Salesforce

NP-Con-102

Salesforce Certified Nonprofit Cloud Consultant (NPC)

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Question: 1

A consultant is helping a nonprofit organization set up Outcome Management. Which object should the consultant use to link Programs to Indicator Definitions?

A. Indicator Performance Period
B. Indicator Result
C. Indicator Assignment

Answer: C

Explanation:
In the Salesforce Nonprofit Cloud (NPC) architecture, the Outcome Management feature is designed to provide a standardized way for organizations to define, measure, and track their impact. To successfully implement this, a consultant must understand the hierarchical relationship between several key objects.
The process begins with the Indicator Definition, which acts as a "template" or "master metric." This object stores the logic of what is being measured (e.g., "Number of students who improved their reading level") without being tied to a specific program. To apply this metric to a specific context, Salesforce uses the Indicator Assignment object. This object serves as the essential link (a junction) between the Indicator Definition and the Program, Outcome, or Goal. By using Indicator Assignment, a consultant allows the organization to reuse the same definition across multiple different programs while keeping the tracking and reporting for each program distinct.
Step-by-Step Configuration Flow:
Create Indicator Definition: Define the global metric, specifying the data type and how the progress will be calculated.
Create the Indicator Assignment: This is the core step. Here, the consultant links the specific Program record to the Indicator Definition. This creates the specific context for measurement.
Establish Indicator Performance Periods: Once the assignment is made, the consultant must define the timeframes (e.g., "Q1 2025" or "Annual 2025") during which the program will be evaluated.
Record Indicator Results: Finally, as the program progresses, actual data points are entered into the Indicator Result object, which rolls up to the Performance Period and is contextualized by the Assignment.
Without the Indicator Assignment, the system would have no way of knowing which programs are responsible for which metrics. This structure ensures that a nonprofit can scale its impact measurement across various departments while maintaining a single, clean library of Indicator Definitions.

Question: 2

A nonprofit organization is evaluating Nonprofit Cloud. Where can the organization see whether they qualify for nonprofit pricing and benefits from Salesforce?

A. The Power of Us Program pages
B. Trailhead Academy
C. The Salesforce Commons Program pages

Answer: A

Explanation:

Question: 3

A nonprofit organization performs wealth prospecting on a donor. The organization wants to track the real estate value and the business ownership value of the donors. Which Nonprofit Cloud object has standard fields to track these values?

A. Opportunity
B. Business Account
C. Contact Profile

Answer: C

Explanation:
In the context of the new Nonprofit Cloud (NPC) and its Fundraising capabilities, Salesforce has introduced a more granular data model to support wealth screening and donor prospecting. The correct object for tracking specific financial indicators like real estate and business ownership is the Contact Profile.
In earlier versions of Salesforce for nonprofits (like NPSP), this data might have required custom fields on the Account or Contact. However, in the modern Nonprofit Cloud architecture, the Contact Profile object is specifically designed to store sensitive, person-centric data that aids in major gift strategies. This object contains standard, out-of-the-box currency fields such as:
RealEstateValue: To track the estimated value of property owned by the constituent.
BusinessOwnershipValue: To record the value of private businesses the contact owns.
AssetLiquidationValue: For tracking liquid assets.
StockValue: For public equity holdings.
Step-by-Step Configuration for Wealth Prospecting:
Enable Fundraising: The consultant must first ensure that Fundraising is enabled in the Setup menu, as the Contact Profile fields for fundraising are available in more recent API versions (v59.0 and later).

Set Up Donor Profiles: The consultant should configure the Donor Profile—an account page layout within the Fundraising app.11 This page uses the Contact Profile record to display a "Donor Summary" card.
Data Integration: Often, wealth data is imported from external screening services (like WealthEngine or iWave). The consultant maps these external data points directly to the standard fields on the Contact Profile object.
ARC Integration: To provide a 360-degree view, the Contact Profile data can be surfaced alongside the Actionable Relationship Center (ARC), allowing major gift officers to see a donor's net worth alongside their professional and personal affiliations.
By utilizing the standard Contact Profile object, nonprofits ensure their data remains compatible with built-in analytics and future Salesforce updates.

Question: 4

What is a consideration a consultant should be aware of when implementing Person Accounts in Nonprofit Cloud?

A. All AppExchange Packages have been confirmed to be compatible with Person Accounts.
B. All standard and custom Contact fields will have an API name that begins with Person when being referenced through a Person Account.
C. The Is Person Account field can be used to exclude Person Accounts from Automation Rules and Validation Rules on the Account object.

Answer: C

Explanation:
When implementing the new Nonprofit Cloud (NPC), the shift toward Person Accounts as the default model for individual constituents is a significant change from the traditional Nonprofit Success Pack (NPSP) model. A consultant must understand how this architecture impacts system logic and data integrity.
The Is Person Account (API name: IsPersonAccount) field is a standard Boolean field on the Account object that automatically evaluates to true when an account record is a Person Account. This field is critical for consultants for several reasons:
Filtering Automation: Because Person Accounts live on the Account object alongside Business Accounts (like Foundation or Corporate partners), a single Flow or Apex Trigger on the Account object will fire for both. To ensure that "Company-specific" logic doesn't execute for an individual donor, a consultant uses the IsPersonAccount field as a decision element or entry criteria in Salesforce Flows.
Validation Rules: Validation rules intended for businesses (e.g., "Tax ID is required for all Corporate Accounts") would fail for individual donors if not properly scoped. By adding AND(NOT(IsPersonAccount), ...) to the formula, the consultant ensures the rule only applies to Business Accounts.
Reporting and List Views: This field is the primary way to segment data. While Person Accounts mimic Contacts, they are technically Accounts, so this flag is the only way to quickly differentiate individuals from organizations in global queries.

Regarding the other options: Option A is incorrect because while many packages support Person Accounts, it is not a universal guarantee, and a consultant must always verify compatibility during the design phase. Option B is a common misconception; while some fields are prefixed in certain API contexts, standard contact fields on the Person Account record page often retain their standard labels, and custom fields created on the Contact object specifically for Person Accounts are suffixed with __pc, not prefixed with "Person" for the API name.

Question: 5

A consultant wants to view an interactive graph of a donor’s key relationships. Which feature available in Nonprofit Cloud should the consultant use?

A. Flexcard
B. Contact Profile
C. Actionable Relationship Center

Answer: C

Explanation:
The Actionable Relationship Center (ARC) is the premier visualization tool in Salesforce Nonprofit Cloud for mapping complex constituent webs. Unlike a standard related list, which shows data in a flat table format, ARC provides a dynamic, multi-level graph that allows fundraisers and case managers to explore the connections between people, households, and organizations.
Key Capabilities for a Consultant:
Visual Hierarchy: ARC displays nodes representing records (e.g., a Donor, their Spouse, their Employer, and a Foundation board they sit on). Each node can be expanded to show further related records, such as the Foundation's recent grants or the Spouse's individual contact details.
Standard and Custom Relationships: It natively supports the Party Relationship Model used in NPC, including Account-Account Relationships and Contact-Contact Relationships. This allows for the visualization of both professional affiliations and personal family ties in one view.
Direct Interaction: It is "Actionable" because users can perform tasks directly from the graph. A consultant can configure the graph so a gift officer can create a new "Follow-up Task" or "Note" on a related relative’s record without ever leaving the primary donor's page.
Customization via Templates: Consultants can build custom ARC graphs using the ARC Graph Builder in Setup. You can choose which objects appear, what fields are shown in the side panel when a node is clicked, and even add filters to show only "Active" relationships.
While Flexcards (Option A) are used to display data visually, they are generally used for summarizing record fields rather than interactive relationship mapping. The Contact Profile (Option B) is a data storage object for wealth and personal attributes but does not provide the interactive, spider-web style graph that characterizes the ARC experience.