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# Salesforce Certified Nonprofit Cloud Consultant

## Salesforce Nonprofit-Cloud-Consultant

### Version Demo

**Total Demo Questions: 42**

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# Topic Break Down

| Topic | No. of Questions |
|---|---|
| Topic 1, Nonprofit Cloud Fundamentals | 179 |
| Topic 2, Nonprofit Cloud for Fundraising | 150 |
| Topic 3, Nonprofit Cloud for Programs | 64 |
| Topic 4, Nonprofit Cloud for Grantmaking | 15 |
| Topic 5, Nonprofit Cloud Data and Analytics | 19 |
| Total | 427 |

QUESTION NO: 1

A consultant for a nonprofit needs to upload data that contains payments on existing opportunities in Salesforce using donation matching in the NPSP Data Importer.

After a gift is successfully matched to an existing record, which two updates may occur?

Choose 2 answers

**A.** The Stage of the Opportunity will change to Closed/Won.

**B.** The open Payment will be marked as Paid.

**C.** A Payment will be added to the Opportunity.

**D.** The Opportunity amount will include the new payment amount.

**ANSWER: B D**

**Explanation:**

The open Payment will be marked as Paid because NPSP Data Importer donation matching can apply an imported gift to an existing donation record rather than treating it as an entirely separate contribution. Where the matched opportunity has an open payment, the import process can update that payment's status to reflect that the expected funds have been received. This preserves the relationship between the original commitment and its payment activity, which is particularly important for pledges and installment-based donations.

The Opportunity amount will include the new payment amount because donation matching can update the matched opportunity with the incoming gift information. The opportunity remains the central donation record, and its amount is updated to reflect the contribution data brought in by the import. This lets the organization maintain accurate gift totals while avoiding duplicate opportunity records for donations that are known to relate to an existing commitment. The Data Importer's matching behavior is designed to support this kind of controlled update workflow, using matching rules and imported donation data to maintain existing nonprofit fundraising records. See Salesforce Trailhead's Nonprofit Success Pack Data Importer module and the Salesforce Nonprofit Success Pack documentation.

**QUESTION NO: 2**

A consultant is planning to use Accounting Subledger and migrate 20 years of donation data into NPSP for a nonprofit that receives more than 200,000 donations each year.

Which two features should the consultant consider implementing to improve search performance?

Choose 2 answers

**A.** Salesforce Object Search Language (SOSL)

**B.** Skinny Tables

**C.** Custom Index

**D.** Salesforce Optimizer

**ANSWER: B C**

**Explanation:**

**Skinny Tables** and **Custom Index** are appropriate considerations for an organization operating at this data volume. With two decades of donation history and more than 200,000 new donations annually, the nonprofit will have large Opportunity and related-record tables. Skinny tables are Salesforce-managed, denormalized tables that contain selected commonly used fields. They can reduce the amount of data Salesforce must read for supported queries, which can improve performance for frequently used list views, reports, and queries. A consultant should identify the fields most commonly used to retrieve donation and accounting-subledger data, then work with Salesforce Support when a skinny table is justified.

Custom indexes improve query selectivity when users or integrations routinely filter on fields that do not already have a standard index. Selective queries allow Salesforce to locate a smaller set of matching records rather than scanning a large proportion of the donation dataset. This is especially important for high-volume operational searches and integrations that retrieve records by specific business identifiers, dates, status values, or other filter fields. The consultant should use query plans and representative production-like data volumes to validate the index strategy. Salesforce guidance on large-data-volume query design is available in SOQL and SOSL Reference: Query Performance and Salesforce Help: Custom Indexes.

## QUESTION NO: 3

A nonprofit organization wants to designate its donors into three categories, Gold, Silver, and Bronze, based on the total gift amount for that year. How can this be accomplished using NPSP?

**A.** Create a picklist field that will display the categories based on the Total Gifts This Year field.
B Create a custom field on the Opportunity that will display the categories and a process in Process Builder to populate the value based on the Total Gifts This Year field.

**B.** Set up NPSP Levels for the categories based on Total Gifts This Year.

**C.** Create a custom field on the Opportunity that will display the categories and a custom trigger to populate the value based on the Total Gifts This Year field.

## ANSWER: B

**Explanation:**

Set up NPSP Levels for the categories based on Total Gifts This Year. NPSP Levels are designed specifically to assign recognition categories to constituent records according to giving criteria, making them the appropriate declarative feature for Gold, Silver, and Bronze donor designations. An administrator can create level records with the applicable minimum and maximum giving thresholds and configure them to evaluate the Total Gifts This Year rollup. NPSP then applies the matching level to the donor automatically as gift activity changes, ensuring the designation stays aligned with each donor's current annual total without requiring custom code or manually maintained category values. Levels can also be used to support stewardship, acknowledgments, segmentation, and reporting because the assigned recognition information is available directly on constituent records. The level configuration supports different time frames and evaluates values maintained by NPSP's rollup summary processes, which is exactly the requirement described. Review Salesforce's NPSP Levels documentation for configuration details and the NPSP rollups documentation for information about the giving totals used by levels.

## QUESTION NO: 4

A nonprofit organization imports new constituent lists each month. The organization wants Salesforce to alert staff when an imported Contact may duplicate an existing Contact record.

Which declarative solution should the consultant recommend?

**A.** Configure a matching rule and a duplicate rule.

**B.** Create a report subscription for all Contacts.

**C.** Enable field history tracking on Contact.

**D.** Create a validation rule requiring a phone number.

## ANSWER: A

**Explanation:**

Configure a matching rule and a duplicate rule. A matching rule defines the criteria Salesforce uses to identify potentially duplicate records, such as matching first name, last name, and email address. A duplicate rule uses the matching rule to determine whether Salesforce should alert users or block the creation of a potential duplicate.

This declarative approach helps the nonprofit protect constituent data quality during imports and manual data entry. The consultant should test the matching criteria with representative data to minimize false positives and ensure the rule reflects the organization's duplicate-management policy. See Salesforce Help: Duplicate Management.

## QUESTION NO: 5

A local community center provides health care services to eligible local residents. Staff currently triage patients through of a series of qualifying questions that drive additional qualification questions. The center wants to extend triage capabilities to its volunteers to determine whether residents qualify for services. Service decisions need to be made immediately while the patient is interacting with the staff or volunteer.

Which solution should the consultant recommend?

**A.** Use Case records, Validation Rules and Process Builder to post case details to the central volunteer Chatter Group so all volunteers can collaborate on eligible services.

**B.** Create a Flow to guide volunteers on triage screens, capture accurate data and generate a services decision.

**C.** Use a Standard Lightning Component to displaying custom fields from several objects and generate a services decision.

**D.** Use a Workflow Rule with Field Updates and Case Assignment Rules to triage and assign the case to the proper services queue.

## ANSWER: B

**Explanation:**

Create a Flow to guide volunteers on triage screens, capture accurate data and generate a services decision. A screen flow is designed for a guided, interactive process in which a user answers questions and receives an outcome during the same interaction. The consultant can configure screens to collect the resident’s responses, use conditional visibility to show only the follow-up questions that apply to prior answers, and use Decision elements to evaluate eligibility criteria as the flow progresses. The flow can then immediately present the appropriate service decision to the staff member or volunteer and, where needed, create or update related Salesforce records to retain the triage result. This approach supports a consistent process across staff and volunteers while minimizing manual interpretation of complex qualification rules. It is also declarative and can be maintained as services or eligibility requirements change, without requiring a custom-coded interface. Salesforce Flow is the platform’s primary automation tool for building guided screens and decision logic; see the Salesforce Flow Builder overview and the Flow Builder Basics Trailhead module.

## QUESTION NO: 6

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.** Self-Service Portal

**B.** Program Management Module

**C.** Engagement Plans

**D.** Service Cloud

## ANSWER: B

**Explanation:**

**Program Management Module** is the appropriate solution because it is designed for nonprofits that need to manage structured programs delivered to participants over time. The organization can represent its teacher-certification offering as a program, define the annual group of participating teachers as a program cohort, and create program engagements to track

each teacher's participation. This structure supports monitoring individual progress through the course experience while retaining the relationship between the participant, the cohort, and the overall program.

The module's service-delivery and outcome-tracking model also provides a practical way to record the courses or modules completed by each teacher and document the credit earned as a measurable result. Consultants can configure the relevant program, cohort, engagement, service, and outcome records to match the nonprofit's terminology and reporting needs. This enables staff to report on cohort enrollment, completion activity, and certification credits at both the individual-teacher and aggregate-program levels. Salesforce describes Program Management Module as a nonprofit solution for managing programs, services, and participant outcomes. See Salesforce's Program Management Module Basics and the Program Management Module documentation repository.

## QUESTION NO: 7

A nonprofit is implementing Accounting Subledger and wants to know how the data from Salesforce would be transferred to its accounting system.

Which three methods are possible?

Choose 3 answers

**A.** Integrate Salesforce with the accounting system using middleware.

**B.** Export data via Salesforce reports to upload to the accounting system.

**C.** Develop a custom integration solution.

**D.** Schedule a Data Export from Salesforce.

**E.** Configure Salesforce Connect to integrate with the accounting system.

## ANSWER: A B C

**Explanation:**

Integrate Salesforce with the accounting system using middleware, export data via Salesforce reports to upload to the accounting system, and develop a custom integration solution are all valid methods for transferring Accounting Subledger data to an external accounting system. Middleware can orchestrate and transform data between Salesforce and the finance platform, commonly using APIs, scheduled jobs, mappings, and error handling. This is often appropriate where the organization needs a managed integration layer or has multiple systems to connect.

A report-based export supports a manual or semi-manual operational process. The nonprofit can build reports containing the accounting transactions and fields required by its accounting application, export the results in a supported format such as CSV, and upload them according to its finance team's posting schedule. A custom integration is suitable when the accounting system has specific API, authentication, transformation, or synchronization requirements that are not met by an existing connector or middleware configuration. Salesforce provides APIs and integration patterns that support programmatic exchange with external systems. See Salesforce's REST API overview and integration patterns guidance.

## QUESTION NO: 8

A nonprofit runs a large scholarship program for high-school graduates. It wants to use Salesforce to help with accepting external scholarship applications, reviewing processes, and tracking requirements.

Which two solutions should the consultant recommend to meet this requirement?

Choose 2 answers

**A.** NPSP Opportunities with GAU Allocation

**B.** Web-to-lead form

**C.** Experience Cloud

**D.** Outbound Funds Module

**ANSWER: C D**

**Explanation:**

**Experience Cloud** is appropriate because it provides an authenticated, branded digital experience where scholarship applicants can access an application process externally. The nonprofit can expose the appropriate application-related records, guides, forms, and status information to applicants without giving them direct internal Salesforce access. This supports a scalable applicant-facing experience and allows applicants to return to complete required information or monitor progress. Salesforce describes Experience Cloud as a way to build digital experiences that connect external users to the information and processes they need.

**Outbound Funds Module** is designed for organizations that manage funding programs, including grants and scholarship-style awards. It supports the lifecycle needed here: receiving and managing funding requests, tracking eligibility and requirements, routing submissions through review processes, recording decisions, and managing awards or disbursements. Used with an applicant-facing Experience Cloud site, it gives the nonprofit both the external submission channel and the internal program-management framework needed for a large scholarship program.

See Salesforce's Experience Cloud overview and the Outbound Funds Module overview.

## QUESTION NO: 9

A nonprofit organization using NPSP does a lot of mailings and wants to ensure states and countries are entered accurately into Salesforce. The nonprofit has heard about State and Country Picklists and asked its consultant about enabling them. What are two considerations the consultant should raise about enabling State and Country Picklists and asked its consultant about enabling them. What are two considerations the consultant should raise about enabling State and Country Picklists for NPSP?

**A.** NPSP Data Import object doesn't support State and Country abbreviations in picklist form

**B.** The Individual ("Bucket") account model does not support State and Country Picklists

**C.** Predefined State and Country abbreviations on Address records must be used

**D.** State and Country Picklist values can only be configured on the Address object

**ANSWER: A C**

**Explanation:**

"NPSP Data Import object doesn't support State and Country abbreviations in picklist form" is a key implementation consideration because State and Country/Territory Picklists validate address data against configured values. Before enabling the feature, the consultant should review import-file values and establish a consistent data-preparation process so NPSP Data Import can match supplied state and country values to the values configured in the org. This is especially important for organizations that regularly import constituent, household, or address data from mailing-list sources.

"Predefined State and Country abbreviations on Address records must be used" is also correct because the feature relies on Salesforce's standardized state and country/territory definitions and their associated codes. The consultant should activate only the countries and states needed by the nonprofit and ensure users, imports, integrations, and existing-data cleanup follow the selected standardized values. Doing so improves consistency for mailing, reporting, duplicate management, and integrations that depend on reliable geographic data. Salesforce recommends planning the rollout and validating existing data because enabling picklists affects address entry across supported standard address fields. See Salesforce's State and Country/Territory Picklists overview and preparation guidance for enabling picklists.

## QUESTION NO: 10

A nonprofit organization wants to identify Contacts who influenced donations but did not make the gifts directly. The development director needs to review each Contact's recognized giving for the current year.

Which NPSP rollup field should the consultant include in the report?

**A.** Soft Credits This Year

**B.** Total Gifts This Year

**C.** Total Payments This Year

**D.** First Gift Amount

**ANSWER: A**

**Explanation:**

Use the Soft Credits This Year field. NPSP uses soft credits to recognize Contacts for gifts that they influenced or should receive credit for, even though they are not the direct donor on the Opportunity. The Soft Credits This Year rollup summarizes the relevant soft-credit amount for the current year on the Contact record.

This allows the development director to report separately on recognized giving and direct giving. For example, a board member, solicitor, spouse, or family member can receive soft-credit recognition without changing the donor associated with the gift Opportunity. See Salesforce Trailhead: Manage Soft Credits.

## QUESTION NO: 11

A nonprofit wants to track various funds in Salesforce to report on its restricted donations. Which NPSP feature should the consultant recommend?

**A.** Levels

**B.** Engagement Plans

**C.** General Accounting Units

**D.** Customizable Rollups

**ANSWER: C**

**Explanation:**

General Accounting Units are the appropriate feature because they let a nonprofit classify gift revenue by the fund, program, grant, restriction, or other accounting designation that the organization needs to report on. A General Accounting Unit can represent a distinct restricted fund, such as a scholarship fund, a capital campaign fund, or a program-specific fund. Fund allocations can then be applied to donation records so that a single donation is attributed to one or more units, including split allocations when a donor directs portions of a gift to different purposes. This structure provides a consistent way to report on the amounts raised for each restricted designation while retaining the underlying donor and donation information. In Nonprofit Success Pack, General Accounting Units and allocations form part of the accounting subledger capabilities, helping organizations organize fundraising transactions in a manner that supports fund accounting and downstream financial processes. The consultant should first work with the nonprofit to define its fund and restriction structure, then configure the corresponding units and allocation process so reports accurately reflect how donations may be used. See Salesforce Trailhead's General Accounting Units configuration guidance and the Nonprofit Success Pack fundraising setup module.

## QUESTION NO: 12

The executive director at a nonprofit needs to understand the overall summary of individuals engaged with the organization across multiple channels, including donations, volunteer shifts, and event attendance. What can the consultant deliver to help them achieve this summary by channel?

**A.** Create a Role Hierarchy to summarize the number of Opportunity records associated with each user, and the Campaign Memberships associated with the Primary Contact on the Opportunity by channel.

**B.** Create an Account Hierarchy to see the number of people related to each household, and their associated Contact records with Campaign Memberships and Opportunities by channel.

**C.** Create a User Hierarchy to report by user with the Opportunity, Contact, and Campaign records owned representing donation, volunteer, and event channels and their Campaign Memberships.

**D.** Create a Campaign Hierarchy to see the number of people associated with each donation, shift, and event, by channel with Campaign Memberships.

**ANSWER: D**

**Explanation:**

Create a Campaign Hierarchy to see the number of people associated with each donation, shift, and event, by channel with Campaign Memberships. Salesforce Campaigns provide a common structure for tracking engagement initiatives, including fundraising appeals, volunteer recruitment or shift activity, and events. Each person's participation can be represented by a Campaign Member record, which connects a Lead or Contact to the relevant campaign and can capture an appropriate member status, such as invited, attended, volunteered, or responded.

A Campaign Hierarchy organizes related campaigns under parent campaigns. The nonprofit can create top-level campaigns representing the engagement channels, such as Donations, Volunteer Shifts, and Events, then place individual appeals, shifts, and events beneath the applicable parent. This gives leadership an organized, channel-based view of the initiatives and the individuals associated with each one. Campaign hierarchy rollups and campaign reporting support summary-level analysis while still allowing users to drill into individual child campaigns and member records when needed. This approach uses Salesforce's standard campaign and campaign-member data model to consistently connect constituent engagement across channels. See Salesforce's Campaign Hierarchies Trailhead unit and Campaign Hierarchies documentation.

## QUESTION NO: 13

A nonprofit organization plans to implement Nonprofit Cloud. The organization's main business objective is to complete the project before its annual fundraising event next year.

Which metric can the organization use to measure the success of the project against the objective?

**A.** Schedule performance index

**B.** Conversion rate

**C.** Cost performance index

**ANSWER: A**

**Explanation:**

**Schedule performance index** is the appropriate metric because the stated project objective is time-based: completing the Nonprofit Cloud implementation before a fixed event date. Schedule performance index, commonly called SPI, is an earned value management measure that compares the value of work actually completed with the value of work that was planned to be completed by a particular point in time. An SPI of 1.0 means work is proceeding exactly as scheduled; a value greater than 1.0 indicates progress ahead of schedule; and a value below 1.0 indicates the project is behind schedule. Tracking this metric at regular project-governance checkpoints gives the nonprofit an objective indicator of whether delivery remains on track for the annual fundraising event and whether schedule adjustments are needed early enough to protect that deadline. This aligns with Salesforce implementation planning practices, which emphasize defining measurable success metrics and managing project scope, milestones, and timelines throughout delivery. See Salesforce's guidance on project management and the U.S. Government Accountability Office's cost and schedule guide for earned-value schedule performance concepts.

## QUESTION NO: 14

A nonprofit organization is hosting an annual fundraising gala. The organization needs to track invitees, attendance status, and responses for each person associated with the event.

Which Salesforce feature should the consultant recommend?

**A.** Campaign Members

**B.** GAU Allocations

**C.** Account Teams

**D.** Opportunity Splits

**ANSWER: A**

**Explanation:**

Campaign Members are the appropriate feature because they connect Leads or Contacts to a Campaign and store each person's membership status. The nonprofit can create a Campaign for the gala, add invitees as Campaign Members, and use member statuses such as Invited, Registered, Attended, or Declined to track participation.

This approach also supports reporting on invitations, response rates, attendance, and campaign-related fundraising activity. Campaign Members provide a standard relationship between the event campaign and the people involved, rather than requiring separate custom records for each invitee. See Salesforce Help: Campaign Members.

## QUESTION NO: 15

A nonprofit is getting ready to go live with its Nonprofit Cloud implementation.

Which two sandbox configuration options can the consultant create to ensure effective user acceptance testing and training?

Choose 2 answers

**A.** Partial Data Sandbox

**B.** Developer Sandbox

**C.** Developer Pro Sandbox

**D.** Full Data Sandbox

**ANSWER: A D**

**Explanation:**

**Partial Data Sandbox** and **Full Data Sandbox** are appropriate for user acceptance testing and training because they can include production record data in addition to the organization’s metadata and configuration. Having representative data lets nonprofit users practice realistic constituent, donation, program, case, and reporting workflows, while also enabling testers to validate that the configured solution meets business requirements before deployment.

A Partial Data Sandbox is suited to focused UAT and training because it can copy a selected sample of production data using a sandbox template. This provides realistic test scenarios without requiring a complete copy of the production database. A Full Data Sandbox copies all production data and metadata, making it especially useful when testing must reflect production data volume, integrations, complex reporting, or end-to-end business processes as closely as possible. Salesforce recommends using sandboxes to develop, test, and train safely without affecting production operations. Consultants should also ensure that sensitive data is handled appropriately in sandbox environments, including masking data where required by organizational policy.

See Salesforce’s Sandbox Overview and Sandbox Templates documentation.

## QUESTION NO: 16

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.** 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

**B.** 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.

**C.** 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.

**ANSWER: C**

**Explanation:**

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. This approach correctly distinguishes between distributions that must be associated with a known program participant and distributions where preserving recipient identity is unnecessary. The Benefit defines the item or service being delivered—in this case, a winter coat—so the organization can consistently report on the type and quantity of assistance it provides. An ad hoc disbursement records an instance of that benefit being delivered outside a prearranged schedule. For an existing participant who arrives to receive a coat, a Walk-In disbursement captures both the delivery and the participant relationship, enabling participant-level service history and outcome reporting. For someone who is not a participant, an Anonymous disbursement allows staff to record the coat distribution quantity without creating a participant or storing personally identifying recipient data. This meets the operational requirement while supporting accurate aggregate inventory and service-delivery reporting. Salesforce Nonprofit Cloud program management supports recording and reporting on benefits and service delivery as part of program operations; see Salesforce Nonprofit Cloud and Salesforce Help: Nonprofit Cloud.

**QUESTION NO: 17**

A nonprofit needs to clean up large amounts of Contact address data from its street canvassing and telemarketing operations on a monthly basis.

What should the consultant use to standardize addresses in NPSP?

**A.** Batch Data Import

**B.** Address Verification

**C.** NPSP Data Importer

**D.** Seasonal Addresses

**ANSWER: B**

**Explanation:**

**Address Verification** is the NPSP feature designed to standardize and validate constituent mailing addresses. It connects NPSP with an address-verification service so that address values can be checked against postal-reference data, corrected into a consistent format, and enriched where supported with details such as ZIP+4 information. This directly supports a nonprofit that receives high volumes of manually captured addresses from canvassing and telemarketing, where abbreviations, misspellings, incomplete unit information, and inconsistent formatting are common.

For a recurring monthly cleanup process, address verification can be run for records in bulk rather than requiring staff to review and standardize every Contact address by hand. This helps make addresses more reliable for mailings, household communications, reporting, and duplicate-management processes. The consultant should also ensure the organization configures the relevant verification provider and credentials, then establishes an operational process for reviewing records that the service cannot confidently validate. Salesforce documents the NPSP address-verification capability and its

configuration in the NPSP Address Verification documentation. For broader guidance on managing constituent information in nonprofit implementations, see Salesforce's Nonprofit Success Pack customization module.

## QUESTION NO: 18

A nonprofit is using Nonprofit Cloud Case Management. Case managers need to share the initial, midterm, and final client assessments; updates or notes on the client; and pertinent alerts about the client with other staff within the nonprofit who also provide services to the client.

Which two approaches should a consultant recommend to meet the requirement?

Choose 2 answers

**A.** Create Sharing Rules for Assessments, Client Notes, and Client Alerts that share these with the public group.

**B.** Create a Public Group of staff that need access to this information.

**C.** Create a permission set that grants Read/Write access to Assessments, Client Notes, and Client Alerts objects.

**D.** Create a Private Group of staff that need access to this information.

## ANSWER: A B

**Explanation:**

**Create a Public Group of staff that need access to this information** is appropriate because a public group provides a reusable, centrally managed collection of users who perform services for clients. Administrators can add or remove staff as responsibilities change, without needing to reconfigure access separately for each user. This is particularly useful when the same class of staff needs access across multiple client-related record types.

**Create Sharing Rules for Assessments, Client Notes, and Client Alerts that share these with the public group** is the corresponding record-access mechanism. Sharing rules extend access to records beyond the organization-wide default and role hierarchy, and can grant the designated group the required access to the relevant assessment, note, and alert records. Together, the group identifies the staff population and the sharing rules provide those users access to the appropriate client information, supporting collaboration among service providers while preserving a controlled sharing model.

Salesforce documents how sharing rules provide record access to users, roles, territories, and public groups in Sharing Rules. For maintaining the target audience, see Salesforce's guidance on creating public groups.

## QUESTION NO: 19

The vice president of development of a nonprofit organization wants to be able to review giving in the pipeline at a high level, and track the organization's process towards finding new potential donors. The VP also wants to track program metrics as compared to donor histories. What should the consultant advise?

**A.** Packaged NPSP reports cannot be edited. Recreate all the reports found on the NPSP Development Forecasting dashboard to edit appropriately. Add additional reports to track program data.

**B.** Review the reports on the NPSP Fundraising Reports folder. Create additional reports to track program data. Schedule each report to be sent to the vice president every morning.

**C.** Review the components that are already on the NPSP Development Forecasting dashboard. Create additional reports and edit the dashboard to add components to track the program data.

**D.** Packaged NPSP dashboards cannot be edited. Recreate the NPSP Development Forecasting dashboard components. Add additional components to track program data.

## ANSWER: C

**Explanation:**

Review the components that are already on the NPSP Development Forecasting dashboard. Create additional reports and edit the dashboard to add components to track the program data. This approach directly supports the vice president's need for an executive-level view of prospective giving while retaining the useful fundraising pipeline information already supplied by the Development Forecasting dashboard. Dashboards provide visual, at-a-glance summaries of report data, making them well suited to monitoring prospecting progress, expected revenue, and other development measures without requiring the VP to open individual reports.

The consultant should first evaluate the existing dashboard components and underlying reports so the organization can preserve relevant packaged content and tailor it to its fundraising process. New reports can then be created using the nonprofit's program and donor-history data, subject to the available data model and reporting relationships. Adding those reports as dashboard components creates one consolidated view in which program outcomes or participation metrics can be considered alongside donor information. Salesforce supports editing dashboards and adding report-based components, enabling the dashboard to evolve as leadership reporting needs change. See Salesforce's guidance on customizing dashboards and the Salesforce Help overview of reports and dashboards.

## QUESTION NO: 20

A developer needs to create a custom Apex class in the TDTM framework. Which sets of steps should the developer take?

**A.** Create the Visualforce page, test class, and a Trigger Handler record

**B.** Create the Apex class, test class, and Trigger Handler record

**C.** Create the Apex trigger, test class, and Trigger Handler record

**D.** Create the Lightning component, test class, and Trigger Handler record

## ANSWER: B

**Explanation:**

**Create the Apex class, test class, and Trigger Handler record** is correct because Table-Driven Trigger Management (TDTM) centralizes trigger execution through configurable handler records rather than requiring a separate Apex trigger for each customization. The developer implements the required TDTM runnable Apex class so the framework has executable logic for the applicable object and trigger context. The class must be covered by an Apex test class, both to validate the intended behavior and to meet Salesforce deployment requirements for Apex code. Finally, a Trigger Handler record registers the class with TDTM and controls how it runs, including the target object, execution order, active status, and relevant trigger operations. This configuration-driven design lets multiple handlers run predictably from the framework's managed trigger infrastructure and avoids conflicts caused by custom triggers on the same object. The Nonprofit Success Pack source repository documents the managed-package architecture and its extensibility model, while Salesforce's Apex testing documentation explains the requirement to test Apex behavior before deployment. See the Nonprofit Success Pack repository and Salesforce Apex Testing documentation.

## QUESTION NO: 21

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

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

Choose 2 answers

**A.** NPSP Data Import will automatically create the Campaign Member with the default Member Status.

**B.** Respect Duplicate Matching Rules' should be checked in NPSP Settings.

**C.** NPSP Data Import Dry Run will validate Campaign Member Status.

**D.** Existing Campaigns are matched by exact Name.

**ANSWER: B D**

**Explanation:**

“Respect Duplicate Matching Rules' should be checked in NPSP Settings.” is appropriate because recurring imports need to follow the organization’s established duplicate-management controls. When this setting is enabled, NPSP Data Import honors Salesforce duplicate rules during its matching and record-creation process. This helps the nonprofit maintain trustworthy constituent data as files are imported repeatedly, while applying the same duplicate safeguards that users encounter elsewhere in Salesforce. The consultant should also ensure that the organization has reviewed and activated suitable duplicate and matching rules before relying on this process. Salesforce documents duplicate management and the role of matching rules in identifying potential duplicate records at Salesforce Help: Manage Duplicate Records.

“Existing Campaigns are matched by exact Name.” is also a key setup consideration. NPSP Data Import uses the Campaign Name supplied in the import file to locate the campaign to which imported contacts should be added. Consequently, the CSV value must precisely match the name of an existing Campaign, including spacing and punctuation conventions used by the nonprofit. Establishing a consistent campaign naming standard and providing admins with approved campaign names reduces failed matches and helps ensure imported constituents are associated with the intended outreach effort. Campaign membership and campaign management concepts are described in Salesforce Help: Campaign Members.

## QUESTION NO: 22

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 answers

**A.** Customizable Rollups

**B.** Opportunity Stages

**C.** NPSP Health Check

**D.** Salesforce Optimizer report

**E.** Campaign Hierarchy

**ANSWER: A B C**

**Explanation:**

**Customizable Rollups**, **Opportunity Stages**, and **NPSP Health Check** are the appropriate troubleshooting areas. NPSP donation summary fields are maintained by the rollup engine, and the Customizable Rollups configuration defines which Opportunity records are included, the date and amount fields used, the aggregation method, and any filter criteria. Reviewing those definitions confirms that the summary field is configured to reflect the organization’s intended giving calculation.

Opportunity stage configuration is also essential because donation rollups can include or exclude records according to their stage. For example, an organization may intend to count only committed gifts, while a rollup’s configured stages could include pledges, exclude Closed Won gifts, or otherwise differ from the fundraiser’s expectation. The stages and the actual stages on the relevant donation Opportunities should therefore be compared.

NPSP Health Check provides an administrative diagnostic for NPSP configuration and data conditions, including checks relevant to donation rollups. It helps identify setup or processing conditions that can cause displayed totals to be inconsistent and directs an administrator toward remediation or recalculation where appropriate. Salesforce documents NPSP rollup behavior in its Customizable Rollups documentation and provides NPSP administration learning resources in the Nonprofit Success Pack Basics Trailhead module.

## QUESTION NO: 23

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 Opportunities as the primary object. Use Individual Applications, Funding Awards, and Funding Award Participants as related objects.

**B.** Use Funding Opportunities as the primary object. Use Individual Applications, Funding Awards, and Funding Disbursements as related objects.

**C.** Use Funding Awards as the primary object. Use Individual Applications, Funding Disbursements, and Budget Allocations as related objects.

**ANSWER: B**

**Explanation:**

Use Funding Opportunities as the primary object, with Individual Applications, Funding Awards, and Funding Disbursements as related objects. A Funding Opportunity is the appropriate reporting anchor because it represents the grant opportunity or funding program for which the organization needs a consolidated view. Starting with this object lets the report group results by each opportunity and apply a fiscal-year filter appropriate to the organization's reporting process.

Individual Applications provide the application-level outcome data, including whether applicants were approved or denied. Funding Awards represent the awards made from those applications or opportunities, allowing the organization to report what was awarded. Funding Disbursements provide the payment records needed to total the amounts actually paid out. Combining these objects in a four-object custom report type supplies the complete reporting path from grant opportunity through application and award to payment, so a single report can show both decision outcomes and disbursed totals per opportunity.

Salesforce custom report types define the primary object and the related-object relationships available to reports. See Create Custom Report Types and the Salesforce Nonprofit Cloud data model documentation.

**QUESTION NO: 24**

A development director wants to compare year over year donation information on a weekly basis for the last five years in order to see giving trends via a bar chart. The director asks the consultant if reporting snapshots would work.

What should the consultant advise about the limitations of reporting snapshots?

**A.** Reporting snapshots can run on a monthly basis.

**B.** Reporting snapshots can display a line chart.

**C.** Reporting snapshots can show data for the past three years.

**D.** Reporting snapshots do NOT work retroactively.

**ANSWER: D**

**Explanation:**

Reporting snapshots do NOT work retroactively. A reporting snapshot is a scheduled process that runs a source report and stores the report's summarized results in a custom object over time. It is useful when an organization needs to establish a historical trend going forward, such as recording weekly donation totals so those values can later be compared in reports and charts. However, enabling a snapshot today does not create stored weekly values for prior weeks, months, or years. Because the development director needs five years of year-over-year donation history immediately, a snapshot alone cannot supply that historical data unless the organization has already been running it throughout that period. The consultant should clarify that snapshots begin collecting point-in-time report results only after configuration and scheduled execution. Existing donation records can still be analyzed with reports, custom report types, or other data-model and reporting approaches, but the snapshot feature itself cannot backfill historic snapshot records from past dates. Salesforce describes reporting snapshots as a mechanism for capturing and storing report results at regular intervals, which makes advance planning

important for longitudinal reporting. See Salesforce Help: Reporting Snapshots Overview and Trailhead: Track Historical Data with Reporting Snapshots.

## QUESTION NO: 25

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: A D

**Explanation:**

“All existing integrations should be reviewed for compatibility” is a key pre-conversion consideration because Enhanced Recurring Donations changes the recurring-donation data model behavior, automation, and record-processing patterns used by the Nonprofit Success Pack. Any custom Apex, Flow, API-based integration, installed package, payment processor connection, report, or middleware process that reads or writes recurring-donation records should be assessed and tested against the enhanced model. A sandbox rehearsal and an inventory of dependencies help the organization identify required updates before production conversion.

“Reverting to Legacy Recurring Donations is unsupported” is also essential because the upgrade is intended as a one-way transition. The organization should treat enablement and conversion as a production change that requires planning, stakeholder approval, data validation, integration testing, and a defined cutover plan. Salesforce’s recurring-donation guidance describes Enhanced Recurring Donations as the newer framework and provides implementation resources for evaluating and preparing the transition. Review the Salesforce Enhanced Recurring Donations documentation and the Recurring Donations in Nonprofit Success Pack Trailhead module before scheduling the upgrade.

## QUESTION NO: 26

Donations made by nonprofit volunteers are captured on a spreadsheet monthly. The nonprofit utilizes NPSP and Volunteers for Salesforce.

Which two NPSP Data Import features will streamline the import of these donations?

Choose 2 answers

**A.** Create a Batch and map Opportunity Primary Contact on First and Last Name.

**B.** Schedule a Batch by updating the NPSP Scheduled Batches.

**C.** Create a Batch and match Contact on First and Last Name.

**D.** Schedule a Batch by checking the Process Using Scheduled Job checkbox.

## ANSWER: C D

**Explanation:**

**Create a Batch and match Contact on First and Last Name.** is appropriate because NPSP Data Import uses the batch’s field mappings and matching rules to associate each donation row with the appropriate existing Contact. Mapping the donor’s first and last name to the Contact matching fields allows recurring spreadsheet imports to identify volunteer donors without manually locating each person before processing the batch. This supports creation or association of the donation records in a consistent, repeatable import process.

**Schedule a Batch by checking the Process Using Scheduled Job checkbox.** is also appropriate for a monthly donation spreadsheet process. After the source file is loaded and mappings are configured, the scheduled-job setting lets NPSP Data Import process the batch asynchronously through Salesforce's scheduled processing rather than requiring a user to remain in the import workflow and manually initiate each processing run. Using scheduled processing is especially helpful for routine imports and can reduce administrative effort while allowing the importer to handle the related data-processing steps in the background.

Salesforce's NPSP learning material describes using Data Import batches, mappings, matching, and batch processing for nonprofit data loads. See Salesforce Trailhead: NPSP Data Import and the NPSP project documentation repository.

## QUESTION NO: 27

A user has reported an error when trying to merge two contacts using NPSP Contact Merge tab.

Which two issues are the likely cause of the problem?

Choose 2 answers

**A.** A unique external Id was kept from the non-master contact.

**B.** The contacts must be in the same household to merge.

**C.** The user needs to have delete access to the contacts being merged.

**D.** The NPSP Duplicate Rule was set to Warn instead of auto-merge.

## ANSWER: A C

**Explanation:**

"A unique external Id was kept from the non-master contact." is a likely cause because Salesforce must maintain uniqueness for fields configured as unique, including unique external ID fields, throughout the merge transaction. NPSP Contact Merge combines the selected survivor record with values and related data from the record being removed. Selecting or retaining a unique value from the non-master record can create a uniqueness conflict during that process, particularly when the survivor record already has a value in the same unique field. The merge must be adjusted so the surviving contact retains a valid, non-conflicting unique value.

"The user needs to have delete access to the contacts being merged." is also required because a merge operation deletes the non-master contact after its selected field values and related information are consolidated into the master contact. Salesforce therefore requires the user to have the necessary record access and object-level Delete permission for the records being merged, in addition to the permissions needed to update the surviving record. Administrators should review the user's Contact object permissions, sharing access, and any permission sets that govern contact deletion before retrying the merge. Salesforce's general merge guidance describes the survivor-and-delete behavior of record merges: Merge Duplicate Contacts. The NPSP package and its supported functionality are maintained in the Salesforce Foundation repository: Salesforce Foundation NPSP repository.

## QUESTION NO: 28

A nonprofit organization needs to organize a portfolio of major donation prospects based on the prospect status to engage the most promising relationships. Which Nonprofit Cloud feature should the organization use?

**A.** Actionable Lists

**B.** Action Plans

**C.** Contact Profiles

**D.** Prospect Portfolios

## ANSWER: D

**Explanation:**

**Prospect Portfolios** is the appropriate Nonprofit Cloud feature for organizing and prioritizing major-gift prospects. A prospect portfolio gives a fundraiser a focused, manageable collection of people or organizations to cultivate, enabling the organization to assign prospects to the appropriate relationship manager and manage those prospects as a cohesive body of work. Within the major-gifts process, prospect information such as prospect status helps fundraisers understand where each relationship is in qualification, cultivation, solicitation, or stewardship. This supports prioritization of the most promising prospects and ensures that engagement effort is directed toward the right relationships at the right time.

Portfolio management is designed around a gift officer's ongoing responsibility for a set of prospects, rather than merely producing a temporary filtered audience. It provides the organizational structure needed to review assigned prospects, monitor their progress, and coordinate purposeful engagement as the relationship advances. Salesforce positions prospect management and major-gift fundraising capabilities as tools for tracking and managing donor relationships throughout this lifecycle. See Salesforce's Nonprofit Cloud Fundraising overview and the related Salesforce Trailhead learning resources for prospect portfolios.

## QUESTION NO: 29

A consultant has implemented Outcome Management in Nonprofit Cloud for a nonprofit organization. The organization is struggling to understand how all the objects in Qutcome Management relate.

What should the consultant do to help the organization understand the outcomes, indicators, and associated objects?

**A.** Build an Actionable Relationship Center graph.

**B.** Add the Relationships Viewer button to the Outcome and Indicator object pages.

**C.** Enable the Scoring Framework feature in Nonprofit Cloud and set up analytics templates.

## ANSWER: B

**Explanation:**

Add the Relationships Viewer button to the Outcome and Indicator object pages. The Relationships Viewer gives users an interactive, record-centered visualization of related records, making it especially useful when a nonprofit needs to understand the Outcome Management data model in context. From an outcome or indicator record, staff can inspect the connected records and the relationships that support outcome tracking, rather than relying on a static diagram or requiring users to navigate through multiple related lists manually.

Outcome Management is designed to help organizations define the changes they seek, establish indicators that measure progress toward those changes, and record performance over time. Because these records are intentionally interconnected, a visual relationship tool helps program staff and administrators see how a particular outcome, its indicators, and associated records fit together in their own implementation. Adding the button directly to the relevant record pages makes this understanding available at the point where users are reviewing or maintaining outcome data.

Salesforce describes the Relationship Viewer as a way to visualize and explore a record's relationships. For additional context on Nonprofit Cloud outcome management capabilities, see Salesforce Help: Outcome Management and Salesforce Help: Relationship Viewer.

## QUESTION NO: 30

A user creating Opportunities wants to avoid manually entering information twice in order to have it appear on both the Opportunity record and the Payment record. Which two steps should be taken to set this up?

**A.** Create Payment Mappings in NPSP Settings.

**B.** Create custom fields on the Payment object.

**C.** Create lookup fields on the Payment object.

**D.** Create a workflow that will copy Payment information to the Opportunity record.

**ANSWER: A B**

**Explanation:**

**Create Payment Mappings in NPSP Settings.** and **Create custom fields on the Payment object.** are the required setup actions for synchronizing organization-specific information from an Opportunity to its related Payment records in Nonprofit Success Pack. Payment mappings define the field-to-field relationship that NPSP uses when it creates or updates Payments associated with an Opportunity. This lets staff enter the value once on the Opportunity and have NPSP populate the corresponding Payment field automatically, reducing duplicate entry and improving data consistency.

Before a mapping can be configured, the destination field must exist on Payment. In practice, the organization also needs a compatible source field on Opportunity; matching field types and appropriate field-level access are important so the mapping can reliably transfer the value. After the custom Payment field is available, an administrator selects the Opportunity source field and Payment destination field in Payment Mappings. NPSP then applies that configured mapping as it processes Payment records generated from the Opportunity. This is the standard declarative NPSP approach, rather than requiring users to rekey values for each related record. See Salesforce's Payment Mappings documentation and the Opportunity Settings in Nonprofit Success Pack Trailhead module.

## QUESTION NO: 31

A nonprofit created a custom Opportunity Name for all In-kind gifts.

Which two considerations should the consultant discuss with the nonprofit?

Choose 2 answers

**A.** The nonprofit should change existing Opportunities to the new naming convention by running the Refresh All Opportunity Names utility.

**B.** The Opportunity Name Format will only be applied to new Opportunities of the matching record type.

**C.** The nonprofit should change existing Opportunities to the new naming convention through an upsert.

**D.** Click the Refresh Name button on one Opportunity record to update all relevant Opportunities.

**ANSWER: A B**

**Explanation:**

The nonprofit should understand that an Opportunity Name Format is applied prospectively. After a format is configured for the In-kind gift record type, opportunities subsequently created with that matching record type receive the configured automatic name. Changing the format does not automatically rewrite the names already stored on existing Opportunity records. This allows an organization to introduce a revised convention without unintentionally changing historical records immediately.

If the nonprofit decides that existing In-kind gift Opportunities should also follow the new convention, the appropriate NPSP action is the *Refresh All Opportunity Names* utility. This utility recalculates and updates Opportunity names using the current naming-format configuration, enabling the organization to apply the new standard consistently to applicable historical records. Before running it, the consultant should help the nonprofit validate the format and communicate the expected bulk update, because Opportunity names may be used in reports, integrations, acknowledgments, or staff workflows. Salesforce describes configurable automatic Opportunity naming in its Nonprofit Success Pack setup guidance and provides additional implementation resources in the Nonprofit Success Pack documentation.

## QUESTION NO: 32

A nonprofit organization is migrating from a standard Salesforce org to an NPSP org. It has a large volume of contacts. The nonprofit organization is considering using an Individual ("Bucket") account model. What are two considerations in this situation?

**A.** The Individual account model is a legacy account model and is no longer recommended.

**B.** Once the Individual model is enabled, it cannot be changed.

**C.** The Account name is identical to the Contact name.

**D.** There is a risk of account data skew with the Individual account model and the large volume of contacts.

**ANSWER: A D**

**Explanation:**

The Individual (Bucket) account model is a legacy NPSP approach and is not recommended for new implementations. In this model, NPSP associates individual contacts with a common account rather than creating and maintaining a distinct household relationship structure. Salesforce's recommended NPSP account model for most nonprofit organizations is the Household Account model, which is designed to represent constituent households and their relationships more naturally.

Using a bucket account for a very large contact population also creates a significant account data-skew concern. Data skew occurs when a single parent record has a very large number of related records. When many contacts are associated with the same bucket account, record ownership changes, sharing recalculations, and other operations involving those records can affect performance, especially as the organization grows. This is particularly relevant during a migration, when large batches of records may be inserted or updated. The nonprofit should evaluate a scalable account model and plan its data migration carefully. See Salesforce's NPSP account-model documentation and guidance on ownership and data skew.

## QUESTION NO: 33

A nonprofit wants to make a substantial technology shift that will affect multiple teams and departments. Which two initial steps should a consultant discuss with the nonprofit? (Choose 2)

**A.** Summarize final technology implementation steps.

**B.** Deploy features to meet departmental requirements.

**C.** Establish a sense of urgency.

**D.** Form a powerful guiding coalition.

**ANSWER: C D**

**Explanation:**

"Establish a sense of urgency" and "Form a powerful guiding coalition" are the appropriate initial discussions because a substantial technology change is fundamentally an organizational change, not merely a technical deployment. Establishing urgency helps the nonprofit's leaders and staff connect the proposed shift to mission outcomes, current operational risks, and the cost of maintaining the status quo. A clear, shared reason for acting now creates the commitment needed for teams to prioritize the work and engage with new processes.

Forming a powerful guiding coalition ensures that the change has visible sponsorship and cross-functional ownership from the beginning. For a shift affecting several departments, the coalition should include executive sponsors with authority to remove barriers as well as influential stakeholders who understand departmental needs and can champion adoption. This group aligns the change with organizational strategy, makes timely decisions, communicates consistently, and supports staff throughout the transition. These activities correspond to the first stages of Kotter's change framework and support Salesforce's guidance that successful adoption requires executive alignment, stakeholder engagement, and intentional change management. See Kotter's 8-Step Process and Salesforce Trailhead: Change Management for Salesforce Adoption.

## QUESTION NO: 34

A consultant needs to set up a sandbox strategy for a nonprofit implementation project involving two major development initiatives. For which three purposes should separate sandboxes be used?

**A.** Quality Assurance

**B.** Analytics

**C.** Field Tracking

**D.** Staging

**E.** Development

**ANSWER: A D E**

**Explanation:**

Separate sandboxes for **Development**, **Quality Assurance**, and **Staging** support a controlled delivery lifecycle when the implementation includes major, potentially concurrent initiatives. Development sandboxes give builders isolated environments in which to configure features, write code, integrate components, and perform early validation without disrupting shared testing or production-like work. A dedicated Quality Assurance sandbox provides a stable location for formal functional, regression, and end-to-end testing. This lets testers validate that each initiative meets documented requirements and that changes work together before release approval. A Staging sandbox is used as the final preproduction environment, where the approved deployment can be validated using production-like configuration, data, integrations, and release steps. Keeping these purposes separate reduces the chance that ongoing development changes alter a test baseline or interfere with release validation. Salesforce describes sandbox types and their intended uses, including development and testing activities, in its Sandbox Overview. Salesforce's Change Sets and Deployment guidance also supports promoting tested changes through sandbox environments before deploying to production. This structure enables each initiative to progress safely while maintaining dependable testing and release controls.

**QUESTION NO: 35**

A nonprofit organization wants to integrate its event management system and Salesforce. The organization wants to automatically send event and event attendee data from its event management system and create Campaigns and Campaign Members in Salesforce on a daily basis. What should the consultant recommend?

**A.** Export event and event attendee information to the NPSP Import Template and import into Salesforce

**B.** Consider using a middleware tool to integrate the event management system with Salesforce

**C.** Export Campaign and Campaign Member information and import into the event management system

**D.** Consider using Salesforce Connect

**ANSWER: B**

**Explanation:**

Consider using a middleware tool to integrate the event management system with Salesforce. The requirement is a scheduled, automated data integration that takes event and attendee records from an external system and creates corresponding Campaign and Campaign Member records in Salesforce each day. Middleware is designed for this type of system-to-system orchestration: it can connect to the event platform's API or data exports, transform source fields to Salesforce's data model, identify or match existing constituent records, and use Salesforce APIs to insert or update Campaigns and Campaign Members. It can also provide scheduling, error handling, retries, logging, and monitoring, which are important for a dependable recurring integration. The consultant should evaluate an appropriate integration platform based on the event system's available interfaces, data volume, identity-matching requirements, and the organization's operational capacity to support the integration. Salesforce describes integration as connecting Salesforce with external systems through APIs and other integration capabilities; middleware commonly coordinates these interactions and data transformations. See Salesforce's Integration Patterns guidance and the Salesforce REST API overview for the API capabilities used to create and maintain Salesforce records.

**QUESTION NO: 36**

A nonprofit organization has created a fundraising dashboard for the executive director. The executive director needs to see all fundraising data, while other users who are given access to the dashboard should only be able to view the dashboard.

Which two actions should the consultant recommend? Choose 2 answers

**A.** Set the executive director as the dashboard running user.

**B.** Share the dashboard folder with users using Viewer access.

**C.** Convert the dashboard to a dynamic dashboard.

**D.** Give all dashboard users Modify All Data permission.

**ANSWER: A B**

**Explanation:**

The consultant should set the executive director as the running user for the dashboard. A dashboard runs using the security context of its running user unless it is configured as a dynamic dashboard. Using an executive director who has access to all required fundraising data ensures that the dashboard displays the intended organizational totals.

The consultant should also share the dashboard folder with the intended users using Viewer access. Folder access controls whether users can locate and open dashboards, while Viewer access allows users to run the dashboard without editing it or managing the folder contents.

See Salesforce Help: Dashboard Running User and Salesforce Help: Dashboard Folders.

## QUESTION NO: 37

A development director needs to understand which organizations have given to the nonprofit in some year prior to the current, but have not contributed to the nonprofit in the current year. How should the consultant accomplish this task?

**A.** Customize the date range on the NPSP SYBUNT report for Accounts

**B.** Customize the date range on the NPSP SYBUNT report for Contacts

**C.** Create an Opportunity report that compares Contact donations from the previous fiscal year to the current

**D.** Customize the date range on the NPSP LYBUNT report for Accounts

**ANSWER: B**

**Explanation:**

Customize the date range on the NPSP SYBUNT report for Contacts because SYBUNT means “Some Year But Unfortunately Not This.” This report is designed to identify prior donors whose giving history includes a contribution before the current reporting period but does not include a contribution within that current period. It supports a development director’s need to identify lapsed donors for stewardship, re-engagement, and renewal outreach.

In Nonprofit Success Pack, donation history is evaluated from Opportunities, while donors are surfaced through the donor-oriented Contact report structure. Contacts can be associated with organizational Accounts, allowing the report results to support analysis of donors connected to those organizations. The consultant should set the report’s date criteria to align with the nonprofit’s definition of the current year, such as its fiscal year, so the report accurately excludes donors with qualifying current-year gifts while retaining those with gifts in earlier years. Salesforce reporting also supports saving the tailored report and scheduling it for recurring development review. See Salesforce’s Reports overview and the Nonprofit Success Pack project documentation for reporting and NPSP context.

## QUESTION NO: 38

A nonprofit organization is preparing to load several hundred thousand historical donation records into Salesforce. The organization wants to reduce risk and validate the import approach before loading all records.

Which two actions should the consultant recommend? Choose 2 answers

**A.** Test the import with a representative sample in a sandbox.

**B.** Use the Bulk API for the high-volume production load.

**C.** Use the Data Import Wizard for all donation and payment records.

**D.** Load all records directly into production before reviewing error files.

**ANSWER: A B**

**Explanation:**

The consultant should test the import with a representative sample in a sandbox. A sample load validates field mappings, record relationships, automation behavior, error handling, and reporting outcomes before historical data is committed to production. It also helps the organization identify data-quality issues early.

The consultant should use the Bulk API for the high-volume production load. Bulk API is designed for asynchronous processing of large data sets and is more appropriate than interactive import methods for hundreds of thousands of records. The consultant should still plan batches, monitor results, and reconcile successful and failed records after the load.

See Salesforce Trailhead: Plan Your Data Import and Salesforce Bulk API Developer Guide.

## QUESTION NO: 39

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**

**Explanation:**

Campaign Member records use less storage space than custom object records because campaign membership is a storage-efficient native Salesforce mechanism for associating people with a marketing effort and recording an engagement status. Before selecting an integration, the consultant should establish whether the platform can use Campaign Members appropriately for email-delivery and response statuses, rather than creating a large volume of separate custom tracking records. This design choice is especially important when campaigns reach a large subscriber base or occur frequently.

Email subscribers' activities can be retained for a certain length of time because email sends, opens, clicks, and related engagement events can grow rapidly. A defined retention period lets the nonprofit preserve detailed data while it remains useful for segmentation, reporting, and follow-up, then archive or remove older granular activity according to its reporting and compliance needs. Salesforce data storage is finite and is consumed by records retained in the org, so retention planning should be part of evaluating both the integration architecture and the email platform’s own storage capabilities. Salesforce documents how storage usage and allocations are managed in Data and File Storage Allocations and describes the role of campaign members in Campaign Members.

## QUESTION NO: 40

A nonprofit organization has been using Salesforce without NPSP. The organization is now interested in the NPSP functionality and wants the consultant to recommend if NPSP should be used in the same Salesforce environment or if they should start over in a new environment.

Which tool should the consultant use to help evaluate and recommend the best course of action?

**A.** Salesforce Optimizer

**B.** Lightning Experience Migration Assistant

**C.** Setup Audit Trail

**D.** NPSP Health Check

**ANSWER: D**

**Explanation:**

NPSP Health Check is the appropriate tool because it is designed specifically to assess an existing Salesforce org before the Nonprofit Success Pack is installed or adopted. It reviews the organization's current configuration and data model for conditions that can affect an NPSP implementation, such as existing customizations, object usage, and potential compatibility considerations. That assessment gives the consultant evidence for recommending whether the organization can safely implement NPSP in its current environment or whether a new org would better support the desired nonprofit architecture and processes.

The key requirement is not merely a general review of org performance or recent administrative changes; it is an NPSP-focused readiness evaluation. By identifying implementation considerations early, NPSP Health Check supports informed scoping, reduces avoidable rework, and helps establish a practical migration or implementation path. Salesforce's Nonprofit Success Pack documentation describes the package and its implementation resources, while Salesforce's nonprofit guidance explains how organizations can evaluate and plan their nonprofit solution architecture. See Salesforce Help: Nonprofit Success Pack and Salesforce for Nonprofits.

## QUESTION NO: 41

A nonprofit uses Salesforce for fundraising and now wants to provide support for clients through a real-time chat interface with a staff member.

What should the consultant recommended?

**A.** Digital Engagement

**B.** Web-to-Case

**C.** Experience Cloud

**D.** Einstein Bots

**ANSWER: A**

**Explanation:**

**Digital Engagement** is the appropriate recommendation because it extends Salesforce Service Cloud with digital service channels that let an organization engage clients in real time and route conversations to staff. A nonprofit can use messaging and chat-based support to give clients a convenient way to begin a conversation, while service representatives manage the work in Salesforce and retain the interaction history in the associated service records. This supports a staffed, conversational service experience rather than only collecting a request for later follow-up.

Digital Engagement is designed for organizations that need to communicate with customers or constituents through digital channels and handle those interactions within their Salesforce service workflow. Its routing capabilities help direct incoming conversations to available staff with the right skills or queue assignment, which is important when a nonprofit must connect clients to appropriate program or support personnel. The organization can therefore build a scalable real-time support process while maintaining a unified view of client interactions alongside its existing Salesforce data. Salesforce describes Digital Engagement as enabling service across messaging channels and supporting connected, personalized conversations. See Salesforce Digital Engagement and Salesforce Help: Messaging Overview.

## QUESTION NO: 42

Which two scenarios should be included in a Salesforce-recommended V2MOM?

**A.** Metrics

**B.** Virtues

**C.** Milestones

**D.** Vision

**E.** Objectives

**ANSWER: A D**

**Explanation:**

Salesforce's V2MOM is a strategic alignment framework that communicates how an organization will turn an intended future state into coordinated action. **Vision** is essential because it states the shared picture of what the organization seeks to achieve. It provides the overarching direction that connects teams and stakeholders around a common purpose. **Metrics** is also appropriate because a V2MOM requires measurable outcomes—formally called "Measures"—to determine whether the work is succeeding. These measures establish objective indicators of progress and completion, helping leaders and delivery teams assess results, maintain accountability, and adjust execution when needed. In a nonprofit implementation, the vision can express the desired mission impact, while metrics can quantify adoption, service delivery, fundraising outcomes, or data-quality improvements. Together, a clear vision and measurable results make the plan actionable and enable everyone involved to understand both the intended destination and how success will be evaluated. Salesforce describes V2MOM as a framework for aligning goals and measuring progress across an organization. See Salesforce's V2MOM overview and the Trailhead V2MOM alignment module.