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Salesforce Certified Nonprofit Success Pack Consultant Sample Questions (Q17-Q22):

NEW QUESTION # 17
An international nonprofit organization works across six different countries in Europe and Afric a. The organization relies heavily on volunteers in each country to support its work and wants volunteers to be able to sign up for volunteer jobs on its website.
What is a consideration when setting up Volunteers for Salesforce given this context?

- A. Set the Volunteer Job's Website Time Zone field value to the time zone in which the job will take place when creating Volunteer Jobs.
- B. Set up a different Site in Volunteers for Salesforce for each country and set the time zone for the Site to the local time zone so all events will appear as the correct time for the time zone.
- C. Add text to the Volunteers for Salesforce website informing all volunteers that all time for volunteer jobs and shifts is shown in the time zone of the headquarters and they need to convert the time to their local time zone.
- D. Remove the Start Time and End Time fields from the website template and put the times in the description in the local time

zone.

Answer: A

Explanation:
When setting up Volunteers for Salesforce in an international context, it's important to ensure that volunteer jobs and shifts reflect the local time zones accurately. Here's how to configure this:
Navigate to Volunteers for Salesforce Settings:
Go to Setup.
Type "Volunteers for Salesforce" in the Quick Find box and select it.
Configure Volunteer Jobs:
Create Volunteer Jobs for each country.
For each job, set the "Website Time Zone" field to the local time zone where the job will take place.
Adjust Volunteer Shift Times:
When creating volunteer shifts, ensure the start and end times are set according to the local time zone.
Update Website Information:
Inform volunteers about the time zone settings on the volunteer signup pages if necessary.
"Volunteers for Salesforce Setup Guide" from Salesforce Help: Volunteers for Salesforce
"Managing Volunteer Shifts and Jobs" from Salesforce.org: Volunteer Management

NEW QUESTION # 18
A nonprofit is implementing Accounting Subledger and wants to know how the data from Salesforce would be transferred to its accounting system.
Which three methods are possible?
Choose 3 answers

- A. Export data via Salesforce reports to upload to the accounting system.
- B. Schedule a Data Export from Salesforce.
- C. Configure Salesforce Connect to integrate with the accounting system.
- D. Develop a custom integration solution.
- E. Integrate Salesforce with the accounting system using middleware.

Answer: A,D,E

Explanation:
To transfer data from Salesforce to an accounting system using Accounting Subledger, nonprofits can use several methods. Here are three possible methods:
Integrate Salesforce with the Accounting System Using Middleware:
Middleware can act as a bridge between Salesforce and the accounting system, facilitating data transfer.
Tools like MuleSoft, Jitterbit, or Dell Boomi can be used to create integrations that sync data between Salesforce and the accounting system.
This method ensures real-time or near-real-time data synchronization, reducing manual data handling.
Export Data via Salesforce Reports to Upload to the Accounting System:
Salesforce allows the creation of detailed reports which can be exported in various formats (e.g., CSV, Excel).
These reports can be manually uploaded to the accounting system.
This method is suitable for organizations with fewer transactions or where real-time integration is not critical.
Develop a Custom Integration Solution:
For organizations with specific needs that are not met by standard middleware solutions, a custom integration can be developed.
This involves using Salesforce APIs (REST or SOAP) to programmatically extract data from Salesforce and load it into the accounting system.
Custom integrations provide flexibility but require more technical expertise and maintenance.
Salesforce Integration Patterns and Best Practices: Salesforce Integration Guide.
Salesforce Reporting and Exporting: Salesforce Reporting.

NEW QUESTION # 19
A nonprofit runs a workforce development program for its clients. Job seekers contact the nonprofit via phone, web, and email. The nonprofit wants to track each engagement separately from start to finish. The nonprofit needs to assign job seekers to case managers.
What solution should the consultant propose?

- A. Create a custom junction object between Contact and Case for the assignment and customize workflow rules.
- B. Enable web-to-case and customize cases and assignment rules.
- C. Create a custom multi-select picklist field to track the assignment and customize related lists.
- D. Enable web-to-lead and customize leads and assignment rules.

Answer: B

Explanation:
For tracking job seeker engagements and assigning them to case managers:
Enable web-to-case: This allows job seekers to submit inquiries via web forms, which automatically create cases in Salesforce.
Customize cases: Modify the case object to track specific engagement details from start to finish.
Assignment rules: Set up rules to automatically assign cases (job seekers) to appropriate case managers based on predefined criteria (e.g., job seeker's needs, case manager's workload).
This solution provides a structured way to handle multiple engagement channels (phone, web, email) and ensures that each job seeker is assigned a case manager for personalized support.
Salesforce Help: Setting Up Web-to-Case
Salesforce Trailhead: Service Cloud for Nonprofits

NEW QUESTION # 20
A consultant wants to test out new Nonprofit Cloud features coming out in the upcoming Salesforce release in their customs..
Which action must the consultant take to do this?

- A. Create a preview instance sandbox during the sandbox preview period.
- B. Refresh a preview instance sandbox during the sandbox preview period.
- C. Create a new sandbox during the sandbox preview period.
- D. Refresh a preview Instance sandbox just prior to sandbox preview period.

Answer: B

Explanation:
To test new Nonprofit Cloud features coming out in the upcoming Salesforce release, follow these steps:
Identify the Sandbox Preview Period:
Salesforce announces preview periods before major releases. Check the Salesforce release calendar for the dates.
Refresh a Preview Instance Sandbox:
During the sandbox preview period, refresh one of your sandboxes. Ensure that you refresh an existing sandbox that is on a preview instance, or create a new sandbox if needed.
Verify the Sandbox Instance:
Make sure your sandbox is on a preview instance. Salesforce typically migrates sandboxes to preview instances for testing new features.
Test New Features:
Once the sandbox is refreshed, you can start testing the new Nonprofit Cloud features that will be included in the upcoming release.
Use the Release Notes and documentation provided by Salesforce to guide your testing.
This process allows you to evaluate new features before they are available in your production environment, ensuring a smooth transition and allowing time to address any potential issues.
Salesforce Sandbox Preview Guide: Sandbox Preview Instructions.

NEW QUESTION # 21
A membership organization needs to send out automated renewal emails on a 30/60/90 period. Each referenced email template needs to differ based on the members' web site visits. Which automation method should a consultant recommend?

- A. Time-Based Workflow
- B. Process Builder
- C. Pardot
- D. Apex Trigger and Scheduler

Answer: C

Explanation:

Pardot is the recommended automation method for sending out automated renewal emails on a 30/60/90 day schedule, with different email templates based on members' website visits. Pardot is a powerful marketing automation tool that integrates seamlessly with Salesforce, providing advanced capabilities for email marketing, lead nurturing, and segmentation. Here's how to set this up:

Integrate Pardot with Salesforce:

Ensure that Pardot is connected to your Salesforce instance. This allows seamless data synchronization between the two systems.

Create Email Templates in Pardot:

Design and create the different email templates in Pardot that you want to use for the 30, 60, and 90-day renewal reminders.

Personalize the email content based on the members' interactions and website visits.

Set Up Automation Rules:

Use Pardot's automation rules to create rules that trigger emails based on the members' renewal dates and website activity.

Define the criteria for each rule (e.g., 30 days before renewal date, 60 days before renewal date, etc.).

Create Engagement Programs:

Use Engagement Studio in Pardot to create automated drip programs that send out the renewal emails at the specified intervals.

Add logic to the engagement program to select different email templates based on the members' website visits and interactions.

Track and Analyze:

Use Pardot's reporting and analytics features to track the performance of the email campaigns, monitor open rates, click-through rates, and engagement metrics.

By leveraging Pardot's advanced automation capabilities, the organization can efficiently manage and personalize its renewal email campaigns, improving member retention and engagement.

"Getting Started with Pardot" from Salesforce Help: Pardot Setup Guide

"Pardot Engagement Studio" from Salesforce Help: Engagement Studio

NEW QUESTION # 22

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