Salesforce

Nonprofit-Cloud-Consultant

Salesforce Certified Nonprofit Cloud Consultant

Product Version

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Latest Version: 17.0

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.
Reference:
CertGod Nonprofit Cloud Consultant Guide:

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.
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.
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.

Answer: C

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.
Reference:
CertGod Nonprofit Cloud Consultant Guide:

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

Answer: C

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.
Reference:
CertGod Nonprofit Cloud Consultant Guide

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