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Salesforce Certified Nonprofit Cloud Consultant (NPC) Sample Questions (Q117-Q122):

NEW QUESTION # 117

A nonprofit needs to track key information for grants it applies for and receives, such as deadline dates, activity completion dates, and descriptions. In addition, the nonprofit wants to track actions completed and view the next deadline date on the Opportunity. Which feature should the consultant recommend?

- A. Engagement Plans
- **B. Deliverables**
- C. Tasks and Events
- D. Cases

Answer: B

Explanation:

For a nonprofit engaged in Grant Seeking, the Deliverables object in NPSP is the specific tool designed to manage the high-stakes requirements of institutional funding.³⁴ Why Deliverables (D) are the best fit:⁵⁶

* Grant-Specific Metadata: Unlike standard Tasks, Deliverables include fields specific to the grant process, such as "Grantee Requirements," "Due Date," and "Requirement Description."

* Next Deadline Visibility: NPSP has built-in automation that identifies the "earliest" incomplete Deliverable and surfaces its date on the parent Opportunity record in the "Next Deliverable Date" field. This allows the fundraising team to see their upcoming deadlines at a glance without digging into related lists.

* Audit and Compliance: Deliverables allow the organization to track not just that a "Task" was finished, but that a specific legal or financial report was submitted. You can track "Submitted" and

"Confirmed" dates, which are vital for maintaining good standing with a funder.

While Engagement Plans (Option A) and Tasks (Option B) can be used for general "Moves Management," they lack the specialized fields and the automated "Next Deadline" rollup logic that makes Deliverables the gold standard for grant management in NPSP.

NEW QUESTION # 118

A nonprofit organization plans to use Program and Case Management to track its substance abuse services.

When the Case Managers log in, they cannot see any of the Program and Benefit records that have been set up. What should the organization do to resolve the issue?

- A. Mark all the Program and Benefit records as Active.
- **B. Assign the Advanced Program Management permission set to the users.**
- C. Assign the Outcome Management permission set to the users.

Answer: B

Explanation:

In Nonprofit Cloud, access to core functionality is governed by specific industry-aligned permission sets. If Case Managers are unable to see Program and Benefit records, it is typically a matter of missing object-level and feature-level permissions.

The Advanced Program Management permission set is a critical requirement for users who need to interact with the full program lifecycle.

Permissions included in Advanced Program Management:

* Object Access: It grants Read, Create, Edit, and Delete access (depending on the specific assignment) to the Program, Benefit, Benefit Type, and Benefit Schedule objects.

* Functional Access: It allows users to manage Program Enrollments and track Benefit Disbursements

* Visibility: Without this permission set (or a Permission Set Group containing it), the objects remain hidden from the user's navigation bar and global search, even if the records are marked as "Active." Step-by-Step Resolution:

* The Admin should navigate to Setup > Users.

* Select the Case Manager users.

* Click Permission Set Assignments > Edit Assignments.

* Add Advanced Program Management to the assigned list.

* Note: If the organization wants to limit Case Managers to "Read-Only," they would use this permission set in conjunction with a Muting Permission Set within a Permission Set Group.

Why other options are incorrect:

* Outcome Management (Option A): This grants access to impact tracking (Outcomes, Indicator Definitions) but does not provide the primary access to the Program and Benefit service delivery objects.

* Status Marking (Option C): While a record should be active for operational use, "Active" status on a record does not override Salesforce security. If the user doesn't have object-level permissions via a permission set, they cannot see the record regardless of its

status.

NEW QUESTION # 119

A nonprofit organization wants Major Gift Officers to use a standardized set of tasks when soliciting a large donation. The Major Gift officers must be able to add tasks as needed. Which Nonprofit Cloud feature should the organization use?

- **A. Action Plans**
- B. Actionable Segmentation
- C. Actionable Relationship Center (ARC)

Answer: A

Explanation:

To standardize the "Moves Management" process for major gifts, a consultant should implement Action Plans. This feature allows a nonprofit to define a "checklist" of tasks that represent their best practices for high-touch fundraising.

Step-by-Step Implementation:

* **Template Creation:** The consultant creates an Action Plan Template named "Major Gift Solicitation."

* **Standardized Tasks:** Within the template, they define the mandatory steps, such as:

* "Research donor wealth profile" (Due in 2 days)

* "Draft personal solicitation letter" (Due in 7 days)

* "Schedule face-to-face meeting" (Due in 14 days)

* **Flexibility for Users:** When a Major Gift Officer starts a solicitation, they generate an Action Plan from this template and link it to the donor's record. A key feature of Action Plans is that once they are generated, the officer can add additional, ad-hoc tasks that are unique to that specific donor, meeting the "add tasks as needed" requirement.

* **Tracking:** The tasks generated by the Action Plan appear in the officer's standard Salesforce task list and on the record's activity timeline, ensuring full visibility into the progress of the solicitation.

Why other options are incorrect:

* **Actionable Segmentation (Option A):** This is used to create specific lists of donors for outreach (like a "call list") but does not provide a task-based workflow for individual solicitation.

* **Actionable Relationship Center (Option C):** While ARC helps visualize the donor's relationships, it is a data visualization tool, not a workflow engine for standardized task management.

NEW QUESTION # 120

A nonprofit wants to send an event cancellation notice to 150 Salesforce contacts without a separate email service provider. It wants to manage bounces, resend the notice as needed, and view the send history on the Contact record. Which option should a consultant recommend to meet the requirements?

- **A. Send List Email**
- B. Elevate
- C. Account Engagement
- D. Email-to-Case

Answer: A

Explanation:

For a small volume of contacts (150) and a simple one-off requirement like an event cancellation, standard Salesforce functionality is the most cost-effective and efficient choice. Send List Email is a native Lightning Experience feature that meets all the organization's criteria without the complexity of a third-party marketing tool.

How Send List Email Meets the Requirements:

* **Direct Send:** Users can select up to 2,000 contacts from a list view or a campaign and click Send List Email. This uses Salesforce's internal mail servers (or the organization's connected Office 365/Gmail account).

* **Send History:** Every list email sent is automatically recorded in the Activity History (specifically the "HTML Email Status" or "Emails" related list) on the Contact record. This satisfies the requirement to "view the send history."

* **Manage Bounces:** Salesforce has a native "Email Bounce Management" feature. If an email address is invalid, a warning icon appears next to the email address on the Contact record, and the staff can see the "Bounce Reason."

* **Resending:** Because the send history is logged as an activity, staff can easily identify who didn't receive the message and trigger a follow-up email manually or by creating a filtered list of "bounced" contacts.

Why other options are incorrect:

- * Elevate (Option A): This is a payment processing platform for fundraising and has no native bulk email capabilities for event management.
- * Email-to-Case (Option B): This is a support tool for receiving incoming emails and turning them into tickets; it is not for proactive event outreach.
- * Account Engagement (Option D): Formerly known as Pardot, this is a robust marketing automation platform. While it could do this, it is considered "overkill" for a one-off 150-person email and requires a separate, significant license and technical setup.

NEW QUESTION # 121

A nonprofit is migrating from a legacy donor management database. The database has donor contact information, donation history, and payment information. How should the consultant load the data from the database using a single file to create the related records?

- A. Data Import Wizard
- B. Workbench
- C. Data Loader
- **D. NPSP Data Importer**

Answer: D

Explanation:

When migrating data into the Nonprofit Success Pack (NPSP), the most efficient and robust tool is the NPSP Data Importer. This tool was specifically built to handle the "multi-object" nature of nonprofit data in a single pass.

Why NPSP Data Importer is the Correct Choice:

- * Single File Processing: Standard Salesforce tools like Data Loader or the Data Import Wizard usually require separate files and separate "upserts" for each object. You would have to import Accounts, then export the IDs, then import Contacts, then export those IDs, then import Opportunities.
- * Complex Logic in One Row: The NPSP Data Importer allows you to put the Contact Name, the Household address, and the Donation Amount on the same row of a CSV file.
- * Automatic Relationship Management: When you process the file, the Importer automatically:
 - * Creates or finds the Contact.
 - * Automatically creates the Household Account.
 - * Creates the Opportunity (Donation) and links it to the Account.
 - * Creates the Payment record (if payment info is included).
 - * Handles GAU Allocations and Campaign Memberships.
- * Dry Run Capability: It includes a "Dry Run" feature that validates the data and checks for duplicates before any actual records are created, which is vital for a clean migration.

While Workbench and Data Loader are powerful technical tools, they lack the specific NPSP business logic that makes the NPSP Data Importer the fastest and safest way to move a legacy database into Salesforce using a single flat file.

NEW QUESTION # 122

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