NPSP Cloud Consultant Practice Exam (Sample)

Study Guide

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Questions

1. **What action must be taken to include a donor as a Campaign Member automatically?**
   - A. Use the Data Import Wizard to upload donors
   - B. Create an automated trigger for Campaign Members
   - C. Populate the Primary Campaign Source on Opportunity
   - D. Enable Automatic Campaign Member Management in NPSP settings

2. **What report filter should be used to find memberships expiring in 30 days?**
   - A. Membership End Date is equal to NEXT 30 DAYS
   - B. Membership End Date is equal to or less than NEXT 30 DAYS
   - C. Membership End Date is equal to or greater than NEXT 30 DAYS
   - D. Membership End Date equals NEXT 30 DAYS and does not equal NEXT 29 DAYS

3. **What should a consultant advise a nonprofit wanting to use Customizable Rollups?**
   - A. After Customizable Rollups are enabled, it is irreversible.
   - B. Advanced Currency Management is unsupported by Customizable Rollups.
   - C. Existing User Defined Rollups need to be re-created as Customizable Rollups.
   - D. Customizable Rollups can only be used in orgs using the Household Account model.

4. **What should be recommended to a nonprofit wanting real-time insights into membership data stored externally?**
   - A. Utilize Salesforce Connect to store this information in External Objects.
   - B. Utilize Big Objects to store this information in Custom Objects.
   - C. Utilize Salesforce Connect to store this information in Custom Objects.
   - D. Utilize Big Objects to store this information in External Objects.

5. **What action should a consultant take when installing NPSP for a nonprofit organization using the memberships feature?**
   - **A. Create a Membership Opportunity record type**
   - **B. Add a value in the Type field on Opportunity for Membership**
   - **C. Create a Membership Affiliation record type**
   - **D. Add a checkbox field on the Opportunity called "Membership"**

6. **A donor requests to credit their spouse on a processed donation. What is the best recommendation for the consultant?**
   - **A. Create an Opportunity Contact Role for the spouse and mark it as primary**
   - **B. Create an Opportunity Contact Role for the spouse and set the role to Soft Credit**
   - **C. Clone the Opportunity and set the primary contact to the spouse**
   - **D. Enable Automatic Soft Credit for household members in NPSP settings**

7. **What capability does the Engagement Plan feature in NPSP provide?**
   - **A. Allows customization of service offerings**
   - **B. Tracks engagement with individual donors**
   - **C. Automates grant renewals**
   - **D. Facilitates event management**

8. **What is a key focus of the NPSP Data Import with regard to custom unique IDs?**
   - **A. Custom Unique IDs can be created from any field**
   - **B. Unique ID matching is unaffected by field encryption**
   - **C. Custom Unique ID matching is possible with encrypted fields**
   - **D. NPSP Data Import cannot match encrypted Contact fields**

9. What should a consultant recommend for a nonprofit trade association selling products online?

A. Salesforce Experience Cloud

B. Salesforce B2B Commerce

C. Salesforce B2C Commerce

D. Salesforce Billing

10. Which feature allows tracking of Soft Credit rollups in relation to encrypted fields?

A. Nightly rollup process can handle encryption

B. Soft Credit rollups fail if Role Name is encrypted

C. Soft Credit does not interact with encrypted data

D. Encryption has no effect on rollup logic

Answers

1. D
2. D
3. D
4. A
5. A
6. B
7. B
8. D
9. B
10. B

Explanations

1. **What action must be taken to include a donor as a Campaign Member automatically?**
   - A. Use the Data Import Wizard to upload donors
   - B. Create an automated trigger for Campaign Members
   - C. Populate the Primary Campaign Source on Opportunity
   - **D. Enable Automatic Campaign Member Management in NPSP settings**

To include a donor as a Campaign Member automatically, enabling Automatic Campaign Member Management in NPSP settings is essential. This feature allows the system to automatically manage the association between Opportunities and Campaigns without requiring manual intervention. When this feature is enabled, the system can automatically enroll donors as campaign members based on their contributions. This streamlines the process of tracking donor engagement and facilitates the overall management of campaigns by ensuring that all relevant donors are aligned with the campaigns they support. While the other options may pertain to aspects of managing data or opportunities, they do not specifically address the automation of adding donors to Campaigns. For instance, using the Data Import Wizard is helpful for uploading bulk data, but it won't automatically enroll donors into campaigns. Creating an automated trigger can be an effective way to manage processes, but it requires custom setup and isn't a built-in feature specific to campaign membership management. Populating the Primary Campaign Source on Opportunity is important for tracking purposes but does not directly cause automatic enrollment of donors as Campaign Members. Thus, enabling Automatic Campaign Member Management is the most effective and direct method for achieving this goal.

2. **What report filter should be used to find memberships expiring in 30 days?**
   - A. Membership End Date is equal to NEXT 30 DAYS
   - B. Membership End Date is equal to or less than NEXT 30 DAYS
   - C. Membership End Date is equal to or greater than NEXT 30 DAYS
   - **D. Membership End Date equals NEXT 30 DAYS and does not equal NEXT 29 DAYS**

To identify memberships that are expiring in 30 days, the focus is on filtering results based on the exact date range. The most effective filter would check for a specific end date that matches exactly 30 days from the current date. The option that states "Membership End Date equals NEXT 30 DAYS and does not equal NEXT 29 DAYS" effectively narrows down the results to only those memberships that are due to expire precisely in 30 days, thus ensuring accuracy. This type of filter is essential when exact timing is important, as it eliminates any memberships that might fall one day earlier than the 30-day mark. Other options may lead to broader results or include memberships that are either too soon or far too late relative to the specific 30-day period you are targeting. Therefore, by using the precise criteria specified, you can accurately manage and anticipate membership renewals.

3. What should a consultant advise a nonprofit wanting to use Customizable Rollups?

A. After Customizable Rollups are enabled, it is irreversible.

B. Advanced Currency Management is unsupported by Customizable Rollups.

C. Existing User Defined Rollups need to be re-created as Customizable Rollups.

D. Customizable Rollups can only be used in orgs using the Household Account model.

The correct answer pertains to the requirement that Customizable Rollups can only be utilized in organizations that are operating on the Household Account model. This model is specifically designed to group donations and relationships under a single household account, allowing for a more streamlined approach to managing donor information and contributions. By using the Household Account model, nonprofits can take full advantage of the features offered by Customizable Rollups, such as more flexible configurations for summarizing donation data across various levels of the organization. This structural alignment between the account model and the rollups is essential for leveraging the functionality effectively, as the Customizable Rollups are tailored to enhance data reporting within that particular setup. Understanding this foundational requirement is crucial for consultants when advising nonprofits on best practices for data management in Salesforce, particularly when implementing features like Customizable Rollups to ensure they have the right organizational structure in place to maximize the benefits.

4. What should be recommended to a nonprofit wanting real-time insights into membership data stored externally?

A. Utilize Salesforce Connect to store this information in External Objects.

B. Utilize Big Objects to store this information in Custom Objects.

C. Utilize Salesforce Connect to store this information in Custom Objects.

D. Utilize Big Objects to store this information in External Objects.

For a nonprofit seeking real-time insights into membership data that is stored externally, utilizing Salesforce Connect to store this information in External Objects is the most suitable recommendation. Salesforce Connect is specifically designed to enable Salesforce to interact with external data sources seamlessly. By using External Objects, organizations can access and manipulate data that resides outside of Salesforce as if it were part of their Salesforce environment. This facilitates real-time access, enabling users to retrieve and view up-to-date membership data without duplicating it in Salesforce. Additionally, External Objects are a better fit in this scenario because they allow for dynamic querying of the external data source in real-time, ensuring that the nonprofit can always work with current data. This approach promotes efficiency and accuracy, which are critical for making informed decisions based on member interactions and insights. In contrast, the other options leverage either Custom Objects or Big Objects, which are not suited for real-time insights into externally stored data, as they imply that data would be imported or stored within Salesforce itself rather than viewed in its external location. This would not provide the desired immediacy and synchrony crucial for a nonprofit needing to act quickly on membership data.

5. What action should a consultant take when installing NPSP for a nonprofit organization using the memberships feature?

A. Create a Membership Opportunity record type

B. Add a value in the Type field on Opportunity for Membership

C. Create a Membership Affiliation record type

D. Add a checkbox field on the Opportunity called "Membership"

When installing the Nonprofit Success Pack (NPSP) for a nonprofit organization that plans to utilize the memberships feature, creating a Membership Opportunity record type is essential. This action allows the organization to effectively track and manage membership renewals and benefits associated with membership types. A Membership Opportunity record type enables the nonprofit to distinguish membership-related opportunities from other types of opportunities within Salesforce, such as donations or event registrations. By setting up this specific record type, the organization can customize the fields and processes relevant to memberships, ensuring that they capture all necessary information required for membership management. In contrast, while adding a value in the Type field on Opportunity for Membership could have implications for categorization, it does not provide the comprehensive management capabilities and customizability that defining a dedicated Membership Opportunity record type offers. Similarly, creating a Membership Affiliation record type or adding a checkbox field may contribute to membership management, but they do not leverage the full functionality of Opportunities tailored for memberships, potentially complicating reporting and data management down the line. Thus, establishing a Membership Opportunity record type is the most effective action for a consultant to take in this scenario.

6. **A donor requests to credit their spouse on a processed donation. What is the best recommendation for the consultant?**

   A. **Create an Opportunity Contact Role for the spouse and mark it as primary**

   B. **Create an Opportunity Contact Role for the spouse and set the role to Soft Credit**

   C. **Clone the Opportunity and set the primary contact to the spouse**

   D. **Enable Automatic Soft Credit for household members in NPSP settings**

When a donor requests to credit their spouse on a processed donation, the best recommendation is to create an Opportunity Contact Role for the spouse and set the role to Soft Credit. This approach is particularly effective because it allows the primary donor to maintain ownership of the donation while ensuring that the spouse receives the recognition they deserve for their involvement. Soft credits are designed specifically for scenarios where the donation should be acknowledged but where the primary donation responsibility remains with the original donor. This method maintains the integrity of the financial records while providing the necessary recognition for both parties. Implementing soft credit ensures that both the donor and their spouse are acknowledged in fundraising reports, donor recognition events, and other documentation. It also allows for accurate tracking of contributions for both individuals in the system, which is valuable for relationship management and future fundraising strategies. Other options might not fully address the donor's request for acknowledgment or could complicate the tracking of the donation. Cloning the Opportunity, for example, might lead to duplication and confusion about who the primary donor is or distort the records. Enabling Automatic Soft Credit for household members can be beneficial in some circumstances, but it does not specifically cater to the individual request made by the donor. Hence, creating an Opportunity Contact Role with soft credit is the

7. **What capability does the Engagement Plan feature in NPSP provide?**

   A. **Allows customization of service offerings**

   B. **Tracks engagement with individual donors**

   C. **Automates grant renewals**

   D. **Facilitates event management**

The Engagement Plan feature in NPSP (Nonprofit Success Pack) is specifically designed to track engagement with individual donors. This capability allows organizations to create tailored engagement strategies for each donor, ensuring that their interactions are meaningful and aligned with the donors' interests and preferences. By leveraging Engagement Plans, nonprofits can effectively monitor each donor's history and interaction points, which helps in building stronger relationships over time. This focus on individual engagement enhances donor retention and potentially increases support, as donors feel more valued and connected to the mission of the organization. The other capabilities mentioned in the options, while important in their own right, do not specifically pertain to the primary function of the Engagement Plan feature. Customizing service offerings, automating grant renewals, and facilitating event management are distinct functionalities that serve different aspects of nonprofit operations but are not the core purpose of Engagement Plans.

8. What is a key focus of the NPSP Data Import with regard to custom unique IDs?

A. Custom Unique IDs can be created from any field

B. Unique ID matching is unaffected by field encryption

C. Custom Unique ID matching is possible with encrypted fields

D. NPSP Data Import cannot match encrypted Contact fields

The focus on the NPSP Data Import regarding custom unique IDs centers on the limitation in matching against encrypted fields. When working with encrypted Contact fields, NPSP Data Import is unable to match records based on these fields. This is important because unique identifiers are crucial for ensuring that records from different systems can be accurately reconciled, and encryption complicates this process. Therefore, acknowledging that NPSP Data Import cannot utilize encrypted fields for matching reinforces the understanding that care must be taken when planning data imports and how identifiers are utilized within the platform. The other options suggest possibilities that do not align with the functionality of the NPSP system; hence, recognizing the limitations is vital for effective data management and maintaining data integrity throughout the import process. Understanding this limitation aids consultants and users in planning their data strategies accordingly, avoiding potential issues that could arise during data import scenarios.

9. What should a consultant recommend for a nonprofit trade association selling products online?

A. Salesforce Experience Cloud

B. Salesforce B2B Commerce

C. Salesforce B2C Commerce

D. Salesforce Billing

The recommendation for the nonprofit trade association selling products online should be Salesforce B2B Commerce because it is specifically designed for businesses that engage in selling to other businesses, which aligns with the nature of a trade association. This platform facilitates complex pricing structures, account-based purchasing, and bulk order processing, which are typical needs for a B2B selling environment. Salesforce B2B Commerce provides a robust set of features tailored for B2B transactions, including custom catalogs, account hierarchies, and support for sales representatives. These features enable trade associations to effectively manage their online product sales, cater to their member companies, and streamline their sales processes, ensuring they can adequately support their unique selling environment. In contrast, Salesforce Experience Cloud focuses more on creating digital experiences and community engagement, which may not directly address the specific transactional needs of selling products online. Salesforce B2C Commerce, while effective for consumer sales, is not ideal for a trade association that primarily sells products to other businesses, as it emphasizes direct-to-consumer sales nuances. Salesforce Billing, though important for managing invoices and payments, does not directly manage the selling process, making it insufficient alone for the needs outlined. Therefore, Salesforce B2B Commerce stands out as the most aligned option for the

10. Which feature allows tracking of Soft Credit rollups in relation to encrypted fields?

A. Nightly rollup process can handle encryption

B. Soft Credit rollups fail if Role Name is encrypted

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D. Encryption has no effect on rollup logic

The selected answer correctly identifies that Soft Credit rollups fail if the Role Name is encrypted. In Salesforce Nonprofit Success Pack (NPSP), rollup summaries are a way to consolidate and summarize information from related records. However, when encrypted fields are involved, particularly in the context of Role Names, the system encounters limitations due to how encryption affects data visibility and access. When a Role Name is encrypted, it cannot be processed by the rollup logic. This is because the rollup summary function needs to access and evaluate the data in the related records to execute correctly. Encrypting the Role Name prevents the system from reading it, causing the Soft Credit rollups to fail. Understanding this relationship is crucial for configuring and managing Soft Credits effectively in an NPSP implementation. The other options do not accurately describe the interaction between Soft Credit rollups and encrypted fields. For instance, the notion that the nightly rollup process can handle encryption is misleading, as encryption may hinder these processes rather than facilitate them. Saying that Soft Credit does not interact with encrypted data oversimplifies the issue and overlooks the specific context of how encryption affects certain fields like Role Names. Finally, asserting that encryption has no effect on rollup logic ignores the critical operational limitations presented by encrypted