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Salesforce Certified Nonprofit Cloud Consultant (NPC) Sample Questions (Q20-Q25):

NEW QUESTION # 20

A user has been assigned the System Administrator Profile in Nonprofit Cloud. The user discovers that they cannot see any Nonprofit Cloud for Fundraising objects. What is a possible cause of this issue?

- A. The Sharing Rules are missing for the Fundraising objects.
- B. The Permission Set License is unassigned.

- C. The custom Tabs have not been created for the Fundraising objects.

Answer: B

Explanation:

One of the most common configuration hurdles in Nonprofit Cloud is understanding the "Two-Key" access model. Unlike standard Sales or Service Cloud, where a Profile can grant access to almost any object, Industry Clouds (like NPC) require a Permission Set License (PSL) to be assigned before the objects even become "visible" or "available" in the system's schema for that user.

The "Two-Key" Access Model:

* The First Key (Permission Set License): The PSL "unlocks" the feature set at the organization level for a specific user. For Fundraising, the user must be assigned the Nonprofit Cloud Fundraising PSL.

Without this, the Fundraising objects (like Gift Transaction) literally do not exist from that user's perspective, even if they are a System Administrator.

* The Second Key (Permission Set): Once the license is assigned, the user then needs a Permission Set (e.g., "Fundraising Access") to grant the actual CRUD (Create, Read, Update, Delete) permissions.

Step-by-Step Resolution for a Consultant:

* Navigate to Setup > Users.

* Open the user record for the System Administrator.

* Scroll to the Permission Set License Assignments related list and click Edit Assignments.

* Locate and check the box for Nonprofit Cloud Fundraising (and any other relevant industry licenses like Nonprofit Cloud Grantmaking).

* Once the PSL is saved, the Admin will then be able to assign themselves the necessary Permission Sets to see and manage the Fundraising objects.

Option A is incorrect because Sharing Rules control which records you see, not whether the object itself is visible. Option B is incorrect because tabs are easily accessible via the App Launcher; if the objects are missing from the "All Objects" list, it is a licensing and permissioning issue, not a tab configuration issue.

NEW QUESTION # 21

A human services nonprofit needs to track client goals and action items related to those goals. The nonprofit is unsure whether Program Management Module alone will meet its requirements. The nonprofit is considering whether to implement Nonprofit Cloud Case Management. What should the consultant discuss with the nonprofit?

- A. Program Management Module can track Case Plans and Action Items.
- B. Program Management Module has custom objects for calendars and activities.
- C. Case Management requires Experience Cloud licenses.
- **D. Case Management has a custom object for tracking goals.**

Answer: D

Explanation:

For a consultant, it is vital to distinguish between the Program Management Module (PMM) and Nonprofit Cloud Case Management (NCCM). While they work together, they serve different functional depths.

* PMM (Standard Service Tracking): PMM is designed for "Service Delivery." It tracks which clients are in which programs and when they received a service (e.g., "John attended the Food Bank on Tuesday"). It is excellent for high-volume, low-touch interactions.

* NCCM (Deep Clinical/Social Work): Nonprofit Cloud Case Management is designed for "high-touch" human services. It introduces a much more granular data model. Specifically, it includes custom objects like Goals and Action Items that are part of a Case Plan. These allow a caseworker to define a specific journey for a client (e.g., Goal: "Secure Employment," Action Item: "Draft Resume").

The Core Distinction:

The consultant should explain that while PMM tracks what was delivered, Case Management provides the specialized objects needed to track the client's long-term progress through Goal tracking.

* Option A: PMM does not have specialized calendar objects; it uses standard Salesforce Activities.

* Option C: This is incorrect. Case Plans and Action Items are features of Case Management, not the standard PMM.

* Option D: Case Management does not require Experience Cloud, though they are often used together for participant portals.

By highlighting the Goal and Action Item objects, the consultant helps the nonprofit understand that Case Management is the correct choice for their "care-centric" requirements.

NEW QUESTION # 22

A nonprofit organization provides direct care services to clients based on their individual needs. The process for clients to begin receiving services includes meeting with a caseworker for an intake evaluation that includes a series of questions to determine the client's needs and assets. Which Salesforce Industries feature can be used to create an efficient intake process?

- **A. Dynamic Assessments**
- B. Interaction Summaries
- C. Actionable Lists

Answer: A

Explanation:

For organizations delivering personalized social services, the intake evaluation is the most critical touchpoint.

To manage this efficiently, Salesforce Nonprofit Cloud utilizes Dynamic Assessments, a feature built upon the Discovery Framework and OmniStudio (specifically OmniScript).

Unlike a static form, a Dynamic Assessment allows a caseworker to navigate a "branching" path of questions.

If a client answers "Yes" to a question about housing instability, the system can automatically trigger a sub-section of questions regarding shelter history. If they answer "No," those questions remain hidden, reducing "form fatigue" and ensuring the intake is as fast and relevant as possible.

Step-by-Step Implementation for the Consultant:

- * Define Assessment Questions: Using the Discovery Framework, the consultant creates a library of individual questions (e.g., "Do you have dependable transportation?"). These questions are modular and can be reused across different intake forms.
- * Build the OmniScript: The consultant uses the OmniScript Designer to arrange these questions. This is where the Conditional Logic is applied (e.g., "Set Element Visibility" based on prior answers).
- * Map to Objects: Through DataRaptors or Integration Procedures, the consultant ensures that the data captured during the assessment is automatically pushed into the correct Salesforce objects, such as Person Accounts, Case Proceedings, or Life Events.
- * Action Plan Integration: Often, the completion of a Dynamic Assessment is linked to an Action Plan, which might automatically generate a "Welcome Kit" task or a "Referral" based on the needs identified during intake.

By using Dynamic Assessments, the nonprofit ensures a standardized, compliant, and data-driven intake process that captures a 360-degree view of the client's assets and barriers to success without requiring the caseworker to navigate through irrelevant fields.

NEW QUESTION # 23

A nonprofit wants to make a substantial technology shift that will affect multiple teams and departments.

Which two initial steps should a consultant discuss with the nonprofit? (Choose 2)

- **A. Form a powerful guiding coalition.**
- **B. Establish a sense of urgency.**
- C. Summarize final technology implementation steps.
- D. Deploy features to meet departmental requirements.

Answer: A,B

Explanation:

For a "substantial technology shift," a consultant must apply Change Management principles, such as Kotter's 8-Step Process for Leading Change. Technology is only one part of the project; the human element is what determines success.

Initial Strategic Steps:

- * Establish a Sense of Urgency (C): People are naturally resistant to change. The consultant must help the organization articulate why this shift is necessary now. This involves identifying the risks of staying with the current siloed systems (e.g., "We are losing 20% of our donors because our data is inaccurate") and the opportunities of the new system. Without urgency, the project will likely lose momentum.
- * Form a Powerful Guiding Coalition (D): A technology shift cannot be led by the IT department alone. A consultant must encourage the formation of a team that includes Executive Sponsors (to provide budget and authority) and Departmental Champions (to provide ground-level influence). This coalition works together to overcome resistance and ensure the project remains aligned with the mission.

Why other options are incorrect:

- * Summarizing final steps (Option A): This happens at the end of the project lifecycle.
- * Deploying features (Option B): You cannot deploy features successfully until the groundwork for change has been laid. Jumping straight to deployment without leadership alignment is a leading cause of implementation failure.

NEW QUESTION # 24

A nonprofit organization wants to give specific users the ability to upload gift acknowledgement templates in Nonprofit Cloud for Fundraising. What should be assigned to the users?

- A. The OmniStudio User permission set
- B. The FundraisingAccess and DocGen User permission sets
- **C. The FundraisingAccess and DocGen Designer permission sets**

Answer: C

Explanation:

In the modern Nonprofit Cloud (NPC) for Fundraising, the generation of gift acknowledgments and tax receipts is powered by Document Generation (DocGen) technology. This system allows organizations to move beyond simple mail merges into a robust, server-side document creation process.

To manage these templates effectively, a consultant must understand the distinction between "Designers" and "Users" within the permission set framework.

* FundraisingAccess: This is the foundational permission set group (or permission set) that grants the user rights to interact with fundraising-specific objects like Gift Transactions, Gift Commitments, and Gift Designations. Without this, the user cannot access the data that needs to be merged into the templates.

* DocGen Designer: This specific permission set is required for administrative or "super user" tasks. A user with the DocGen Designer permission set is granted the ability to upload, manage, and customize the .docx or .pptx files that serve as the templates. This includes mapping Salesforce fields to the document tokens and organizing the library of available templates for the rest of the team.

* DocGen User (Contrast): In contrast, the DocGen User permission set is intended for staff who only need to trigger the creation of a document (e.g., clicking a "Generate Receipt" button). They cannot upload new templates or change the underlying logic of existing ones.

Step-by-Step Assignment Logic:

* Navigate to Setup > Users > Permission Sets.

* Locate the DocGen Designer permission set and assign it to the staff responsible for template creation.

* Ensure the user also has the SalesforceCRM Content User license enabled on their User record, as templates are stored and managed within Salesforce Files/Content.

* Verify that the FundraisingAccess group is assigned to provide the necessary object-level permissions.

By correctly separating these roles, a consultant ensures that only authorized personnel can modify the official legal and branding language used in the organization's donor communications.

NEW QUESTION # 25

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