients in the field. When case managers return to the office, they need to enter over 100 contacts from a spreadsheet, and then create a Case for each.
What should the consultant recommend to meet the requirement?

A. Use Data Import Wizard to insert Contacts and related Cases.
B. Configure NPSP Data Importer to upsert Contacts with related Cases.
C. Install Case Management to upsert Contacts and relate them to Cases.
D. Create a web-to-case form that case managers will use to record the contact details.
Answer: B (LEAVE A REPLY)
For entering a large number of contacts from a spreadsheet and creating related cases for each contact, the NPSP Data Importer is the best tool. It allows for configuring upserts (updates or inserts) for Contacts and linking them to related records such as Cases.
Steps:
* Prepare the spreadsheet with the necessary data for Contacts and Cases, ensuring all required fields are included.
* Open the NPSP Data Importer in Salesforce.
* Map the fields in the spreadsheet to the appropriate Salesforce fields for Contacts and Cases.
* Configure the importer to upsert Contacts and create related Cases based on the spreadsheet data.
* Run the import process and verify the data in Salesforce to ensure all Contacts and Cases are correctly created and linked.
References:
CertGod Nonprofit Cloud Consultant Guide: Describes the use of the NPSP Data Importer for bulk data operations and linking related records.
Salesforce Documentation on NPSP Data Importer: Provides instructions on setting up and using the Data Importer for complex data migrations.

NEW QUESTION: 115
A nonprofit hired a consultant to restart a stalled implementation. The nonprofit identified needs by documenting its Salesforce vision and pain points, and by defining specific goals with user stories.
What are two components of a user story the nonprofit should consider?
Choose 2 answers
A. Align each story to the implementation vision.
B. Associate an epic to each story.
C. Assign a priority to each story.
D. Include configuration instructions on each story.
Answer: A,C (LEAVE A REPLY)
When defining user stories for a Salesforce implementation, it is essential to ensure that each story is aligned with the overall vision of the project and that they are prioritized based on business needs. This approach helps in delivering value incrementally and keeps the project focused on the key objectives.
Key Components of a User Story:
* Alignment with Vision (A):

* Ensure that each user story aligns with the nonprofit's overall implementation vision. This alignment helps in maintaining consistency and achieving the strategic goals of the organization.
* Assign Priority (C):
* Assign a priority to each user story to manage the implementation effectively. Prioritizing user stories ensures that the most critical functionalities are developed and delivered first.
References:
Salesforce Agile Development Practices
Salesforce Trailhead: User Stories for Agile Development

NEW QUESTION: 116
A nonprofit organization wants to record the most recent Opportunity close date on Contact records. The nonprofit organization expects the field on the Contact to be overwritten every time a new Opportunity meets the criteria. Which feature should the consultant use to meet this requirement?
A. AppExchange App
B. NPSP Customizable Rollups
C. Roll-Up Summary Field
D. Formula Field
Answer: B (LEAVE A REPLY)

NEW QUESTION: 117
A user has reported an error when trying to merge two contacts using NPSP Contact Merge tab.
Which two issues are the likely cause of the problem?
Choose 2 answers
A. A unique external Id was kept from the non-master contact.
B. The contacts must be in the same household to merge.
C. The user needs to have delete access to the contacts being merged.
D. The NPSP Duplicate Rule was set to Warn instead of auto-merge.
Answer: B,C (LEAVE A REPLY)
(https://trailhead.salesforce.com/en/content/learn/modules/contact-and-account-settings-in-nonprofit-success-pack/merge-duplicate-contacts-and-accounts-npsp)

NEW QUESTION: 118
A consultant is implementing Salesforce for a nonprofit client who is inexperienced with Salesforce. The staff wants to assign an NPSP fundraising training module.
Which training resource should the consultant recommend?
A. Trailblazer Community Dashboard
B. Salesforce Help and Training
C. Trail Tracker by Trailhead

D. AppExchange Report

Answer: C (LEAVE A REPLY)

For a nonprofit client inexperienced with Salesforce, the best training resource to recommend is Trail Tracker by Trailhead:

Trail Tracker by Trailhead:

Trail Tracker is a Salesforce app that integrates with Trailhead, allowing organizations to assign, track, and manage Trailhead training for their users.

It is specifically designed to help users learn Salesforce through guided, interactive learning paths.

Set Up Trail Tracker:

Install Trail Tracker from the Salesforce AppExchange.

Configure the app to align with your nonprofit's training goals.

Assign Training Modules:

Identify the relevant NPSP fundraising training modules on Trailhead.

Use Trail Tracker to assign these modules to staff members.

Monitor Progress:

Use Trail Tracker dashboards to monitor the progress of staff members as they complete their training modules.

Provide additional support or resources as needed to ensure successful completion.

Reference:

Salesforce Trailhead and Trail Tracker documentation

CertGod Nonprofit Cloud Consultant guide

NEW QUESTION: 119

How should a consultant install NPSP in an existing Salesforce organization?

A. Download each NPSP component from the AppExchange, install in the target organization, and complete the post-install instructions

B. Visit the NPSP Installer page, install in the target organization, and complete the post-install instructions

C. Download each NPSP component from The Powrt of Us Hub, install organization, and complete the post-install instructions

D. Visit the NPSP Conversion Utility tool, install in the target organization, and complete the post-install instructions

Answer: B (LEAVE A REPLY)

The most efficient way to install NPSP in an existing Salesforce organization is to use the NPSP Installer. Here's how to do it:

Access the NPSP Installer Page:

Go to the NPSP Installer page: NPSP Installer

This page provides the latest version of NPSP and installation instructions.

Initiate the Installation:

Click on the installation link for the latest NPSP version.

Log in to your Salesforce org where you want to install NPSP.
Follow the Installation Wizard:
Follow the prompts in the installation wizard to complete the installation.
Choose the appropriate options based on your organization's needs (e.g., data model selection, configurations).
Complete Post-Install Instructions:
After installation, follow the post-install instructions provided in the documentation. This might include configuring NPSP settings, setting up users, and data import processes.
By following these steps, you can ensure that NPSP is correctly installed and configured in your Salesforce organization.
Reference:
"Installing NPSP" from Salesforce.org: Installing NPSP
"Post-Install Configuration" from Salesforce Help: Post-Install Configuration

NEW QUESTION: 120
A nonprofit organization is setting up Outcome Management in Nonprofit Cloud to track the effectiveness of its job skills training program. The overall goal of the program is to reduce unemployment among its clients.
What should the organization use to represent the goal in the Outcome Management objects?
A. An Outcome
B. A Benefit
C. An Indicator Result
Answer: A (LEAVE A REPLY)
In the Outcome Management framework, there is a clear distinction between the "service" provided, the
"metric" used for measurement, and the "long-term change" desired.
To represent the "overall goal"-which in this case is the broad, systemic change of "reducing unemployment"
-the consultant must use the Outcome object. An Outcome is the North Star of the Impact Strategy; it defines the qualitative "Future State" the organization is working toward.
Key Components of the Outcome Strategy:
* Outcome (The Goal): "Reduced Unemployment" or "Economic Self-Sufficiency." This is a high-level record that acts as a container for all related measurements.
* Indicator Definition (The Metric): To see if the Outcome is being met, you need a metric, such as the
"Percentage of program graduates employed within 90 days."
* Outcome Activity: This is the link that connects the high-level Outcome to the specific Program (Job Skills Training).

* Indicator Result (The Data): This object (Option C) holds the actual numerical values (e.g., "85%") collected during a specific timeframe. It represents the proof of the goal's achievement, not the goal itself.
* Benefit (Option B): This represents the specific service delivered (e.g., "Resume Workshop").
Delivering a benefit is an activity that contributes to an outcome, but it is not the outcome itself.
By defining the goal as an Outcome, the consultant allows the organization to aggregate data from multiple programs and timeframes to see the cumulative impact they are having on unemployment in their community.

NEW QUESTION: 121
The system administrator at a nonprofit encounters a 500 server error when trying to map additional objects and fields with Advanced Mapping.
What is likely causing the error?
A. A user modified or deleted a mapped field.
B. The administrator is trying to map to an object from a managed package.
C. The administrator is trying to map to an unsupported field type.
D. The target field has a validation rule in place.
Answer: C (LEAVE A REPLY)
The likely cause of encountering a 500 server error when trying to map additional objects and fields with Advanced Mapping is attempting to map to an unsupported field type. Advanced Mapping in Salesforce has specific requirements and limitations regarding the types of fields that can be mapped.
Key Considerations:
Supported Field Types: Ensure that the target fields are of supported types, such as text, currency, number, date, or address fields.
Field Compatibility: Unsupported field types, such as certain complex formula fields or picklists, can cause errors during the mapping process.
Steps to Resolve:
Review Field Types:
Verify the field types of the target fields you are trying to map to ensure they are supported.
Check Documentation:
Refer to Salesforce documentation on Advanced Mapping to confirm the supported field types and any limitations.
Reference:
Salesforce Nonprofit Success Pack Documentation
Salesforce Help: Configure Advanced Mapping for Data Import

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NEW QUESTION: 122
A nonprofit organization has a large number of duplicate contacts the consultant needs to clean up. What should the consultant recommend to handle duplicate clean up in bulk?
A. Salesforce Duplicate Management
B. Third party app from the AppExhange
C. Salesforce Data Loader
D. NPSP Contact Merge
Answer: D (LEAVE A REPLY)

NEW QUESTION: 123
A nonprofit organization wants to give specific users the ability to upload gift acknowledgement templates in Nonprofit Cloud for Fundraising. What should be assigned to the users?
A. The FundraisingAccess and DocGen Designer permission sets
B. The FundraisingAccess and DocGen User permission sets
C. The OmniStudio User permission set
Answer: (SHOW ANSWER)
In the modern Nonprofit Cloud (NPC) for Fundraising, the generation of gift acknowledgments and tax receipts is powered by Document Generation (DocGen) technology. This system allows organizations to move beyond simple mail merges into a robust, server-side document creation process.
To manage these templates effectively, a consultant must understand the distinction between "Designers" and
"Users" within the permission set framework.
* FundraisingAccess: This is the foundational permission set group (or permission set) that grants the user rights to interact with fundraising-specific objects like Gift Transactions, Gift Commitments, and Gift Designations. Without this, the user cannot access the data that needs to be merged into the templates.
* DocGen Designer: This specific permission set is required for administrative or "super user" tasks. A user with the DocGen Designer permission set is granted the ability to upload, manage, and customize the .docx or .pptx files that serve as the templates. This includes

mapping Salesforce fields to the document tokens and organizing the library of available templates for the rest of the team.
* DocGen User (Contrast): In contrast, the DocGen User permission set is intended for staff who only need to trigger the creation of a document (e.g., clicking a "Generate Receipt" button). They cannot upload new templates or change the underlying logic of existing ones.
Step-by-Step Assignment Logic:
* Navigate to Setup > Users > Permission Sets.
* Locate the DocGen Designer permission set and assign it to the staff responsible for template creation.
* Ensure the user also has the SalesforceCRM Content User license enabled on their User record, as templates are stored and managed within Salesforce Files/Content.
* Verify that the FundraisingAccess group is assigned to provide the necessary object-level permissions.
By correctly separating these roles, a consultant ensures that only authorized personnel can modify the official legal and branding language used in the organization's donor communications.

NEW QUESTION: 124
A nonprofit organization needs to report outcomes for each of its programs. The organization just finished defining and creating records for each of its Outcomes in Nonprofit Cloud. The organization wants to link the Outcome objects to its Programs and Benefits to see how they are doing. What should the organization use?
A. Indicator Performance Period records with the Baseline Value field
B. Outcome Activity records with the Type field
C. Indicator Definition records and Indicator Result records
Answer: C (LEAVE A REPLY)

NEW QUESTION: 125
A fundraiser at a nonprofit wants to be donation solicitations on which she is easily track and update her gift asks.
What should requirement
A. Kanban View
B. Einstein for Nonprofits
C. Manage Campaign Members
D. Path
Answer: D (LEAVE A REPLY)
To allow a fundraiser to easily track and update her gift asks for donation solicitations, using Path is a suitable solution in Salesforce. Here's how to configure and use Path for this requirement:
Enable Path:
Navigate to Setup and type "Path" in the Quick Find box.

Click on Path Settings and enable Path if it is not already enabled.
Create a Path:
Click New Path and follow the steps to create a new Path.
Select the Opportunity object since you want to track donation solicitations.
Define the stages of your solicitation process (e.g., Identification, Cultivation, Solicitation, Stewardship).
Configure Key Fields and Guidance:
For each stage, specify key fields that the fundraiser should complete.
Add guidance for success to provide tips and best practices for each stage.
Assign the Path to a Record Type:
If using record types, ensure the Path is assigned to the correct record type for your donation solicitations.
Use Path:
On the Opportunity record page, the fundraiser can now see the Path at the top of the record.
She can track her progress, update fields, and follow the guidance provided at each stage.
Using Path helps the fundraiser to visualize the stages of the solicitation process, ensuring she can track and update gift asks effectively.
Reference:
Salesforce Path Documentation: Path in Salesforce.

NEW QUESTION: 126
A nonprofit needs to clean up large amounts of Contact address data from its street canvassing and telemarketing operations on a monthly basis.
What should the consultant use to standardize addresses in NPSP?
A. Batch Data Import
B. Address Verification
C. NPSP Data Importer
D. Seasonal Addresses
Answer: (SHOW ANSWER)
To standardize addresses in NPSP, especially when dealing with large amounts of Contact address data from street canvassing and telemarketing operations, the consultant should use Address Verification:
Enable Address Verification:
In Salesforce, navigate to the NPSP Settings.
Under "Address Management," enable Address Verification.
Configure the Address Verification settings according to the needs of the nonprofit.
Use Address Verification Service:
Utilize the integrated Address Verification service to standardize and validate addresses.
The service checks addresses against a reliable database, ensuring they are accurate and properly formatted.

Batch Processing:
For large amounts of data, set up batch processing to regularly verify and standardize addresses.
This can be scheduled to run monthly or as needed to keep the address data clean and accurate.
Review and Correct:
After verification, review any addresses flagged as incorrect or incomplete and make necessary corrections.
Using Address Verification helps ensure the nonprofit's address data is accurate and standardized, improving the quality of their data management.
Reference:
Salesforce Nonprofit Success Pack (NPSP) Documentation: Address Management
Salesforce Help: Configuring Address Verification

NEW QUESTION: 127
A nonprofit has engaged a consultant to help export detailed accounting transactions to its existing external financial system using Accounting Subledger. The nonprofit requires export of all pledges when they are booked.
Which solution should the consultant recommend?
A. Upgrade Accounting Subledger from Starter Edition to Growth Edition.
B. Set "Pledged" stage to "Committed" in Stage to State Mapping.
C. Set "Pledged" stage to "Finalized" m Stage to State Mapping.
D. Use Process Builder to create Ledger Entries on Opportunity update.
Answer: (SHOW ANSWER)
https://powerofus.force.com/s/article/ASL-Automate-Stage-to-State-Mappings

NEW QUESTION: 128
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?
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 (LEAVE A REPLY)
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.

Reference: CertGod-NONPROFIT-CLOUD-CONSULTANT.pdf - Question 5, states the need to select the appropriate membership record type to ensure correct rollups.
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.
Reference: CertGod-NONPROFIT-CLOUD-CONSULTANT.pdf - Question 5, emphasizes creating a specific record type for memberships for proper tracking and rollup.

NEW QUESTION: 129
A Household Account has Contacts with Affiliations, Relationships, and Closed/Won donations associated with it.
What is the outcome when a system admin attempts to delete this Household Account record?
A. Since Closed/Won donations are associated with the Account record, an error message displays.
B. The Household Account record and its standard related records are deleted.
C. Since Affiliations and Relationships are associated with the Contacts in this Account, an error message displays.
D. The Household Account record and its standard related records remain.
Answer: A (LEAVE A REPLY)
When a system admin attempts to delete a Household Account record that has Contacts with Affiliations, Relationships, and Closed/Won donations associated with it, Salesforce will prevent the deletion and display an error message. Here's why:
* Closed/Won Donations:
* Salesforce prevents the deletion of records that have important related records, such as Closed
/Won donations, to maintain data integrity.
* Closed/Won Opportunities represent actual donations that are crucial for reporting and financial tracking. Deleting the associated Household Account would disrupt this data integrity.
* Error Message:
* Salesforce will display an error message indicating that the record cannot be deleted because of its associated Closed/Won donations. This safeguard ensures that critical financial data is preserved.
Salesforce Documentation on Record Deletion and Related Records
Salesforce NPSP Data Integrity and Protection Guide

NEW QUESTION: 130
A nonprofit considers risk mitigation to be vital to the success of its implementation project.

What are three elements impacted by change that cause risk?
A. People, processes, cost
B. Time, governance, people
C. Quality, processes, time
D. Cost, quality, time
Answer: D (LEAVE A REPLY)
https://trailhead.salesforce.com/content/learn/modules/project-risk-management-for-partners/identify-assess-address-risk In project management, the three elements impacted by change that cause risk are cost, quality, and time. These elements are often referred to as the project management triangle or triple constraint.
Elements Impacted by Change:
Cost: Changes can lead to increased project costs, affecting the budget and financial resources.
Quality: Changes can impact the quality of the project deliverables, potentially leading to rework or reduced standards.
Time: Changes can affect the project timeline, causing delays and extending the project schedule.
Steps for Risk Mitigation:
Identify Potential Risks:
Conduct a risk assessment to identify potential changes that could impact cost, quality, or time.
Develop Mitigation Strategies:
Create plans to mitigate identified risks, including contingency plans and resource allocations.
Monitor and Control:
Regularly monitor the project for changes and adjust plans as necessary to manage risks effectively.
Reference:
Salesforce Project Management Best Practices
Salesforce Trailhead: Risk Management in Project Management

NEW QUESTION: 131
A nonprofit organization wants to add any donor who gives to its Capital Fund to the Capital Campaign. Which two steps should be taken to accomplish this?
A. Upload a list of all donors as Campaign Members using the Data Import Wizard
B. Enable the Automatic Campaign Member Management in NPSP settings
C. Create a trigger that automatically adds any donor as a Campaign Member
D. Populate the Primary Campaign Source field on the Opportunity record
Answer: (SHOW ANSWER)

NEW QUESTION: 132

A nonprofit needs to send automated renewal emails on a 30/60/90/180-day cadence. Each email template needs to be different based on the members' website visits. Which solution should a consultant recommend?

A. Apex

B. Engagement Plans

C. Flow

D. Account Engagement

Answer: D (LEAVE A REPLY)

This requirement involves complex Marketing Automation that goes beyond the capabilities of standard Salesforce transactional tools. While Salesforce Flow (Option C) can handle time-based triggers, it cannot natively track and react to specific "website visits" or web behavior without significant custom coding or integration.

Account Engagement (formerly Pardot) is the ideal solution for this scenario because of its specialized feature set:

* Website Tracking: Account Engagement uses a tracking code (cookie) to monitor constituent behavior on the nonprofit's website. This allows the system to "know" which pages a member visited (e.g., a
"Benefits" page vs. a "Donate" page).
* Engagement Studio: This is a visual journey builder. A consultant can create an "Automated Renewal Program" where the system waits 30, 60, 90, and 180 days.
* Dynamic Content: At each step of the 30/60/90/180-day cadence, the system can use Dynamic Content to swap out parts of the email template. If a member visited the "Member Events" page recently, the renewal email can automatically include a section about upcoming events to increase the relevancy of the appeal.
* Recency and Frequency: The tool can segment members based on how recently they visited the site, ensuring the messaging is timely and tailored to their current level of engagement.

Why other options are incorrect:

* Engagement Plans (Option B): These create internal Tasks for staff, not automated external emails with web-tracking logic.
* Flow (Option C): While it can send emails, it lacks the built-in web-tracking and high-volume marketing analytics provided by Account Engagement.
* Apex (Option A): This would be an expensive, high-maintenance custom solution for a problem that is solved out-of-the-box by a marketing automation platform.

NEW QUESTION: 133

A Household Account has Contacts with Affiliations, Relationships, and Closed/Won donations associated with it. What is the outcome when a system admin attempts to delete this Household Account record?

A. The Household Account record and its standard related records are deleted.

B. The Household Account record and its standard related records remain.

C. Since Affiliations and Relationships are associated with the Contacts in this Account, an error message displays.
D. Since Closed/Won donations are associated with the Account record, an error message displays.
Answer: (SHOW ANSWER)
In the Nonprofit Success Pack (NPSP), Salesforce implements strict data integrity guardrails to prevent the accidental loss of financial history. One of the most critical protections involves the deletion of Account records that have associated "financial" records.
According to NPSP documentation and standard database behavior:
* Opportunity Protection: An Account cannot be deleted if it has any associated Opportunity (Donation) records that are in a "Closed/Won" stage. This is a hard-coded safety feature in NPSP's trigger framework.
* The Error Message: When a user attempts to delete the Household Account, the system will halt the operation and display an error message such as: "This Account has Opportunities. You must delete all Opportunities before you can delete this Account."
* Audit Integrity: This ensures that the organization's total revenue figures remain accurate. If a household gave $1,000 last year, deleting that account would "orphan" or delete those gifts, leading to a reconciliation nightmare in the general ledger.
Regarding other objects:
* Affiliations and Relationships (Option C): These are child records of the Contact, not the Account. If you were deleting a Contact, these might be impacted, but they do not typically prevent the deletion of the parent Account directly; the primary blocker is the financial transaction.
* Option A and B: These are incorrect because they imply the operation would either complete silently or be ignored without feedback. Salesforce always provides a clear error when a trigger validation (like NPSP's Opportunity check) fails.
To successfully delete such an account, the admin would first have to delete (or re-parent) the Closed/Won Opportunities.

NEW QUESTION: 134
A nonprofit organization has engaged a consultant to implement NPSP and has a large membership program it wants to manage in Salesforce. Which two things does the consultant need to set up to ensure that the membership rollups in NPSP will work properly?
A. Ensure there is a custom field created for Membership Amount and selected for membership rollups
B. Check that the membership record type is selected for membership rollups.
C. Ensure there is an Opportunity record type set up for memberships
D. Check that the grace period is set up for memberships.
Answer: B,C (LEAVE A REPLY)
To ensure that the membership rollups in NPSP work properly, the following settings need to be configured:

* Check that the Membership Record Type is Selected for Membership Rollups:
* Go to NPSP Settings.
* Navigate to "Settings" -> "Donations" -> "Customizable Rollups".
* Ensure that the membership record type is selected and configured to be included in the rollups.
This allows NPSP to aggregate membership data correctly.
* Ensure there is an Opportunity Record Type Set Up for Memberships:
* Navigate to Setup -> Object Manager -> Opportunity.
* Ensure there is a specific record type for memberships (e.g., "Membership Opportunity").
* Configure this record type with the necessary fields and settings specific to membership tracking.
By ensuring these configurations are in place, NPSP can properly roll up membership data and provide accurate metrics for the organization.
"Customizable Rollups in NPSP" from Salesforce Help: Customizable Rollups
"Setting Up Opportunity Record Types" from Salesforce.org: Opportunity Record Types

NEW QUESTION: 135
How often are updates to the NPSP pushed to production orgs?
A. Four times per year
B. Once every month
C. Three toimes per year
D. Once every two weeks
Answer: (SHOW ANSWER)

NEW QUESTION: 136
A consultant has installed NPSP and is setting up Relationships using List Settings. The nonprofit wants the reciprocal relationship to be selected automatically based on gender.
On which object should the consultant create the custom "Gender" field?
A. Affiliation
B. Relationship
C. Contact
D. Account
Answer: B (LEAVE A REPLY)
Explanation
https://powerofus.force.com/s/article/NPSP-Manage-Relationships-Settings

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NEW QUESTION: 137
A nonprofit needs to load approximately 3 million records into Salesforce.
Which API will load the data in the most efficient manner?
A. Streaming API
B. REST API
C. Bulk API
D. SOAP API
Answer: C (LEAVE A REPLY)

NEW QUESTION: 138
The admin at a nonprofit wants to delegate authority to two specific users to process gift entries. Which three permissions should the consultant add to a permission set so the users can perform this work with only the necessary level of access? (Choose 3)
A. Grant the View All Data permission.
B. Grant create and edit access to all required objects and fields.
C. Grant visibility to the Gift Entry tab.
D. Grant access to BOI_BatchOverride and BOI_DataImport Visualforce pages.
E. Grant create, edit, and delete access to all required objects and fields.
Answer: (SHOW ANSWER)
When delegating access to Gift Entry in NPSP, a consultant must follow the "Principle of Least Privilege." This means granting enough access to do the job without exposing the entire system.
Three Essential Permissions:
* Object and Field Access (B): Users must be able to Create and Edit the records involved in the gift entry process. This includes the NPSP Data Import (the staging object), Accounts, Contacts, Opportunities, and GAU Allocations. Note that Delete (Option E) is usually not a "necessary level of access" for a standard entry clerk; they only need to enter and modify records.
* Tab Visibility (C): A user cannot use a feature if they cannot find it. The Gift Entry tab must be set to
"Default On" or "Visible" within the permission set so the users can access the interface.
* Visualforce Page Access (D): NPSP Gift Entry is built using a custom interface. To run this interface, the user's profile or permission set must explicitly have access to the underlying Visualforce pages that power the tool, specifically those related to the Batch Object Importer (BOI). Without access to BOI_BatchOverride and BOI_DataImport, the user will see an "insufficient privileges" error when they try to open the Gift Entry tool.

Option A is incorrect because View All Data is a powerful administrative permission that bypasses all security and is never appropriate for a standard data entry role.

NEW QUESTION: 139
A volunteer manager at a nonprofit organization needs to be able to search for volunteers with landscaping skills who are available at a given time. The organization is using Volunteers for Salesforce. What should the consultant advise?
A. Create a list view on Contacts using a filter for those who have skills that include landscaping. Add the field for Volunteer Availability on the list view and sort by it to find those with landscaping skills who are available at the given time
B. Click on the Find Volunteers tab and fill in the Volunteer Status, Volunteer Availability, and Volunteer Skills tabs with the values you're looking for and hit search
C. Use the Volunteers Wizard to look for volunteers with landscaping skills and Volunteer Availability and choose those available at the given time
D. Create a report with the report type Contacts with Volunteer Hours and Volunteer Jobs. Filter the report by the Volunteer Job for landscaping and Volunteer Availability at the time the Volunteer Manager needs them
Answer: B (LEAVE A REPLY)
For a volunteer manager to search for volunteers with specific skills and availability using Volunteers for Salesforce, the following steps can be advised:
Use the Find Volunteers Tab:
Click on the "Find Volunteers" tab in Salesforce.
Filter Criteria:
Fill in the Volunteer Status, Volunteer Availability, and Volunteer Skills tabs with the required values:
Volunteer Status: Select the appropriate status (e.g., Active, Available).
Volunteer Availability: Specify the dates and times the volunteer is available.
Volunteer Skills: Include landscaping or other required skills.
Hit Search:
Click on the "Search" button to retrieve the list of volunteers matching the criteria.
Review and Contact Volunteers:
Review the list of volunteers who meet the criteria.
Use the contact information provided to reach out to the suitable volunteers for the specific task.
This method leverages the built-in search functionalities in Volunteers for Salesforce, providing an efficient way to find and manage volunteers based on specific needs.
Reference:
Volunteers for Salesforce Documentation: Finding and Managing Volunteers Salesforce Trailhead: Volunteers for Salesforce

NEW QUESTION: 140

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 only change existing Opportunities to the new naming convention by using the
"Refresh Name" action.

B. The organization should change existing Opportunities to the new naming convention by using the
"Refresh All Opportunity Names" button in Bulk Data Processes.

C. The organization should change existing Opportunities to the new naming convention through an upsert.

D. The custom naming convention only applies to new Opportunities of matching record types; it is not retroactive.

Answer: A,B (LEAVE A REPLY)

NEW QUESTION: 141

A nonprofit wants to track various funds in Salesforce to report on its restricted donations. Which NPSP feature should the consultant recommend?

A. Engagement Plans

B. Levels

C. Customizable Rollups

D. General Accounting Units

Answer: (SHOW ANSWER)

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