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Salesforce Certified Nonprofit Success Pack Consultant Sample Questions (Q62-Q67):

NEW QUESTION # 62
A consultant is migrating historic donation records into a nonprofit's Salesforce org. Many of these donations were paid in multiple installments.
What should the consultant do to correctly match the Payments to the Opportunities?

- A. heck the Do Not Automatically Create Payment field.
- B. Delete the automatically created payments.
- C. Change the Opportunity record type to an excluded value.
- D. Set the Stage field to "Closed Lost".

Answer: A

Explanation:
When migrating historic donation records into a nonprofit's Salesforce org where many of these donations were paid in multiple installments, it is important to ensure that the Payments are correctly matched to the Opportunities. The correct approach involves using the "Do Not Automatically Create Payment" field:
Check the Do Not Automatically Create Payment Field:
When importing historic donations, check the "Do Not Automatically Create Payment" field on the Opportunities.
This prevents Salesforce from automatically creating Payments for these Opportunities, which allows you to manually enter the correct Payments that match the historic installment records.
Manually Create Payments:
After importing the Opportunities with the "Do Not Automatically Create Payment" field checked, manually create Payment records that correspond to each installment.
Ensure each Payment is correctly associated with the corresponding Opportunity.
Validation:
Validate the imported data to ensure all Payments are correctly matched with the Opportunities.
This method ensures that the historic donation records with multiple installments are accurately represented in Salesforce.
Salesforce Nonprofit Success Pack (NPSP) Documentation: Managing Payments and Opportunities.
Salesforce Help: Data Import Guidelines.

NEW QUESTION # 63
A nonprofit, who does a lot of mail appeals to donors, asks their consultant for the best solution to keep their constituents' addresses formatted properly to ensure the mail reaches them.
What should the consultant recommend?

- A. Insights Platform Data Integrity
- B. Sender Authentication Package
- C. NPSP Address Management
- D. Customer Data Platform

Answer: C

Explanation:
For a nonprofit that does a lot of mail appeals to donors and wants to ensure addresses are formatted correctly, the consultant should recommend:
NPSP Address Management:
NPSP Address Management helps ensure that addresses are standardized and formatted correctly. It includes tools and processes to manage and validate addresses, thus reducing errors in mailings and improving delivery rates.

NEW QUESTION # 64
A consultant is importing a number of new individual gifts from a recent fundraising event for a non-profit that is using NPSP. It is very important that donors receive credit for these new donations. Where is the automatic Opportunity Contact Role hard credit value configured for this scenario?

- A. Opportunity Settings
- B. NPSP Settings
- C. Relationship record
- D. Affiliation record

Answer: B

Explanation:
To ensure that donors receive credit for new donations, the automatic Opportunity Contact Role hard credit value should be configured in NPSP Settings. Here's how to do it:
Navigate to NPSP Settings:
Go to the App Launcher and search for "NPSP Settings".
Access Donations Settings:
Under NPSP Settings, select "Donations".
Click on "Opportunity Contact Roles".
Configure Default Contact Role:
Set the default Contact Role for Opportunities to ensure that the primary donor is automatically assigned the correct role.
This role typically is "Primary Donor" or "Donor".
Verify and Save:
Ensure that the configuration is correct and save the changes.
This setup ensures that when new donations are imported or entered, the primary donor receives the appropriate hard credit automatically, maintaining accurate donor credit records.
Salesforce NPSP Documentation: Opportunity Contact Roles
Salesforce Trailhead: Manage Donations in NPSP

NEW QUESTION # 65
A nonprofit organization wants a report that compares giving at a consistent point in time from year to year.
Now should the consultant set this up?

- A. Create a joined report showing the two years side by side.
- B. Run the NPSP Account SYBUNT and Contact SYBUNT reports.
- C. Create a matrix report bucketing the dates you wish to compare.
- D. Set up a Reporting Snapshot on Opportunities.

Answer: D

Explanation:
To compare giving at consistent points in time from year to year, the best solution is to set up a Reporting Snapshot on Opportunities. A Reporting Snapshot allows you to capture data at specific points in time and then compare it across different periods. Here are the steps to set this up:
Create the Report:
Create a report on Opportunities that includes the relevant data you want to capture (e.g., donation amounts, dates).
Ensure the report filters are set to capture data for the specific time frames you are interested in.
Create a Custom Object:
Create a custom object to store the snapshot data.
Add fields to this custom object that correspond to the fields in your report.
Set Up the Reporting Snapshot:
Navigate to Setup.
In the Quick Find box, type "Reporting Snapshots" and select "Reporting Snapshots".
Click "New Reporting Snapshot".
Name the snapshot and select the source report you created.
Select the target object (the custom object you created).
Map the fields from the report to the fields in the custom object.
Schedule the Reporting Snapshot:
Set up a schedule for when the snapshot should run (e.g., daily, weekly, monthly).

Save and activate the schedule.

By capturing the data at regular intervals, you can generate historical reports that compare giving over different years at consistent points in time.

"Set Up Reporting Snapshots" from Salesforce Help: Reporting Snapshots

"Salesforce Reporting Snapshots for Nonprofits" from Salesforce.org: Salesforce.org Guide

NEW QUESTION # 66

How often are updates to the NPSP pushed to production orgs?

- A. Four times per year
- B. Three times per year
- C. Once every month
- D. Once every two weeks

Answer: D

Explanation:

Updates to the Nonprofit Success Pack (NPSP) are pushed to production organizations once every two weeks. These frequent updates ensure that organizations using NPSP have access to the latest features, bug fixes, and improvements. Here's what you need to know:

Regular Updates:

NPSP follows a bi-weekly release schedule, meaning updates are deployed approximately every two weeks.

Automatic Updates:

These updates are automatically pushed to production environments, requiring no manual intervention from administrators.

Release Notes:

Release notes for each update are published and can be accessed to understand the changes and new features included in each release.

Testing and Sandbox Environments:

It's recommended to test updates in a sandbox environment before they are deployed to production, especially if customizations are in place.

"NPSP Release Schedule" from Salesforce.org: NPSP Release Schedule

"Release Notes and Announcements" from Salesforce.org: NPSP Release Notes

NEW QUESTION # 67

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