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Salesforce Certified Nonprofit Cloud Consultant (NPC) Sample Questions (Q126-Q131):

NEW QUESTION # 126

A consultant wants to enable Person Accounts as part of the Nonprofit Cloud setup process. What is a limitation when using Person Accounts?

- A. Person Accounts do not work with Opportunity Contact Roles.

- B. Person Account formulas cannot reference custom formula fields from Contacts.
- C. Person Accounts cannot be invited to events or associated with activities.

Answer: B

Explanation:

When implementing Nonprofit Cloud (NPC), the transition to Person Accounts is a foundational architectural choice. While Person Accounts effectively combine Account and Contact attributes into a single record to represent an individual, they come with specific technical constraints that consultants must navigate during the solution design phase.

One significant limitation involves field references in formulas. Because a Person Account is technically a hybrid, it utilizes fields from both the Account and Contact objects. However, from a metadata perspective, a formula created on the Account object (which is the parent for the Person Account) cannot directly reference a custom formula field that resides on the Contact object. This is because the system does not allow "cross-object" formula references between the Account and Contact layers within the Person Account record structure.

To work around this, a consultant must often recreate the logic directly on the Account object or use a standard (non-formula) field on the Contact that is populated via Flow, which can then be surfaced on the Person Account.

Other limitations and considerations include:

* Opportunity Contact Roles (Option C): This is actually supported. In fact, Person Accounts are frequently used as Contact Roles in donor management and gift processing.

* Activities (Option B): Person Accounts fully support Tasks, Events, and being invited to meetings, just like a standard Contact or Lead.

* AppExchange Compatibility: Not all third-party apps are "Person Account ready." A consultant must verify that any external integrations or packages can handle the IsPersonAccount field and the unique record type structure.

Understanding these limitations ensures that the data model supports the organization's reporting and automation needs without hitting architectural roadblocks late in the implementation.

NEW QUESTION # 127

A Household Account has Contacts with Affiliations, Relationships, and Closed/Won donations associated with it. What is the outcome when a system admin attempts to delete this Household Account record?

- A. Since Closed/Won donations are associated with the Account record, an error message displays.
- B. Since Affiliations and Relationships are associated with the Contacts in this Account, an error message displays.
- C. The Household Account record and its standard related records remain.
- D. The Household Account record and its standard related records are deleted.

Answer: A

Explanation:

In the Nonprofit Success Pack (NPSP), Salesforce implements strict data integrity guardrails to prevent the accidental loss of financial history. One of the most critical protections involves the deletion of Account records that have associated "financial" records.

According to NPSP documentation and standard database behavior:

* Opportunity Protection: An Account cannot be deleted if it has any associated Opportunity (Donation) records that are in a "Closed/Won" stage. This is a hard-coded safety feature in NPSP's trigger framework.

* The Error Message: When a user attempts to delete the Household Account, the system will halt the operation and display an error message such as: "This Account has Opportunities. You must delete all Opportunities before you can delete this Account."

* Audit Integrity: This ensures that the organization's total revenue figures remain accurate. If a household gave \$1,000 last year, deleting that account would "orphan" or delete those gifts, leading to a reconciliation nightmare in the general ledger.

Regarding other objects:

* Affiliations and Relationships (Option C): These are child records of the Contact, not the Account. If you were deleting a Contact, these might be impacted, but they do not typically prevent the deletion of the parent Account directly; the primary blocker is the financial transaction.

* Option A and B: These are incorrect because they imply the operation would either complete silently or be ignored without feedback. Salesforce always provides a clear error when a trigger validation (like NPSP's Opportunity check) fails.

To successfully delete such an account, the admin would first have to delete (or re-parent) the Closed/Won Opportunities.

NEW QUESTION # 128

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 # 129

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 custom Tabs have not been created for the Fundraising objects.
- B. The Sharing Rules are missing for the Fundraising objects.
- **C. The Permission Set License is unassigned.**

Answer: C

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 # 130

A nonprofit offers courses that grant teachers credit toward maintaining their teaching certification. Teachers can enroll in an annual cohort to complete the course modules together. The nonprofit needs to track the courses each teacher completes and the credits awarded to them. Which solution should a consultant recommend?

- A. Engagement Plans
- **B. Program Management Module**
- C. Self-Service Portal
- D. Service Cloud

Answer: B

Explanation:

The Program Management Module (PMM) is the standard industry solution for tracking the delivery of mission-centric services. In this scenario, the "Courses" are the services, and the "Teachers" are the participants.

Mapping the Requirement to PMM Objects:

* The Course (Program/Service): Each certification course is modeled as a Program. Individual modules or sessions within that course are modeled as Services.

* Annual Cohorts (Program Cohort): PMM has a standard Program Cohort object. This is perfectly suited for tracking a group of teachers who start and move through the certification modules together on an annual basis.

* Tracking Completion (Service Delivery): When a teacher completes a module, a Service Delivery record is created. The consultant can add a custom field to the Service Delivery object to track the "Credits Awarded" for that specific session.

* Teacher Enrollment (Program Engagement): The teacher's overall progress toward their certification is tracked via the Program Engagement record, which rolls up the total number of credits earned from the related Service Deliveries.

While a Self-Service Portal (Option D) might be the interface the teachers use, and Service Cloud (Option B) provides the base infrastructure, the Program Management Module provides the specific data model (Programs, Cohorts, and Deliveries) required to track credits and educational progress out-of-the-box.

NEW QUESTION # 131

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