COOKING MATTERS
by SHARE OUR STRENGTH

Cooking Matters Salesforce Guidelines

Salesforce serves as a bi-directional reporting and program management system. Cooking Matters implementers can use the Cooking Matters Salesforce for basic tracking of program activity. Salesforce can also aid you in program assessment, and we hope you take advantage of its features.

The following guidelines outline **who should use Salesforce** and data maintenance.

you have questions or need clarification about how to use Salesforce, please look to the Cooking Matters Help Desk for additional resources and support.

Cooking Matters Salesforce is available for use until September 2024.

Contents

Terms of Use

Share Our Strength suggests that all Salesforce users to adhere to the guidelines presented so that information enters the database in a timely and accurate manner. All users should enter data under their own usernames to help maintain data integrity.

Users

Users are individuals who have access to Salesforce. Salesforce's design allows users to create, access, share, and modify records. Typically, users are implementation staff/coordinators, AmeriCorps members, and in, some cases, administrative staff or interns at your organization.

Accessing the Partner Community

Your organization will access Salesforce through the Cooking Matters Partner Community (https://strength.my.site.com/s/login/).

User License Types and Access levels

Organizations implementing Cooking Matters can view their current allotment of users at the bottom of the Salesforce homepage and/or via the chart below:

Minimum Programs Offered (in Previous Program Year)	Full User Licenses Allotted to Ongoing Partner
0	1
89	3
177	6
357	9
537	12

When determining who at your organization should receive a full-access license, we encourage you to remember there is a learning curve to Salesforce use and suggest that you request licenses for those who will access the Salesforce regularly.

Program Records

Creating Records

For guidance on adding programs to Salesforce, visit the Schedule a Program article on the Help Desk.

Deleting Records

We ask that you only delete records when they are created in error. **Do not delete Contact records for people who leave your organization, a Partner record for a Host Agency with which you no longer collaborate, or a Location record for a site you no longer use, etc.** If a record owner is no longer with your organization and you would like to delete a record created in error, submit a request to the [Help Desk](#) to transfer the ownership of records. Once created, you cannot delete a Program record, but you can update its status to canceled and include a reference to the error in the Notes field.

Canceling Programming

You can cancel a program before it begins for any reason using the Cancel Program button in the Program record. Canceled program information will remain in Salesforce for eighteen months before the system automatically deletes it.

For courses in session: Instead of cancelling a course you have the option to convert the Program record type from Course to Other Educational Activity by selecting the Change Record Type option in the Program record. In these instances, it is not required that you create subordinate Session records.

Structure and Function

Types of Data Collected

Salesforce captures a variety of information that ranges from Program geographical data to participant survey responses. Cooking Matters implementers can use the Cooking Matters Salesforce instance to collect and report on the following basic program activity: Program details, Location, Contact(s), Program Team, and Participant Surveys.

We have made several other objects available to you (like trainings) for your use with managing your organization's program operations. Please note that your user license type determines your access to some objects and/or record types.

Details on Types of Data Collected

Here is a breakdown of the major types of data, their associated record types, and required fields.

Contacts

Individuals with whom your organization engages to implement programming. This definition includes Staff, AmeriCorps members, and Volunteers.

Record Type(s)	Definition	Required Fields

| Staff/AmeriCorps | Staff and AmeriCorps members at your organization as well as key staff at the partner organizations with whom you work (such as site/location staff) | Name, Active, Start Date, Phone, Email, Mailing Address, Role |
| Volunteer | Program volunteers, advisory board members, and volunteers involved in fundraising | Name, Active, Start Date, Phone, Email, Mailing Address |

A note about tracking a contact's programmatic activity history: One contact record will capture a person's activity with a specific organization. If a person changes their role at an organization, you will only need to ensure that their record type reflects their current role. You do not need to create a new Contact record for the individual.

You can find an individual's Program Team affiliations in their Contact record. Additionally, individuals can maintain their programmatic history across organizations. If you have a volunteer or staff member who has transitioned from another partner organization, please reach out to us via the Help Desk to transition their Contact record to your organization.

Programs

Activities that include use of or reference to Cooking Matters curricula during their implementation like Cooking Matters 6-week courses, Cooking Matters at Home, Cooking Matters for Child Care Professionals, and Cooking Matters at the Store tours. Note that Salesforce is not set up to force a response for all of these fields, but they are still considered essential because they provide the most essential information about programs.

Record Types(s)	Definition	Required Fields
Course	Signature 6-week class series, Cooking Matters for Child Care Professionals (full curriculum)	*To create a Course:* Program Code, Curriculum, Start Date, End Date, Host Organization, Location, Delivery Method, Scheduling Status, Course Coordinator *To close a Course:* Adult participants, Child participants, Adult graduates, Child graduates, All team members entered
Tour	Cooking Matters at the Store for Adults or Cooking Matters at the Store for WIC Parents tour	*To create a Tour:* Program Code, Curriculum, Date, Delivery Method, Host Organization, Location *To close a Tour:* Adult participants, Child participants, Adult graduates, Child graduates

Other Educational Activity	Cooking Matters at Home lessons; individual Cooking Matters for Child Care Professionals modules	*To create a record:* Program Code, Curriculum, Start Date, End Date, Location, Session Record(s) *To close a record:* Adult participants, Child participants, Toolkits used, Activities, Setting
Outreach Event	Networking events, conferences, presentations, demos, and general program promotion events *not targeted at low-income families*	*To create a record:* Program code, Start date, End Date, Est. Adults reached, Est. Children reached

A note about program codes: To help keep things clear, Salesforce automatically generates a unique identification number any time you create a new program record. The Program Code plays a key role in identifying participant surveys, as well as program records. For more information on program codes and their use see, [Understanding Program Codes](#).

Location

The physical location that hosts Cooking Matters programming. Your organization might act as the location, or your organization might host programming at multiple locations.

For Virtual Programming Location information, use your own organization for a newly created Location titled "*[partner name]* virtual location" using your physical address for this newly created virtual location object.

Record Type(s)	Definition	Required Fields
General	All non-retail programming sites (i.e. course sites)	Name, Address, City, State, Zip
Store	All physical retail locations in which programming is held. This includes farmer's markets	Name, Address, City, State, Zip

A note about organization records as locations: When adding a new organization record to Salesforce for a partner that acts as a program site as well, use the "is Course Site" checkbox field to trigger the creation of a location record for this site. If an organization already exists in Salesforce, just create a   new location record for the site.

Participant Surveys

Records participant responses collected through electronic survey submission. Participant survey records are necessary components for connecting participant responses   to program activity Salesforce. Electronic survey submission automatically creates participant survey records.

Record Type(s)	Definition	Required Fields
n/a	n/a	Participant survey name, Unique ID (aka Participant ID), Program Code, Course

A note about retrieving missing survey data: If a participant survey record is not associated with/missing from a course record, you will need to locate and update the record to correct this error. You can view unassociated participant survey records by selecting Missing Related Course from the view options (You will need to use the created date and participant survey name to identify the record). Update the course code field and the course code within the unique ID to correct the disassociation error.

Organizations

Establishments with whom you engage to implement Cooking Matters programming.

Record Type(s)	Definition	Required Fields
Host Agency	Organizations with whom you work to coordinate program logistics such as participants, venue, and/or staff instructors or translators	Name, Phone Number, Mailing Address, Physical Address, Partner Name, Active
Satellite	Takes on primary responsibility for implementing programming. Works as an implementing partner of an ongoing partner	Name, Partner Name, Phone Number, Mailing Address, Physical Address, Active
Other	Provides funding, helps with events, or in another capacity directly with ongoing partners	Name, Partner Name, Phone Number, Mailing Address, Physical Address, Active

A note about your Account (Organization): This dashboard allows you to view your program activity at a glance, gives you quick access to editing the contact information provided, and lets you see who at your organization maintains   a limited or full access Salesforce user license.

Trainings

Events or activities during which you provide learning opportunities to   volunteers and/or staff.

Record Type(s)	Definition	Required Fields
n/a	n/a	Training Name, Type, Leader, Date, Time, Duration, Attendees

Program Team

Individuals who are involved in the delivery and/or coordination of your programming.

Record Type(s)	Definition	Required Fields
n/a	n/a	Name, Role, Program code

Data Maintenance and Management

What you need to do

To ensure that you are getting the most out of your Salesforce experience, we encourage you to review and follow the guidance provided in this document for keeping your data up to date and relevant for your programmatic needs.

Data Analysis

Using Reports

Salesforce users possessing full access have the option to view their Salesforce data aggregated in reports. Running regular internal reports is a great way to celebrate program progress while monitoring data quality. Your organization has ultimate responsibility for the accuracy of records housed in Salesforce and viewable within reports.

Technical Assistance and Support

The help desk is your one stop shop for technical assistance and guidance on navigating the Cooking Matters Partner Community powered by Salesforce. If you are new to the community or need a reminder on how to use it, here's a link to where you will find articles to assist you.