



# New user training

[TEMPLATE]

January 2026

Home > My cases

Search for anything

Eng 12 ▼ Ruben Rosser

Case overview 1 new this week

🏠 Add new customer

Search table

👤 Created by: anyone 📅 Date: All time 📍 Location: Everywhere 🏗 Project: All 🔼 Selective sort by User custom

Customer name	Date added	Case owner	Case stage	Project	Last interaction	Urgency
Omar Saris	27/03/24	Craig Vaccaro	📍 Visit	Eon power project	27/03/24 3 weeks and 2 days ago	🔴 High
Haylie Lubin	27/03/24	Alena Schleifer	📍 Measures started	NEST energy	27/03/24 3 weeks and 2 days ago	🟡 Medium
Lydia Ekstrom Bothman	27/03/24	Kaiya Kenter	📍 Visit	UK Winter fuel	27/03/24 3 weeks and 2 days ago	🟢 Low
Hanna Westervelt	27/03/24	Madelyn Botosh	📍 Activities started	Sustainable warmth	27/03/24 3 weeks and 2 days ago	🟡 Medium
Kaylynn Korsgaard	27/03/24	Emery Schleifer	📍 Visit	Efficiency improve	27/03/24 3 weeks and 2 days ago	🟢 Low
Maria Schleifer	27/03/24	Roger Schleifer	📍 Awaiting feedback	Retrofit	27/03/24 3 weeks and 2 days ago	🟢 Low
Jaylon Curtis	27/03/24	Skylar Philips	📍 Follow-up	NEST energy	27/03/24 3 weeks and 2 days ago	🟡 Medium
Davis Dorwart	27/03/24	Jaylon Herwitz	📍 Activities started	Retrofit	27/03/24 3 weeks and 2 days ago	🟡 Medium
Alena Septimus	27/03/24	Leo Stanton	📍 Follow-up	Power up	27/03/24 3 weeks and 2 days ago	🔴 High
Wilson Lipshutz	27/03/24	Chance Rhiel Madsen	📍 Activities started	UK Winter fuel	27/03/24 3 weeks and 2 days ago	🟡 Medium
Lindsey Korsgaard	27/03/24	Omar Torff	📍 Visit	UK Winter fuel	27/03/24 3 weeks and 2 days ago	🟢 Low
Kierra Workman	27/03/24	Roger Schleifer	📍 Customer engaged	Eon power project	27/03/24 3 weeks and 2 days ago	🔴 High
Abram Curtis	27/03/24	Maria Baptista	📍 Visit	UK Winter fuel	27/03/24 3 weeks and 2 days ago	🟡 Medium
Zaire Vetrovs	27/03/24	Roger Schleifer	📍 Activities started	UK Winter fuel	27/03/24 3 weeks and 2 days ago	🟢 Low
Corey Botosh	27/03/24	Haylie Dorwart	📍 Visit	Power up	27/03/24 3 weeks and 2 days ago	🔴 High
Ruben Dorwart	27/03/24	Livia Lubin	📍 Customer engaged	Sustainable warmth	27/03/24 3 weeks and 2 days ago	🟡 Medium
Justin Herwitz	27/03/24	Adison Lipshutz	📍 Customer engaged	NEST energy	27/03/24 3 weeks and 2 days ago	🟢 Low
Omar Torff	27/03/24	Cheyenne Korsgaard	📍 Visit	Sustainable warmth	27/03/24 3 weeks and 2 days ago	🟡 Medium
Rayna Botosh	27/03/24	Carla Lipshutz	📍 Activities started	Power up	27/03/24 3 weeks and 2 days ago	🟡 Medium
Randy Press	27/03/24	Marcus Dorwart	📍 Activities started	Power up	27/03/24 3 weeks and 2 days ago	🟡 Medium
Ann Carder	27/03/24	Marcus Geldt	📍 Follow-up	Sustainable warmth	27/03/24 3 weeks and 2 days ago	🟢 Low

# Agenda for today



→ Nook & Outlandish

→ A quick walkthrough

→ Case management

1. New cases & referral forms
2. Triage
3. Case journeys, Steps & Tasks
4. Measures
5. Reassigning Tasks & Case owners
6. Search
7. Notes

→ Nook management

8. Your dashboard
9. Reporting
10. Settings

→ Next steps & Questions



# Nook team



Richard Edwards  
Project Lead



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Product Owner



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Comms and Content



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Developer



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Designer



Fran Cook  
Branding

Nook's development was funded by the Energy Saving Trust, [Energy Industry Voluntary Redress Scheme](#).

**energy  
saving  
trust**

# A quick walkthrough

## An introduction to Nook

→ Cases - what are they?

→ The Case Overview

- ◆ List view
- ◆ Card view

→ The Waiting List

→ Case Records

*Let's login and explore these together, at:  
[instance login link]*



# Case management:

## 1. New cases & referral forms

- Manually adding a case
- Projects
- Referral forms

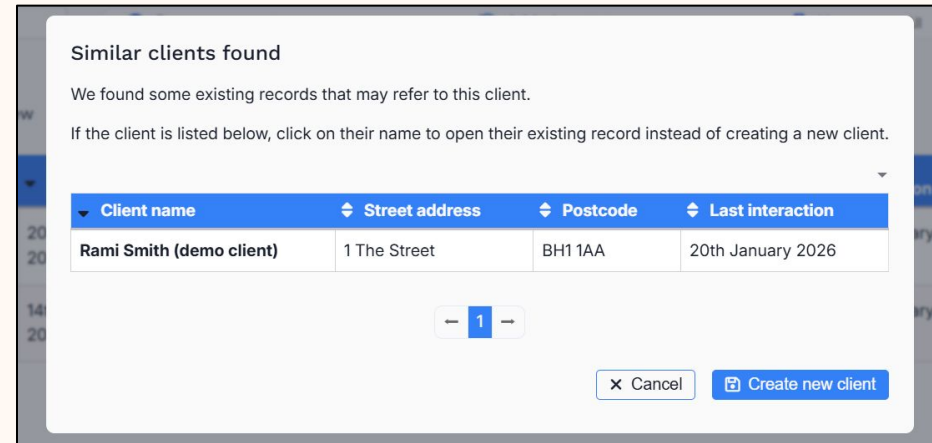
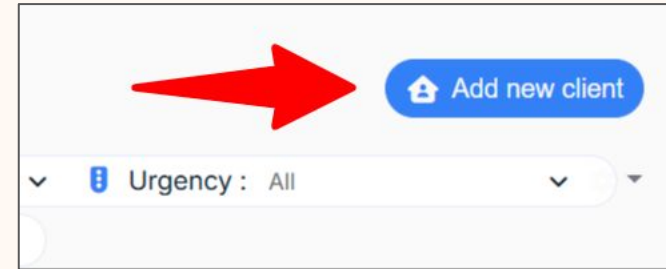


# Case management:

## 1. New cases

To manually add a case:

- Click the **Add new client** button
- Enter the name and which **Project** they are associated with
- You may get a warning of the existence of similar cases. If so follow the case link to check it's not already on the system.  
*(FYI merging duplicate cases is possible using the core CiviCRM system, but it's outside of the scope of today's training)*



# Case management:

## 1. New cases

After adding the client's basic details (name and project) it should:

1. create the case in your Waiting List
2. open the Update Case screen.

→ Now you can populate any extra case data (e.g. address, property & energy information etc)

→ You can also move cases straight from here into the main workflow (however remember to **Save** any updates first!)

The screenshot shows the 'Update case details' interface. At the top, there's a title 'Update case details' with a 'Save Case Details' button. Navigation links include 'Back to waiting list' and 'Move on from waiting list'. Below this, case metadata is displayed: ID: C01001030, Current stage: Waiting List, and Projects: 1. West Dunbartonshire Energy Advice Service, 1b. The Robertson Trust. A 'Show notes' link is on the right. The form is divided into several sections: 'Referral Source' (dropdown), 'Urgency' (dropdown), 'Status' (dropdown, currently 'Open'), 'Case Owner' (dropdown), 'Case Team Members' (dropdown, showing 'xOutlandish Admin'), and 'Contact details'. The 'Contact details' section includes fields for 'First Name' (Gregor), 'Surname' (Powers (demo client)), 'Phone', 'Email', 'Preferred Language', 'Gender', and 'Date of birth'. Each of these fields has an 'Add' button and a 'Is Primary' checkbox. The 'Address details' section at the bottom includes fields for 'Street Address', 'City', and 'Postal Code'. The interface is clean with a light blue and white color scheme.

# Case management:

## 1. New cases

*Activity: Let's create a case together.*



# Case management:

## 1. Referral forms

You may have 1 or more referral forms. E.g. for a client to self-refer, or a partner to refer clients. These will have been built for you during the initial setup.

- New cases submitted via a form will appear in your **Waiting List**.
- Data submitted via the form gets added into the case record fields as per usual.

*Let's look at these together, at:  
[forms link]*

The screenshot shows the 'Update case details' form for case ID C01001030. The form is divided into several sections: 'Referral Source' and 'Urgency' (both dropdowns), 'Status' (dropdown, currently 'Open'), 'Case Owner' (dropdown), and 'Case Team Members' (dropdown, currently 'xOutlandish Admin'). There are buttons for 'Save Case Details', 'Back to waiting list', and 'Move on from waiting list'. A 'Show notes' link is also present. Below these is a 'Contact details' section with fields for 'First Name' (Gregor), 'Surname' (Powers (demo client)), 'Phone', 'Email', 'Preferred Language' (dropdown), 'Date of birth', 'Gender' (dropdown), and 'Is Primary' checkboxes. There are '+ Add' and 'Edit' buttons for each field. Below the contact details is an 'Address details' section with fields for 'Street Address', 'Postal Code', and 'City'.

# Case management:

## 2. Triaging & updating a case

- Moving a case into the main workflow
- Updating / editing a case record



# Case management:

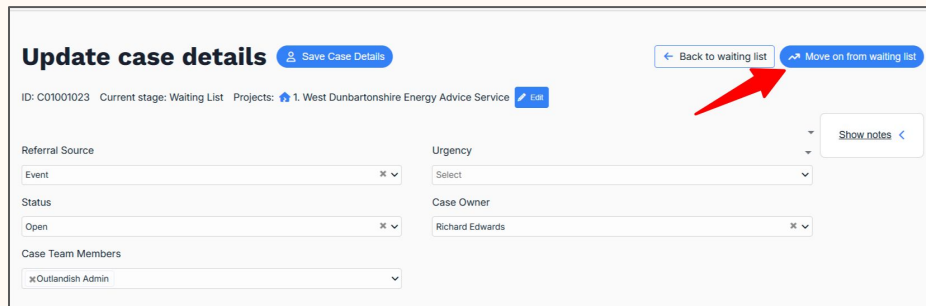
## 2. Triaging & updating a case

Moving a case into the main workflow:


→ Go to **Waiting List** -> [the case record] -> **Move on from Waiting List** button

→ Then **choose** which Step to move them into

They will now disappear from your Waiting List and appear in the correct Step in your main case journey.



The screenshot shows the 'Update case details' interface. At the top right, there are two buttons: '← Back to waiting list' and '→ Move on from waiting list'. A red arrow points to the 'Move on from waiting list' button. Below the buttons, the case ID is 'C01001023', the current stage is 'Waiting List', and the project is '1. West Dunbartonshire Energy Advice Service'. The form contains several fields: 'Referral Source' (Event), 'Urgency' (Select), 'Status' (Open), 'Case Owner' (Richard Edwards), and 'Case Team Members' (Outlandish Admin). There is also a 'Show notes' button on the right.



The screenshot shows a dialog box titled 'What is the next step for this client?'. It contains four buttons: 'Assessment' (highlighted in blue), 'Energy support provided', 'Case closed', and 'Feedback survey'. At the bottom left, there is a 'Cancel' button with a close icon.

# Case management:

## 2. Triaging & updating a case

Editing a case record:

- Open the case and click one of the **Edit details** buttons
  - You'll see that case data fields have been organised into various tabs, e.g. address, property & energy information etc.
- (FYI the groupings are controlled in **Settings -> Data collection**)
- Please remember to **Save** any updates before leaving!

The screenshot shows the 'Update case details' interface. At the top, there's a header with the title 'Update case details', a 'Save Case Details' button, and navigation links 'Back to waiting list' and 'Move on from waiting list'. Below the header, case information is displayed: ID: C01001030, Current stage: Waiting List, and Projects: 1. West Dunbartonshire Energy Advice Service, 1b. The Robertson Trust. An 'Edit' button is next to the projects.

The form is divided into several sections:

- Referral Source**: A dropdown menu with 'Select' as the current value.
- Urgency**: A dropdown menu with 'Select' as the current value.
- Status**: A dropdown menu with 'Open' as the current value.
- Case Owner**: A dropdown menu with 'Select' as the current value.
- Case Team Members**: A dropdown menu with 'x Outlandish Admin' as the current value.

Below these are two expandable sections:

- Contact details**: Contains fields for First Name (Gregor), Surname (Powers (demo client)), Phone, Email, Preferred Language, Date of birth, and Gender. There are checkboxes for 'Is Primary' next to the Phone and Email fields. '+ Add' and 'Refresh' icons are present for the Phone and Email fields.
- Address details**: Contains fields for Street Address, Postal Code, and City.

A 'Show notes' link is visible on the right side of the form.

# Case management:

## 2. Triaging & updating a case

*Activity:*

*Let's*

- 1. edit a case*
- 2. move it into the next part of your Case Journey*

# Case management:

## 3. Case journeys, Steps & Tasks

- Steps vs. Tasks
- Adding Tasks to a case
- Automatically created Tasks
- Completing Tasks

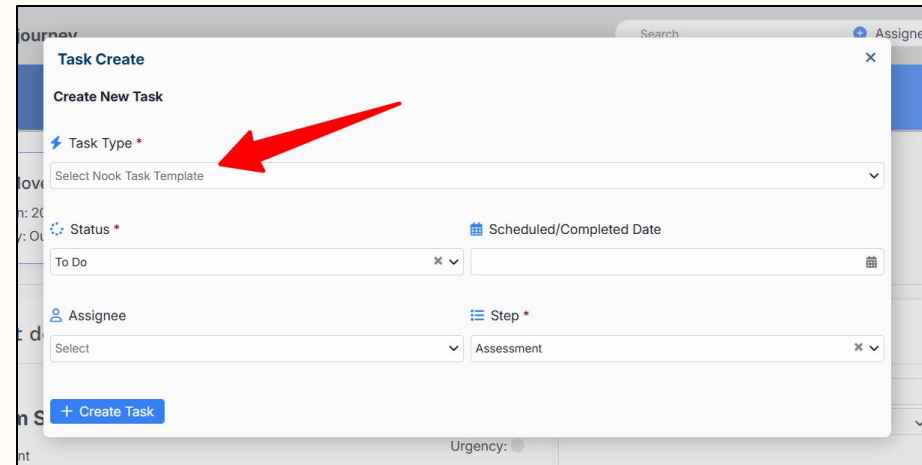
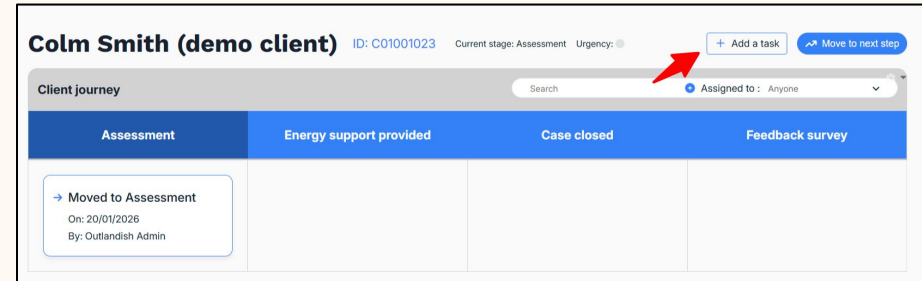


# Case management:

## 3. Case journeys, Steps & Tasks

To add a Task to a case:

- Go into the client's Case Record -> Click the **Add Task** button
- Then choose the Task type from the list of pre-configured Tasks
- Add the other information if relevant (due date, Step, assignee)
- It should now appear in the Client's Case Journey.



# Case management:

## 4. Recording your measures taken

In Nook there are two ways of recording your data:

- Recording measures at a Case-level
- Recording measures taken as part of a Task



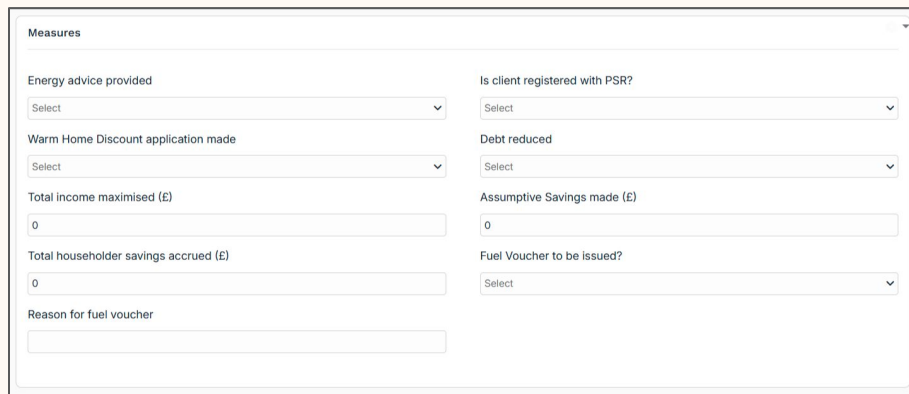


# Case management:

## 4. Recording your measures taken

Recording measures at a Case-level:

- = for recording more one-off interventions re: the person / property (e.g. they've been referred to X service)
- Go to [the case] -> **Edit details** -> Scroll down to the **Measures** section (or whatever your section is called)



The screenshot shows a form titled 'Measures' with a dropdown arrow in the top right corner. The form is divided into two columns. The left column contains: 'Energy advice provided' (dropdown menu with 'Select' option), 'Warm Home Discount application made' (dropdown menu with 'Select' option), 'Total income maximised (£)' (text input field with '0'), 'Total householder savings accrued (£)' (text input field with '0'), and 'Reason for fuel voucher' (text input field). The right column contains: 'Is client registered with PSR?' (dropdown menu with 'Select' option), 'Debt reduced' (dropdown menu with 'Select' option), 'Assumptive Savings made (£)' (text input field with '0'), 'Fuel Voucher to be issued?' (dropdown menu with 'Select' option), and an empty text input field at the bottom.

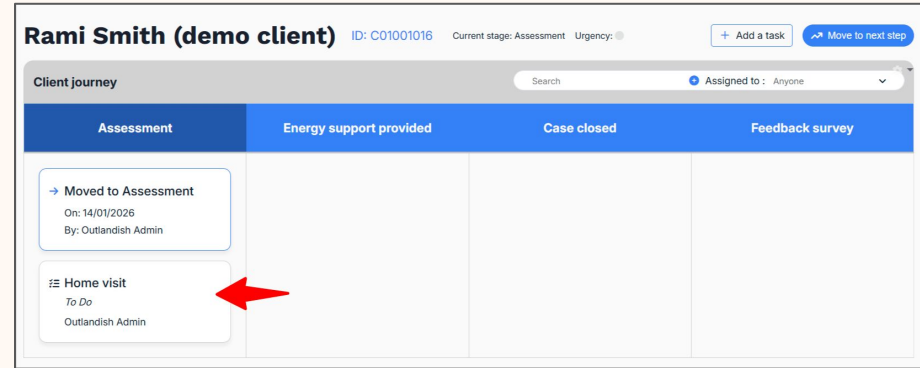


# Case management:

## 4. Recording your measures taken

Recording measures taken as part of a Task:

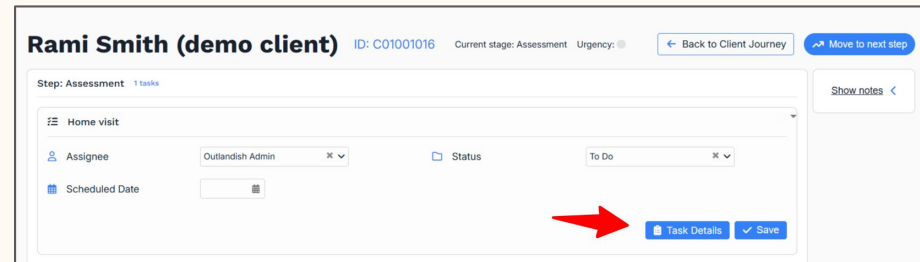
- = for recording data when it's more variable & changes often (e.g. the amount of a fuel voucher to be issued after **each** home visit)
- Go to [the case] -> [the relevant task in the Steps] -> Click **Task Details**
- Now add the data you need to record



Rami Smith (demo client) ID: C01001016 Current stage: Assessment Urgency: + Add a task Move to next step

Client journey Search Assigned to: Anyone

Assessment	Energy support provided	Case closed	Feedback survey
<div>→ Moved to Assessment On: 14/01/2026 By: Outlandish Admin</div>			
<div>≡ Home visit To Do Outlandish Admin</div>			



Rami Smith (demo client) ID: C01001016 Current stage: Assessment Urgency: Back to Client Journey Move to next step

Step: Assessment 1 task Show notes

≡ Home visit

Assignee Outlandish Admin x Status To Do x

Scheduled Date

Task Details Save



# Case management:

## 4. Recording your measures taken

*Activity: Recording measures taken as part of a **Task***

*Let's*

- 1. Add a Task with a completion date and assignee*
- 2. Now record some details, and mark it as Complete*

# Case management:

## 5. Case Owners & Case Team

- *Case Team* = Case Owner + Members
- The Case Owner is set explicitly (and shown in dashboard etc)
- There is only 1 Case Owner, there can be as many Members as you like
- Case Members are auto added automatically when someone interacts with the case (ie adds a note or Task)
- You can also add/remove Case Members manually

**Rami Smith (demo client)**[View Map](#)

[Self-Referral](#) Urgency: ☐

Projects: [1. West Dunbartonshire Energy Advice Service](#)

Client step	Case status	Last action
Assessment	Open	20th January 2026

Case Team

User	Role
Outlandish Admin	Case Owner
Richard Edwards	Case Team Member




# Case management:

## 5. Case Owners & Case Team

Reassigning the Case Owner:

- Can be done via the **Case Record** -> **Edit details** button
- Don't forget to click **Save** after any edits!

### Client details


[Edit details](#)

**Rami Smith (demo client)**

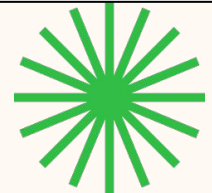
[View Map](#)

Self-Referral

Urgency: ☐

Projects:  1. West Dunbartonshire Energy Advice Service

Client step	Case status	Last action
Assessment	Open	20th January 2026

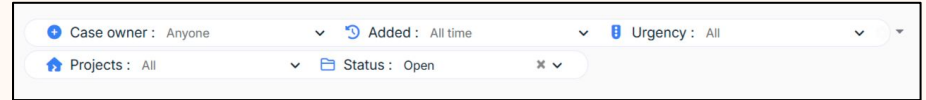


# Case management:

## 6. Search

In the Case Overview and Waiting List screens you can Search by a number of different fields:

- Name
- Postcode fragment (e.g. BH1, BH2)
- Street name
- You can also use the **Filters** (Owner, date added, Project, Urgency, Status [Open/Archived])



A screenshot of a search and filter interface. It features two rows of filter controls. The first row includes 'Case owner : Anyone', 'Added : All time', and 'Urgency : All'. The second row includes 'Projects : All', 'Status : Open', and a search icon. Each control has a dropdown arrow or a search icon.

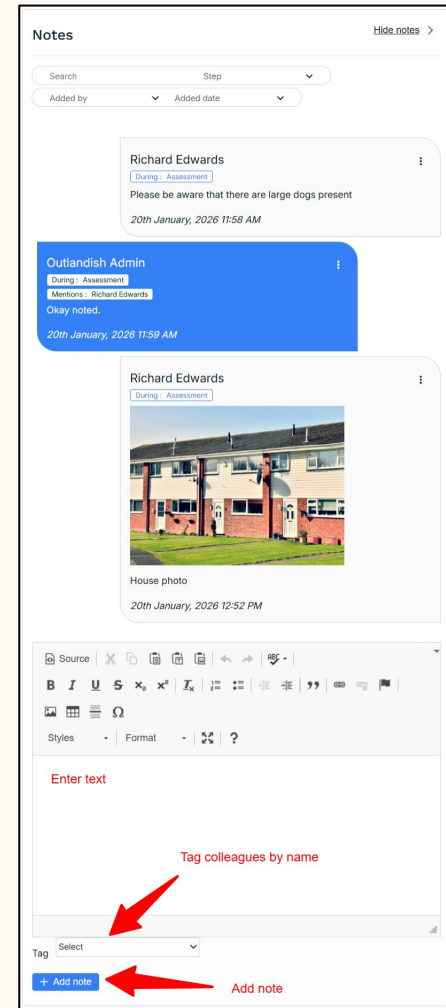


# Case management:

## 7. Notes

Use Notes to record running updates on a case.

- In the Notes editor, enter text and click **Add Note**
- You can *mention* colleagues using the **Tag** button.
- If *mentioned*, the user can see it in **Dashboard -> Notes**.



# Case management:

## 7. Notes

*Activity: Let's add some Notes to a task.*

*Let's*

- 1. Find a demo client*
- 2. Add some Notes to their record. Also  
Tag one of your colleagues.*



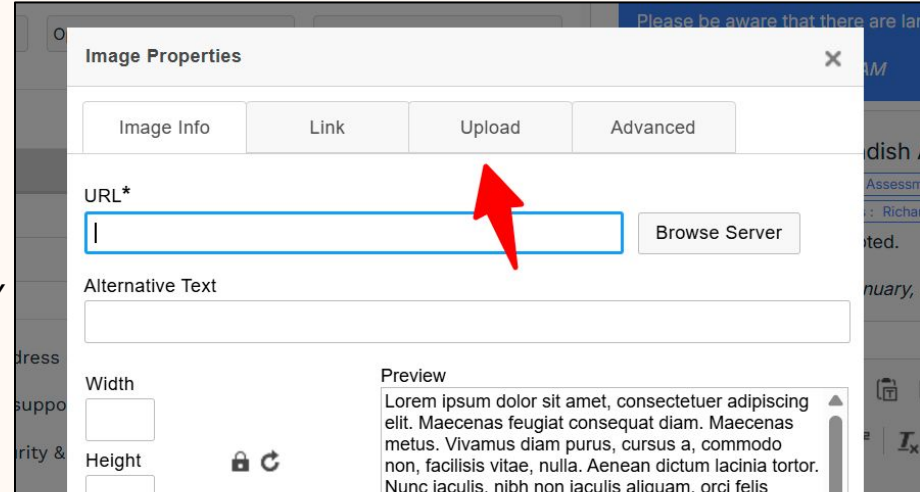
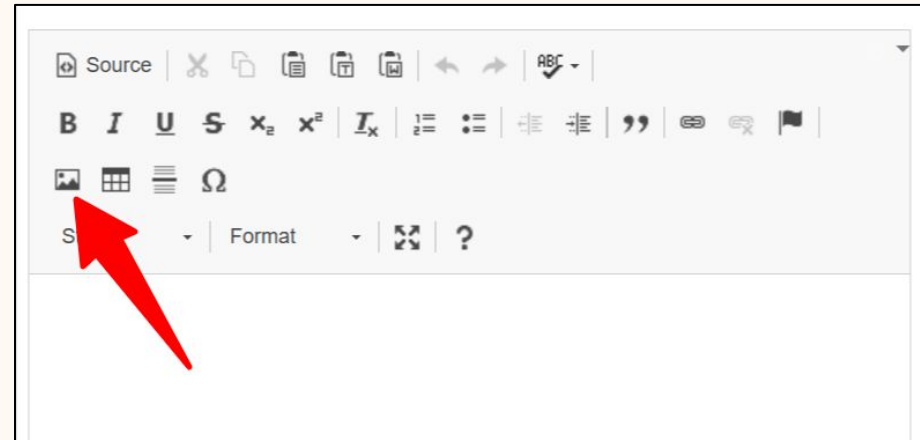
# Case management:

## 7. Notes

Adding an image to the Notes:

- In the Notes editor, click the **Add image** button
- Choose **Upload** -> **Choose image** -> [find your file on your computer], then **Send to server**

*Note: There is a known bug that images are not resized correctly if they are large. You may want to reduce the width and height on the Add Image form.*



# Case management:

## 7. Notes

Adding an image to the Notes:

*Note: There is a known bug that images are not resized correctly if they are large. You may want to reduce the height on the Add Image form.*

Image Properties

Image Info Link Upload Advanced

URL\*

<https://comlinks.portal.nookcrm.com/public/media/images/house> Browse Server

Alternative Text

Width 1024

Height 768

Border

HSpace

VSpace

Align <not set> ▾

Preview

If your image looks very large, reduce this number when uploading, e.g. to 100. It should then appear less squished.

OK Cancel

System Status Powered by CiviCRM 6.8.0, free and open source AGPLv3 software.

# Nook management:



# Nook management:

## 8. Your dashboard

- **Tasks** = Tasks that you're assigned to do.
- **Notes** = where you have been *mentioned* on Case Notes
- **Case updates** = all updates on cases in which you're part of the team



# Nook management:

## 9. Reporting

There are 2 ways of reporting in Nook.

- **Templates** = create, tweak and re-run reports, e.g. every week, month etc.

These generate spreadsheets you can take into Excel etc.

- **Global reports** = get an export of all the raw data

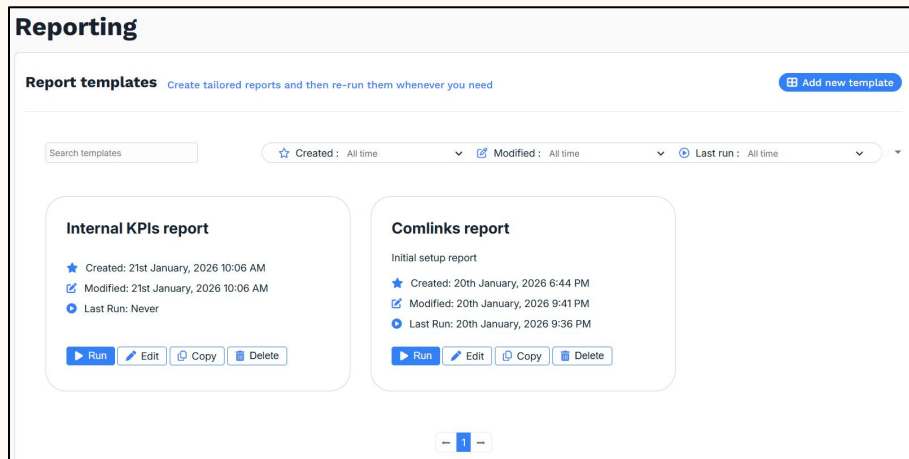


# Nook management:

## 9. Reporting

Report Templates:

- Appear when you visit **Reporting**.
- You can **Add new template** to build a new one, duplicate/edit an existing template, or **Run** one to produce a spreadsheet-based report.



# Nook management:

## 9. Reporting

### Report Templates:

Nook reporting uses “blocks”. These become tabs in your exported spreadsheet.

There are three types:

- **Statistics** = basic metrics, counts, totals, averages.
- **Breakdown** = create a comparison table. E.g. no. cases BY property type.
- **Table** = build a table of columns of your choice, based on the data.

### Choose entity

#### Add Case Breakdown

Summarise statistics for cases

*Example: Total savings by property type*

Property type	Total financial savings
Detached	£1123.43
Semi-detached	£4123.43
Flat	£2321.23
Bungalow	£213.12

#### Add Task Breakdown

Summarise statistics for tasks

*Example: Count of tasks by task type*

Task type	Task count
Triage call	203
Home visit	113
Follow up call	57

Back











# Nook management:

## 9. Reporting

### Global reports:

- To export raw data, go to **Reporting** -> scroll down.
- Export **Default project projects**, or all data at once using **Global Reports**.
- Filters at the top let you narrow results by project, journey step, date range, or case number.

**Default project reports** [See the data for cases and tasks associated with a specific project](#)

<p>1. West Dunbartonshire Energy Advice Service</p> <p> Associated with 16 clients</p> <p></p>	<p>2. Inverclyde Energy Advice</p> <p> Associated with 0 clients</p> <p></p>	<p>1a. Big Energy Savings Network</p> <p> Associated with 0 clients</p> <p></p>
<p>1b. The Robertson Trust</p> <p> Associated with 1 clients</p> <p></p>	<p>1c. West Dunbartonshire Cost of Living Fund</p> <p> Associated with 0 clients</p> <p></p>	



# Nook management:

## 10. Settings

In the Settings section you can:

- Edit users.
- Edit **Project** details.
- Edit your **Case Journey**, Steps and Tasks.
- Edit the data you collect in **Data collection**

# Notes on your setup

→ Add here

→ Add here

→ Add here

# Ongoing support

→ You can liaise in the first instance with the team at [nooksupport@outlandish.com](mailto:nooksupport@outlandish.com)

→ We also have a knowledge base here:

<https://docs.nookcrm.com/>

*(It's only just launched and isn't comprehensive yet, but new support articles are going up all the time.)*

# Thank you!

Feel free to send any follow-up questions  
or comments at  
[nooksupport@outlandish.com](mailto:nooksupport@outlandish.com)

