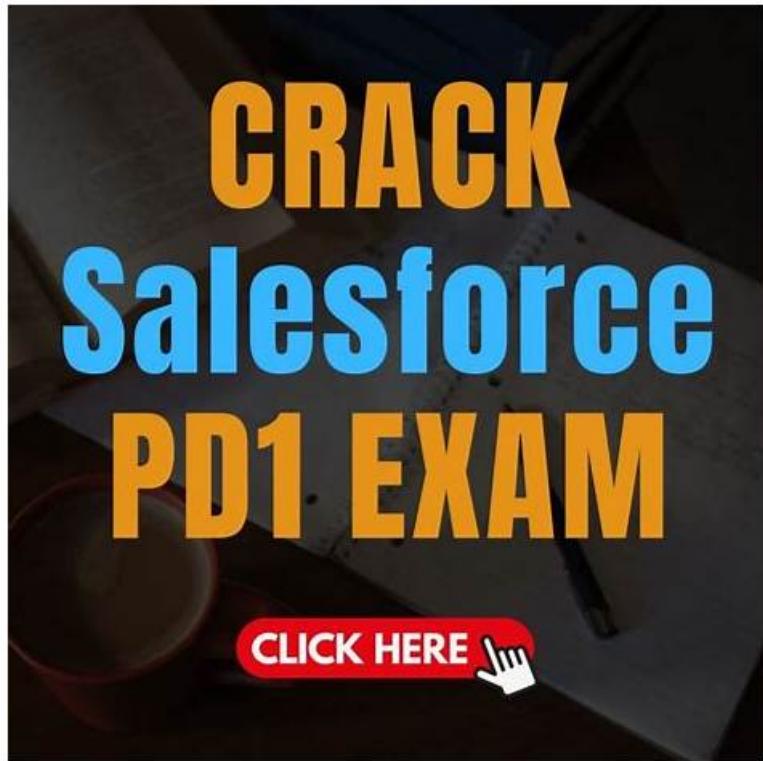


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Salesforce Certified Nonprofit Success Pack Consultant Sample Questions (Q15-Q20):

NEW QUESTION # 15

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

CertGod Nonprofit Cloud Consultant Guide:

NEW QUESTION # 16

A nonprofit is embarking on an organization implementation to replace numerous outdated systems. A consultant recommends establishing a Lean Governance Framework to ensure compliance, assess risk, and roll out a successful implementation for all users. Which component is a key process of the Lean Governance Framework?

- A. Executive buy-in
- B. End user management
- C. Software Development Lifecycle
- D. Power user feedback

Answer: C

Explanation:

A key process of the Lean Governance Framework recommended for ensuring compliance, assessing risk, and rolling out a successful implementation is the Software Development Lifecycle (SDLC).

Software Development Lifecycle (SDLC):

SDLC is a framework that defines the processes and stages involved in software development from initial planning through to deployment and maintenance.

Implementing SDLC as part of Lean Governance ensures that all software changes are thoroughly planned, tested, and reviewed, reducing the risk of errors and ensuring compliance with organizational standards.

Components of SDLC in Lean Governance:

Planning: Defining project goals, scope, and requirements.

Design: Creating design specifications and architecture.

Development: Actual coding and development of software.

Testing: Rigorous testing to ensure software meets all requirements and is free of defects.

Deployment: Releasing the software to users.

Maintenance: Ongoing support and updates.

NEW QUESTION # 17

A nonprofit organization wants to automate some of its routine activities.

Which declarative Salesforce solution is designed for process automation?

- A. Einstein
- B. NPSP TDTM

- C. Pardot
- D. Lightning Flow

Answer: D

Explanation:

Lightning Flow in Salesforce is a powerful declarative tool that allows users to automate business processes and create guided visual experiences. This tool is specifically designed for process automation and can help nonprofits streamline routine activities without requiring any coding knowledge. Here are the steps to use Lightning Flow for automating processes:

Access Lightning Flow Builder:

Navigate to Setup.

In the Quick Find box, type "Flows" and select "Flows" under Process Automation.

Create a New Flow:

Click "New Flow".

Choose the type of flow you want to create. For automating routine activities, "Screen Flow" or "Scheduled-Triggered Flow" might be appropriate.

Design the Flow:

Use the drag-and-drop interface to add elements like screens, decisions, assignments, and loops.

Configure each element to define the process logic.

Set Entry Conditions and Actions:

Define the trigger for the flow (e.g., record creation, updates, scheduled times).

Specify the actions to be taken (e.g., create/update records, send emails, call Apex classes).

Test the Flow:

Before activating the flow, use the Debug mode to test and ensure it works as expected.

Activate the Flow:

Once tested, activate the flow so it starts running based on the defined conditions.

"Get Started with Automation Tools" from Salesforce Help: Salesforce Automation

"Salesforce Flow for Nonprofits" from Salesforce.org: Salesforce.org Guide

NEW QUESTION # 18

A volunteer with a nonprofit works at Universal Containers. The volunteer is recorded in Salesforce as part of the Household's account record, but Universal Containers needs to be entered into the Salesforce system.

How should a consultant track the volunteer's relationship with Universal Containers?

- A. Create a Lead for the volunteer at Universal Containers and create a Relationship record between the volunteer Lead and the volunteer Contact.
- B. Create a Universal Containers Organization Account and create an Affiliation record between the volunteer and Universal Containers.
- C. Create a Lead for the volunteer at Universal Containers and create an Affiliation record between the volunteer Lead and Universal Containers.
- D. Create a Universal Containers Organization Account and create a Relationship record between the volunteer and Universal Containers.

Answer: B

Explanation:

To track the volunteer's relationship with Universal Containers, the consultant should create an Affiliation record. Here's why:

Affiliation Record:

In NPSP, Affiliation records are used to track the relationship between Contacts (individuals) and Accounts (organizations).

Creating an Affiliation record between the volunteer (who is a Contact) and Universal Containers (an Organization Account) effectively captures the volunteer's association with the company.

This method aligns with NPSP best practices for managing relationships and affiliations within the nonprofit's Salesforce instance.

Salesforce Nonprofit Success Pack Documentation on Affiliations

Salesforce NPSP Account and Contact Management Guide

NEW QUESTION # 19

A donor has committed to give a consistent amount every month. The nonprofit wants to update the schedule to reflect one-time adjustments to this amount.

What should the consultant recommend to record the regular donations correctly?

- A. Clone Opportunities with Payments.
- **B. Implement Enhanced Recurring Donations.**
- C. Create a process using Process Builder.
- D. Create scheduled Payments.

Answer: B

Explanation:

Enhanced Recurring Donations in NPSP allows nonprofits to manage recurring donations more flexibly, including making one-time adjustments to the donation amounts. This feature provides a robust way to handle scenarios where donors want to change their regular giving amounts temporarily.

Steps to Implement:

Enable Enhanced Recurring Donations:

Navigate to NPSP Settings -> Donations -> Recurring Donations.

Enable Enhanced Recurring Donations.

Set Up Recurring Donations:

Create a Recurring Donation record for the donor, specifying the regular donation amount and schedule.

Use the Enhanced Recurring Donations feature to adjust the schedule and amounts as needed.

Salesforce Nonprofit Success Pack Documentation

Salesforce Trailhead: Manage Recurring Donations in NPSP

NEW QUESTION # 20

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