Free Questions for Nonprofit-Cloud-Consultant

Shared by Barrett on 04-10-2024

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Question 1

Question Type: MultipleChoice

A system admin encounters an error at run time that a record update failed when a Customizable Rollup ran.

Which attribute would cause an error?

Options:

A- The object from which the record is derived is a custom object.

B- The target field is on the correct object.

C- The object from which the record is derived is an NPSP object.

D- The target field has an active validation rule.

Answer:

D

Explanation:

A runtime error during a Customizable Rollup operation often occurs if the target field has an active validation rule that prevents the update. Validation rules enforce specific criteria that records must meet before they can be saved, and if these criteria are not met during the rollup operation, an error will occur.

Steps to Troubleshoot:

Review Validation Rules:

Navigate to Setup -> Object Manager -> [Target Object] -> Validation Rules.

Review the validation rules on the target object to identify any that might conflict with the rollup operation.

Modify or Temporarily Disable Validation Rules:

If a validation rule is causing the error, consider modifying the rule to accommodate the rollup operation or temporarily disabling it during the data update process.

Check Rollup Configuration:

Ensure the Customizable Rollup settings are correctly configured and that no unnecessary constraints are in place.

Salesforce Nonprofit Success Pack Documentation

Salesforce Help: Validation Rules

Question 2

Question Type: **MultipleChoice**

An admin at a nonprofit using NPSP finds that the donation totals on a handful of donor's records are not showing the right totals.

How should the consultant troubleshoot this?

Options:

A- Check if the correct Operation is chosen

B- Verify Opportunity Primary Contact

C- Check if the correct target custom field is chosen

D- Verify Customizable Rollups is enabled

Answer:

C

Explanation:

When donation totals on donor records are not showing correctly in NPSP, one common issue is that the Customizable Rollups might be configured incorrectly. Specifically, it's crucial to verify that the correct target custom field is chosen for the rollup calculations.

Steps to Troubleshoot:

Check Customizable Rollups Settings:

Navigate to NPSP Settings -> Donations -> Customizable Rollups.

Review the rollup configurations to ensure that the correct fields are selected as targets for the rollup calculations.

Verify Target Fields:

Confirm that the fields where the totals should appear are correctly mapped in the rollup settings.

Ensure there are no discrepancies or misconfigurations that might cause incorrect calculations.

Review Opportunity Primary Contact:

While the primary contact verification is less likely to affect donation totals directly, it's good practice to check that the opportunities are correctly associated with the primary contacts.

Salesforce Nonprofit Success Pack Documentation

Salesforce Trailhead: Configure Customizable Rollups in NPSP

Question 3

Question Type: MultipleChoice

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?

Options:

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:

B

Explanation:

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.

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.

Question 4

Question Type: **MultipleChoice**

An annual fund coordinator wants to create a report that identifies which Individual donors have yet to make a gift toward the Annual Fund Campaign this year. It is important that the annual giving coordinator avoids soliciting any individuals who are attending an upcoming gal

a. The nonprofit uses Campaigns to track event attendance.

What should a consultant add to the report to exclude gala attendees?

Options:

A- Cross filter

B- Summary formula

C- Bucket field

D- Filter logic

Answer:

A

Explanation:

To exclude gala attendees from the report that identifies individual donors who have yet to make a gift toward the Annual Fund Campaign this year, a cross filter should be added to the report. Cross filters allow you to filter records based on related objects, such as excluding contacts who are campaign members of the gala event.

Steps:

Go to Reports and create a new report or edit an existing report on donors.

Add a cross filter to the report by clicking on the 'Filters' pane and selecting 'Add Cross Filter.'

Set the cross filter to exclude Contacts who are Campaign Members of the specific gala campaign.

Save and run the report to ensure it correctly excludes gala attendees.

Nonprofit Cloud Reporting Guide: Explains how to use cross filters to refine report data based on related objects.

Salesforce Help: Detailed steps on creating and using cross filters in reports.

Question 5

Question Type: MultipleChoice

A nonprofit wants to manage a new program In Salesforce.

What should the consultant recommend as the first step before embarking on a new implementation project?

Options:

A- Set up an implementation timeline and delivery plan.

B- Identify the challenges the nonprofit is currently experiencing.

C- Review data in a .csv file and begin mapping to existing fields.

D- Audit existing standard and custom objects and fields.

Answer:

B

Explanation:

Before embarking on a new implementation project, it is crucial to first identify the challenges the nonprofit is currently experiencing. This ensures that the new solution will address the specific needs and pain points of the organization. Understanding these challenges will guide the implementation strategy and help in configuring Salesforce to meet the nonprofit's goals effectively.

Steps:

Conduct stakeholder interviews to gather information on current processes and challenges.

Analyze the data collected to identify common themes and pain points.

Document the identified challenges and prioritize them based on their impact on the organization's mission and operations.

Use these insights to define the scope and objectives of the new implementation project.

NGO Ebook CRM For Good: Emphasizes the importance of understanding current challenges before starting new projects.

Nonprofit Cloud Implementation Guide: Provides best practices for identifying and documenting challenges to inform implementation strategy.

Question 6

Question Type: **MultipleChoice**

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?

Options:

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

Explanation:

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.

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.

Question 7

Question Type: **MultipleChoice**

A nonprofit wants to use Salesforce technology to train and test its employees on skills related to brand messaging, creating support cases for IT, and publishing online videos.

Which solution should the consultant recommend?

Options:

A- Custom Help pages

B- Prompts for In-App Guidance

C- myTrailhead

D- Knowledge

Answer:

C

Explanation:

myTrailhead is the best solution for a nonprofit organization that wants to train and test its employees on various skills such as brand messaging, creating support cases for IT, and publishing online videos. myTrailhead provides a customized learning experience that can be tailored to specific needs and allows for interactive and engaging training modules. This solution also includes testing capabilities to assess employee understanding and track progress over time.

Nonprofit Cloud Consultant Guide: myTrailhead is recommended for creating customized and engaging training modules that can be tracked and assessed over time.

Question 8

Question Type: MultipleChoice

A nonprofit wants to use Customizable Rollups in its NPSP org.

What should the consultant advise1?

Options:

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:

A

Explanation:

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.

Salesforce Nonprofit Success Pack Documentation

Salesforce Trailhead: Configure Customizable Rollups in NPSP

Question 9

Question Type: **MultipleChoice**

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'?

Options:

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

Explanation:

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.

Salesforce Help: Encrypt Custom Fields

Salesforce Trailhead: Data Security and Encryption

Question 10

Question Type: **MultipleChoice**

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)

Payments = Opportunities with Deliverables
Applications = Activities
Reporting deadlines = Opportunities with Deliverables
Actions = Activities

B)

Payments = Opportunities with Payments
Applications = Deliverables
Reporting deadlines = Deliverables
Actions = Activities

C)

Payments = Opportunities with Payments
Applications = Activities
Reporting deadlines = Activities
Actions = Activities

D)

Payments = Recurring Donations with Opportunities
Applications = Deliverables
Reporting deadlines = Deliverables
Actions = Activities

Options:

A- Option A

B- Option B

C- Option C

D- Option D

Answer:

B

Explanation:

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.

Salesforce Nonprofit Success Pack Documentation: Detailed instructions on using Opportunities, Payments, Deliverables, and Activities in NPSP.

Salesforce Help Documentation: Opportunities, Activities, Payments, Deliverables.

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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

Question 11

Question Type: MultipleChoice

A nonprofit has high staff turnover in several key roles that use Salesforce. The nonprofit needs to improve training and adoption of Salesforce to maximize the value of its investment.

Which two standard Salesforce tools can quickly help new staff use Salesforce with only a Sales or Service Cloud license?

Choose 2 answers

Options:

A- Einstein Bots

B- In-App Guidance

C- Path

D- myTrailhead

Answer:

B, D

Explanation:

To improve training and adoption of Salesforce, the following standard Salesforce tools can be highly effective:

In-App Guidance (B):

This feature allows administrators to create and customize prompts and walkthroughs that appear directly within the Salesforce interface. In-App Guidance helps new users learn how to use Salesforce by providing contextual help and tips.

myTrailhead (D):

myTrailhead is a customizable learning platform that allows organizations to create their own training content. It provides a self-paced learning environment where new staff can access and complete training modules specific to the nonprofit's Salesforce setup.

Steps to Implement:

Set Up In-App Guidance:

Navigate to Setup -> In-App Guidance.

Create prompts and walkthroughs tailored to the nonprofit's processes.

Deploy myTrailhead:

Customize and publish training content on myTrailhead.

Encourage staff to complete the training modules to improve their Salesforce skills.

Salesforce In-App Guidance Documentation

Salesforce myTrailhead Documentation