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Salesforce Certified Nonprofit Success Pack Consultant Sample Questions (Q176-Q181):

NEW QUESTION # 176
A gift officer successfully imported a small list of donors and their donations. The gift officer wants to add these donors to a Campaign from an Opportunities report but the "Add to Campaign" option is not available. The gift officer wants to add donors to a Campaign from a report. What should the consultant recommend?

- A. Go to Setup and add the "Add to Campaign" button to the report type
- B. Create a joined report with Opportunities and Campaigns
- C. Export the Opportunity report results and import the list of donors as Campaign Members using the Data Import Wizard
- D. Create a report type that includes Contacts such as the Opportunities with Contact Roles report type

Answer: D

Explanation:
To add donors to a Campaign from an Opportunities report, the report must include Contact records. The correct approach is to create a report type that includes Contacts, such as the Opportunities with Contact Roles report type.

Creating the Report:

Navigate to the Reports tab and click "New Report."

Select the "Opportunities with Contact Roles" report type. This report type includes both Opportunity and Contact records.

Configuring the Report:

Add the necessary filters to include the desired Opportunities and their related Contacts.

Customize the report to display relevant fields, such as Contact Name and Opportunity Amount.

Adding to Campaign:

Once the report is configured and run, select the Contacts you want to add to the Campaign.

Use the "Add to Campaign" button available in the report to add these Contacts as Campaign Members.

Benefits of This Approach:

Ensures that the Campaign Members are correctly linked to the Opportunity records.

Streamlines the process of managing Campaigns and associated donor information.

Additional Steps:

Ensure that the "Add to Campaign" button is enabled for the report type in Setup if it is not already visible.

CertGod Nonprofit Cloud Consultant study guide: "Create a report type that includes Contacts such as the Opportunities with Contact Roles report type".

NEW QUESTION # 177

A nonprofit organization has engaged a consultant to implement NPSP and has a large membership program it wants to manage in Salesforce. Which two things does the consultant need to set up to ensure that the membership rollups in NPSP will work properly?

- A. Check that the membership record type is selected for membership rollups.
- B. Check that the grace period is set up for memberships.
- C. Ensure there is a custom field created for Membership Amount and selected for membership rollups
- D. Ensure there is an Opportunity record type set up for memberships

Answer: A,D

Explanation:

To ensure that the membership rollups in NPSP work properly, the following settings need to be configured:

Check that the Membership Record Type is Selected for Membership Rollups:

Go to NPSP Settings.

Navigate to "Settings" -> "Donations" -> "Customizable Rollups".

Ensure that the membership record type is selected and configured to be included in the rollups. This allows NPSP to aggregate membership data correctly.

Ensure there is an Opportunity Record Type Set Up for Memberships:

Navigate to Setup -> Object Manager -> Opportunity.

Ensure there is a specific record type for memberships (e.g., "Membership Opportunity").

Configure this record type with the necessary fields and settings specific to membership tracking.

By ensuring these configurations are in place, NPSP can properly roll up membership data and provide accurate metrics for the organization.

"Customizable Rollups in NPSP" from Salesforce Help: Customizable Rollups

"Setting Up Opportunity Record Types" from Salesforce.org: Opportunity Record Types

NEW QUESTION # 178

A nonprofit wants to present active volunteer sites on a map which should be visible without logging in.

Which tool would support this requirement?

- A. Custom Report
- B. Tableau Public
- C. Tableau CRM
- D. Custom Dashboard

Answer: B

Explanation:

To present active volunteer sites on a map that should be visible without logging in, the nonprofit can use Tableau Public. Here's why:

Tableau Public:

Tableau Public is a free platform that allows users to create and share interactive data visualizations online.

It supports publishing maps and other visualizations that can be accessed publicly without requiring login credentials.
This tool is ideal for sharing information like volunteer site locations with a broad audience.
Tableau Public Documentation
Salesforce and Tableau Integration Guide

NEW QUESTION # 179

A nonprofit wants to be in full compliance with Salesforce best practices for data security and has asked its consultant an evaluation. Which tool should the consultant use to provide this assessment?

- A. Salesforce Optimizer
- B. Salesforce Health Check
- C. NPSP Health Check
- D. Shield Platform Encryption

Answer: B

Explanation:
To ensure full compliance with Salesforce best practices for data security, the consultant should use Salesforce Health Check. Here's why:
Salesforce Health Check:
This tool provides a comprehensive security assessment of your Salesforce org by measuring its settings against the Salesforce recommended baseline.
It evaluates critical security settings such as password policies, session settings, and other security configurations.
Health Check provides a score and recommendations to improve the overall security posture of the org, making it a crucial tool for maintaining data security compliance.
Salesforce Health Check Documentation
Salesforce Security Best Practices Guide

NEW QUESTION # 180

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

Answer: D

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 # 181

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