Salesforce

NP-Con-101

Salesforce Certified Nonprofit Success Pack Consultant

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Question: 1

A nonprofit organization wants a cost-effective solution to generate and send donation acknowledgements automatically to donors via email. Which Salesforce solution should the consultant recommend?

A. Nonprofit Success Pack
B. Commerce Cloud
C. Pardot
D. Marketing Cloud

Answer: A

Explanation:
Install NPSP:
Ensure that NPSP is installed in your Salesforce instance. You can download it from the AppExchange or install it directly from the NPSP Installer page.
Configure Acknowledgement Settings:
Navigate to NPSP Settings.
Under "Donations," find the "Acknowledgements" settings.
Configure the settings to define when and how acknowledgements should be sent.
Set Up Email Templates:
Go to Setup > Classic Email Templates.
Create a new email template or modify an existing one to suit your acknowledgment needs.
Ensure the template includes merge fields to personalize the emails with donor information.
Create Automation with Process Builder:
Use Process Builder to automate the sending of acknowledgment emails.
Create a new process on the Opportunity object.
Set criteria to trigger the process when a new donation is recorded.
Add an action to send an email using the previously created template.
Testing:
Test the process by creating a test donation record and verifying that the acknowledgment email is sent automatically.
Monitoring and Refinement:
Monitor the process to ensure it is working correctly.
Refine the email templates and automation rules based on feedback and evolving needs.
By utilizing the NPSP, nonprofits can streamline their donation acknowledgment process, ensuring timely and personalized communications with donors, ultimately enhancing donor satisfaction and retention.

Question: 2

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 change existing Opportunities to the new naming convention through an upsert.
B. The organization should only change existing Opportunities to the new naming convention by using the "Refresh Name" action.
C. The organization should change existing Opportunities to the new naming convention by using the "Refresh All Opportunity Names" button in Bulk Data Processes.
D. The custom naming convention only applies to new Opportunities of matching record types; it is not retroactive.

Answer: B, C

Explanation:
When a nonprofit organization creates a custom Opportunity name for all organization donations, the consultant should discuss the following considerations:
Using the "Refresh Name" Action (B):
The organization should use the "Refresh Name" action to change existing Opportunities to the new naming convention. This action ensures that the custom naming convention is applied correctly.
Navigate to the Opportunity record.
Click on the "Refresh Name" button to update the Opportunity name according to the new naming convention.
Using the "Refresh All Opportunity Names" Button in Bulk Data Processes (C):
For bulk updates, the organization should use the "Refresh All Opportunity Names" button available in Bulk Data Processes.
Go to NPSP Settings.
Under Bulk Data Processes, find the "Refresh All Opportunity Names" button.
Click on it to update all existing Opportunities to the new naming convention in bulk.
These methods ensure that the custom naming convention is applied consistently across all existing Opportunity records, maintaining data integrity and consistency within the Salesforce org.

Question: 3

A nonprofit organization provides case management to its clients. There is a requirement for a score to be automatically assigned to each client based on several factors such as age, income and number of health conditions. The nonprofit also wants to automate the creation and assignment of follow up tasks related to the client.

Which combination of functions should the consultant recommend?

A. Activities and Customizable Rollups
B. Volunteer Recurrence and Customizable Rollups
C. Engagement Plans and Levels
D. Volunteer Wizard and Reports

Answer: C

Explanation:
For a nonprofit organization providing case management and requiring automatic scoring of clients based on various factors like age, income, and health conditions, along with automating the creation and assignment of follow-up tasks, the best combination of functions is Engagement Plans and Levels.
Engagement Plans: These are used to automate the creation of tasks and follow-up activities based on predefined templates. This feature ensures that specific tasks are generated and assigned to relevant staff members as soon as certain criteria are met.
Steps to Set Up Engagement Plans:
Navigate to the "Engagement Plans" tab in NPSP.
Create a new Engagement Plan Template, defining the tasks and follow-ups that should be created.
Specify the conditions under which this Engagement Plan should be triggered (e.g., a new client intake).
Assign the Engagement Plan to the appropriate client records.
Levels: These are used to categorize clients (or any other records) based on numeric values or other criteria. In this case, Levels can be used to automatically assign a score to each client based on their age, income, and health conditions.
Steps to Set Up Levels:
Navigate to NPSP Settings > Levels.
Create a new Level, specifying the criteria for each level (e.g., age range, income bracket, number of health conditions).
Define the actions that should be triggered when a client reaches a specific level.
By using Engagement Plans and Levels, the nonprofit can automate both the scoring of clients and the creation of follow-up tasks, ensuring a streamlined case management process.
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Question: 4

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 picklist field that will display the categories based on the Total Gifts This Year field.
C. Set up NPSP Levels for the categories based on Total Gifts This Year.
D. 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.

Explanation:
To categorize donors into Gold, Silver, and Bronze based on the total gift amount for the year, the NPSP Levels feature should be utilized. This feature allows the organization to automatically categorize donors based on specified criteria.
Define Levels in NPSP:
Navigate to NPSP Settings > Levels.
Create three new Levels: Gold, Silver, and Bronze.
For each Level, specify the range of the total gift amount for the year. For example:
Gold: $10,000 and above
Silver: $5,000 to $9,999
Bronze: $1,000 to $4,999
Configure Level Criteria:
Set the criteria for each Level to be based on the "Total Gifts This Year" field.
Ensure the system is tracking the total gifts correctly by verifying the Customizable Rollups settings.
Assign Levels to Donors:
The system will automatically evaluate donors and assign them to the appropriate Level based on their total giving for the year.
This categorization can be used in reports, dashboards, and donor segmentation for targeted communication and recognition.
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Question: 5

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

Explanation:
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.

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Question: 6

A consultant is installing NPSP in an existing Salesforce org for a nonprofit organization that plans to use the memberships feature in NPSP. Which action should a consultant take?

A. Create a Membership Opportunity record type.
B. Add a value in the Type field on Opportunity for Membership.
C. Create a Membership Affiliation record type.
D. Add a checkbox field on the Opportunity called "Membership".

Answer: A

Explanation:

When installing NPSP (Nonprofit Success Pack) in an existing Salesforce org for a nonprofit organization that plans to use the memberships feature, the consultant should create a Membership Opportunity record type. This step is crucial because it allows the organization to effectively track and manage membership-related opportunities distinctly from other types of opportunities.

Steps:

Log in to Salesforce: Access the Salesforce org where NPSP will be installed.

Navigate to Object Manager: Go to Setup and search for "Object Manager".

Select Opportunity Object: From the Object Manager, select the Opportunity object.

Create a New Record Type:

Click "Record Types" under the Opportunity object.

Click "New" to create a new record type.

Enter "Membership" as the Record Type Label.

Provide a description such as "Record type for tracking membership opportunities".

Select the existing record type to clone from (e.g., "Master").

Assign this record type to appropriate profiles.
Click "Save".
Customize Page Layouts: Assign and customize page layouts for the new Membership record type as needed.
Verify and Test: Ensure that the Membership record type is correctly set up by creating a test membership opportunity.
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Question: 7

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

Answer: D

Explanation:
When an international nonprofit organization adds a translated relationship picklist value, and the reciprocal relationship record is not displaying correctly, it is typically due to the system administrator not adding the reciprocal relationship value in the NPSP Settings tab.
Steps:
Log in to Salesforce: Access the Salesforce org with NPSP installed.
Navigate to NPSP Settings: Go to the App Launcher, search for "NPSP Settings", and select it.
Find Relationship Settings: In the NPSP Settings, expand "People" and then "Relationships".
Add Reciprocal Relationship:
Click "Reciprocal Method Settings".
Ensure that the new reciprocal relationship values are added and correctly configured.
Check both the primary and reciprocal relationship values to ensure they are set correctly.
Save and Test: Save the settings and test to confirm that the reciprocal relationships display correctly.
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Question: 8

A finance associate needs to track specific funds associated with gifts from individuals and organizations. Gifts may be received as either single amounts associated with one or more funds, and totals by fund will need to be reported on for reconciliation with a finance system. How should the consultant accomplish this with NPSP?

A. Create Campaign records for each of the funds, create a custom Lookup to Campaigns on the Payment Object, and associate them with Payment records representing the amounts towards each fund.
B. Create General Accounting Unit records for each of the funds, and associate them with the Opportunity by GAU Allocation record amounts representing the amounts towards each fund.
C. Create a custom multi-select picklist on the Opportunity record to allow for choosing each of the funds towards which the gift is designated.
D. Create Campaign records for each of the funds, and associate them with the Opportunity Primary Campaign field on the Opportunity records representing the amounts towards each fund.

Answer: B

Explanation:
To track specific funds associated with gifts from individuals and organizations in NPSP, the consultant should create General Accounting Unit (GAU) records for each of the funds and associate them with the Opportunity by GAU Allocation record amounts.
Steps:
Log in to Salesforce: Access the Salesforce org with NPSP installed.
Create GAU Records:
Navigate to the App Launcher and search for "General Accounting Units".
Click "New" to create a new GAU record for each fund.
Fill in the necessary details such as GAU Name, Description, and any other relevant information.
Save the GAU records.
Associate GAUs with Opportunities:
Navigate to the Opportunity related to the donation.
In the Opportunity record, find the "GAU Allocations" related list.
Click "New" to create a new GAU Allocation.
Select the appropriate GAU record from the lookup field.
Enter the allocation amount and any other necessary details.
Save the GAU Allocation record.
Reporting: Use standard or custom reports to track and report on GAU Allocations for reconciliation with the finance system.
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Question: 9

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 400,000 new records to a custom object
C. Uploading 100,000 new Task records
D. Uploading 1 million new Contact records

Answer: D

Explanation:
When a consultant is about to begin a data project with a nonprofit to clean up Opportunity data and needs to temporarily disable NPSP Triggers for performance reasons, it is typically necessary when uploading a large volume of records, such as 1 million new Contact records.
Steps:
Log in to Salesforce: Access the Salesforce org with NPSP installed.
Navigate to NPSP Settings: Go to the App Launcher, search for "NPSP Settings", and select it.
Disable Triggers:
In the NPSP Settings, expand "Bulk Data Processes" and then "TDTM".
Find the specific triggers related to the data being uploaded.
Disable the relevant triggers by unchecking the "Active" checkbox.
Save the changes.
Perform Data Upload:
Use a data loader or similar tool to upload the 1 million Contact records.
Ensure data integrity and verify successful upload.
Re-enable Triggers:
After the data upload is complete, go back to the NPSP Settings.
Re-enable the previously disabled triggers by checking the "Active" checkbox.
Save the changes.
Verify and Test: Confirm that the triggers are working correctly and that the data has been uploaded properly.
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Question: 10

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: B

Explanation:
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.
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