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NEW QUESTION: 1
A nonprofit organization is setting up Outcome Management in Nonprofit Cloud to track the effectiveness of its job skills training program. The overall goal of the program is to reduce unemployment among its clients.
What should the organization use to represent the goal in the Outcome Management objects?
A. An Outcome
B. A Benefit
C. An Indicator Result
Answer: (SHOW ANSWER)
In the Outcome Management framework, there is a clear distinction between the "service" provided, the
"metric" used for measurement, and the "long-term change" desired.
To represent the "overall goal"-which in this case is the broad, systemic change of "reducing unemployment"
-the consultant must use the Outcome object. An Outcome is the North Star of the Impact Strategy; it defines the qualitative "Future State" the organization is working toward.
Key Components of the Outcome Strategy:
* Outcome (The Goal): "Reduced Unemployment" or "Economic Self-Sufficiency." This is a high-level record that acts as a container for all related measurements.
* Indicator Definition (The Metric): To see if the Outcome is being met, you need a metric, such as the
"Percentage of program graduates employed within 90 days."
* Outcome Activity: This is the link that connects the high-level Outcome to the specific Program (Job Skills Training).
* Indicator Result (The Data): This object (Option C) holds the actual numerical values (e.g., "85%") collected during a specific timeframe. It represents the proof of the goal's achievement, not the goal itself.

* Benefit (Option B): This represents the specific service delivered (e.g., "Resume Workshop"). Delivering a benefit is an activity that contributes to an outcome, but it is not the outcome itself. By defining the goal as an Outcome, the consultant allows the organization to aggregate data from multiple programs and timeframes to see the cumulative impact they are having on unemployment in their community.

NEW QUESTION: 2

A nonprofit organization has received 50 donations from a peer-to-peer fundraising event. When entering the donations, the organization wants to ensure that both the team organizer and the donor get equal attribution for each donation, so the organization can send them acknowledgements later. How should the donation attributions be entered in Nonprofit Cloud?

A. Enter the donor donation total in the Donor Cover Amount on the Gift Transaction and create a Gift Transaction Designation for the event.

B. Create an Opportunity Contact Role for the donor and create a Gift Tribute for the team organizer.

C. Create a Gift Soft Credit for the team organizer and attribute the Gift Transaction to Donor.

Answer: C (LEAVE A REPLY)

In Nonprofit Cloud for Fundraising, correctly attributing "Hard Credit" and "Soft Credit" is essential for accurate financial reporting and donor stewardship.

In a peer-to-peer (P2P) scenario, the person who actually gave the money is the Donor. They receive the legal

"Hard Credit" for tax purposes. The Team Organizer (the solicitor) is the influencer who motivated the gift.

They receive the "Soft Credit" for recognition purposes.

Step-by-Step Entry Process:

* Create the Gift Transaction: The consultant (or the automated P2P integration) creates a Gift Transaction record. The Donor field is populated with the Person Account of the individual who made the payment. This is the Hard Credit.

* Assign the Soft Credit: To recognize the team organizer, a Gift Soft Credit record is created and linked to that specific Gift Transaction.

* The Soft Credit Recipient is the Team Organizer's Person Account.

* The Role is set to "Solicitor" or "P2P Organizer."

* Automation: When these gifts are entered in bulk, the consultant can use a Gift Batch where a default

"Soft Credit" can be applied to all transactions in the batch if they all belong to the same organizer.

* Acknowledgement: By having both names linked to the transaction-one as the primary donor and one as a soft credit recipient-the organization can run two separate acknowledgment runs. One generates a

"Tax Receipt" for the donor, and the other generates a "Thank You/Influence Alert" for the organizer.

Why other options are incorrect:
* Option A: "Donor Cover Amount" is used for tracking when a donor pays for the credit card processing fees, not for attribution to a third party.
* Option B: Gift Tribute is for "In Memory Of" or "In Honor Of" designations, which are purely sentimental and do not represent the solicitation influence of a peer-to-peer organizer. Gift Soft Credit is the standard NPC object for this business requirement.

NEW QUESTION: 3

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)

A. Salesforce Optimizer report
B. Customizable Rollups
C. Opportunity Stages
D. NPSP Health Check27
E. Campaign Hierarchy28

Answer: (SHOW ANSWER)

When donor totals (e.g., "Total Gifts This Year") are incorrect, the consultant must investigate the l30ogic that aggregates those numbers. In NPSP, this involves a combination of configuration settings and system health tools.
Three Critical Areas to Troubleshoot:
* Customizable Rollups (B): This is the engine that calculates the totals. The consultant should check if the Filter Groups are correctly defined. For example, if a rollup is set to only count "Individual" gifts but the missing gifts are marked as "Major Gifts," the filter logic is the culprit.
* Opportunity Stages (C): NPSP rollups only include donations that are in a "Closed/Won" state. If the organization created a custom stage (e.g., "Received - Awaiting Acknowledgment") but didn't mark that stage as "Won" in the Stage picklist settings, those gifts will be ignored by the rollup engine.
* NPSP Health Check (D): This is the first place a consultant should look for system-wide issues. The Health Check will identify if the nightly rollup batch job is failing, if there are orphaned records, or if there are "Data Integrity" issues (like an Opportunity without an Account) that prevent the rollups from processing successfully.
Why other options are incorrect:
* Salesforce Optimizer (Option A): This is a general org health tool (checking limits, unused fields, etc.) and does not have the nonprofit-specific logic needed to troubleshoot NPSP rollups.
* Campaign Hierarchy (Option E): While hierarchies help with campaign reporting, they do not impact the "hard credit" rollups on Account and Contact records.

NEW QUESTION: 4

A nonprofit organization wants to summarize donor activity related to Campaigns. Which object stores rollup fields that relate to the Campaigns?

A. Donor Gift Summary

B. Gift Designation

C. Outreach Summary

Answer: (SHOW ANSWER)

In the Nonprofit Cloud Fundraising data model (specifically API v59.0 and later), Salesforce introduced the Outreach Summary object to provide deep insights into the performance of marketing and solicitation efforts.

While the standard Campaign object in Salesforce tracks basic metrics like "Total Value Won Opportunities," the Outreach Summary in NPC is designed for the high-volume needs of nonprofits. It stores specialized rollup fields that provide a granular view of how a specific campaign or "Outreach Source Code" is performing.

Standard Rollup Fields in Outreach Summary:

* GiftCount: The total number of gifts received in response to the campaign.
* DonorCount: The number of unique donors who gave.
* TotalGiftAmount: The sum of all gift amounts.
* AverageGiftAmount: Automatically calculated to show donor value.
* TotalRecurringGiftAmount: Specifically tracks the success of sustaining giving appeals.

Implementation Logic:

* Calculation: These fields are not updated by standard Apex triggers in real-time. Instead, they are populated using the Data Processing Engine (DPE).
* Scheduling: A consultant schedules the "Outreach Summary" DPE job to run (e.g., nightly).
* Visibility: The results are written back to the Outreach Summary record, which is linked to the Campaign. This allows the fundraising team to see the true ROI of their outreach without the performance overhead of real-time calculations.

Why other options are incorrect:

* Donor Gift Summary (Option A): This object rolls up data at the Donor/Person Account level (e.g.,
"John Doe's lifetime giving"), not at the Campaign level.
* Gift Designation (Option B): This object tracks the "Fund" or "Purpose" (e.g., "General Fund"), and while it can have rollups, it doesn't represent the "Campaign" or "Outreach" performance.

NEW QUESTION: 5

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. The development manager requires additional permissions for the new Engagement Plan Template changes.12

B. Engagement Plan Template changes must be accepted by the user on the Template detail record first.34
C. Changes to Engagement Plan Templates only affect new Engagement Plans.56
D. Engagement Plan Template changes need to propagate through t7he pla8tform.
Answer: (SHOW ANSWER)
In NPSP, Engagement Plans are used to automate the creation of a set of tasks when a specific goal is identified (e.g., "Major Donor Stewardship"). It is critical to understand the relationship between the Template and the Instance.
The Logic of Decoupling:
* The Template: This is the "blueprint" that defines which tasks should be created, who should own them, and what their due dates are relative to the start date.
* The Engagement Plan (Instance): When a user applies a template to a Contact or Campaign, the system "explodes" the template and creates actual Task records and an Engagement Plan record.
* Persistence: Once those tasks are created, they become independent records. If an admin modifies the original Engagement Plan Template (e.g., adding a new task or changing a deadline), NPSP does not retroactively update existing tasks or plans that were already generated. This is intentional to prevent disrupting ongoing workflows or overwriting manual changes staff may have made to their active tasks.
* Result: Any modifications to the template will only be visible on new Engagement Plans created after the change was saved.
To update existing plans, the manager would have to delete the current Engagement Plan and re-apply the updated template, or manually add the new tasks to the current records.

NEW QUESTION: 6
How does Salesforce support donor cultivation and stewardship strategies for nonprofit organizations?
A. By enabling nonprofit organizations to track interactions with donors, create and manage campaigns, and log gifts
B. By centralizing grant application, approval, and reporting processes for outbound grants
C. By automating financial ledger reporting for various revenue streams, including grants and in-kind donations
Answer: (SHOW ANSWER)
Donor cultivation and stewardship are the core pillars of a nonprofit's fundraising strategy. In the modern Nonprofit Cloud (NPC), Salesforce provides a unified platform to manage the entire donor lifecycle-from the initial "prospect" phase to long-term "stewardship." The Stewardship Framework in NPC:
* Tracking Interactions: Salesforce allows development officers to log every "touchpoint" with a donor.

Using the Interaction and Interaction Summary objects, staff can record detailed notes from discovery calls, coffee meetings, or site visits. This historical record ensures that as staff change, the relationship with the donor remains consistent and informed.
* Campaign Management: Cultivation often begins with targeted outreach. NPC uses the Campaign object and Outreach Source Codes to segment donors based on their interests (tracked via Interest Tags) and engage them with specific appeals. By tracking which campaigns a donor responds to, the organization can tailor future communications to the donor's proven interests.
* Gift Logging and Recognition: Stewardship relies on timely and accurate acknowledgment. When a gift is logged via Gift Entry, the system immediately updates the Donor Gift Summary. This allows staff to see the donor's impact at a glance. Features like OmniStudio Document Generation then automate the creation of personalized thank-you letters, which are a vital part of stewardship.
* Moves Management: Using Action Plans, a consultant can build standardized "stewardship tracks." For example, after a major gift is received, the system can automatically assign tasks for the Executive Director to make a thank-you call and for the Program Director to send a 6-month impact report.
While Grantmaking (Option B) and Accounting Subledger (Option C) are important operational features, they do not define the relational strategy of "cultivation and stewardship." Option A correctly identifies the tools used by fundraisers to build and maintain the emotional and financial connection between the donor and the mission.

NEW QUESTION: 7
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: (SHOW ANSWER)
In Volunteers for Salesforce (V4S), managing "ongoing" or "reliable" volunteers is handled through a specific automation feature called Volunteer Recurrence Schedules (VRS).
How VRS Works:

* Automated Enrollment: While a Job Recurrence Schedule (JRS) is used to create the empty shifts (the "slots" on the calendar), a Volunteer Recurrence Schedule is used to link a specific person (Contact) to those slots on a repeating basis.
* Configuration: The volunteer manager navigates to the Volunteer Job and finds the Volunteer Recurrence Schedules related list. They create a new record for the volunteer (e.g., "Jane Doe").
* Setting the Frequency: They specify the recurrence (e.g., "Every Monday" or "The 1st and 3rd Friday of every month").
* Batch Processing: V4S runs a nightly batch job (or it can be triggered manually via "Process Recurrence Schedules"). This job looks ahead (typically 4 months) and automatically creates Volunteer Hours records with a status of "Confirmed" for that person on every date that matches their schedule.
Why Option C is incorrect: A Job Recurrence Schedule creates the "container" for work (the shifts) but does not automatically assign a specific person to them.1 Why Option A and D are incorrect: These are manual workarounds. The purpose of using a specialized package like V4S is to utilize its native automation rather than relying on external sprea2dsheets or additional paid AppExchange tools.
By using Volunteer Recurrence Schedules, the nonprofit saves hundreds of hours of manual data entry and ensures that their "regular" volunteers are always accounted for on the roster.

NEW QUESTION: 8
A nonprofit organization wants to track the individual tutoring services they provide. Participants are eligible for an unlimited number of tutoring sessions. The organization needs to see how many sessions have been provided, and which tutoring subjects are most popular.
Which objects should the nonprofit use?
A. Program, Benefit, and Benefit Disbursement
B. Benefit, Goal Assignment, and Benefit Disbursement
C. Program, Program Enrollment, and Program Cohort
Answer: (SHOW ANSWER)

NEW QUESTION: 9
Which donor lifecycle step focuses on building a relationship with a potential new donor?
A. Cultivation
B. Stewardship
C. Solicitation
Answer: (SHOW ANSWER)

NEW QUESTION: 10
A consultant needs to configure Salesforce to track relationships between individuals.

How should the consultant configure Nonprofit Claud to meet the requirement?
A. Enable Person Accounts, create Contact Contact Relationships, assign Record Types and Page Layouts, and then create Party Role Relationships.

B. Enable Person Accounts, assign Record Types and Page Layouts, enable Group Membership, create Party Role Relationships, and then create Contact Contact Relationships.
C. Assign Record Types and Page Layouts, enable Group Membership, enable Person Accounts, create Contact Contact Relationships, and then create Party Role Relationships.
Answer: (SHOW ANSWER)

NEW QUESTION: 11
A consultant is engaged by a nonprofit organization that has millions of records and receives hundreds of thousands of individual donations daily. The organization is struggling with its current system, which is unable to handle the volume of records being generated. The organization wants to know if Nonprofit Cloud can handle this volume. Which Nonprofit Cloud feature can process this volume of records?
A. Stage Management
B. Batch Management
C. Data Consumption Framework
Answer: B (LEAVE A REPLY)
One of the most significant advantages of the new Nonprofit Cloud (NPC)-built on the Salesforce Industries (formerly Vlocity) core-is its ability to handle "Large Data Volumes" (LDV) that would often cause performance issues in traditional NPSP environments.
The Batch Management feature is the specific tool designed for processing hundreds of thousands or even millions of records efficiently.
How Batch Management Works:
* Chunking Data: Instead of trying to process a million donations in a single, massive transaction (which would hit Salesforce governor limits), Batch Management breaks the data into smaller "chunks" or batches.
* Asynchronous Processing: These batches are processed in the background. This ensures that the user interface remains responsive and that the system can scale to handle high-frequency transaction periods, such as Giving Tuesday or year-end appeals.
* Integration with DPE: Batch Management often works hand-in-hand with the Data Processing Engine (DPE). The DPE aggregates and transforms the millions of records, and Batch Management manages the execution of those transformations to ensure they complete successfully without timing out.
* Error Handling: It provides a robust framework for tracking which records in a batch failed and why, allowing consultants to troubleshoot specific data issues without stopping the entire processing run.
For a consultant, recommending Batch Management is the key to solving the "performance struggle" mentioned in the prompt. It moves the organization from a "real-time" processing model (which is fragile at scale) to a robust "batch-driven" model designed for enterprise-level volume.

NEW QUESTION: 12

A consultant is training a system admin to prepare for a new release of a particular open source Nonprofit Cloud product. Where are two places the system admin should look for release notes on the product? (Choose
2)

A. The product's GitHub repository release page.

B. The Nonprofit Hub group in the Trailblazer Community.

C. The Nonprofit Cloud release announcement group in the Trailblazer Community.

D. The Salesforce Trust website.

Answer: (SHOW ANSWER)

Managing releases for open-source products like NPSP, PMM, or V4S requires a different approach than standard Salesforce seasonal releases. Because these are managed packages developed in an open-source model, the documentation is found in specific community and developer locations.

The Two Primary Sources:

* GitHub Repository Release Page (A): Most Nonprofit Cloud open-source products (like NPSP) are hosted on GitHub (e.g., under the SalesforceFoundation or SFDO-Community organizations). The Releases tab on the repository provides the most technical and immediate information, including the specific version number, bug fixes, and "New Feature" logic directly from the developers.

* Nonprofit Cloud Release Announcement Group (C): This is the official Salesforce Trailblazer Community group for nonprofit customers. Salesforce product managers post "Push" schedules and high-level summaries of what is included in the upcoming package releases. This is where an admin finds out when the package will be automatically pushed to their sandboxes and production orgs.

Why other options are incorrect:

* Nonprofit Hub (Option B): This is a general discussion group for networking and "How-To" questions, but it is not the official repository for release notes.

* Salesforce Trust (Option D): This site monitors system performance, security alerts, and instance status (e.g., "Is NA123 down?"). It does not contain feature-level release notes for managed packages like NPSP.

NEW QUESTION: 13

A nonprofit considers risk mitigation to be vital to the success of its implementation project. What are three elements impacted by change that cause risk?

A. Time, governance, people

B. Quality, processes, time

C. People, processes, cost

D. Cost, quality, time

Answer: (SHOW ANSWER)

In project management and Salesforce implementation strategy, the Triple Constraint (also known as the Iron Triangle) defines the three most critical elements that are impacted by any change to a project's scope.
These three elements are Cost, Quality, and Time.
* Cost: This refers to the financial budget and resources allocated to the project. If a nonprofit decides to add a new "Impact Dashboard" mid-implementation, the cost will likely increase as more consultant hours are required.
* Time: This is the schedule or deadline for the project. Adding features or facing technical hurdles usually extends the timeline. If the "Time" cannot be moved (e.g., a "Go-Live" before a major fundraising gala), then Cost or Quality must be adjusted.
* Quality (or Scope): This represents the robustness and functionality of the final solution. If a project is running over time and over budget, the organization might decide to "cut corners" or reduce the complexity of certain automations to meet the deadline, which negatively impacts the quality of the system.
Risk Mitigation Strategy: A consultant's job is to manage the balance between these three. If one changes, at least one of the others will be impacted. For example, if a nonprofit wants to speed up the Time to go-live, they must either increase the Cost (hiring more people) or decrease the Quality (reducing the initial scope).
Understanding these three risks is essential for settting realistic

NEW QUESTION: 14
A consultant is tasked with implementing NPSP for a UK-based nonprofit. One of their requirements is to localize the US-focused labels of some NPSP fields, such as replacing all references to Organization with Organisation. What should the consultant do to meet the requirement?
A. Reword the field label in Setup.
B. Activate English (UK) in Language Settings.
C. Create a support case to change the label.
D. Override the default English labels in Translation Workbench.
Answer: (SHOW ANSWER)
NPSP is a Managed Package. In Salesforce, you cannot simply go into Setup and change the labels of fields that are part of a managed package because those fields are "locked" to protect the package's integrity and ability to receive updates.
The Solution: Translation Workbench:
* Overriding Labels: To change "Organization" to "Organisation" (the UK spelling), the consultant must use the Translation Workbench. Even though both are English, Salesforce treats English (UK) and English (US) as different locales.
* Override Feature: Within the Translation Workbench, there is an "Override" section specifically for managed packages. The consultant selects the Nonprofit Success Pack package, chooses the object (e.
g., Account or GAU), and then enters the "New Label" for the specific field.

* Global Impact: This change is reflected across the entire user interface, including reports, list views, and page layouts, without actually modifying the underlying code of the managed package.
Why other options are incorrect:
* Reword in Setup (Option A): This works for custom fields you created, but it is blocked for fields starting with the npsp__ prefix.
* Language Settings (Option B): Activating English (UK) will change standard Salesforce labels (like
"Zip Code" to "Postcode"), but it does not automatically "UK-ize" the custom labels defined inside the NPSP managed package.
* Support Case (Option C): Salesforce support does not perform UI label customization for individual customers.

NEW QUESTION: 15
The system admin at a nonprofit has set up automated soft credits to grant to the solicitor of each donation.
The development director wants a report to show who the solicitor is for each donor. Which report type does the system admin need to use to create the requested report?
A. Contacts with Relationships
B. Accounts with Contact Roles and Household
C. Opportunities with Contact Roles
D. Opportunities with Partial Soft Credits and Contacts
Answer: (SHOW ANSWER)
In NPSP, soft credits are fundamentally based on the Opportunity Contact Role (OCR) object.
Even if
"Partial Soft Credits" are used for splitting a gift, the primary mechanism for attributing a "Solicitor" to a donation is assigning them a specific role on the Opportunity.
Reporting Logic:
* The Junction: The Opportunity Contact Role acts as the bridge between the Opportunity (the donation) and the Contact (the solicitor).
* Standard Report Type: The standard report type Opportunities with Contact Roles allows the user to see the donor (the Account) and all related contacts who have a role on that gift.
* Filtering: The Admin can filter this report by the "Role" field (e.g., Role EQUALS Solicitor). This surfaces exactly who the solicitor was for every donor's transaction.
Why other options are incorrect:
* Option D: Partial Soft Credits is a more complex object used when multiple people get different dollar amounts of credit for a single gift. For a standard report showing "who the solicitor is," the Contact Role is the simpler and more standard starting point.
* Option A: Relationships track person-to-person ties (like "Spouse" or "Coworker"), not who influenced a specific financial transaction.
* Option B: This focuses on the Household structure rather than the individual donation influence history.

NEW QUESTION: 16

The System Administrator at a nonprofit organization is assigning permission sets to users for the organization's new Nonprofit Cloud implementation. The organization needs some of its staff to have read- only access to the Fundraising and Grantmaking objects. What should the Administrator use to limit the access?

A. Sharing Rules

B. Muting permission sets

C. Restriction Rules

Answer: (SHOW ANSWER)

NEW QUESTION: 17

A nonprofit organization has identified that some donations should be directed to one or more program areas in the financial accounting software. This information is identified when an Opportunity is being solicited. In the Nonprofit Cloud Fundraising Data Model, which object should be used to record the donor's intent during solicitation?

A. Gift Transaction Designation

B. Gift Designation

C. Gift Default Designation

Answer: (SHOW ANSWER)

In the Nonprofit Cloud (NPC) Fundraising model, tracking donor intent-where the money is "designated" to go-is a core requirement for financial transparency. It is important to distinguish between the "Fund" and the "Allocation."

* Gift Designation (The Fund): This object represents the master fund or program area (e.g., "Clean Water Initiative"). It is a static record that holds rollup data for that specific fund.

* Gift Transaction Designation (The Allocation): This is the junction object that records the donor's specific intent for a particular gift. When a consultant identifies that a donation needs to be split across multiple programs, they create multiple Gift Transaction Designation records linked to a single Gift Transaction. This object stores the specific amount or percentage of that transaction that should be credited to a particular program.

Workflow During Solicitation:

During the solicitation of an Opportunity, the consultant or gift officer captures the donor's intent. Even if the money has not yet arrived, the data model for NPC Fundraising (v59 and higher) anticipates that this intent will eventually live on the Gift Transaction Designation record. When an Opportunity is "Won" and converted into a Gift Transaction, the system uses the metadata captured during solicitation to populate these designation records.
Why other options are incorrect:
* Gift Default Designation (Option C): These are used at the Campaign or Org-wide level to define where unrestricted or "unmarked" gifts should go by default. They are templates for inheritance rather than the record that tracks a specific donor's intent for a specific solicitation.
* Gift Designation (Option B): As mentioned, this is the master definition of the fund, not the record of a specific allocation instance.

NEW QUESTION: 18
A nonprofit organization uses Nonprofit Cloud for Fundraising. The organization wants to track the relationships between board members and major donors.
Which object should the organization use for this use case?
A. Account Account Relationship
B. Account Contact Relationship
C. Contact Contact Relationship
Answer: (SHOW ANSWER)

NEW QUESTION: 19
A nonprofit organization needs to suspend a recurring donation for a donor who has requested a temporary break.
Which Nonprofit Cloud invocable action should the organization use?
A. Pause Gift Commitment Schedule Action
B. Process Gift Entries Action
C. Close Gift Commitment Action
Answer: A (LEAVE A REPLY)

NEW QUESTION: 20
A consultant creates 4 Data Processing Engine definition and activates the definition.
What should be used to schedule the definition?

A. Schedule Builder
B. A Flow
C. An Apex trigger
Answer: (SHOW ANSWER)

NEW QUESTION: 21

A nonprofit organization has a winter coat distribution program. The organization wants to track the recipient of each coat if the recipient is an existing participant in one of the organization's programs. For non- participants, only the number of coats distributed must be recorded.
What should the organization do?
A. Create a Benefit for the coat distribution. Record a Benefit Schedule Assignment of type Walk-In for each participant. Record a Benefit Schedule Assignment for non-participants.
B. Create a Benefit for the coat distribution. Record an Ad Hoc Disbursement of type Walk-In for each participant. Record an Ad Hoc Disbursement of type Anonymous for non-participants.
C. Benefit Assignment of type Delivery for non-participants. Create a Benefit for the coat distribution.
Record a Benefit Assignment of type Walk-In for each participant. Record
Answer: (SHOW ANSWER)

NEW QUESTION: 22
The development director wants all users to only see Engagement Plans on Opportunity records for donations with an Amount greater than 10,000. How should this be accomplished?
A. Add the Related Lists component to the Opportunity Lightning page. Set the component visibility filter to ensure the Opportunity Amount field is greater than 10,000. Assign the page to the development director's profile.
B. Create a tab and associate the Engagement Plan object to the tab. Add the Related List - Single Lightning component and set it to Engagement Plans. Give read access for the Engagement Plan object to all profiles.8
C. Create a custom Lightning component that dis9plays all Engagement Plans. Add the component to the Opportunity Lightning Page. Assign the Lightning Page as the Org Default and Activate it.101112
D. Add the Related List - Single Lightning component to the Opportunity Lightning pa13ge. Add a component visibility filter to display the Engagement Plan when the Opportunity Amount field is greater than 10,000.
Answer: (SHOW ANSWER)
To meet this requirement, a consultant should leverage Dynamic Lightning Pages, specifically using Component Visibility Filters. This allows for a declarative solution that does not require multiple page layouts or custom code.
Step-by-Step Implementation:
* Edit the Page: Navigate to an Opportunity record and select Edit Page from the Setup (gear) icon to open the Lightning App Builder.
* Add the Component: Drag the Related List - Single component onto the page layout.
* Configure the Component: In the component properties sidebar, set the Related List to "Engagement Plans."
* Set Visibility Filter: Scroll down to the Set Component Visibility section and click + Add Filter.
* Define Criteria: * Field: Amount
* Operator: Greater Than

* Value: 10,000
* Save and Activate: Save the page. When "All Users" (per the requirement) view an Opportunity, the Engagement Plan related list will simply be invisible if the amount is $10,000 or less. If it is $10,001 or more, the component will appear.
Why other options are incorrect:
* Option A: Assigning the page only to the development director's profile violates the requirement that
"all users" should see it when the criteria is met.
* Option B: This is an overly complex and disjointed user experience that doesn't actually filter the view based on the specific Opportunity's amount.
* Option C: A custom component is unnecessary "Technical Debt" since standard functionality meets the requirement perfectly.

NEW QUESTION: 23
A consultant is helping a nonprofit organization set up Outcome Management. Which object should the consultant use to link Programs to Indicator Definitions?
A. Indicator Performance Period
B. Indicator Result
C. Indicator Assignment
Answer: (SHOW ANSWER)
In the Salesforce Nonprofit Cloud (NPC) architecture, the Outcome Management feature is designed to provide a standardized way for organizations to define, measure, and track their impact. To successfully implement this, a consultant must understand the hierarchical relationship between several key objects.
The process begins with the Indicator Definition, which acts as a "template" or "master metric." This object stores the logic of what is being measured (e.g., "Number of students who improved their reading level") without being tied to a specific program. To apply this metric to a specific context, Salesforce uses the Indicator Assignment object. This object serves as the essential link (a junction) between the Indicator Definition and the Program, Outcome, or Goal. By using Indicator Assignment, a consultant allows the organization to reuse the same definition across multiple different programs while keeping the tracking and reporting for each program distinct.
Step-by-Step Configuration Flow:
* Create Indicator Definition: Define the global metric, specifying the data type and how the progress will be calculated.
* Create the Indicator Assignment: This is the core step. Here, the consultant links the specific Program record to the Indicator Definition. This creates the specific context for measurement.
* Establish Indicator Performance Periods: Once the assignment is made, the consultant must define the timeframes (e.g., "Q1 2025" or "Annual 2025") during which the program will be evaluated.

* Record Indicator Results: Finally, as the program progresses, actual data points are entered into the Indicator Result object, which rolls up to the Performance Period and is contextualized by the Assignment.
Without the Indicator Assignment, the system would have no way of knowing which programs are responsible for which metrics. This structure ensures that a nonprofit can scale its impact measurement across various departments while maintaining a single, clean library of Indicator Definitions.

NEW QUESTION: 24
A nonprofit wants to implement an external email platform that integrates with Salesforce. The integration will record every email sent to a subscriber, as well as which recipients open the email, click a link, or unsubscribe. Which two storage considerations should the consultant take into account before recommending an email platform? (Choose 2)
A. Subscribers must be synced as Leads and Campaign Members in NPSP.
B. Campaign Member records use less storage space than custom object records.
C. Email subscribers' activities can be retained for a certain length of time.
D. Unsubscribed Leads should be deleted from Salesforce immediately.
Answer: B,C (LEAVE A REPLY)
Data storage is a significant cost and performance consideration for nonprofits. External email platforms (like Mailchimp, Constant Contact, or Marketing Cloud) can generate millions of "Activity" records that quickly consume a Salesforce org's data storage limits.
Two Key Considerations:
* Record Type Efficiency (B): In the Salesforce storage model, Campaign Member records are highly efficient. They take up significantly less space than a record in a custom object (like a "Email Result" object). If the integration uses Campaign Members to track status, the org can store more data before hitting its limits.
* Retention Policies (C): Because individual "Open" and "Click" data becomes less relevant over time, the consultant must consider a Data Retention Policy. For example, the organization might decide to keep granular engagement data for 6 months to drive near-term marketing, but then archive or delete that data to free up space for new records.
Why other options are less relevant:
* Option A: Syncing as Leads is a functional choice, but not a "storage consideration" in itself.
* Option D: Deleting unsubscribed leads is a bad practice; you should keep the record and mark it as
"Email Opt Out" to ensure you don't accidentally re-import and email them in the future, which would violate anti-spam laws.

NEW QUESTION: 25
A nonprofit organization uses Nonprofit Cloud. The organization is shifting from a traditional community- based social services organization that delivers benefits to the community to an organization that focuses on delivering financial capital to other organizations operating in the

community. Which Nonprofit Cloud license is needed to manage and track applications for funding?

A. Outcome Management

B. Program Management

C. Grantmaking

Answer: (SHOW ANSWER)

When a nonprofit shifts its mission from direct service delivery (program management) to funding other entities, it moves into the role of a "Grantmaker." In the Salesforce Nonprofit Cloud ecosystem, this specific business process is supported by the Grantmaking module.

The Grantmaking license provides access to a specialized data model and set of features designed for the full grant lifecycle:

* Funding Opportunities: Grantmakers use this object to define the available grants, including eligibility criteria, total funding amounts, and application deadlines.

* Individual Applications: This is the core object for tracking incoming requests for funding. It allows the organization to manage the review process, due diligence, and scoring of applications from other nonprofits or community groups.

* Funding Awards and Disbursements: Once an application is approved, the system tracks the Funding Award and schedules the actual payment of "financial capital" through Disbursements.

* Grantee Portal: Grantmaking often utilizes an Experience Cloud site where applicants can submit their proposals, view their status, and submit required progress reports.

While Program Management (Option B) is used for direct services (like running a food bank), and Outcome Management (Option A) is used to measure the impact of those services, Grantmaking is the specific functional area required for "delivering financial capital" and managing funding applications. For a consultant, identifying this shift in business model is key to ensuring the organization has the correct objects- such as Budget, Funding Opportunity, and Application- available in their org.

NEW QUESTION: 26

A nonprofit organization provides funding ta partners that work directly with the community to provide one- on-one nutinitianal counseling. Each year, these partners apply for funding and indicate how they plan to spend any awarded funds.

The organization is currently using the Grantmaking Experience Cloud Template to offer a place for partners to apply and collaborate on grants and the post-award process.

What can the partners do from the site?

A. See the Application Review records and provide feedback on the records.

B. Request changes in scope via Funding Award Amendment and submit the record for review after a grant has been awarded.

C. Edit the values after a budget that has already been submitted and then re-submit the budget.

Answer: (SHOW ANSWER)

NEW QUESTION: 27

The development director at a nonprofit needs to track grant lifecycles using NPSP, including assigning actions to staff members, tracking applications, reporting deadlines, and summarizing the total amount awarded with payments. How should the consultant model payments, applications, reporting deadlines, and actions in NPSP for the grant seeking institution?
A. Payments = Recurring Donations with Opportunities; Applications = Deliverables; Reporting deadlines
= Deliverables; Actions = Activities
B. Payments = Opportunities with Payments; Applications = Deliverables; Reporting deadlines = Deliverables; Actions = Activities
C. Payments = Opportunities with Payments; Applications = Activities; Reporting deadlines = Activities
Answer: (SHOW ANSWER)
Tracking the "Grant Seeking" process in NPSP requires a specific mapping of business requirements to the NPSP data model. Unlike "outbound" grantmaking, "inbound" grant seeking uses the Opportunity object as the primary record for each grant proposal.
Mapping the Lifecycle:
* Applications & Reporting Deadlines (Deliverables): In NPSP, the Deliverable object is specifically designed to track milestones associated with a grant Opportunity. An "Application Submission" is a deliverable (the first milestone), and "Mid-Year Report" or "Final Report" are subsequent deliverables with specific due dates. This allows the development director to see a calendar of all upcoming grant requirements.
* Payments (Opportunities with Payments): While the Opportunity tracks the total amount awarded, the Payment object in NPSP tracks the actual cash coming in. Since grants are often paid in multiple installments (multi-year grants), using the related Payments list is the standard way to reconcile the total award against what has actually been deposited in the bank.
* Actions (Activities): Standard Salesforce Activities (Tasks and Events) are used to track the day-to- day engagement steps, such as "Draft Narrative," "Call Program Officer," or "Review Budget." These are the "internal" actions assigned to staff members.
Why other options are incorrect:
* Option A: Recurring Donations are for open-ended, sustaining gifts (like monthly donors), not for specific fixed-amount grant awards with a set payment schedule.
* Option C: Using Activities for reporting deadlines is a poor practice because activities are easily deleted or closed without the formal tracking and field-level detail (like "Grantee Requirements") that the Deliverable object provides.

NEW QUESTION: 28
A nonprofit admin notices the nightly NPSP batch jobs are suddenly taking significantly longer to complete than they did a month earlier. What are two factors the consultant should tell the system admin to consider?
(Choose 2)
A. A new Flow was activated.

B. A new standard roll-up summary field was added to an object.
C. A new customizable rollup was added in NPSP Settings.
D. A new node tree was added to the role hierarchy.
Answer: (SHOW ANSWER)
Nightly batch jobs in NPSP, particularly the Rollup Donors batch, process thousands or millions of records.
Any increase in the "workload" per record will result in a measurable increase in total processing time.
Two Primary Performance Factors:
* New Flows (A): Salesforce Flows (especially Record-Triggered Flows) are highly powerful but resource-intensive. If a new Flow was activated on the Opportunity or Account object, it will fire every time the NPSP batch job updates a record. If the batch job updates 100,000 Accounts, the Flow runs
100,000 times. If the Flow contains "In-Loop" queries or complex logic, it can drastically slow down the batch execution time or even cause it to hit governor limits.
* New Customizable Rollups (C): Every time you add a new Customizable Rollup in NPSP Settings, you are adding another calculation that the batch job must perform for every record. If the new rollup has complex filters (e.g., "Total Gifts from 3 years ago excluding In-Kind and Grants"), the system must query more data and perform more evaluations per record, extending the batch window.
Why other options are less likely:
* Standard Roll-up Summary (Option B): These are calculated by the Salesforce platform kernel and are generally more efficient than Apex-based rollups. While they add some overhead, they usually do not cause the "significant" slowdowns seen with custom logic or complex NPSP settings.
* Role Hierarchy (Option D): While changes to the hierarchy trigger sharing recalculations, this typically affects record visibility and sharing performance rather than the execution speed of a data- processing batch job.

NEW QUESTION: 29
A nonprofit organization uses Nonprofit Cloud ta manage recurring donations. The organization wants to easily see the scheduled transactions for the next several months.
What should be added to provide visibility to this information?
A. The Gift Transactions related list ta the Opportunity record page
B. The Timeline component to the Person Account record page
C. The Upcoming Transactions component to the Gift Commitment record page
Answer: (SHOW ANSWER)

NEW QUESTION: 30
A nonprofit wants to convert from Legacy Recurring Donations to Enhanced Recurring Donations. What are two considerations the nonprofit should take into account before making the switch? (Choose 2)

A. All existing integrations should be reviewed for compatibility.
B. Enhanced Recurring Donations introduces a new custom object.
C. Data Loader is required to revert to Legacy Recurring Donations.
D. Reverting to Legacy Recurring Donations is unsupported.
Answer: (SHOW ANSWER)
The move from Legacy Recurring Donations to Enhanced Recurring Donations (ERD) is a significant architectural upgrade in NPSP. While ERD offers better performance and more flexible scheduling, it changes how data is processed and stored.
Key Considerations:
* Integration Compatibility (A): Enhanced Recurring Donations changes the underlying logic of how installments (Opportunities) are created and managed. If the nonprofit uses third-party apps (like an external payment gateway or a custom web form) that rely on the legacy npe03__Recurring_Donation__c fields or the old "Monthly" vs. "Custom" picklist values, those integrations may break. A consultant must perform a thorough audit of all APIs and managed packages before the conversion.
* No Revert Path (D): This is a "one-way door." Salesforce documentation explicitly states that reverting to Legacy Recurring Donations is unsupported once the upgrade process has been completed. The conversion process modifies the database schema and migrates records in a way that cannot be easily undone. Therefore, testing in a full sandbox is a non-negotiable prerequisite.
Clarifying Other Points:
* New Custom Object (Option B): This is incorrect. Enhanced Recurring Donations actually uses the same custom object as the legacy version (npe03__Recurring_Donation__c), but it utilizes new fields, new page layouts, and a completely different set of Apex triggers and batch jobs.
* Data Loader (Option C): Since the process is unsupported, Data Loader is not a viable or recommended way to "revert" the complex architectural changes.

NEW QUESTION: 31
A nonprofit organization wants to track donations of computers, books, and cleaning supplies as they are received.
What should the organization do in Nonprofit Cloud?
A. Create Git Commitment records and use the asset fields.
B. Create Contact Profile records and use the asset fields
C. Create Opportunity records and a custom field to track the asset value.
Answer: (SHOW ANSWER)

NEW QUESTION: 32
A nonprofit wants to deploy Nonprofit Cloud Case Management into its production org. Which two prerequisites should be considered prior to installing Case Management? (Choose 2)
A. Ensure appropriate licenses are provisioned
B. Ensure Volunteers for Salesforce is properly configured
C. Enable My Domain
D. Install NPSP
Answer: (SHOW ANSWER)
Nonprofit Cloud Case Management (NCCM) is a managed package that extends the capabilities of Salesforce for human services. Like many high-end Salesforce industry solutions, it has specific technical and legal prerequisites that must be met before the installation can succeed.
Prerequisite 1: Provisioned Licenses (A):
NCCM is not a free, open-source tool like NPSP. It is a paid product that requires specific Permission Set Licenses (PSLs) to be provisioned in the org. A consultant must verify that the organization has purchased the necessary licenses through their Salesforce Account Executive. Without these licenses appearing in the
"Company Information" section of Setup, the managed package will not function, and users will not be able to access the custom Case Management objects like Goals, Action Items, or Case Plans.
Prerequisite 2: My Domain (C):
NCCM relies heavily on modern Lightning components and OmniStudio features to power its interactive interfaces (such as the Case Plan Wizard). Salesforce requires My Domain to be enabled and deployed in any org that uses custom Lightning components. My Domain adds a unique prefix to the Salesforce URL (e.g.,
https://my-nonprofit.my.salesforce.com), which is necessary for the secure rendering of these components.
Why other options are incorrect:
* Volunteers for Salesforce (Option B): This is a completely separate application for managing volunteer shifts and is not required for Case Management to function.
* Install NPSP (Option D): While NCCM is often used alongside NPSP, the modern Nonprofit Cloud Case Management package can technically run on a standard Salesforce platform without NPSP, provided the necessary licenses are in place.

NEW QUESTION: 33
A nonprofit organization is reviewing its Salesforce licenses as part of its User management strategy.
Which statement describes the Salesforce Integration user license?

A. Can only be assigned to System Administrators
B. Only available in Enterprise Edition
C. Restricts assigned users to APT only access
Answer: (SHOW ANSWER)

NEW QUESTION: 34
A nonprofit organization plans to use Program and Case Management to track its substance abuse services.
When the Case Managers log in, they cannot see any of the Program and Benefit records that have been set up. What should the organization do to resolve the issue?
A. Assign the Outcome Management permission set to the users.
B. Assign the Advanced Program Management permission set to the users.
C. Mark all the Program and Benefit records as Active.
Answer: (SHOW ANSWER)
In Nonprofit Cloud, access to core functionality is governed by specific industry-aligned permission sets. If Case Managers are unable to see Program and Benefit records, it is typically a matter of missing object-level and feature-level permissions.
The Advanced Program Management permission set is a critical requirement for users who need to interact with the full program lifecycle.
Permissions included in Advanced Program Management:
* Object Access: It grants Read, Create, Edit, and Delete access (depending on the specific assignment) to the Program, Benefit, Benefit Type, and Benefit Schedule objects.
* Functional Access: It allows users to manage Program Enrollments and track Benefit Disbursements
.
* Visibility: Without this permission set (or a Permission Set Group containing it), the objects remain hidden from the user's navigation bar and global search, even if the records are marked as "Active." Step-by-Step Resolution:
* The Admin should navigate to Setup > Users.
* Select the Case Manager users.
* Click Permission Set Assignments > Edit Assignments.
* Add Advanced Program Management to the assigned list.
* Note: If the organization wants to limit Case Managers to "Read-Only," they would use this permission set in conjunction with a Muting Permission Set within a Permission Set Group.
Why other options are incorrect:
* Outcome Management (Option A): This grants access to impact tracking (Outcomes, Indicator Definitions) but does not provide the primary access to the Program and Benefit service delivery objects.
* Status Marking (Option C): While a record should be active for operational use, "Active" status on a record does not override Salesforce security. If the user doesn't have object-level permissions via a permission set, they cannot see the record regardless of its status.

NEW QUESTION: 35
What does a consultant need to enable and deploy before using Advanced Mapping in NPSP?
A. Custom triggers
B. Delegated Administration
C. My Domain
D. Customizable Rollups
Answer: (SHOW ANSWER)
Advanced Mapping is the powerful engine behind NPSP Gift Entry and the NPSP Data Importer. It allows consultants to map fields from a staging record to multiple objects (Account, Contact, Opportunity, etc.) simultaneously.
However, Advanced Mapping is architecturally dependent on the newer NPSP framework components.
Specifically, Salesforce documentation states that Customizable Rollups must be enabled and deployed before Advanced Mapping can be activated.
Step-by-Step Dependency Logic:
* Modernization: Customizable Rollups replaced the legacy "Legacy Rollups" and provide a more flexible way to calculate donor totals.
* Infrastructure: Both Customizable Rollups and Advanced Mapping utilize a shared set of underlying NPSP code resources. Enabling Customizable Rollups updates the database schema and triggers the necessary background processes that Advanced Mapping requires to function.
* Enabling Advanced Mapping: Once Customizable Rollups are active, the consultant can go to NPSP Settings > Bulk Data Processes > Advanced Mapping and toggle the feature on. The system will then perform a "deployment" of the mapping logic.
My Domain (Option C) is a general Salesforce requirement for Lightning components but is not the specific functional prerequisite for this NPSP feature. Custom Triggers (Option A) and Delegated Administration (Option B) are unrelated to the internal NPSP mapping engine dependencies.

NEW QUESTION: 36
The system administrator at a nonprofit wants to use Advanced Mapping for regular data imports of constituent and donation data. What is an important consideration of Advanced Mapping?
A. The target fields can only be text, currency, number, date or address fields.
B. The target objects must directly relate to Accounts, Contacts, or Opportunities.
C. Checkbox fields are unavailable to map to as target fields.
D. The target objects must be NPSP objects.
Answer: (SHOW ANSWER)
Advanced Mapping in the Nonprofit Success Pack (NPSP) is a powerful tool that allows admins to customize how data from the NPSP Data Import staging object is pushed into target records. However, it operates within a specific architectural framework.
Key Architectural Considerations:

* Object Relationships: Advanced Mapping is designed to handle the core "Nonprofit Triangle" of data:
Accounts, Contacts, and Opportunities. For any additional or custom object to be eligible as a target in Advanced Mapping, it must have a direct lookup or master-detail relationship to one of these three primary objects. This is because the NPSP Data Importer logic relies on these "anchor" records to establish context and maintain data integrity.
* Mapping Groups: The tool organizes mappings into Object Groups. When you create a new group for a custom object (e.g., "Volunteer Hours"), the system validates that the custom object is related to a Contact or Account so it knows which record to link the new data to.
* Field Type Support: Contrary to Option A and C, Advanced Mapping supports a wide variety of field types, including Checkboxes, Picklists, and Lookups. The restriction isn't on the field type, but on the object's position in the data hierarchy.
* Custom Object Support: While the question asks about "NPSP objects" (Option D), Advanced Mapping can map to custom objects created by the organization, provided they follow the relationship rules mentioned above.
Understanding these relationship requirements is essential for a consultant during the data migration or integration design phase. It ensures that the staging file can successfully populate multiple related records in a single execution without custom Apex code.

NEW QUESTION: 37
A nonprofit organization provides funding to partners that work directly with the community to provide one- on-one nutritional counseling. The organization wants to make a dynamic, multi-section application that applicants can fill out on their Experience Cloud site to request funding.
The organization plans to use the Form Overview and Form Review components included in the Grantmaking Experience Cloud template.
What should the organization do?
A. Create a grantmaking application form on the Individual Application object by using Form Framework.
B. Create a Field Set and use Dynamic Forms on the Individual Application object to create sections for information.
C. Create a grantmaking application form on the Individual Application object by using Dynamic Assessments and Discovery Framework.
Answer: (SHOW ANSWER)
To create a sophisticated, multi-section grant application in Nonprofit Cloud for Grantmaking, Salesforce leverages the Discovery Framework and Dynamic Assessments. This combination allows a consultant to build an interactive digital experience that goes far beyond simple data entry.
Step-by-Step Application Build:
* Discovery Framework: The consultant starts by creating the individual "Questions" in the Discovery Framework. Each question (e.g., "Number of individuals served" or "Geographic focus") is a reusable record.

* Assessment Definition: These questions are then organized into an Assessment Task or Assessment Definition.
* OmniScript Design: Using OmniStudio, the consultant builds an OmniScript that serves as the "Dynamic Assessment" engine. This is where the multi-section logic is defined. For example, a "Counseling Details" section might only appear if the applicant selects "One-on-one Counseling" as their service type.
* Mapping: Using DataRaptors, the data entered into the form is mapped directly to the Individual Application object and its related records (like Budget or Contact Profile).
* Experience Cloud Integration: Finally, the consultant places the Assessment component on the Grantmaking portal. The Form Overview and Form Review components (part of the Grantmaking template) work specifically with this Discovery Framework/OmniScript data to show the applicant their progress and allow them to review their answers before a final submission.
Why other options are incorrect:
* Option A: "Form Framework" is not a standard, named feature in NPC; the required technology is Discovery Framework.
* Option B: While Dynamic Forms (and Field Sets) work for internal record pages, they do not support the complex multi-step, branching logic or the specialized "Overview/Review" components required for a public-facing Grantmaking portal application. Using Discovery Framework is the architecturally correct way to provide a professional and compliant grant seeking experience.

NEW QUESTION: 38
A nonprofit organization processed a gift batch, but the Gift Batch Status is updated to Partially Processed; Failed.
Which step should be performed to successfully process the batch?
A. Process a dry run of the batch.
B. Manually set the Gill Gatch Status to Processed.
C. Resolve the Gift Entry errors and process the batch again,
Answer: (SHOW ANSWER)

NEW QUESTION: 39
A nonprofit offers courses that grant teachers credit toward maintaining their teaching certification. Teachers can enroll in an annual cohort to complete the course modules together. The nonprofit needs to track the courses each teacher completes and the credits awarded to them. Which solution should a consultant recommend?
A. Program Management Module
B. Service Cloud
C. Engagement Plans
D. Self-Service Portal
Answer: (SHOW ANSWER)

The Program Management Module (PMM) is the standard industry solution for tracking the delivery of mission-centric services. In this scenario, the "Courses" are the services, and the "Teachers" are the participants.
Mapping the Requirement to PMM Objects:
* The Course (Program/Service): Each certification course is modeled as a Program. Individual modules or sessions within that course are modeled as Services.
* Annual Cohorts (Program Cohort): PMM has a standard Program Cohort object. This is perfectly suited for tracking a group of teachers who start and move through the certification modules together on an annual basis.
* Tracking Completion (Service Delivery): When a teacher completes a module, a Service Delivery record is created. The consultant can add a custom field to the Service Delivery object to track the
"Credits Awarded" for that specific session.
* Teacher Enrollment (Program Engagement): The teacher's overall progress toward their certification is tracked via the Program Engagement record, which rolls up the total number of credits earned from the related Service Deliveries.
While a Self-Service Portal (Option D) might be the interface the teachers use, and Service Cloud (Option B) provides the base infrastructure, the Program Management Module provides the specific data model (Programs, Cohorts, and Deliveries) required to track credits and educational progress out-of-the-box.

NEW QUESTION: 40

A nonprofit organization is evaluating how its inbound revenue will map to Nonprofit Cloud. The organization's inbound grant and major donor stewardship processes are closely aligned.
What are components of both these processes that the organization would track in Salesforce?

A. Cultivation steps, agreements, and discount structures

B. Cultivation steps, payment schedules, and deliverables

C. Agreements, price books, and deliverables

Answer: (SHOW ANSWER)

NEW QUESTION: 41

A consultant began an implementation project with a nonprofit that is new to Salesforce. The nonprofit's leadership is hesitant to spend time at the beginning of the project on change management. What are three reasons the consultant can share to emphasize the value and importance of governance? (Choose 3)

A. Technical interoperability

B. Cost savings

C. Compliance

D. Delivery Speed

E. Security

Answer: (SHOW ANSWER)

Governance in a Salesforce project is the framework of rules and processes that ensure the system remains healthy, secure, and aligned with the mission. While leadership may view it as "bureaucracy," a consu1ltant must frame it as risk2 management.
Three Core Pillars of Governance Value:
* Security (E): Without governance, users might be granted broad permissions "to move fast," leading to data breaches or the exposure of sensitive donor/client information. Governance ensures a "Principle of Least Privilege" is maintained through a structured review of Permission Sets and Sharing Rules.
* Compliance (C): Nonprofits are subject to strict regulations (e.g., GDPR, HIPAA, or IRS audit requirements). Governance provides the documentation and audit trail needed to prove that the organization is handling data according to legal standards.
* Cost Savings (B): This is often the most persuasive argument for leadership. Poor governance leads to
"Technical Debt"-duplicate apps, messy data, and conflicting automations that require expensive consultant hours to fix later. By establishing a Change Control Board (CCB), the organization avoids wasting money on redundant tools or poorly designed features.
While Delivery Speed (D) and Interoperability (A) are benefits of a well-run project, they are often the result of good governance rather than the primary strategic reasons to implement it. Security, Compliance, and Cost Savings are the fundamental justifications for a nonprofit's long-term sustainability on the platform.

NEW QUESTION: 42
A nonprofit wants to convert from Legacy Recurring Donations to Enhanced Recurring Donations. What are two considerations the nonprofit should take into account before making the switch? (Choose 2)
A. Data Loader is required to revert to Legacy Recurring Donations.
B. Reverting to Legacy Recurring Donations is unsupported.
C. All existing integrations should be reviewed for compatibility.
D. Enhanced Recurring Donations introduces a new custom object.
Answer: (SHOW ANSWER)
The move from Legacy Recurring Donations to Enhanced Recurring Donations (ERD) is a significant architectural upgrade in NPSP. While ERD offers better performance and more flexible scheduling, it changes how data is processed and stored.
Key Considerations:
* Integration Compatibility (A): Enhanced Recurring Donations changes the underlying logic of how installments (Opportunities) are created and managed. If the nonprofit uses third-party apps (like an external payment gateway or a custom web form) that rely on the legacy npe03__Recurring_Donation__c fields or the old "Monthly" vs. "Custom" picklist values, those integrations may break. A consultant must perform a thorough audit of all APIs and managed packages before the conversion.

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Clarifying Other Points:
* New Custom Object (Option B): This is incorrect. Enhanced Recurring Donations actually uses the same custom object as the legacy version (npe03__Recurring_Donation__c), but it utilizes new fields, new page layouts, and a completely different set of Apex triggers and batch jobs.
* Data Loader (Option C): Since the process is unsupported, Data Loader is not a viable or recommended way to "revert" the complex architectural changes.

NEW QUESTION: 43
The program team at a nonprofit organization wants to provide services to individuals as well as their families.
How should the team set up the program participants and their family by using Nonprofit Cloud?
A. Create a Person Account for the primary individual only.
Create an Account for the househeald.
Create a Contact Contact Relationship for the rest of the household members.
B. Create a Person Account for each individual.
Create a Party Relationship Group for the household.
Create an Account Contact Relationship between each individual and the household Party Relationship Group.
C. Create a Person Account for each individual.
Create a Business Account and a Party Relationship Group for the household.
Create an Account Contact Relationship between each individual and the household Business Account.
Answer: (SHOW ANSWER)

NEW QUESTION: 44
A consultant is engaged by a nonprofit organization that wants to implement Nonprofit Cloud to digitize its siloed processes. Currently, the processes are comprised mostly of spreadsheets, notepads, and inboxes. The organization wants to have a fixed budget and a fixed scope of work (SOW). The organization already understands what is required and will clearly define all deliverables upfront. Which project management methodology describes the organization approach?
A. Waterfall
B. Agile
C. Kanban
Answer: A (LEAVE A REPLY)
The organization's requirements-fixed budget, fixed scope, and deliverables defined upfront-are the classic characteristics of the Waterfall methodology.

In a Waterfall implementation for Nonprofit Cloud:
* Linear Progression: The project follows a strict sequence: Requirements -> Design -> Build -> Test -> Deploy. You do not move to the next phase until the previous one is "signed off."
* Upfront Requirements: As mentioned in the prompt, the organization believes they already know exactly what they need. A consultant spends a long "Discovery" phase at the beginning documenting every single field, report, and automation.
* Predictability: This model provides the nonprofit's board with a clear "end date" and a total cost, which is often attractive for organizations with rigid fiscal year budgets.
Why this is different from other methods:
* Agile (Option B): Agile assumes the scope will change as the users learn more about the system. It prioritizes flexibility over a fixed upfront scope.
* Kanban (Option C): Kanban is a "just-in-time" delivery system focused on visualizing work and managing flow. It is typically used for ongoing support or "business-as-usual" tasks rather than a structured implementation with a fixed SOW and predefined deliverables.
For a consultant, while the organization wants Waterfall, it is important to warn them that translating
"spreadsheets and notepads" into a sophisticated cloud system often reveals new requirements that Waterfall's rigid structure may struggle to accommodate without costly "Change Orders."

NEW QUESTION: 45
A Nonprofit Cloud consultant is troubleshooting Accounting Subledger records that are not being created as expected. What should the consultant use to see which jobs have run recently and whether there have been any errors?
A. Scheduled Jobs
B. Monitor Workflow Services
C. Event Monitoring Analytics App
Answer: (SHOW ANSWER)

NEW QUESTION: 46
A nonprofit organization wants to track the cohorts of individuals who are interested in programs or are participating in programs.
What should the Nonprofit Cloud Administrator configure?
A. Enable Create and manage program cohorts.
B. Set the Program Cohort object sharing settings to Public Read/Write.
C. Assign the Program and Benefit Management Access permission set.
Answer: (SHOW ANSWER)

NEW QUESTION: 47
A nonprofit organization performs wealth prospecting on a donor. The organization wants to track the real estate value and the business ownership value of the donors. Which Nonprofit Cloud object has standard fields to track these values?
A. Opportunity
B. Business Account
C. Contact Profile
Answer: (SHOW ANSWER)
In the context of the new Nonprofit Cloud (NPC) and its Fundraising capabilities, Salesforce has introduced a more granular data model to support wealth screening and donor prospecting. The correct object for tracking specific financial indicators like real estate and business ownership is the Contact Profile.
In earlier versions of Salesforce for nonprofits (like NPSP), this data might have required custom fields on the Account or Contact. However, in the modern Nonprofit Cloud architecture, the Contact Profile object is specifically designed to store sensitive, person-centric data that aids in major gift strategies. This object contains standard, out-of-the-box currency fields such as:
* RealEstateValue: To track the estimated value of property owned by the constituent.
* BusinessOwnershipValue: To record the value of private businesses the contact owns.
* AssetLiquidationValue: For tracking liquid assets.
* StockValue: For public equity holdings.
Step-by-Step Configuration for Wealth Prospecting:
* Enable Fundraising: The consultant must first ensure that Fundraising is enabled in the Setup menu, as the Contact Profile fields for fundraising are available in more recent API versions (v59.0 and later).
* Set Up Donor Profiles: The consultant should configure the Donor Profile-an account page layout within the Fundraising app.11 This page uses the Contact Profile record to display a "Donor Summary" card.
* Data Integration: Often, wealth data is imported from external screening services (like WealthEngine or iWave). The consultant maps these external data points directly to the standard fields on the Contact Profile object.
* ARC Integration: To provide a 360-degree view, the Contact Profile data can be surfaced alongside the Actionable Relationship Center (ARC), allowing major gift officers to see a donor's net worth alongside their professional and personal affiliations.
By utilizing the standard Contact Profile object, nonprofits ensure their data remains compatible with built-in analytics and future Salesforce updates.

NEW QUESTION: 48

An annual fund coordinator wants to create a report that identifies which individual donors have yet to make a gift toward the Annual Fund Campaign this year. It is important that the annual giving coordinator avoids soliciting any individuals who are attending an upcoming gala. The nonprofit uses Campaigns to track event attendance. What should a consultant add to the report to exclude gala attendees?

A. Filter logic

B. Cross filter

C. Summary formula

D. Bucket field

Answer: (SHOW ANSWER)

This is a "Who Has NOT" reporting requirement, which is the primary use case for Cross Filters in Salesforce.

How to build this report:

* Base Report: Create a report of Contacts (or "Contacts with Opportunities").

* Annual Fund Filter: Set the standard report filters to show only those who have $0 in giving for the current year.

* The Exclusion (Cross Filter): Click the "Filters" dropdown and select Add Cross Filter.

* Configuration: * Set the filter to: Contacts WITHOUT Campaign Members.

* Add a sub-filter to the cross filter: Campaign Name EQUALS [Upcoming Gala Name].

* Result: The report will now list only people who are donors but are not currently registered for the Gala.

Why other options are incorrect:

* Filter Logic (Option A): This is used for "AND/OR" statements between existing fields (e.g., 1 AND (2 OR 3)). It cannot easily look "across" to the Campaign Member object to check for the absence of a record.

* Summary Formula (Option C) and Bucket Field (Option D): These are used for calculating or grouping data that is present in the report; they cannot be used to exclude records based on their relationship to other objects.

NEW QUESTION: 49

A nonprofit organization wants grant seekers to be able to add collaborators in Experience Cloud to help complete grant applications. What should the organization configure in Nonprofit Cloud for Grantmaking?

A. Compliant Data Sharing

B. Group Membership

C. Permission sets

Answer: (SHOW ANSWER)

In the Grantmaking lifecycle, transparency and collaboration are key, especially during the application phase. A lead applicant (grant seeker) often needs to bring in subject matter experts, accountants, or board members to help draft specific sections of a complex funding proposal.
To enable this within an Experience Cloud portal, Salesforce utilizes Compliant Data Sharing (CDS). CDS allows for granular, record-level sharing that can be managed directly by end-users (the grant seekers) rather than requiring an administrator to manually adjust sharing rules or public groups every time a collaborator is added.
Step-by-Step Configuration for the Consultant:
* Enable CDS: The consultant must first enable "Compliant Data Sharing" in the Setup menu for the relevant objects, such as Individual Application or Funding Award.
* Define Participant Roles: Roles like "Collaborator," "Reviewer," or "Signatory" are defined. Each role is assigned a specific access level (Read or Read/Edit).
* Add Related Lists: The consultant adds the "Participants" related list to the page layout used in the Grantmaking Portal.
* User Empowerment: Once configured, a grant seeker can navigate to their application in the portal, click "Add Participant," and search for other users within their organization to grant them access to that specific application.
This feature ensures that sensitive financial and program data is shared only with authorized individuals, maintaining a high level of security and "compliance" while still promoting the collaborative effort necessary for high-quality grant applications. Permission sets (Option C) provide the broad ability to use the portal, but CDS provides the specific mechanism for peer-to-peer record sharing.

NEW QUESTION: 50

A nonprofit organization wants to enable staff to track detailed notes of conversations with clients. Some of the notes will be associated to multiple individuals. Which Nonprofit Cloud object should the consultant configure?

A. Interaction Summaries

B. Action Plans

C. Outreach Summaries

Answer: (SHOW ANSWER)

The Interaction Summary object is a cornerstone of the modern Nonprofit Cloud, borrowed from the Financial Services Cloud architecture to support professional-grade relationship management. One of the primary advantages of Interaction Summaries over standard Salesforce "Notes" or "Activities" is the ability to relate a single set of notes to multiple participants and entities.
Configuration and Usage:
* The Interaction: Represents the meeting itself (the "Event").
* The Interaction Summary: This is the record where the detailed, often sensitive, notes are stored.
* Multiple Individuals: Using the Interaction Participant related list, a consultant can link the summary to multiple Person Accounts. For example, if a caseworker meets with a mother and her

two children, a single Interaction Summary can be created and then related to all three individual records.
This ensures that the meeting notes appear on the "Timeline" and "Related Lists" for every person involved without the caseworker having to copy and paste the notes three times.
* Confidentiality: Because these summaries often contain sensitive case data, they are designed to work with Compliant Data Sharing (CDS). This allows the consultant to ensure that while the note is linked to multiple people, only staff with the correct "Participant Role" can actually read the contents.
Why other options are incorrect:
* Action Plans (Option B): These are used for tracking a series of tasks or checklists (e.g., "Steps to complete intake"). They are not a note-taking or conversation-tracking feature.
* Outreach Summaries (Option C): This object is used in Fundraising to roll up the performance of a specific marketing campaign (e.g., total gifts and donor count from a direct mail appeal); it has no relation to client conversations or case notes.

NEW QUESTION: 51
A nonprofit organization wants board members to be able to review details of the grant applications received by the organization. Which component included on the Grantmaking Experience Cloud template should the organization use?
A. Form Review
B. Batch Assign Reviews
C. Form Overview
Answer: (SHOW ANSWER)
In Nonprofit Cloud for Grantmaking, the "Reviewer" persona (often a board member or external expert) needs a specialized interface to look at submitted data without accidentally changing it.
Salesforce provides a specific Lightning component in the Grantmaking Experience Cloud template called Form Review.
How the Form Review Component Works:
* Read-Only Presentation: This component is designed to render the data captured via the Discovery Framework (the application questions) in a clean, read-only format. It ensures the board member sees the applicant's responses exactly as they were submitted.
* Integration with Assessments: The Form Review component works in tandem with the Dynamic Assessment records. It "pulls" the answers from the assessment and displays them in a structured layout on the portal page.
* Use Case: When a board member logs into the portal to evaluate a grant, they click on an application.
The page they land on includes the Form Review component, allowing them to scroll through the project description, budget summaries, and impact goals.
Why other options are incorrect:

* Form Overview (Option C): This component is typically used by the applicant to see a "Table of Contents" or a status summary of their own application (e.g., "Section 1: Complete, Section 2: In Progress").
* Batch Assign Reviews (Option B): This is an administrative tool used by the internal Grant Manager to distribute applications to different reviewers; it is not the component used by the reviewer to actually see the application details.
By using the Form Review component, a consultant provides a professional and secure evaluation experience for the board, ensuring they have all the context needed to make funding decisions.

NEW QUESTION: 52
A nonprofit wants to record the most recent Opportunity close date on Contact records. The nonprofit expects the field on the Contact to be overwritten every time a new Opportunity meets the criteria. Which feature should the consultant use to meet this requirement?
A. Formula field
B. Roll-up summary field
C. Customizable rollups
D. AppExchange app
Answer: (SHOW ANSWER)
In NPSP, aggregating data from child Opportunity records to the parent Contact or Account record is handled by the Rollup engine. While there are several ways to do this in Salesforce, Customizable Rollups are the standard NPSP tool for this requirement.
Why Customizable Rollups (C) are the best fit:
* Cross-Object Support: Standard Roll-up Summary fields (Option B) only work if there is a Master- Detail relationship. Because the relationship between Opportunities and Contacts in NPSP is technically a Lookup relationship (managed through Opportunity Contact Roles), standard roll-ups cannot be used.
* Logic and Filtering: Customizable Rollups allow the consultant to define specific "Filter Groups." For example, you can set the rollup to only look at "Closed/Won" donations and ignore "In-Kind" gifts.
* Operation Types: To get the "most recent" date, the consultant sets the rollup operation to MAX. The system will look at all qualifying Opportunities, find the one with the latest (highest) date, and write that date to the target field on the Contact.
* Automation: Every time a new Opportunity is added or updated, NPSP's nightly batch (or real-time triggers) will re-calculate the value. If a new gift arrives with a more recent date, the old value on the Contact will be overwritten automatically.
Formula fields (Option A) cannot be used because they can only pull data up from a parent to a child, not aggregate multiple child records into a single parent field.

NEW QUESTION: 53

A nonprofit organization needs to report outcomes for each of its programs. The organization just finished defining and creating records for each of its Outcomes in Nonprofit Cloud. The organization wants to link the Outcome objects to its Programs and Benefits to see how they are doing. What should the organization use?

A. Indicator Performance Period records with the Baseline Value field

B. Outcome Activity records with the Type field

C. Indicator Definition records and Indicator Result records

Answer: (SHOW ANSWER)

NEW QUESTION: 54

A gift officer is entering donations and wants to track that the donor responded to the most recent direct mail campaign. Which feature should the consultant configure to record the donor's campaign response?

A. Automatic Campaign Member Management

B. Customizable Rollups

C. Customizable Campaign Influence

D. Sales Process

Answer: (SHOW ANSWER)

In NPSP, the most efficient way to link a donation to a donor's campaign participation is through Automatic Campaign Member Management.31 How the Feature Works:32

* The Link:33 When an Opportunity (donation) is created, it has a Primary Campaign Source field.
* The Automation: If Automatic Campaign Member Management is enabled in NPSP Settings, the system automatically looks at the Primary Contact on the donation and checks if they are already a Campaign Member of that campaign.
* Status Update: If they are already a member, the system can automatically update their Member Status (e.g., from "Sent" to "Responded").
* Creation: If they are not yet a member, the system can automatically create a new Campaign Member record for that donor with a "Responded" status.

Why other options are incorrect:

* Customizable Rollups (Option B): These summarize financial totals but do not handle the "Status" or
"Response" logic on a campaign.
* Customizable Campaign Influence (Option C): This is a Sales Cloud feature used to attribute "Influence" across multiple campaigns for a single deal. While relevant to high-level ROI, it is not the primary mechanism for simply recording that a donor "responded" to a specific direct mail appeal.
* Sales Process (Option D): This defines the "Stages" an Opportunity goes through (Pledged, Won, etc.) and has no role in campaign response tracking.

NEW QUESTION: 55

A consultant is working on a data migration to NPSP that includes tens of millions of records across many objects. The migration needs to take place over a weekend to minimize system downtime. What should the consultant recommend?

A. Bulk API

B. SOAP API

C. NPSP Data Import

D. Data Import Wizard

Answer: (SHOW ANSWER)

When dealing with Large Data Volumes (LDV)-specifically in the range of "tens of millions of records"- standard import tools and standard APIs are insufficient due to governor limits and processing speeds. For a time-sensitive weekend migration, the Bulk API is the only architecturally sound recommendation.

Why Bulk API is Required:

* Parallel Processing: Unlike the SOAP API (Option B), which processes records synchronously (one by one or in small serial batches), the Bulk API is designed for asynchronous processing. It breaks the data into large chunks (up to 10,000 records per batch) and processes them in parallel on the Salesforce application servers.

* Minimized API Calls: Tens of millions of records would quickly exhaust an organization's daily SOAP API limits. The Bulk API is optimized to handle massive datasets with significantly fewer API calls.

* Weekend Constraint: The "weekend" requirement implies a need for high throughput. The Bulk API is the fastest method available for moving data into Salesforce, making it possible to complete a multi- million record migration within a 48-hour window.

Why other options fail:

* NPSP Data Import (Option C): While powerful for processing complex logic (like creating Accounts and Contacts at once), it is built on top of standard Apex processing and is significantly slower than the Bulk API for pure volume.

* Data Import Wizard (Option D): This tool is limited to 50,000 records per session, making it impossible to use for a migration of this scale.

A consultant would typically use a tool like Data Loader (configured for Bulk mode) or a dedicated ETL tool (like Informatica or Mulesoft) that utilizes the Bulk API to achieve the necessary performance.

NEW QUESTION: 56

A nonprofit organization wants to implement donor levels. The organization wants to see at-a-glance identifiers that show how often a donor donates and how much they have donated. What should the organization do in Nonprofit Cloud?

A. Configure Recency, Frequency, and Monetary Value (RFM) Scoring. Add the scoring fields to a Related Record Detail Display for the Donor Gift Summary object.

B. Configure a Record Alert FlexCard with the values for donor levels. Add the Record Alert component to the Person Account layouts.

C. Create custom donor level fields on the Contact Profile object. Add the scoring fields to a Related Record Detail Display for the Contact Profile object.
Answer: (SHOW ANSWER)
To implement "donor levels" based on behavior (frequency and amount), the modern Nonprofit Cloud utilizes the RFM Scoring framework. RFM stands for Recency (how recently they gave), Frequency (how often they give), and Monetary Value (how much they give). This is the standard industry method for segmenting donors into tiers like "Champion," "Loyal," or "At Risk." Step-by-Step Implementation for the Consultant:
* Configure RFM Scores: In the Setup menu, the consultant goes to Recency, Frequency, and Monetary Value (RFM) Score. Here, you define the "Source" objects (typically the Donor Gift Summary or Gift Transactions) and set the ranges. For example, you might define "Frequency" as: 1-
2 gifts = Score 1; 3-5 gifts = Score 2; 5+ gifts = Score 3.
* Calculate Scores: The consultant then schedules the RFM Data Processing Job. This job runs in the background, evaluates every donor's history, and assigns numerical scores to each category.
* The Composite Score: The system can combine these into a Composite RFM Score (e.g., "3-3-3" for the best donors).
* Displaying the Data: To make these scores "at-a-glance" identifiers, the consultant adds these fields to the Donor Gift Summary object. Using the Related Record Detail Display or a standard Record Detail component on the Person Account page, the staff can immediately see the donor's scores alongside their contact info.
This approach provides a dynamic, data-driven way to identify donor levels without manual updates. Option B is incorrect because Record Alerts are for transient warnings (e.g., "Do not call") rather than persistent behavioral metrics. Option C is incorrect because while the Contact Profile stores donor attributes, the specific engine for calculating and displaying frequency/monetary "levels" is designed to work with the Donor Gift Summary object within the NPC Fundraising architecture.

NEW QUESTION: 57
A Fundraising Operations Manager is entering checks into Nonprofit Cloud by using Gift Batches. Some of the checks are payments on recurring gifts. When the Fundraising Operations Manager attempts to match the checks with the donor's current Gift Commitment in the Gift Entry window, no matching records appear.
Which Fundraising setting should be configured to resolve the issue?
A. Increase the Installment Extension Day Count setting.
B. Change the Recency score thresholds.
C. Select a Donor Matching Method value.
Answer: (SHOW ANSWER)

When processing checks for recurring gifts in the Nonprofit Cloud, the system attempts to find an "expected" payment record to match against the physical check. In the NPC data model, recurring gifts are managed via Gift Commitments and Gift Commitment Schedules.
The system creates "expected" transactions (installments) based on the schedule. However, donors often send checks that arrive slightly before or after the exact scheduled date. If a check arrives outside of the system's
"window of expectation," the Gift Entry interface will not automatically suggest the matching commitment, leading to the "no matching records appear" issue.
The Solution: Installment Extension Day Count
* Function: This setting defines the number of days beyond the scheduled date that the system will look to find a matching installment. For example, if a gift is scheduled for the 1st of the month but the check arrives on the 10th, and the extension is set to 5 days, the system won't see it.
* Configuration: The consultant must go to Fundraising Settings in the Setup menu.
* Adjusting the Value: By increasing the Installment Extension Day Count (e.g., to 14 or 30 days), the consultant widens the "search window."
* Result: The next time the manager enters a check for that donor, the Gift Entry tool will successfully find and display the active Gift Commitment as a suggested match because the check's date now falls within the extended installment window.
Option C is incorrect because "Donor Matching" helps find the person, but the question specifies that the issue is matching the check to a specific Gift Commitment (the recurring gift record).
Option B (RFM scoring) is for analytics and has no impact on the technical matching logic of the gift entry engine.

NEW QUESTION: 58
The admin at a nonprofit is implementing Salesforce Shield in its org to enable field platform encryption.
What are three NPSP considerations when implementing Shield Platform Encryption? (Choose 3)
A. Fields on the NPSP Address object can be encrypted, but encryption is unavailable for address fields on the Account and Contact object.
B. The NPSP Data Import object supports encryption of all fields in the import batch.
C. If the Role Name field is encrypted on the NPSP Partial Soft Credit object, the nightly Soft Credit rollups fail.
D. The NPSP MergeContacts list button on Contact list views will fail if the Contact Name is encrypted.
E. NPSP Data Import is unable to perform Custom Unique Id matching on Accounts and Contacts with an encrypted field.
Answer: (SHOW ANSWER)
Salesforce Shield Platform Encryption provides high-level security, but it has significant "functional trade- offs" because the system cannot "read" encrypted data in the same way it reads plain text for certain automated processes.
Three Critical NPSP Considerations:

* Soft Credit Rollup Failure (C): NPSP's Customizable Rollups often use the Role Name on the Partial Soft Credit object to determine how to aggregate credits. Because encryption prevents the database from performing "Group By" or "Where" queries on that field effectively, the nightly rollup jobs will fail to process those credits.
* Merge Contacts Failure (D): The NPSP Contact Merge tool relies on identifying and comparing names. If the Contact Name is encrypted, the SOSL/SOQL queries used by the "Merge" button cannot properly index or find the records, rendering the specialized NPSP merge interface unusable.
* Data Import Matching (E): The NPSP Data Importer relies heavily on "Matching Rules." If you are trying to match a legacy donor ID or a custom unique ID that has been encrypted, the system cannot perform the "Exact Match" check needed to prevent duplicates during the import process.
Why other options are incorrect:
* Option A: Standard address fields on Account/Contact can be encrypted with Shield, so this is not a limitation.
* Option B: The Data Import object does not support "all fields" for encryption; like most objects, it has specific supported field types and limits.

NEW QUESTION: 59

A human services nonprofit needs to track client goals and action items related to those goals. The nonprofit is unsure whether Program Management Module alone will meet its requirements. The nonprofit is considering whether to implement Nonprofit Cloud Case Management. What should the consultant discuss with the nonprofit?

A. Program Management Module has custom objects for calendars and activities.

B. Case Management has a custom object for tracking goals.

C. Program Management Module can track Case Plans and Action Items.

D. Case Management requires Experience Cloud licenses.

Answer: (SHOW ANSWER)

For a consultant, it is vital to distinguish between the Program Management Module (PMM) and Nonprofit Cloud Case Management (NCCM). While they work together, they serve different functional depths.
* PMM (Standard Service Tracking): PMM is designed for "Service Delivery." It tracks which clients are in which programs and when they received a service (e.g., "John attended the Food Bank on Tuesday"). It is excellent for high-volume, low-touch interactions.
* NCCM (Deep Clinical/Social Work): Nonprofit Cloud Case Management is designed for "high-touch" human services. It introduces a much more granular data model. Specifically, it includes custom objects like Goals and Action Items that are part of a Case Plan. These allow a caseworker to define a specific journey for a client (e.g., Goal: "Secure Employment," Action Item: "Draft Resume").
The Core Distinction:

The consultant should explain that while PMM tracks what was delivered, Case Management provides the specialized objects needed to track the client's long-term progress through Goal tracking.
* Option A: PMM does not have specialized calendar objects; it uses standard Salesforce Activities.
* Option C: This is incorrect. Case Plans and Action Items are features of Case Management, not the standard PMM.
* Option D: Case Management does not require Experience Cloud, though they are often used together for participant portals.
By highlighting the Goal and Action Item objects, the consultant helps the nonprofit understand that Case Management is the correct choice for their "care-centric" requirements.

NEW QUESTION: 60

A nonprofit frequently receives donations through the mail. The consultant recommends using Nonprofit Success Pack (NPSP) Gift Entry. What are three advantages of using NPSP Gift Entry? (Choose 3)

A. Can prefill certain fields for batch entry
B. Standardizes mailing addresses as they are entered
C. Includes built-in mapping rules to help prevent duplicates
D. Can process credit card payments
E. Can create different templates for different types of gifts
Answer: (SHOW ANSWER)
NPSP Gift Entry is a high-speed, accurate tool for processing high volumes of donations received through manual channels like direct mail. It is built upon the NPSP Data Import engine but provides a streamlined user interface.
Three Primary Advantages:
* Prefilling Fields (A): When creating a batch for a specific direct mail appeal, the consultant can set
"Default Values." For example, every gift in the "Year-End Appeal" batch can have the Campaign and GAU Allocation prefilled. This drastically reduces the number of keystrokes required for the data entry clerk.
* Mapping Rules and Duplicate Prevention (C): Gift Entry utilizes the NPSP Data Import logic. It doesn't just "create records"; it first attempts to find existing Contacts or Accounts based on sophisticated matching rules. This "Dry Run" capability identifies potential duplicates before the data is committed to the database, maintaining clean data hygiene.
* Customizable Templates (E): Not all gifts are the same. A consultant can create a "Grant Template" with fields for restricted funds and due dates, and a separate "Individual Check Template" that focuses on donor names and mailing addresses. This ensures that users only see the fields relevant to the specific type of entry they are performing.
Why other options are not primary advantages of Gift Entry:
* Address Standardization (B): While NPSP has address management features, it is not a

"standardization" tool (like an AS/400 or SmartyStreets) that happens during entry; that is usually handled by a separate integration.
* Credit Card Processing (D): While NPSP can link to Salesforce Checkout or Elevate, Gift Entry's primary purpose is manual data entry for offline gifts like checks.

NEW QUESTION: 61
A nonprofit organization uses Nonprofit Cloud ta manage recurring donations. The organization wants to easily see the scheduled transactions for the next several months.
What should be added to provide visibility to this information?
A. The Upcoming Transactions component to the Gift Commitment record page
B. The Gift Transactions related list ta the Opportunity record page
C. The Timeline component to the Person Account record page
Answer: (SHOW ANSWER)

NEW QUESTION: 62
Which Nonprofit Cloud feature can a consultant use to create rollups to display donor giving history?
A. Business Rules Engine
B. Declarative Lookup Rollup Summaries
C. Donor Giving Summary and Data Processing Engine
Answer: (SHOW ANSWER)
The new Nonprofit Cloud (NPC) has introduced a high-performance framework for calculating donor metrics, moving away from the real-time Apex triggers used in the older NPSP model. To display a donor's total giving, last gift date, or largest gift, the system uses a combination of the Data Processing Engine (DPE) and the Donor Giving Summary object.
The Data Processing Engine (DPE):
DPE is a powerful tool built on the Salesforce Industries core that can process massive volumes of data in batches. A consultant uses DPE to:
* Extract: Pull data from Gift Transactions (the records of actual money received).
* Transform: Aggregate the data-summing the amounts, finding the "max" amount, or identifying the

"min" date.
* Write Back: Save these calculated values into fields on the Donor Giving Summary record.
The Donor Giving Summary Object:
This object serves as the "storage container" for these rolled-up values. It is linked to the donor's Account (Person Account). By storing the results here, the system ensures that when a fundraiser opens a donor's page, the summary is already calculated and displays instantly without needing to run a live query across thousands of transaction records.
The Workflow:
* Clone Templates: Salesforce provides pre-built DPE templates for common fundraising rollups.
* Schedule Jobs: The consultant schedules these DPE jobs to run periodically (e.g., nightly).
* Display: The Donor Giving Summary component is added to the Lightning record page via the App Builder to show the fields (e.g., TotalGiftAmount, LastGiftDate) to the users.
While Declarative Lookup Rollup Summaries (DLRS) is a popular community tool, it is not a native
"Nonprofit Cloud feature." The Business Rules Engine (Option A) is used for complex decision logic (like eligibility checks), not for aggregating historical financial totals.

NEW QUESTION: 63
A nonprofit wants its staff to spend most of their time in Salesforce, but the staff needs access to several other applications as well. The nonprofit wants a solution that allows staff to use other applications without leaving Salesforce. How should the consultant integrate these applications?
A. Configure External Objects
B. Configure External Data Sources
C. Implement Salesforce Canvas
D. Implement Distributed Marketing
Answer: ([SHOW ANSWER])
When a nonprofit organization needs to integrate external third-party applications into the Salesforce user interface while maintaining a seamless "single pane of glass" experience, Salesforce Canvas is the specialized tool designed for this purpose.
How Salesforce Canvas Works:
* Application Encapsulation: Canvas allows a consultant to take an existing external web application (such as a legacy accounting tool, a specialized document management system, or a custom program tracking app) and "embed" it directly within Salesforce.
* Authentication and Identity: Unlike a simple <iframe>, Canvas provides a secure way to handle authentication. It can pass the current Salesforce user's identity and session information to the external app, enabling Single Sign-On (SSO). This means staff don't have to log in a second time.
* Bi-directional Communication: Canvas provides a JavaScript API that allows the external application to communicate with the Salesforce record it is sitting on. For example, an external billing app embedded on a Person Account page can "read" the Account ID and "write" a status update back to Salesforce.

* Placement: The consultant can place the Canvas app in the Utility Bar, as a tab on a record page, or even within a Chatter feed.
Why other options are incorrect:
* External Objects/Data Sources (Option A & B): These are part of Salesforce Connect. They are used to view and query external data as if it were stored in Salesforce tables, but they do not provide a way to "use" the full interface and logic of the external application itself.
* Distributed Marketing (Option D): This is a specific tool for Marketing Cloud integration and has no relation to general application embedding.
By implementing Salesforce Canvas, the consultant ensures that staff remain productive within the Salesforce ecosystem while still having full access to the external tools necessary for their daily mission- driven work.

NEW QUESTION: 64
A nonprofit organization is using Care Plans in Nonprofit Cloud to manage interactions with clients. The organization has standard Care Plan Templates set up but must often add additional elements to a Care Plan based on a client's specific needs. What can be manually added directly to a Care Plan?
A. Document Checklists and Document Templates
B. Programs and Program Enrollments
C. Goal Assignments and Benefit Assignments
Answer: (SHOW ANSWER)
In Nonprofit Cloud Case Management, a Care Plan is the central roadmap for a client's journey toward a specific outcome. While Care Plan Templates provide a standardized starting point, the philosophy of person-centered care requires that these plans be customizable to the unique circumstances of each participant.
A Care Plan is structurally composed of two primary "actionable" building blocks:
* Goal Assignments: These represent the milestones the client is working toward (e.g., "Secure Stable Housing" or "Complete GED"). While a template might include five standard goals, a caseworker can manually add a sixth Goal Assignment that is unique to that client's specific barriers.
* Benefit Assignments: These are the services or resources provided to help the client achieve their goals (e.g., "Rental Assistance" or "Weekly Tutoring"). A caseworker can manually link additional Benefits to a Care Plan to ensure the participant has the specific support they need.
Step-by-Step Customization Workflow:
* Template Application: The caseworker begins by applying a standard template, which populates the Care Plan with a set of pre-defined goal and benefit assignments.
* Assessment Review: After a Dynamic Assessment, the caseworker identifies an unmet need.
* Manual Entry: Within the Care Plan interface, the caseworker clicks "New" on the Goal Assignment related list to create a custom goal. They then do the same for Benefit Assignments to link the client to a specific service.

* Linking: The caseworker can then link the manual Benefit Assignment to the manual Goal Assignment to show exactly how that service contributes to the client's progress.
Option B is incorrect because Programs and Program Enrollments are the broader containers that a client is part of. While a Care Plan exists within the context of an enrollment, you don't "add an enrollment" to a plan; rather, the plan is a subset of the enrollment. Option A refers to compliance and document tracking, which are managed via Action Plans, not the core clinical/social service logic of the Care Plan itself.

NEW QUESTION: 65
The program manager of an after-school program wants to pull a report that shows all students in the program and their primary parent/guardian with the parent/guardian's cell phone and email. The nonprofit is using NPSP. Which custom report type should the consultant use to create the report?
A. Contacts with or without Service Participants
B. Contacts with or without Relationships
C. Service Participants with or without Program Engagement
D. Program Engagements with or without Household Account3
Answer: (SHOW ANSWER)
In NPSP, the relationship between a child (student) and a parent is tracked using the Relationship object.
This is a5 person-to-person junction record.
Building the Report:
* The Starting Point: To see the student's information (Phone/Email) alongside their parent's information, the consultant needs a report that spans the Relationship record.
* Custom Report Type: A report type of Contacts with or without Relationships allows the user to list the primary contact (the Student) and pull in the "Related Contact" (the Parent) from the relationship record.
* Cross-Object Fields: In the report builder, the consultant can use the "Add fields related via lookup" feature to pull the parent's cell phone and email address from the Related Contact record.
Why other options are incorrect:
* Option C and D: These refer to Program Management Module (PMM) objects. While they show who is in the program, they don't natively "connect" one person's contact info to another person's contact info without a Relationship record.
* Option A: "Service Participants" is a specific PMM term, but it doesn't provide the bridge to the parent
/guardian data found in the NPSP Relationship model.

NEW QUESTION: 66
A large social services organization uses a complex set of criteria to decide who is eligible for each of its services.

The organization wants to automate the eligibility decisions so that clients receive an eligibility decision immediately after they complete an application from the organization's user portal. If the client is ineligible for a service, the client must receive an explanation.
Which Nonprofit Cloud features should the organization use?
A. Advanced Program Management and Einstein Summary
B. Actionable List Engagement and Feedback Management
C. Business Rules Engine and Decision Explainer
Answer: C (LEAVE A REPLY)

NEW QUESTION: 67
An organization wants to report on outbound grants for the current fiscal year. The organization wants to see what it has awarded for each grant opportunity, including applications that were approved or denied and the total amount paid out for each grant opportunity.
How should the organization build 4 report type in Nonprofit Cloud to meet the requirements?
A. Use Funding Opportunities as the primary abject. Use Individual Applications, Funding Awards, and Funding Disbursements as related objects.
B. Use Opportunities as the primary object. Use Individual Applications, Funding Awards, and Funding Award Participants as related objects.
C. Use Funding Awards as the primary object. Use Individual Applications, Funding Disbursements, and Budget Allocations as related objects.
Answer: (SHOW ANSWER)

NEW QUESTION: 68
A nonprofit organization uses Nonprofit Cloud and wants to ensure that members of the fundraising department cannot access the program department's Interaction Summaries. What should the organization use to accomplish this goal?
A. Permission Sets
B. Session Security Levels
C. Compliant Data Sharing
Answer: (SHOW ANSWER)
In many nonprofits, "Interaction Summaries" (meeting notes) contain highly sensitive information. A caseworker's notes on a victim of domestic violence must be kept strictly confidential from a fundraiser who might be looking at the same constituent record for a donation appeal.
To solve this challenge, Nonprofit Cloud utilizes Compliant Data Sharing (CDS).
How CDS Secures Interaction Summaries:
* Record-Level Restriction: By default, Interaction Summaries can be set to "Private" in the Organization-Wide Defaults (OWD).
* Role-Based Access: Compliant Data Sharing allows the organization to grant access based on the user's specific role in relation to that record. For example, only the "Assigned Caseworker" and
"Program Supervisor" roles are granted "Read" access to the summary.

* Departmental Silos: Because fundraisers are not assigned a "Program" role in the CDS configuration for those specific records, they will not be able to see the Interaction Summaries, even if they have access to the Person Account record.
* Auditability: CDS provides a clear audit trail of who was granted access to sensitive notes and why, which is critical for legal compliance in social services.
Why other options are incorrect:
* Permission Sets (Option A): These grant the ability to use the Interaction Summary object (CRUD), but they do not control which specific records a user can see. If OWD is set to Public, Permission Sets won't hide specific department notes.
* Session Security (Option B): This deals with 2-factor authentication and login requirements, not record-level data visibility between departments. Compliant Data Sharing is the standard Industry Cloud tool for this level of granular privacy.

NEW QUESTION: 69
A nonprofit organization uses direct mail as one of its communication channels and wants to track mailing and seasonal addresses for its donors. What should be included in the solution?
A. Multiple custom Address fields
B. Multiple Person Account records
C. Multiple Contact Point Address records
Answer: (SHOW ANSWER)
Managing complex constituent movement-such as "Snowbirds" who live in Florida for the winter and New York for the summer-is a classic nonprofit challenge. In the modern Nonprofit Cloud, the data model has shifted away from the simple "Mailing Address" fields on the Account/Contact toward the Contact Point Address (CPA) object.
How a Consultant Implements Seasonal Addresses:
* Contact Point Address Object: Instead of adding custom fields to the Person Account, the consultant uses the related Contact Point Address object. A single donor (Person Account) can have multiple CPA records (e.g., "Summer Home" and "Winter Home").
* Seasonal Fields: The CPA object includes standard fields specifically for this purpose: Seasonal Start Month/Day and Seasonal End Month/Day.
* Address Synchronization: When the current date falls within the "Winter" range, the Automatic Person Account Mailing Address Synchronization can ensure that the "Winter" address is marked as Is Primary, which then mirrors that address into the standard mailing fields on the Person Account record for use in direct mail exports.
* Usage Type: Each CPA record can be categorized using the Usage Type field (e.g., Home, Work, Temporary).
Using Multiple Contact Point Address records is the architecturally sound approach because it maintains a single "source of truth" for the person (one Person Account) while allowing for an unlimited history of geographic locations. Option A (Custom fields) is difficult to report on and scale, while Option B (Multiple records for the same person) causes data duplication and fragments the donor's giving history.

NEW QUESTION: 70

A nonprofit organization wants Major Gift Officers to use a standardized set of tasks when soliciting a large donation. The Major Gift officers must be able to add tasks as needed. Which Nonprofit Cloud feature should the organization use?

A. Actionable Segmentation

B. Action Plans

C. Actionable Relationship Center (ARC)

Answer: (SHOW ANSWER)

To standardize the "Moves Management" process for major gifts, a consultant should implement Action Plans
. This feature allows a nonprofit to define a "checklist" of tasks that represent their best practices for high- touch fundraising.

Step-by-Step Implementation:

* Template Creation: The consultant creates an Action Plan Template named "Major Gift Solicitation."
* Standardized Tasks: Within the template, they define the mandatory steps, such as:
* "Research donor wealth profile" (Due in 2 days)
* "Draft personal solicitation letter" (Due in 7 days)
* "Schedule face-to-face meeting" (Due in 14 days)
* Flexibility for Users: When a Major Gift Officer starts a solicitation, they generate an Action Plan from this template and link it to the donor's record. A key feature of Action Plans is that once they are generated, the officer can add additional, ad-hoc tasks that are unique to that specific donor, meeting the "add tasks as needed" requirement.
* Tracking: The tasks generated by the Action Plan appear in the officer's standard Salesforce task list and on the record's activity timeline, ensuring full visibility into the progress of the solicitation.

Why other options are incorrect:

* Actionable Segmentation (Option A): This is used to create specific lists of donors for outreach (like a "call list") but does not provide a task-based workflow for individual solicitation.
* Actionable Relationship Center (Option C): While ARC helps visualize the donor's relationships, it is a data visualization tool, not a workflow engine for standardized task management.

NEW QUESTION: 71

A nonprofit organization provides funding to partners that work directly with the community to provide one- on-one nutritional counseling. Each year, these partners apply for funding and indicate how they plan to spend any funds awarded.

The organization wants to be able to track planned and actual spending by the partners.

What should the organization use in Nonprofit Claud?

A. Indicator Assignment and Indicator Performance Period

B. Budget, Budget Category, and Budget Period

C. Funding Disbursement and Funding Award Requirement
Answer: (SHOW ANSWER)

NEW QUESTION: 72
A consultant is engaged by a nonprofit organization that wants to use audience segmentation for Campaigns in Nonprofit Cloud.
What should the consultant configure?
A. Data Cloud
B. Tableau Desktop
C. Agentforce
Answer: (SHOW ANSWER)

NEW QUESTION: 73
A nonprofit organization is implementing Nonprofit Cloud. An Administrator needs to set up individual gift acknowledgements by using native Nonprofit Cloud features.
Which steps should the Administrator include in the process?
A. Enable Document Generation, upload acknowledgement templates, and set up Outreach Summary rollups.
B. Install the Document Generation managed package, set up Donor Matching, and configure Page Layouts.
C. Set up Document Generation, upload acknowledgement templates, and configure Page Layouts.
Answer: (SHOW ANSWER)

NEW QUESTION: 74
A nonprofit on Unlimited Edition uses direct mail extensively as a fundraising channel. The nonprofit wants to automate the search for duplicate contact records. What should the consultant recommend implementing?
A. Duplicate Rules
B. Duplicate Jobs
C. Matching Rules
D. Scheduled Apex Jobs
Answer: (SHOW ANSWER)
While Duplicate Rules and Matching Rules are essential for preventing new duplicates from being created, they do not help with a database that already contains existing duplicates (which is common after large direct mail imports).12 The Solution for "Auto13mating the Search":
On Unlimited Edition, Salesforce provides a feature called Duplicate Jobs.
* Scanning the Database: Unlike rules that fire during a save, a Duplicate Job runs a scan across the entire existing database (or a specific segment) to find existing duplicate records based on your Matching Rules.

* Reporting: Once the job completes, it generates a list of "Duplicate Record Sets." This allows the nonprofit's data integrity team to review and merge records in bulk.
* Use Case: For a direct mail organization, running a Duplicate Job before a large mailing ensures they aren't wasting money by sending two identical letters to the same household.
Why other options are incorrect:
* Duplicate/Matching Rules (Options A & C): These act as "gatekeepers" during data entry. They find duplicates only when a record is created or edited; they do not proactively "search" the existing database.
* Scheduled Apex (Option D): This is a custom coding solution. A consultant should always recommend native, declarative features like Duplicate Jobs before suggesting custom code.

NEW QUESTION: 75
A nonprofit organization has a successful company match donation process. The development team wants to attribute the grouped check to the company, but also ensure that individual donors are credited for their individual match. How should the organization accomplish this goal in Nonprofit Cloud?
A. Record the company as the donor on the Gift Transaction of the grouped check. Create a Gift Soft Credit for each individual donor and their respective amounts.
B. Record the individual as the donor on the Gift Transactions for their respective amount of the grouped check. Create a Gift Soft Credit for the company on each of those gifts.
C. Record the company as the donor on the Gift Transaction of the grouped check. Create a Gift Designation for each individual donor and their respective amounts.
Answer: (SHOW ANSWER)
In the context of a Solution Design for corporate giving, a consultant must balance the "Hard Credit" (legal
/accounting ownership of the funds) with the "Soft Credit" (relationship and influence credit).
When a company sends a single "grouped check" that represents the matching funds for multiple employees, the legal donor is the Company. Therefore, according to standard accounting principles, the Hard Credit must be assigned to the company's Business Account.
Step-by-Step Solution Workflow:
* Create the Gift Transaction: The consultant records a single Gift Transaction (or a batch gift) where the Donor field points to the Business Account of the company. This ensures that the organization's financial reports correctly show that the cash came from the corporation.
* Identify the Individuals: The consultant then identifies the individual employees whose gifts triggered the match.
* Assign Gift Soft Credits: For each individual donor, a Gift Soft Credit record is created and linked to the company's Gift Transaction.
* The Soft Credit Recipient is the individual's Person Account.
* The Amount is the specific portion of the matching check that applies to them.
* The Role can be set to "Matched Donor."

* Reporting: When the organization runs its "Total Giving" reports for individuals, it can include "Soft Credit" amounts. This allows the development team to recognize the individuals for their influence in bringing in the matching funds, even though the company technically provided the money.
Why other options are incorrect:
* Option B: This would incorrectly attribute the "Hard Credit" (the legal ownership of the money) to the individuals. This would cause issues with tax receipts and financial reconciliation, as the individual did not personally write the check for the matching portion.
* Option C: Gift Designations are used to track which internal fund the money is for (e.g., "Education Fund"); they are not used to credit people or organizations for their involvement in a gift. Using Soft Credits is the correct architectural approach in NPC for influence and matching-gift recognition.

NEW QUESTION: 76
A nonprofit organization uses Nonprofit Cloud for Grantmaking. What should the organization add to the Individual Application record page to be able to review an applicant's submitted budget?
A. The Budget Category related list and the Budget Category Value related list
B. The Budget component
C. The Budget Allocations related list
Answer: (SHOW ANSWER)

NEW QUESTION: 77
The admin at a nonprofit wants to delegate authority to two specific users to process gift entries. Which three permissions should the consultant add to a permission set so the users can perform this work with only the necessary level of access? (Choose 3)
A. Grant the View All Data permission.
B. Grant create and edit access to all required objects and fields.
C. Grant visibility to the Gift Entry tab.
D. Grant access to BOI_BatchOverride and BOI_DataImport Visualforce pages.
E. Grant create, edit, and delete access to all required objects and fields.
Answer: (SHOW ANSWER)

When delegating access to Gift Entry in NPSP, a consultant must follow the "Principle of Least Privilege." This means granting enough access to do the job without exposing the entire system.
Three Essential Permissions:
* Object and Field Access (B): Users must be able to Create and Edit the records involved in the gift entry process. This includes the NPSP Data Import (the staging object), Accounts, Contacts, Opportunities, and GAU Allocations. Note that Delete (Option E) is usually not a "necessary level of access" for a standard entry clerk; they only need to enter and modify records.
* Tab Visibility (C): A user cannot use a feature if they cannot find it. The Gift Entry tab must be set to
"Default On" or "Visible" within the permission set so the users can access the interface.
* Visualforce Page Access (D): NPSP Gift Entry is built using a custom interface. To run this interface, the user's profile or permission set must explicitly have access to the underlying Visualforce pages that power the tool, specifically those related to the Batch Object Importer (BOI). Without access to BOI_BatchOverride and BOI_DataImport, the user will see an "insufficient privileges" error when they try to open the Gift Entry tool.
Option A is incorrect because View All Data is a powerful administrative permission that bypasses all security and is never appropriate for a standard data entry role.

NEW QUESTION: 78
A nonprofit organization provides food baskets and rental assistance. The organization wants to group these benefits as goods and monetary assistance within the same program. Which Nonprofit Cloud object should the organization use to group the items?
A. Benefit Disbursement
B. Benefit Type
C. Program Enrollment
Answer: ([SHOW ANSWER])
In the Nonprofit Cloud Program Management data model, the architecture is designed to handle diverse services within a single program. To categorize and report on these services effectively, the Benefit Type object is used.
Categorization Logic:
* The Program: You have a "Crisis Support Program."
* The Benefits: Within this program, you have two distinct services: "Food Basket Distribution" and
"Rental Assistance Payment."
* The Grouping (Benefit Type): To group these for reporting, the consultant creates two Benefit Type records:
* Goods: Linked to the "Food Basket Distribution" benefit.
* Monetary Assistance: Linked to the "Rental Assistance Payment" benefit.
Step-by-Step Configuration:
* Create Unit of Measure: First, define how each is measured (e.g., "Quantity" for baskets and "Currency" for assistance).

* Create Benefit Type: Navigate to the Benefit Type object. Create a "Goods" type and a "Monetary" type. This object acts as the high-level category.
* Link to Benefits: When creating the Benefit records, the consultant selects the appropriate Benefit Type.

By using Benefit Types, the nonprofit can run high-level reports across multiple programs to see, for example, "Total Monetary Assistance provided organization-wide" vs. "Total Goods distributed." Why other options are incorrect:

* Benefit Disbursement (Option A): This is the record of an individual instance of a service being given to a person (e.g., "John Doe received 1 basket on Dec 21st"). It is not a grouping or categorization object.
* Program Enrollment (Option B): This links a specific Person Account to a Program. It tracks who is in the program, not how the different services within the program are categorized.