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Salesforce Certified Nonprofit Success Pack Consultant Sample Questions (Q147-Q152):

NEW QUESTION # 147

A nonprofit organization is interested in a CRM that manages its constituents and has an integrated email marketing tool with built-in scoring and engagement tracking.

Which solution should the consultant recommend?

- A. NPSP and Social Studio
- **B. NPSP and Marketing Cloud**
- C. NPSP and Community Cloud
- D. NPSP and Pardot

Answer: B

Explanation:

For a nonprofit organization looking for a CRM with an integrated email marketing tool that includes built-in scoring and engagement tracking, the recommended solution is:

NPSP (Nonprofit Success Pack): This provides the CRM functionality to manage constituents.

Marketing Cloud: This offers advanced email marketing capabilities, including automation, scoring, and engagement tracking.

Marketing Cloud is designed to handle complex marketing needs and integrates seamlessly with NPSP to provide a comprehensive solution for nonprofits.

Salesforce Nonprofit Success Pack Documentation

Salesforce Marketing Cloud Overview

NEW QUESTION # 148

A member of the donation processing team wants to set up different batch data input configurations for different donation types.

Which feature should the consultant recommend to make processing different donation batches consistent?

- A. Engagement Plan Templates
- **B. Gift Entry Templates**
- C. Data Import Wizard
- D. Advanced Mapping

Answer: B

Explanation:

<https://powerofus.force.com/s/article/NPSP-Configure-Gift-Entry>

Gift Entry Templates in NPSP allow for the configuration of different batch data input settings for various types of donations. This feature ensures consistency and efficiency in processing different donation batches.

Steps:

Access the Gift Entry Templates in NPSP.

Create a new template for each type of donation batch that needs to be processed.

Configure the fields and layout for each template to match the specific data requirements of each donation type.

Save and publish the templates.

Use the templates when processing donation batches to ensure consistent data entry and processing.

CertGod Nonprofit Cloud Consultant Guide: Recommends using Gift Entry Templates for managing different donation types and ensuring consistent data processing.

Salesforce Documentation on Gift Entry Templates: Provides detailed instructions on creating and using Gift Entry Templates in NPSP.

NEW QUESTION # 149

A fundraiser at a nonprofit wants to be donation solicitations on which she is easily track and update her gift asks.

What should requirement

- A. Kanban View
- B. Einstein for Nonprofits
- **C. Path**
- D. Manage Campaign Members

Answer: C

Explanation:

To allow a fundraiser to easily track and update her gift asks for donation solicitations, using Path is a suitable solution in Salesforce.

Here's how to configure and use Path for this requirement:

Enable Path:

Navigate to Setup and type "Path" in the Quick Find box.

Click on Path Settings and enable Path if it is not already enabled.

Create a Path:

Click New Path and follow the steps to create a new Path.

Select the Opportunity object since you want to track donation solicitations.

Define the stages of your solicitation process (e.g., Identification, Cultivation, Solicitation, Stewardship).

Configure Key Fields and Guidance:

For each stage, specify key fields that the fundraiser should complete.

Add guidance for success to provide tips and best practices for each stage.

Assign the Path to a Record Type:

If using record types, ensure the Path is assigned to the correct record type for your donation solicitations.

Use Path:

On the Opportunity record page, the fundraiser can now see the Path at the top of the record.

She can track her progress, update fields, and follow the guidance provided at each stage.

Using Path helps the fundraiser to visualize the stages of the solicitation process, ensuring she can track and update gift asks effectively.

Salesforce Path Documentation: Path in Salesforce.

NEW QUESTION # 150

A nonprofit is using Nonprofit Cloud Case Management. Case managers need to share the initial, midterm, and final client assessments; updates or notes on the client; and pertinent alerts about the client with other staff within the nonprofit who also provide services to the client.

Which two approaches should a consultant recommend to meet the requirement?

Choose 2 answers

- A. Create a Private Group of staff that need access to this information.
- B. Create a permission set that grants Read/Write access to Assessments, Client Notes, and Client Alerts objects.
- **C. Create Sharing Rules for Assessments, Client Notes, and Client Alerts that share these with the public group.**
- **D. Create a Public Group of staff that need access to this information.**

Answer: C,D

Explanation:

To meet the requirement of sharing client assessments, notes, and alerts among staff within the nonprofit using Nonprofit Cloud Case Management, the following approaches are recommended:

Create a Public Group:

Create a Public Group that includes all staff members who need access to the client information.

This group will be used to grant shared access to the relevant records.

Steps to Create a Public Group:

Go to Setup.

Enter "Public Groups" in the Quick Find box and select it.

Click "New Group" and add the necessary staff members.

Create Sharing Rules:

Set up sharing rules for the Assessments, Client Notes, and Client Alerts objects to share these records with the Public Group.

This ensures that any updates or new records created within these objects are automatically shared with the staff group.

Steps to Create Sharing Rules:

Go to Setup.

Enter "Sharing Settings" in the Quick Find box and select it.

Select the relevant object (e.g., Assessments).

Click "New" under Sharing Rules and define the criteria and target group (Public Group created earlier).
These steps ensure that relevant client information is shared with the appropriate staff, enhancing collaboration and service delivery.
Salesforce Help: Creating Public Groups
Salesforce Help: Defining Sharing Rules

NEW QUESTION # 151

A nonprofit plans to use the Program Management Module (PMM) to manage its service delivery. Case managers must be able to create and edit service delivery records.
How can the consultant change the configuration to meet this requirement?

- A. Sharing Rules
- B. Role Hierarchy
- C. License Type
- **D. Permission Sets**

Answer: D

Explanation:

https://trailhead.salesforce.com/en/content/learn/modules/program-management-with-nonprofit-cloud/manage-nonprofit-programs-with-salesforce?trail_id=manage-programs-with-nonprofit-cloud To allow case managers to create and edit service delivery records in the Program Management Module (PMM), you should assign the appropriate permissions through Permission Sets. Permission Sets provide a way to grant specific permissions to users without changing their profiles, making it easier to manage access to certain functionalities.

Steps:

Create a Permission Set:

Navigate to Setup -> Permission Sets.

Click "New" to create a new permission set.

Grant Permissions:

In the new permission set, go to Object Settings.

Find and select "Service Deliveries."

Grant "Create" and "Edit" permissions.

Assign the Permission Set:

Assign the newly created permission set to the case managers who need access to create and edit service delivery records.

Salesforce Nonprofit Success Pack Documentation

Salesforce Trailhead: Permission Sets

NEW QUESTION # 152

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