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## Salesforce Certified Nonprofit Cloud Consultant (NPC) Sample Questions (Q44-Q49):

NEW QUESTION # 44

A nonprofit receives a donation from a family foundation. What should the consultant recommend to ensure the donation is reflected on the family's household record?

- A. Add an additional Account lookup field on the Opportunity for the household.
- **B. Use Account Soft Credits to credit the household.**
- C. Add an Account lookup field on the Payment for the Opportunity for the household.
- D. Use a GAU Allocation to credit the donation to the household.

**Answer: B**

Explanation:

In NPSP, we must distinguish between "Hard Credit" (legal ownership) and "Soft Credit" (influence /relationship). When a family foundation (a Business Account) gives a donation, the Foundation gets the Hard Credit. However, the organization wants the Household Account (the family themselves) to receive credit for that gift in their "Total Giving" history.

The Solution: Account Soft Credits:

\* Hard Credit: The Opportunity is created with the Family Foundation Account in the Account Name field. This is the legal donor.

\* Soft Credit: To reflect this gift on the Family's Household, the consultant uses the Account Soft Credit feature.

\* Relationship Tracking: A record is created in the Account Soft Credit related list on the Opportunity.

The "Account" is the Family's Household Account, and the "Role" is set to something like "Family Foundation."

\* Rollups: NPSP's rollup engine will then pick up this soft credit. The family's Household record will now show this gift in fields like "Total Account Soft Credits" or "Total Gifts" (if the organization includes soft credits in their summary).

Why other options are incorrect:

\* GAU Allocation (Option A): This tracks the fund or purpose of the money (e.g., "Building Fund"), not the donor or household credit.

\* Lookup Fields (Options B & D): Adding custom lookup fields does not trigger NPSP's complex rollup logic. Only the standard Account Soft Credit object is recognized by the NPSP engine for aggregating influence-based giving to an account.

#### NEW QUESTION # 45

A nonprofit wants to convert from Legacy Recurring Donations to Enhanced Recurring Donations. What are two considerations the nonprofit should take into account before making the switch? (Choose 2)

- **A. Reverting to Legacy Recurring Donations is unsupported.**
- **B. All existing integrations should be reviewed for compatibility.**
- C. Data Loader is required to revert to Legacy Recurring Donations.
- D. Enhanced Recurring Donations introduces a new custom object.

**Answer: A,B**

Explanation:

The move from Legacy Recurring Donations to Enhanced Recurring Donations (ERD) is a significant architectural upgrade in NPSP. While ERD offers better performance and more flexible scheduling, it changes how data is processed and stored.

Key Considerations:

\* Integration Compatibility (A): Enhanced Recurring Donations changes the underlying logic of how installments (Opportunities) are created and managed. If the nonprofit uses third-party apps (like an external payment gateway or a custom web form) that rely on the legacy npe03\_\_Recurring\_Donation\_\_c fields or the old "Monthly" vs. "Custom" picklist values, those integrations may break. A consultant must perform a thorough audit of all APIs and managed packages before the conversion.

\* No Revert Path (D): This is a "one-way door." Salesforce documentation explicitly states that reverting to Legacy Recurring Donations is unsupported once the upgrade process has been completed. The conversion process modifies the database schema and migrates records in a way that cannot be easily undone. Therefore, testing in a full sandbox is a non-negotiable prerequisite.

Clarifying Other Points:

\* New Custom Object (Option B): This is incorrect. Enhanced Recurring Donations actually uses the same custom object as the legacy version (npe03\_\_Recurring\_Donation\_\_c), but it utilizes new fields, new page layouts, and a completely different set of Apex triggers and batch jobs.

\* Data Loader (Option C): Since the process is unsupported, Data Loader is not a viable or recommended way to "revert" the complex architectural changes.

#### NEW QUESTION # 46

Which Nonprofit Cloud feature can a consultant use to create rollups to display donor giving history?

- A. Declarative Lookup Rollup Summaries
- B. Business Rules Engine
- C. Donor Giving Summary and Data Processing Engine

**Answer: C**

Explanation:

The new Nonprofit Cloud (NPC) has introduced a high-performance framework for calculating donor metrics, moving away from the real-time Apex triggers used in the older NPSP model. To display a donor's total giving, last gift date, or largest gift, the system uses a combination of the Data Processing Engine (DPE) and the Donor Giving Summary object.

The Data Processing Engine (DPE):

DPE is a powerful tool built on the Salesforce Industries core that can process massive volumes of data in batches. A consultant uses DPE to:

- \* Extract: Pull data from Gift Transactions (the records of actual money received).
- \* Transform: Aggregate the data—summing the amounts, finding the "max" amount, or identifying the "min" date.
- \* Write Back: Save these calculated values into fields on the Donor Giving Summary record.

The Donor Giving Summary Object:

This object serves as the "storage container" for these rolled-up values. It is linked to the donor's Account (Person Account). By storing the results here, the system ensures that when a fundraiser opens a donor's page, the summary is already calculated and displays instantly without needing to run a live query across thousands of transaction records.

The Workflow:

- \* Clone Templates: Salesforce provides pre-built DPE templates for common fundraising rollups.
- \* Schedule Jobs: The consultant schedules these DPE jobs to run periodically (e.g., nightly).
- \* Display: The Donor Giving Summary component is added to the Lightning record page via the App Builder to show the fields (e.g., TotalGiftAmount, LastGiftDate) to the users.

While Declarative Lookup Rollup Summaries (DLRS) is a popular community tool, it is not a native

"Nonprofit Cloud feature." The Business Rules Engine (Option A) is used for complex decision logic (like eligibility checks), not for aggregating historical financial totals.

#### NEW QUESTION # 47

A consultant is working on a data migration to NPSP that includes tens of millions of records across many objects. The migration needs to take place over a weekend to minimize system downtime. What should the consultant recommend?

- A. Bulk API
- B. Data Import Wizard
- C. SOAP API
- D. NPSP Data Import

**Answer: A**

Explanation:

When dealing with Large Data Volumes (LDV)—specifically in the range of "tens of millions of records"—standard import tools and standard APIs are insufficient due to governor limits and processing speeds. For a time-sensitive weekend migration, the Bulk API is the only architecturally sound recommendation.

Why Bulk API is Required:

- \* Parallel Processing: Unlike the SOAP API (Option B), which processes records synchronously (one by one or in small serial batches), the Bulk API is designed for asynchronous processing. It breaks the data into large chunks (up to 10,000 records per batch) and processes them in parallel on the Salesforce application servers.
- \* Minimized API Calls: Tens of millions of records would quickly exhaust an organization's daily SOAP API limits. The Bulk API is optimized to handle massive datasets with significantly fewer API calls.
- \* Weekend Constraint: The "weekend" requirement implies a need for high throughput. The Bulk API is the fastest method available for moving data into Salesforce, making it possible to complete a multi-million record migration within a 48-hour window.

Why other options fail:

- \* NPSP Data Import (Option C): While powerful for processing complex logic (like creating Accounts and Contacts at once), it is built on top of standard Apex processing and is significantly slower than the Bulk API for pure volume.
- \* Data Import Wizard (Option D): This tool is limited to 50,000 records per session, making it impossible to use for a migration of this scale.

A consultant would typically use a tool like Data Loader (configured for Bulk mode) or a dedicated ETL tool (like Informatica or Mulesoft) that utilizes the Bulk API to achieve the necessary performance.

### NEW QUESTION # 48

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 B): 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 # 49

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