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Salesforce Certified Nonprofit Cloud Consultant (NPC) Sample Questions (Q25-Q30):

NEW QUESTION # 25

An organization wants to track the giving history and life milestones of donors. The organization's staff must be notified when a donor attends an activity, so they can reach out immediately. Which Nonprofit Cloud for Fundraising feature should the organization use?

- **A. Timeline**
- B. Donor Profile
- C. Recency, Frequency, and Monetary Value (RFM) Scoring

Answer: A

Explanation:

The Timeline component in Salesforce Nonprofit Cloud is a specialized visualization tool that provides a chronological view of a constituent's interactions. It is the primary tool for tracking "life milestones" and "giving history" in a single, scannable interface.

When a consultant implements the Timeline for a nonprofit, they are enabling a feature that goes beyond standard related lists. The Timeline can be configured to pull data from multiple objects-such as Tasks, Events, Gift Transactions, and Life Events-to create a unified story of the donor's relationship with the organization.

Configuring for Real-Time Awareness:

* **Timeline Setup:** In the Setup menu, the consultant defines which objects appear on the timeline. For a donor, this would include "Gift Transactions" for giving history and "Life Events" for milestones like a birth, marriage, or graduation.

* **Activity Tracking:** To address the requirement of being "notified" or aware of activities, the Timeline can be paired with Record Alerts. While the Timeline shows what happened, the alert system can trigger a visual cue on the Donor Profile (the page where the timeline sits) when a new activity record is created.

* **Interactive Exploration:** Staff can hover over a point on the timeline to see details of a specific gift or a workshop attendance. This allows a gift officer to see, for example, that a donor attended a gala three days ago and has a "Major Donor" milestone on the same chart.

While the Donor Profile (Option B) is the page layout that contains the timeline, the Timeline itself is the specific "feature" used to track the chronological sequence of milestones and history mentioned in the prompt.

RFM Scoring (Option A) is a quantitative analysis tool for segmentation but does not provide the chronological narrative or activity tracking required for immediate outreach.

NEW QUESTION # 26

A nonprofit wants to use Volunteers for Salesforce for volunteer management. Which action should a consultant take before installing the package?

- A. Ensure the Program Management Module is already installed.
- B. Check that the nonprofit has the most recent NPSP release.
- **C. Compare usage of roll-up summary fields to limits.**
- D. Apply for license donation for Volunteers for Salesforce.

Answer: C

Explanation:

Volunteers for Salesforce (V4S) is a powerful application, but it is "resource-heavy." One of its primary functions is to roll up volunteer hours from the Volunteer Hours object to the Volunteer Job, the Volunteer Shift, and the Contact record.

The Limit Consideration:

* **Roll-up Summary Limits:** Salesforce has a hard limit on the number of roll-up summary fields allowed per object (typically 40).

* **Impact of V4S:** When you install V4S, it automatically attempts to create several roll-up summary fields on the Contact and other objects. If the nonprofit has already used many custom roll-up fields for fundraising or programs, the V4S installation will fail because it will exceed the object's field limit.

* **Best Practice:** A consultant should always audit the current field usage on the Contact and Account objects before installing V4S to ensure there is "headroom" for the new package's fields.

Why other options are incorrect:

* **Option B:** V4S is independent of PMM.

* **Option C:** While being on a recent NPSP is good, V4S can actually run on a standard Salesforce org without NPSP entirely.

* **Option D:** V4S is a free, open-source package; there are no licenses to "apply" for.

NEW QUESTION # 27

Donations made by nonprofit volunteers are captured on a spreadsheet monthly. The nonprofit utilizes NPSP and Volunteers for

Salesforce. Which two NPSP Data Import features will streamline the import of these donations? (Choose 2)

- **A. Create a Batch and map Opportunity Primary Contact on First and Last Name.**
- B. Schedule a Batch by checking the Process Using Scheduled Job checkbox.
- **C. Create a Batch and match Contact on First and Last Name.**
- D. Schedule a Batch by updating the NPSP Scheduled Batches.

Answer: A,C

Explanation:

The NPSP Data Importer is the most effective tool for handling recurring spreadsheet imports. When dealing with a list of volunteers (who are already Contacts in the system) and their donations, the consultant must configure the "Batch" settings to ensure the data is linked correctly without manual intervention.

Streamlining via Batch Configuration:

* Contact Matching (D): The first step in any import is identifying who the donor is. By creating an NPSP Data Import Batch and setting the contact matching rule to use First Name and Last Name (or email/phone), the system will automatically look for existing volunteers. This prevents the creation of duplicate contacts.

* Opportunity Primary Contact Mapping (C): In NPSP, every donation (Opportunity) should be linked to a Primary Contact to ensure rollups (like "Total Gifts") work correctly on the person's record.

Within the batch settings, the consultant can specify how to map the contact from the spreadsheet to the Opportunity Primary Contact field on the resulting donation record.

* Process: Once the batch is configured with these rules, the clerk simply uploads the file to the batch.

The system handles the "Lookup" logic automatically.

Why Option A and B are incorrect:

These options refer to scheduling the processing of the batch. While helpful, scheduling doesn't "streamline" the data quality or relationship mapping-the logic of matching and mapping names (Options C and D) is what actually automates the reconciliation of volunteers to their gifts.

NEW QUESTION # 28

Caseworkers at a nonprofit organization want to see a single chronological view of all past interactions, cases, referrals, and care plans for a participant. Which Nonprofit Cloud feature should the organization use?

- **A. Timeline**
- B. Contact Profile
- C. Events and Milestones

Answer: A

Explanation:

For caseworkers managing complex social services, the ability to see a participant's "story" in chronological order is vital for providing informed care. The Timeline component in Nonprofit Cloud is the specific feature designed to solve this need.

Key Features for Caseworkers:

* Chronological Aggregation: The Timeline pulls records from various objects-Case Proceedings, Referrals, Care Plans, Tasks, and Benefit Disbursements-and plots them on a single horizontal or vertical axis based on their date.

* Filtering and Search: Caseworkers can filter the view to show only specific types of interactions (e.g., "Show me only medical referrals from the last 6 months").

* Actionability: From the timeline, a caseworker can hover over an event to see summary details or click directly into the record to view full notes.

* Configuration: A consultant configures the Timeline via the Timeline Settings in Setup. You can define "Timeline Configurations" for different user personas; for example, a caseworker might see "Care Plans," while a fundraiser might see "Gift History" on their version of the timeline for the same Person Account.

Why other options are incorrect:

* Contact Profile (Option A): This is a summary view of person-centric data (like age, preferred language, or wealth indicators) but is a static layout, not a chronological view of events.

* Events and Milestones (Option B): This feature is used to track "Life Events" (like birth, marriage, or graduation). While these can be surfaced on the Timeline, the feature itself is a component for life-stage tracking, not a comprehensive chronological record of all cases and interactions.

NEW QUESTION # 29

Which two objects in the Program Management Module are directly connected to objects in Nonprofit Cloud Case Management?
Choose 2 answers

- A. Case
- **B. Program**
- **C. Service Delivery**
- D. Client Alert

Answer: B,C

Explanation:

The relationship between the Program Management Module (PMM) and Nonprofit Cloud Case Management (NCCM) is one of "broad service tracking" meeting "individualized care." While PMM provides the framework for what services an organization offers, NCCM provides the specific tools for caseworkers to manage a participant's journey.

Two objects serve as the primary "connectors" between these two modules:

* Program (C): In PMM, the Program object defines the high-level initiative (e.g., "Housing First"). In Case Management, the Case Plan is often directly linked to a Program. When a caseworker creates a Case Plan for a client, they select the Program that the plan supports. This ensures that the individual's goals and action items are contextualized within the organization's broader mission.

* Service Delivery (A): This is the functional link. PMM uses Service Deliveries to track when a service was provided. In NCCM, when a caseworker fulfills an Action Item that involves providing a specific service (like a "Counseling Session"), the system can automatically generate a Service Delivery record.

This allows the organization to see how specific case-managed activities contribute to overall program outputs.

Why other options are incorrect:

* Case (Option B): While NCCM uses the standard Salesforce Case object, it is a base platform object.

The specific PMM objects are designed to link to the program-centric logic, not just the generic case container.

* Client Alert (Option D): This is a specific feature of Case Management used to flag sensitive information (e.g., "Allergy" or "Safety Risk") on a contact record, but it does not have a direct architectural relationship with the PMM objects like Programs or Service Deliveries do.

NEW QUESTION # 30

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