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Salesforce Certified Nonprofit Success Pack Consultant Sample Questions (Q76-Q81):

NEW QUESTION # 76

A system administrator encounters an error at run time that a record couldn't be updated when a Customizable Rollup ran. What should the consultant check?

- A. If the Target Field exists
- B. If the Target Field is a NPSP field
- C. If the Target Field has a validation rule
- D. If the Target Object is a custom object

Answer: C

Explanation:

When encountering an error at run time indicating that a record couldn't be updated during a Customizable Rollup operation, it is often due to validation rules on the target field that prevent the update.

Check the Target Field for Validation Rules:

Navigate to Setup > Object Manager.

Select the object that contains the target field.

Go to Fields & Relationships and find the target field.

Review any validation rules associated with this field to ensure they are not causing the update to fail.

Modify or Disable Validation Rules:

If a validation rule is causing the issue, consider modifying it to allow updates during the rollup operation.

Alternatively, temporarily disable the validation rule, perform the rollup operation, and then re-enable the validation rule.

Test the Rollup Operation:

After addressing any validation rules, rerun the Customizable Rollup operation to ensure that the error is resolved.

Monitor the operation to confirm that the updates are processed correctly without triggering validation errors.

By ensuring that validation rules on the target field do not interfere with the rollup operation, the consultant can resolve the error and ensure smooth data processing.

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NEW QUESTION # 77

A major donor officer needs to capture wealth scoring to support individual cultivations.

How is this best represented in the NPSP?

- A. Report on the total amount of donations received by the nonprofit in the past year, and rank it against peer institutions to best cultivate individual donations.
- B. Using an AppExchange application, collect and rank other nonprofits' wealth information to understand how best to cultivate individual donations.
- C. Report on the total amount of an individual's donations summarized on their Contact record and rank it against donations to the nonprofit by other individual donors to best cultivate individual donations.
- **D. Using an AppExchange application, collect and rank donor prospects' wealth information to understand how to best cultivate individual donations.**

Answer: D

Explanation:

To capture and analyze wealth scoring for donors in Salesforce, leveraging an AppExchange application is the most effective approach. These applications can provide comprehensive wealth data and insights to support donor cultivation efforts. Here's how to do it:

Identify Suitable AppExchange Applications:

Search the Salesforce AppExchange for wealth screening and donor prospecting tools (e.g., WealthEngine, DonorSearch).

Install the Application:

Follow the installation instructions provided by the selected application.

Ensure necessary permissions and configurations are set up.

Configure Wealth Scoring:

Set up the application to pull in wealth data for your donor contacts.

Use the provided features to rank and score donors based on their wealth data.

Integrate with NPSP:

Ensure the wealth data integrates with your existing NPSP setup.

Create reports and dashboards to visualize and analyze donor wealth information.

"WealthEngine for Salesforce" on AppExchange: WealthEngine

"DonorSearch for Salesforce" on AppExchange: DonorSearch

NEW QUESTION # 78

A nonprofit has asked a consultant to configure Lightning Record Pages to optimize the user interface.

Which two resources should the consultant use to ensure the nonprofit staff are up to date on the latest Salesforce platform features and best practices?

Choose 2 answers

- A. Salesforce Help
- **B. Trailhead**
- **C. Power of Us Hub**
- D. Salesforce Known Issues

Answer: B,C

Explanation:

To keep nonprofit staff up to date on the latest Salesforce platform features and best practices, the following resources are recommended:

Trailhead:

Trailhead is Salesforce's free, interactive learning platform. It offers modules, projects, and trails that cover new features, best practices, and hands-on activities to help users learn and apply Salesforce skills.

Regularly check Trailhead for new content related to Salesforce updates and best practices.

Power of Us Hub:

The Power of Us Hub is an online community specifically for Salesforce.org users, including nonprofits. It provides a wealth of resources, discussions, and updates about Nonprofit Cloud and related Salesforce features.

Join the Power of Us Hub to stay informed about new features, best practices, and upcoming releases.

Trailhead: trailhead.salesforce.com

Power of Us Hub: powerofus.force.com

NEW QUESTION # 79

A nonprofit organization wants a report that compares giving at a consistent point in time from year to year.

Now should the consultant set this up?

- **A. Set up a Reporting Snapshot on Opportunities.**
- B. Create a joined report showing the two years side by side.
- C. Create a matrix report bucketing the dates you wish to compare.
- D. Run the NPSP Account SYBUNT and Contact SYBUNT reports.

Answer: A

Explanation:

To compare giving at consistent points in time from year to year, the best solution is to set up a Reporting Snapshot on Opportunities. A Reporting Snapshot allows you to capture data at specific points in time and then compare it across different periods. Here are the steps to set this up:

Create the Report:

Create a report on Opportunities that includes the relevant data you want to capture (e.g., donation amounts, dates).

Ensure the report filters are set to capture data for the specific time frames you are interested in.

Create a Custom Object:

Create a custom object to store the snapshot data.

Add fields to this custom object that correspond to the fields in your report.

Set Up the Reporting Snapshot:

Navigate to Setup.

In the Quick Find box, type "Reporting Snapshots" and select "Reporting Snapshots".

Click "New Reporting Snapshot".

Name the snapshot and select the source report you created.

Select the target object (the custom object you created).

Map the fields from the report to the fields in the custom object.

Schedule the Reporting Snapshot:

Set up a schedule for when the snapshot should run (e.g., daily, weekly, monthly).

Save and activate the schedule.

By capturing the data at regular intervals, you can generate historical reports that compare giving over different years at consistent points in time.

"Set Up Reporting Snapshots" from Salesforce Help: Reporting Snapshots

"Salesforce Reporting Snapshots for Nonprofits" from Salesforce.org: Salesforce.org Guide

NEW QUESTION # 80

A nonprofit uses Salesforce for fundraising and now wants to provide support for clients through a real-time chat interface with a staff member.

What should the consultant recommend?

- A. Web-to-Case
- **B. Digital Engagement**

- C. Einstein Bots
- D. Experience Cloud

Answer: B

Explanation:

To provide support for clients through a real-time chat interface with a staff member, a consultant should recommend Digital Engagement.

Digital Engagement:

Salesforce Digital Engagement allows nonprofits to connect with their clients in real-time through various digital channels, including chat, messaging apps, and social media.

It integrates with Service Cloud to provide a seamless experience for both clients and support staff, enabling real-time interactions and efficient case management.

Benefits of Digital Engagement:

Provides a unified platform for managing multiple communication channels.

Enhances client experience by offering immediate support through live chat.

Facilitates better tracking and resolution of client issues with integrated case management.

NEW QUESTION # 81

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