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## Salesforce Certified Nonprofit Success Pack Consultant Sample Questions (Q140-Q145):

### NEW QUESTION # 140

A nonprofit wants its staff to spend most of their time in Salesforce, but the staff needs access to several other applications as well. The nonprofit wants a solution that allows staff to use other applications without leaving Salesforce. How should the consultant integrate these applications?

- **A. Implement Salesforce Canvas**
- B. Configure External Data Sources
- C. Configure External Objects
- D. Implement Distributed Marketing

**Answer: A**

Explanation:

To allow staff to use other applications without leaving Salesforce, implementing Salesforce Canvas is the recommended solution:

Salesforce Canvas:

Salesforce Canvas allows you to embed external applications directly within Salesforce

### NEW QUESTION # 141

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?

- A. Make the staff member a system admin.
- B. Tell the staff member to merge Contacts from the View Duplicates component.
- 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 select only two instead of three contacts when using Contact Merge.

**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.

### NEW QUESTION # 142

A nonprofit has significant staff turnover and wants to ensure that the purpose of Salesforce field customization is clearly understood by system admins who are new to the nonprofit.

How should the consultant meet the requirement?

- A. Run the Schema Builder.
- B. Create a field history report.
- C. Run and view the Setup Audit Trail.
- D. Complete all field descriptions.

**Answer: D**

Explanation:

[https://trailhead.salesforce.com/content/learn/modules/data\\_modeling/schema\\_builder](https://trailhead.salesforce.com/content/learn/modules/data_modeling/schema_builder) To ensure that new system admins understand the purpose of Salesforce field customizations, the following steps should be taken:

Complete All Field Descriptions:

For every custom field created in Salesforce, ensure that the "Description" field is filled out comprehensively.

Go to Salesforce Setup.

Navigate to the Object Manager and select the object that has custom fields.

For each custom field, click on "Edit" and provide a detailed description that explains the field's purpose, usage, and any important notes regarding its functionality.

Save the changes.

Document Customizations:

Maintain comprehensive documentation of all custom fields, including their descriptions, data types, and any validation rules associated with them.

Use a shared document or a dedicated Salesforce documentation tool to keep this information accessible and up-to-date.

#### Training and Onboarding:

Create a training module or onboarding program for new system admins that includes an overview of key customizations.

Use Trailhead modules to supplement learning about field management and customization best practices.

#### Utilize Salesforce Resources:

Encourage new admins to use Salesforce's Schema Builder to get a visual overview of the data model, which can help them understand how different fields and objects are interconnected.

Leverage the Setup Audit Trail to review any changes made to field customizations and understand their history.

By ensuring that all field descriptions are complete and providing thorough documentation, new system admins will have a clear understanding of the customizations, helping them manage and maintain the Salesforce instance more effectively.

Salesforce documentation on field customization and descriptions

CertGod Nonprofit Cloud Consultant guide

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#### NEW QUESTION # 143

A nonprofit wants a report that shows Opportunity and General Accounting Unit (GAU) custom field data for gifts to the "General Fund" GAU. The nonprofit wants to add filters so only the gifts connected to the "Annual Campaign" are shown.

Which report should the consultant implement?

- A. Opportunity report type with cross filter for Opportunities with GAU Allocations with filter on the cross filter for Campaign = 'Annual Campaign' and General Accounting Unit = 'General Fund'
- B. Opportunity report type with cross filter for Opportunities with GAU Allocations and filter on Opportunity object for the Primary Campaign Source = 'Annual Campaign' and on the GAU Allocations object for General Accounting Unit 'General Fund'
- C. GAU Allocations with Opportunity report type and filter on the GAU Allocation object for Campaign = 'Annual Campaign' and General Accounting Unit = 'General Fund'
- **D. GAU Allocations with Opportunity report type and filter on the Opportunity object for the Primary Campaign Source = 'Annual Campaign' and filter on the GAU Allocation object for General Accounting Unit = 'General Fund'**

#### Answer: D

#### Explanation:

To create a report that shows Opportunity and General Accounting Unit (GAU) custom field data for gifts to the "General Fund" GAU and adds filters to show only the gifts connected to the "Annual Campaign," the consultant should use the "GAU Allocations with Opportunity" report type. This report type allows for filtering on both Opportunity and GAU Allocation fields.

Steps to Create the Report:

Select Report Type:

Go to the Reports tab and create a new report using the "GAU Allocations with Opportunity" report type.

Add Filters:

Filter on the Opportunity object for the Primary Campaign Source = "Annual Campaign." Filter on the GAU Allocation object for General Accounting Unit = "General Fund." Customize Report:

Add the necessary fields from both the Opportunity and GAU Allocation objects to the report layout.

Save and run the report to view the desired data.

Salesforce Nonprofit Success Pack Documentation

Salesforce Trailhead: Create and Customize Reports in Salesforce

#### NEW QUESTION # 144

A nonprofit organization is using a free trial of Nonprofit Cloud and engages with a consultant to do some custom configuration work. The consultant starts to gather requirements and look at the overall design. Which two things should the consultant know about the trial experiences available on the Salesforce.org website?

- A. Five licenses are included at no cost for qualified customers
- **B. The trial choices include Lightning Enterprise or Lightning Enterprise + NPSP**
- **C. The free trial period is for 30 days**
- D. It is a Developer Edition org

#### Answer: B,C

#### Explanation:

Understanding the trial experiences available on the Salesforce.org website is crucial for setting expectations and planning custom

configuration work. Here's detailed information about the trial options:

Available Trial Experiences:

Lightning Enterprise: This option provides a standard Salesforce Lightning Enterprise edition, suitable for exploring core CRM capabilities.

Lightning Enterprise + NPSP: This trial includes the Nonprofit Success Pack (NPSP) on top of the Lightning Enterprise edition, tailored specifically for nonprofit needs.

Free Trial Period:

The free trial period for Salesforce.org trials is 30 days. This provides enough time to explore features, gather requirements, and conduct initial custom configuration work.

Why Not Other Options:

Option A: While free licenses may be available for qualified customers, this is separate from the trial experience and not universally applicable.

Option D: The trial orgs provided by Salesforce.org are typically not Developer Edition orgs but are configured to showcase the Enterprise capabilities with or without NPSP.

By knowing that the trial choices include Lightning Enterprise or Lightning Enterprise + NPSP and that the free trial period is for 30 days, the consultant can effectively plan and execute the initial phases of the project.

Salesforce.org Trial Experiences Information

Salesforce Nonprofit Success Pack (NPSP) Documentation

## NEW QUESTION # 145

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