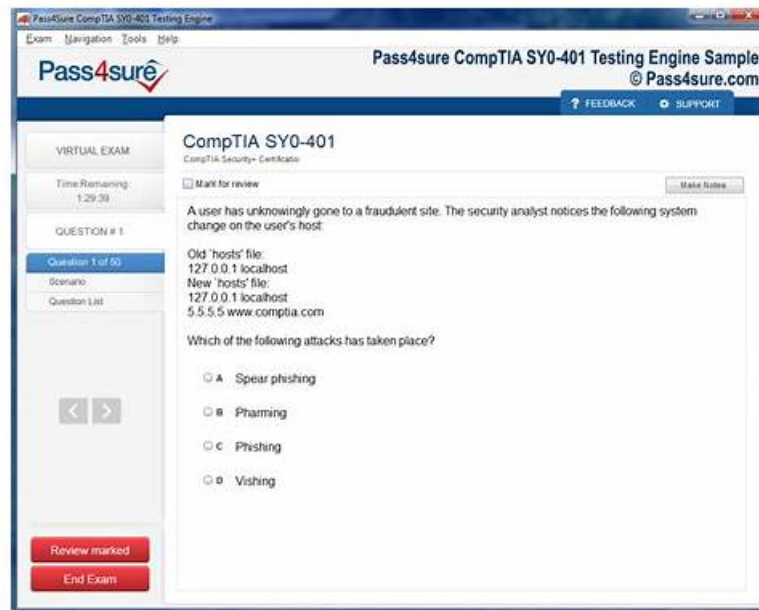


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Salesforce Certified Nonprofit Success Pack Consultant Sample Questions (Q49-Q54):

NEW QUESTION # 49

A nonprofit organization wants to track all donations that go to a specific, designated fund. How should a consultant solution for this use case?

- A. Create an Opportunity record type, called "Funds" and then create an Opportunity record for the designated fund.
- B. Create a custom object for to track fund accounts and then create an Account record for the designated fund.
- C. Create a GAU record for the designated fun.

- **D. Create a GAU Allocation record for the designated fund.**

Answer: D

Explanation:

To track all donations that go to a specific, designated fund, the consultant should create a GAU Allocation record for the designated fund. Here's how to set it up:

Create GAU Records:

Navigate to the App Launcher and search for "General Accounting Units".

Create a new GAU record for each designated fund.

Link Donations to GAUs:

When entering or importing donations (Opportunities), use the GAU Allocation section to allocate the donation amount to the relevant GAU.

Specify the amount or percentage of the donation that should be allocated to each GAU.

Set Up GAU Allocation:

In the Opportunity record, scroll to the GAU Allocations related list.

Click "New" to create a new GAU Allocation.

Select the appropriate GAU and enter the allocation amount.

Reporting on GAUs:

Create reports to track donations by GAU.

Use the GAU Allocation object in your report to filter and summarize donations by designated funds.

By using GAU Allocations, the nonprofit can effectively manage and report on restricted funds, ensuring that donations are tracked according to donor intent.

Salesforce NPSP Documentation: General Accounting Units (GAUs)

Salesforce Trailhead: Manage General Accounting Units (GAUs)

NEW QUESTION # 50

A nonprofit fundraiser notices that some of the NPSP calculated donation summary fields on the Contact and Account records are displaying incorrect values when compared to the donations recorded for each donor.

What are three items the consultant should review to troubleshoot the issue?

Choose 3 answers

- **A. Customizable Rollups**
- **B. NPSP Health Check**
- **C. Opportunity Stages**
- D. Campaign Hierarchy
- E. Salesforce Optimizer report

Answer: A,B,C

Explanation:

To troubleshoot incorrect values in the NPSP calculated donation summary fields on Contact and Account records, the consultant should review the following:

Customizable Rollups:

Verify the settings and configuration of Customizable Rollups in NPSP. Incorrect configurations or mappings can lead to inaccurate summary values.

Ensure that the rollups are set up correctly to calculate totals based on the desired criteria.

Opportunity Stages:

Check the Opportunity stages to ensure they are correctly defined and assigned. Only certain stages (e.g., "Closed Won") should be included in donation summaries.

Misconfigured or incorrect stages can result in inaccurate summary calculations.

NPSP Health Check:

Run the NPSP Health Check to identify any potential configuration issues or data integrity problems.

The Health Check provides insights and recommendations to address common issues within NPSP.

Salesforce Nonprofit Success Pack Documentation on Customizable Rollups Salesforce Opportunity Stages Configuration Guide

NPSP Health Check Documentation

NEW QUESTION # 51

A nonprofit uses Volunteers for Salesforce. The nonprofit has volunteers who work the same schedule every week. The volunteer

manager wants to avoid asking these ongoing volunteers to sign up for the same shift every time. How should the consultant configure Salesforce to meet the requirement?

- A. Enter all volunteer IDs and schedules on a spreadsheet and use an ETL tool to create volunteer hours records In Volunteers for Salesforce.
- **B. Use the Volunteer Recurrence Schedules in Volunteers for Salesforce to create the volunteers' schedules.**
- C. Use the Job Recurrence Schedule functionality In Volunteers for Salesforce to create the volunteers' schedules.
- D. Install a grid app from the AppExchange to mass enter volunteer hours based on each volunteer's schedule.

Answer: B

Explanation:

To configure Salesforce to handle recurring volunteer schedules, the Volunteer Recurrence Schedules feature in Volunteers for Salesforce (V4S) is the ideal solution. Here's a step-by-step guide:

Install Volunteers for Salesforce: If not already installed, you need to install the Volunteers for Salesforce package from the Salesforce AppExchange.

Navigate to Volunteer Jobs: Go to the Volunteers tab and create or select a Volunteer Job that requires a recurring schedule.

Set Up Volunteer Recurrence Schedules:

In the Volunteer Job record, find the "Recurrence Schedules" related list.

Click "New Volunteer Recurrence Schedule."

Define the recurrence pattern, such as weekly, and specify the start and end times for the volunteer shifts.

Assign Volunteers to Recurrence Schedules:

Once the recurrence schedule is created, assign volunteers to this schedule.

Volunteers assigned to a recurrence schedule will automatically be registered for the specified shifts without the need to sign up repeatedly.

Review and Manage:

Periodically review the schedules to ensure they align with any changes in volunteer availability or job requirements.

By using Volunteer Recurrence Schedules, the nonprofit can efficiently manage volunteers who work on a regular basis without needing them to sign up for each shift manually. This feature ensures that the volunteer management process is streamlined and volunteers have a consistent schedule.

Salesforce Volunteers for Salesforce Documentation: This official documentation provides detailed instructions on setting up and managing volunteer schedules. Salesforce V4S Documentation.

NEW QUESTION # 52

A nonprofit organization wants a cost-effective solution to generate and send donation acknowledgements automatically to donors via email. Which Salesforce solution should the consultant recommend?

- **A. Nonprofit Success Pack**
- B. Commerce Cloud
- C. Pardot
- D. Marketing Cloud

Answer: A

Explanation:

Install NPSP:

Ensure that NPSP is installed in your Salesforce instance. You can download it from the AppExchange or install it directly from the NPSP Installer page.

Configure Acknowledgement Settings:

Navigate to NPSP Settings.

Under "Donations," find the "Acknowledgements" settings.

Configure the settings to define when and how acknowledgements should be sent.

Set Up Email Templates:

Go to Setup > Classic Email Templates.

Create a new email template or modify an existing one to suit your acknowledgment needs.

Ensure the template includes merge fields to personalize the emails with donor information.

Create Automation with Process Builder:

Use Process Builder to automate the sending of acknowledgment emails.

Create a new process on the Opportunity object.

Set criteria to trigger the process when a new donation is recorded.

Add an action to send an email using the previously created template.

Testing:

Test the process by creating a test donation record and verifying that the acknowledgment email is sent automatically.

Monitoring and Refinement:

Monitor the process to ensure it is working correctly.

Refine the email templates and automation rules based on feedback and evolving needs.

By utilizing the NPSP, nonprofits can streamline their donation acknowledgment process, ensuring timely and personalized communications with donors, ultimately enhancing donor satisfaction and retention.

NEW QUESTION # 53

A nonprofit created a custom Opportunity Name for all In-kind gifts.

Which two considerations should the consultant discuss with the nonprofit?

Choose 2 answers

- A. The nonprofit should change existing Opportunities to the new naming convention through an upsert.
- **B. The nonprofit should change existing Opportunities to the new naming convention by running the Refresh All Opportunity Names utility.**
- C. Click the Refresh Name button on one Opportunity record to update all relevant Opportunities.
- **D. The Opportunity Name Format will only be applied to new Opportunities of the matching record type,**

Answer: B,D

Explanation:

When a nonprofit creates a custom Opportunity Name for all in-kind gifts, it is important to understand how this change impacts existing and new Opportunity records. The Refresh All Opportunity Names utility can be used to update the names of existing Opportunities to match the new naming convention. Additionally, the custom Opportunity Name Format will only apply to new Opportunities that match the specified record type.

Steps:

Update the Opportunity Name Format settings to reflect the new naming convention for in-kind gifts.

Use the Refresh All Opportunity Names utility to apply the new naming convention to existing Opportunities. This ensures consistency across all records.

Inform users that the new naming convention will only be automatically applied to new Opportunities created with the matching record type going forward.

Monitor the changes and verify that the updated names meet the nonprofit's requirements.

CertGod Nonprofit Cloud Consultant Guide: Provides guidance on updating Opportunity names and using utilities for bulk updates.

Salesforce Documentation on Opportunity Name Formats: Details the steps for configuring and applying custom naming conventions.

NEW QUESTION # 54

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