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## Salesforce Certified Nonprofit Success Pack Consultant Sample Questions (Q157-Q162):

### NEW QUESTION # 157

i. A Salesforce admin changes an Engagement Plan Template as requested by the development team. The development manager expects to see the changes reflected on an existing Engagement Plan using that Template on a campaign.

Why is the development manager unable to see the Template changes?

- A. Engagement Plan Template changes must be accepted by the user on the Template detail record first.
- B. Engagement Plan Template changes need to propagate through the platform.
- C. The development manager requires additional permissions for the new Engagement Plan Template changes.
- D. Changes to Engagement Plan Templates only affect new Engagement Plans.

**Answer: D**

Explanation:

Changes to Engagement Plan Templates in Salesforce only affect newly created Engagement Plans. Here's why:

Template Changes Application:

When an Engagement Plan Template is modified, the changes are not retroactively applied to existing Engagement Plans. Only new plans created after the modification will reflect the changes.

Create New Engagement Plans:

For the development manager to see the changes, new Engagement Plans need to be created using the updated template. Existing plans will retain the configuration they had at the time of creation.

Communicate Changes:

Inform relevant stakeholders about this behavior to manage expectations and plan accordingly. Consider cloning existing Engagement Plans if updates are necessary, applying the new template configurations.

Review Documentation:

Refer to Salesforce documentation on Engagement Plans for detailed information on how templates and plan instances work.

Salesforce Engagement Plan Documentation

Salesforce Nonprofit Success Pack (NPSP) Resources

Salesforce Trailhead: Configure Nonprofit Success Pack Engagement Plans

### NEW QUESTION # 158

A nonprofit admin needs to import lists of Contacts into Salesforce Campaigns regularly from CSV files using the NPSP Data Import tool.

What should the consultant consider when setting up this process for the nonprofit?

Choose 2 answers

- A. NPSP Data Import will automatically create the Campaign Member with the default Member Status.
- B. NPSP Data Import Dry Run will validate Campaign Member Status.
- C. Respect Duplicate Matching Rules' should be checked in NPSP Settings.
- D. Existing Campaigns are matched by exact Name.

**Answer: A,D**

Explanation:

When setting up the process for importing lists of Contacts into Salesforce Campaigns using the NPSP Data Import tool, it is essential to consider how Campaign Members are created and matched.

Key Considerations:

Automatic Campaign Member Creation (A):

The NPSP Data Import tool will automatically create Campaign Member records for the imported Contacts with the default Member Status. This helps streamline the process of adding members to campaigns.

Exact Name Matching (D):

Existing Campaigns in Salesforce are matched by exact Name. This means that the names in the CSV files must match the names of the Campaigns in Salesforce exactly for the import process to associate Contacts with the correct Campaigns.

Steps to Set Up:

Prepare CSV Files:

Ensure that the Campaign names in the CSV files exactly match the names of the Campaigns in Salesforce.

Include all necessary fields to map Contacts to Campaign Members.

Configure NPSP Data Import:

Navigate to NPSP Settings -> Data Import.

Ensure the settings align with the import requirements, including handling duplicates and respecting duplicate matching rules if enabled.

Perform Dry Run:

Use the NPSP Data Import Dry Run feature to validate the import configuration and ensure that the Campaign Member Status and other settings are correctly applied.

Salesforce Nonprofit Success Pack Documentation

Salesforce Trailhead: Import Data for Nonprofits

## NEW QUESTION # 159

A nonprofit needs a marketing automation tool. They want to segment and target supporters over time, based on the supporters' engagement and how they interact with the nonprofit's emails. The nonprofit needs to create emails using Lightning Email Templates. Which marketing automation tool should a consultant recommend?

- A. Pardot
- B. Salesforce Flow
- C. List Emails
- D. Email Studio

**Answer: A**

Explanation:

<https://www.salesforce.org/blog/how-nonprofits-can-use-pardot-for-moves-management/> To address the nonprofit's need for a marketing automation tool that allows for segmentation, targeting, and email creation using Lightning Email Templates:

Choose Pardot:

Pardot is Salesforce's marketing automation solution designed to handle sophisticated email marketing, segmentation, and engagement tracking.

Set Up Pardot:

Ensure Pardot is integrated with Salesforce.

Configure user permissions and roles in Pardot.

Connect Pardot to the Salesforce CRM to synchronize data between the two platforms.

Segment and Target Supporters:

Use Pardot's segmentation tools to create lists based on supporter engagement and interactions.

Set up dynamic lists that automatically update based on predefined criteria such as email opens, clicks, and website visits.

Create Emails with Lightning Email Templates:

Utilize Lightning Email Templates in Pardot to design and personalize emails.

Use drag-and-drop features to build responsive email templates without needing HTML knowledge.

Track Engagement:

Implement Pardot's engagement tracking to monitor how supporters interact with emails.

Use Pardot's scoring and grading system to prioritize leads based on their engagement and fit with your nonprofit's goals.

Analyze and Optimize:

Use Pardot's analytics and reporting tools to measure the effectiveness of your campaigns.

Continuously refine your segmentation and targeting strategies based on data insights to improve engagement and conversion rates.

By using Pardot, the nonprofit can effectively segment its audience, target them with personalized email campaigns, and track engagement over time, enhancing their overall marketing efforts.

Salesforce Pardot documentation on segmentation and email marketing

CertGod Nonprofit Cloud Consultant guide

## NEW QUESTION # 160

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

## Answer: D

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 # 161

A system admin uploaded a .CSV file using the Data Import Wizard with the NPSP Data Importer. The Mailing Street address field was mapped, but the admin noticed the field was Wizard on all of the records after the import completed.

What is a likely cause?

- A. There were validation rules for the missing field.
- B. There were more than 65 columns in the CSV file.
- **C. The column contained incomplete data.**
- D. The mapped Salesforce ID was inappropriate for the record type.

## Answer: C

Explanation:

When using the Data Import Wizard with the NPSP Data Importer and noticing that the Mailing Street address field was missing on all records after import, one likely cause is incomplete data in the CSV file. Here's a detailed explanation:

Check the CSV File:

Open the CSV file that was uploaded.

Verify if the Mailing Street address column contains complete and properly formatted data for all rows.

Ensure Completeness:

Ensure that there are no missing values or improperly formatted addresses in the Mailing Street column.

Even a single missing value can cause the entire column to be skipped during import.

Re-import Data:

Correct any incomplete or missing data in the CSV file.

Use the Data Import Wizard again to re-import the corrected file.

Verify Field Mappings:

During the import process, ensure that the Mailing Street field is correctly mapped to the appropriate Salesforce field.

By ensuring the completeness and correctness of the data in the CSV file, you can avoid issues where fields are missing after import.

Salesforce Data Import Wizard Guide: Data Import Wizard.

## NEW QUESTION # 162

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