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## Salesforce Certified Nonprofit Cloud Consultant (NPC) Sample Questions (Q87-Q92):

### NEW QUESTION # 87

Which Nonprofit Cloud feature can a consultant use to create rollups to display donor giving history?

- A. Business Rules Engine
- B. Donor Giving Summary and Data Processing Engine
- C. Declarative Lookup Rollup Summaries

**Answer: B**

**Explanation:**

The new Nonprofit Cloud (NPC) has introduced a high-performance framework for calculating donor metrics, moving away from the real-time Apex triggers used in the older NPSP model. To display a donor's total giving, last gift date, or largest gift, the system uses a combination of the Data Processing Engine (DPE) and the Donor Giving Summary object.

The Data Processing Engine (DPE):

DPE is a powerful tool built on the Salesforce Industries core that can process massive volumes of data in batches. A consultant uses DPE to:

- \* Extract: Pull data from Gift Transactions (the records of actual money received).
- \* Transform: Aggregate the data—summing the amounts, finding the "max" amount, or identifying the "min" date.
- \* Write Back: Save these calculated values into fields on the Donor Giving Summary record.

The Donor Giving Summary Object:

This object serves as the "storage container" for these rolled-up values. It is linked to the donor's Account (Person Account). By storing the results here, the system ensures that when a fundraiser opens a donor's page, the summary is already calculated and displays instantly without needing to run a live query across thousands of transaction records.

The Workflow:

- \* Clone Templates: Salesforce provides pre-built DPE templates for common fundraising rollups.
- \* Schedule Jobs: The consultant schedules these DPE jobs to run periodically (e.g., nightly).
- \* Display: The Donor Giving Summary component is added to the Lightning record page via the App Builder to show the fields (e.g., TotalGiftAmount, LastGiftDate) to the users.

While Declarative Lookup Rollup Summaries (DLRS) is a popular community tool, it is not a native

"Nonprofit Cloud feature." The Business Rules Engine (Option A) is used for complex decision logic (like eligibility checks), not for aggregating historical financial totals.

**NEW QUESTION # 88**

In the NPSP Data Import Template, the Account fields should contain which two types of information?

Choose 2 answers

- A. Household-related data
- B. Business-related data
- C. Contact's address-related data
- D. Contact's employer-related data

**Answer: A,B**

**Explanation:**

The NPSP Data Import Template is a "flat file" structure designed to populate multiple objects in the NPSP data model simultaneously. Because NPSP uses a "Household-centric" model but also supports corporate and foundation giving, the Account fields in the template serve a dual purpose depending on the record being imported.

\* Business-related data (A): If the nonprofit is importing donations from a corporation, foundation, or local business, the "Account" fields in the template (such as Account Name, Account Phone, etc.) are used to create or match an Organization Account. This allows the consultant to track the entity's history and give them "Hard Credit" for their donations.

\* Household-related data (B): If the nonprofit is importing individual donors, the Account fields are used to define the Household Account. For example, if the template specifies "The Smith Household" in an Account field, NPSP logic will use that data to name the household record it creates for the associated contacts.

\* Address Logic (C): While addresses are part of an account, in the NPSP Data Importer, address data is typically handled by specific Address fields that NPSP then intelligently routes to the Household or the Contact record.

\* Employer Logic (D): Tracking an employer is usually handled via Affiliations. While the employer is an Account, the template has specific "Home" vs. "Work" logic to handle these relationships separately from the primary account being created.

In summary, the Account columns in the CSV template are the landing spot for any data related to the

"Institutional" or "Household" entity that owns the donation or contains the contact.

**NEW QUESTION # 89**

A board member introduced a high-net-worth individual to the work of the nonprofit. The individual made a donation at an event. The fundraising manager wants to record this information in Salesforce. It is important the donation is hard credited to the individual while ensuring this donation, as well as any future donations from the individual, are soft-credited to the board member. The board

member and the individual already exist as contacts in Salesforce. How should the data be entered?

- **A. Create a relationship between the individual and the board member with a Related Opportunity Contact Role of Soft Credit. Create the donation opportunity for the individual.**
- B. Create a relationship between the individual and the board member. Create the donation opportunity for the individual. Enter a Partial Soft Credit for the board member.
- C. Create a relationship between the individual and the board member. Create the donation opportunity for the individual. Add the board member as a Soft Credit contact role to the donation.
- D. Create the donation opportunity for the individual. Add the board member as a Soft Credit contact role for the donation. Create a relationship between the board member and the individual.

**Answer: A**

Explanation:

This requirement involves two parts: a one-time transaction and an automated long-term "influence" tracking.

In NPSP, this is best accomplished by using the Relationship object's advanced soft-credit capabilities.

Step-by-Step Implementation:

\* Define the Automated Soft Credit: The consultant should create a Relationship record between the Board Member and the Donor.

\* Set the Related Opportunity Contact Role: On this Relationship record, there is a field called Related Opportunity Contact Role.

The consultant should select Soft Credit (or a custom role like "Solicitor").

\* The Automation Logic: By setting this field on the relationship, NPSP's trigger framework is instructed that every time a donation is created where the donor is the "Primary Contact," the person on the other end of the relationship should automatically be added to that donation as an Opportunity Contact Role with the specified soft credit role.<sup>45</sup>

\* Result: When the fundraiser creates the current donation, the board member is automatically soft-credited. For every future donation the donor makes, the system will continue to grant that soft credit automatically, satisfying the requirement to track all future gifts without manual intervention.

Why other options are incorrect:

\* Option A and D: These suggest adding the soft credit manually to the current donation. While this works for the current gift, it does not address the "any future donations" requirement, which would require the fundraiser to remember to do it every single time.

\* Option C: Partial Soft Credits are used for splitting gifts among multiple people (e.g., \$50 to person A, \$50 to person B). It is more complex than needed here and does not have the automated "future" triggering logic found in the Relationship-based soft credit model.

## NEW QUESTION # 90

A nonprofit organization is evaluating Nonprofit Cloud. The organization has common focus areas, which are used to track programs, individuals, and grants to organize data across departments. Which Nonprofit Cloud feature can the organization use to organize the data in the same manner?

- A. Compliant Data Sharing
- **B. Interest Tags**
- C. Data Pipelines

**Answer: B**

Explanation:

To organize data across different departments and objects using "focus areas" (e.g., "Youth Literacy," "Veterans Affairs," or "Sustainability"), a consultant should implement Interest Tags.

Interest Tags (built on the Salesforce Industry's Tagging framework) provide a flexible, "horizontal" way to categorize records regardless of their object type.

How to Implement Focus Areas with Interest Tags:

\* Define Tag Categories: The consultant creates a Tag Category called "Focus Areas."

\* Create Tags: Within that category, the consultant creates individual Interest Tags (e.g., "Environment," "Health," "Education").

\* Cross-Object Application: Unlike a standard picklist which is tied to one object, Interest Tags can be added to almost any object in the Nonprofit Cloud. A consultant adds the "Interest Tags" component to:

\* Programs: To show the focus of the service.

\* Person Accounts: To show the interests of a donor or participant.

\* Individual Applications: To show the focus of a grant request.

\* Unified Reporting: Because all these records share the same tags, the organization can easily run a report to see "Everything related

to Youth Literacy"-including the donors interested in it, the programs delivering it, and the grants funding it.

Why other options are incorrect:

\* Data Pipelines (Option A): This is a tool for high-volume data transformation and aggregation, not for qualitative categorization.

\* Compliant Data Sharing (Option C): This is a security feature for record-level visibility, not a data organization or tagging tool.

Interest Tags are the architecturally correct choice for cross-departmental

"Focus Area" tracking.

### NEW QUESTION # 91

A nonprofit needs more insight into why some corporate sponsorships are closing and why others are lost.

They want to evaluate information including pipeline value, number of opportunities, Pardot score, win/lost percentage, stage value, and a table of opportunities. The system admin wants to deploy a solution quickly.

Which solution should a consultant recommend?

- A. Insights Platform Data Integrity
- **B. Salesforce Reports**
- C. NPSP Advanced Mapping
- D. B2B Marketing Analytics

**Answer: B**

Explanation:

When a nonprofit requires immediate visibility into their opportunity pipeline and win/loss metrics, the most efficient and "quick to deploy" solution is Salesforce Reports and Dashboards.

Why Salesforce Reports is the best fit:

\* Standard Functionality: Reports are a native part of the Salesforce platform. There is no additional software to install or license to procure.

\* Cross-Object Reporting: Salesforce allows for "Opportunities with Pardot (Account Engagement)" report types. This allows the consultant to pull in the Pardot Score alongside standard Opportunity fields like Stage, Amount, and Probability.

\* Visual Analytics: Using a Dashboard, the consultant can create a "Corporate Sponsorship Pipeline" view. They can include:

\* Funnel Charts: For pipeline value by stage.

\* Summary Tables: To list the specific opportunities.

\* Gauge Charts: For the win/loss percentage.

\* Speed of Deployment: A consultant can build a comprehensive dashboard meeting all these requirements in a matter of hours, whereas B2B Marketing Analytics (Option B) requires a complex setup process involving the "Analytics Studio," data syncs, and specialized licenses.

Why other options are incorrect:

\* Advanced Mapping (Option A): This is a data import tool, not an analytics or reporting tool.

\* Insights Platform (Option D): This is used for data cleansing and duplicate management, not for pipeline performance analysis.

By leveraging standard reports, the nonprofit gets the "insight" they need immediately using the data already sitting in their NPSP instance.

### NEW QUESTION # 92

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