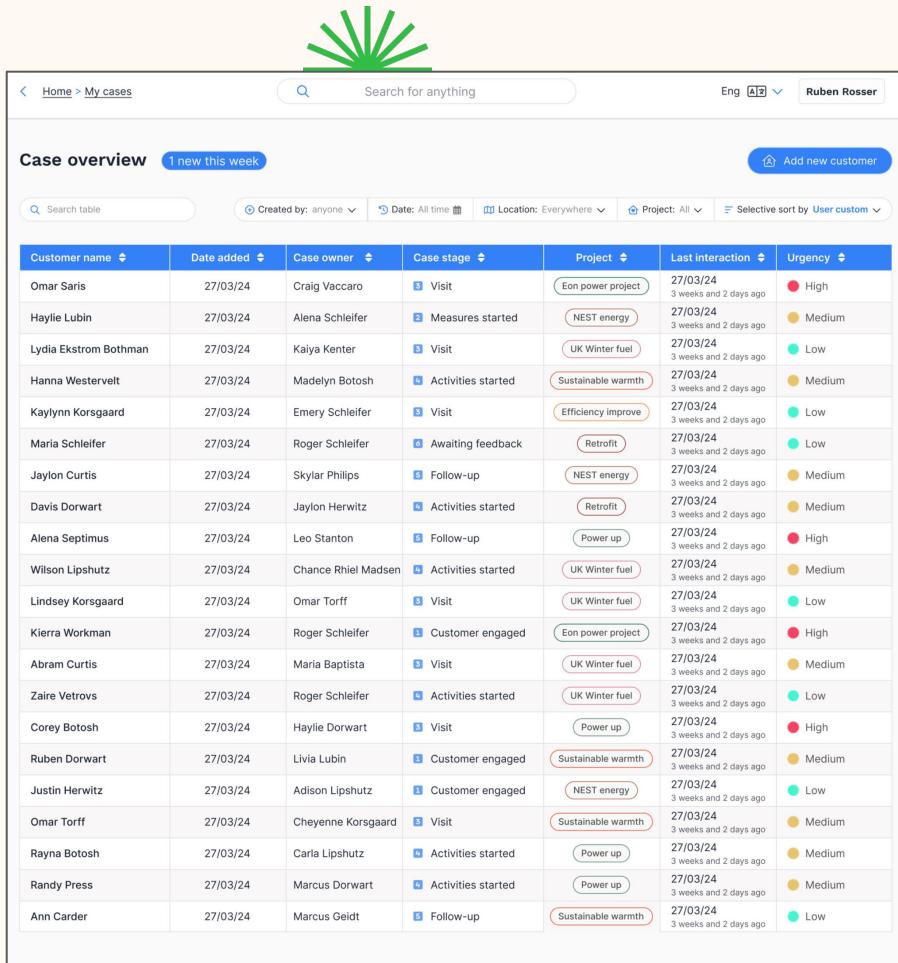




# New user training

[TEMPLATE]

January 2026



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 Vetrov	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 Geidt	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



Nadia Gorchakova  
Product Owner



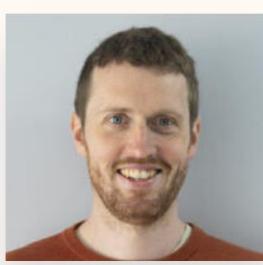
Ben Walpole  
Developer



Natasha Natarajan  
Support Lead



Tim Hunt  
Comms and Content



Rasmus Winter  
Developer



Kieran Abbott  
Designer



Fran Cook  
Branding

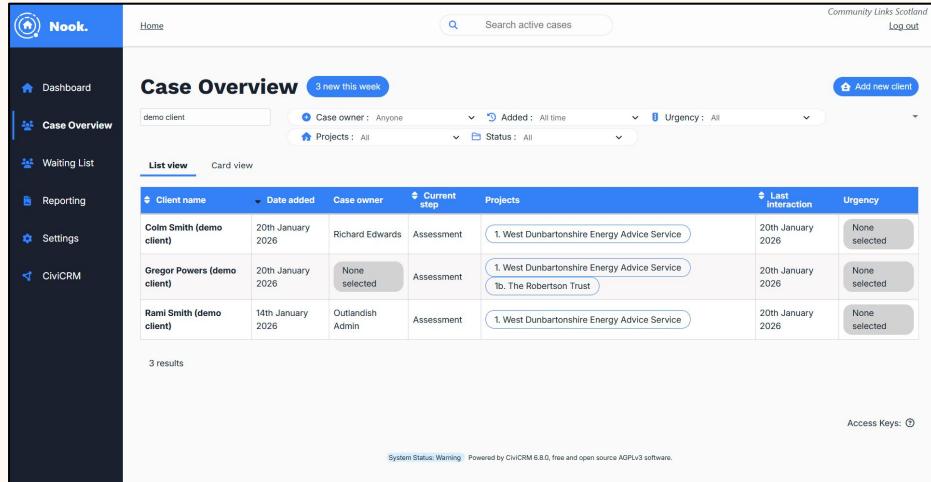
Nook's development was funded by the Energy Saving Trust, [Energy Industry Voluntary Redress Scheme](#).

**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



The screenshot shows the Nook Case Overview page. The left sidebar has a dark blue background with white text and icons for Dashboard, Case Overview (selected), Waiting List, Reporting, Settings, and CivCRM. The main content area has a white background with a header 'Case Overview' and a sub-header '3 new this week'. It includes a search bar and filters for Case owner, Added, Urgency, Projects, and Status. Below this is a table with three rows of data. The table has columns for Client name, Date added, Case owner, Current step, Projects, Last interaction, and Urgency. The data is as follows:

Client name	Date added	Case owner	Current step	Projects	Last interaction	Urgency
Colm Smith (demo client)	20th January 2026	Richard Edwards	Assessment	1. West Dunbartonshire Energy Advice Service	20th January 2026	None selected
Gregor Powers (demo client)	20th January 2026	None selected	Assessment	1. West Dunbartonshire Energy Advice Service 1b. The Robertson Trust	20th January 2026	None selected
Rani Smith (demo client)	14th January 2026	Outlandish Admin	Assessment	1. West Dunbartonshire Energy Advice Service	20th January 2026	None selected

At the bottom, it says '3 results' and 'Access Keys: ⓘ'. The footer includes 'System Status: Warning' and 'Powered by CivCRM 6.8.0, free and open source AGPLv3 software.'

*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

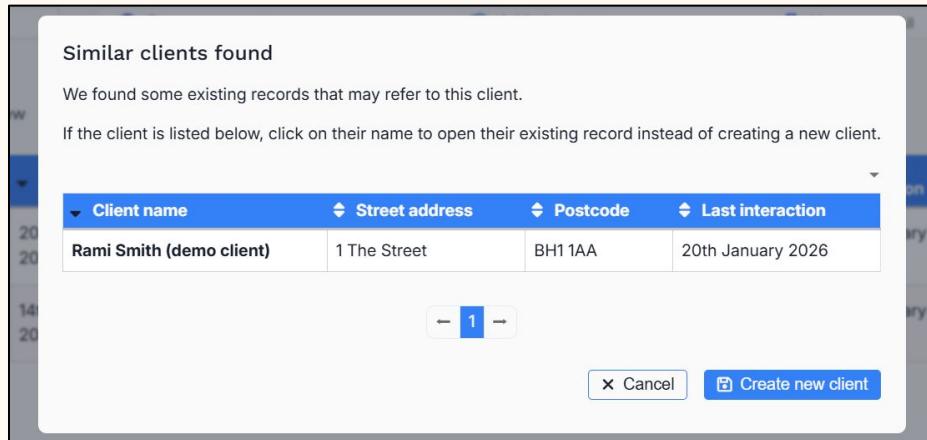
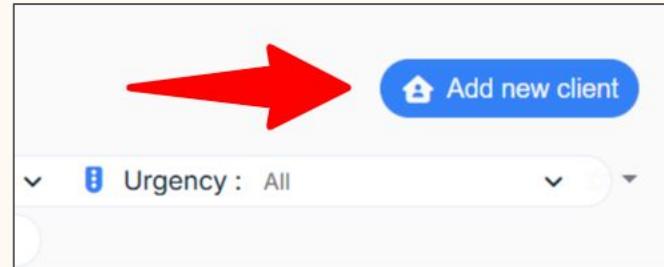


# Case management:

## 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!)

**Update case details** [Save Case Details](#)

ID: C01001030 Current stage: Waiting List Projects: 1. West Dunbartonshire Energy Advice Service 1b. The Robertson Trust [Edit](#)

[Back to waiting list](#) [Move on from waiting list](#)

Referral Source  Urgency

Status  Case Owner

Case Team Members  [Show notes](#)

**Contact details**

First Name  Surname

Phone  Is Primary  [+ Add](#) [Edit](#)

Email  Is Primary  [+ Add](#) [Edit](#)

Preferred Language

Date of birth

Gender

**Address details**

Street Address

Postal Code

City

# 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 a 'Update case details' form for a case with ID C01001030. The current stage is 'Waiting List' and the project is '1. West Dunbartonshire Energy Advice Service'. The form includes fields for Referral Source (Select), Urgency (Select), Status (Open), Case Owner (Select), Case Team Members (xOutlandish Admin), and Contact details. The Contact details section contains fields for First Name (Gregor), Surname (Powers (demo client)), Phone (Is Primary checked), Email (Is Primary checked), Preferred Language (Select), Gender (Select), and Date of birth. The Address details section includes fields for Street Address, Postal Code, and City.

Update case details Save Case Details

ID: C01001030 Current stage: Waiting List Projects: 1. West Dunbartonshire Energy Advice Service 1b. The Robertson Trust Edit

Referral Source Urgency

Status Case Owner

Open Select

Case Team Members xOutlandish Admin

Contact details

First Name Surname

Gregor Powers (demo client)

Phone Is Primary

+ Add Import

Email Is Primary

+ Add Import

Preferred Language Date of birth

Select Select

Gender Select

Address details

Street Address Postal Code

City

# Case management:

## 2. Triaging & updating a case

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



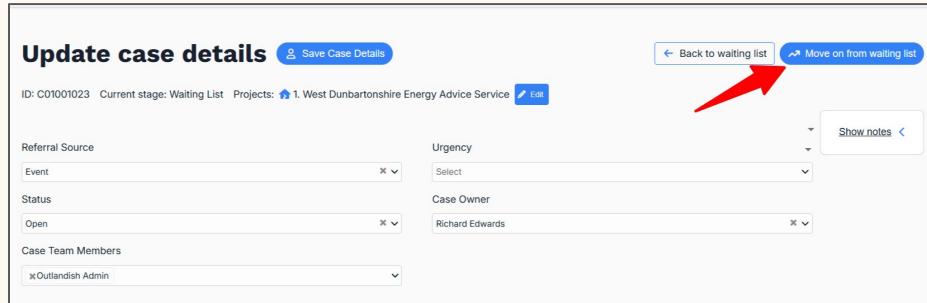
# Case management:

## 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' page for a case with ID C01001023. The page includes fields for Referral Source (Event), Status (Open), Case Team Members (Outlandish Admin), Urgency (Select), and Case Owner (Richard Edwards). At the top right are 'Save Case Details' and 'Edit' buttons. Below these are 'Back to waiting list' and 'Move on from waiting list' buttons. A red arrow points to the 'Move on from waiting list' button. A modal window is also visible, asking 'What is the next step for this client?' with options: 'Assessment' (selected), 'Energy support provided', 'Case closed', and 'Feedback survey'. A 'Cancel' button is at the bottom of the modal.

# 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 a 'Update case details' form with the following sections and fields:

- Header:** 'Update case details' with a 'Save Case Details' button, 'Back to waiting list', and 'Move on from waiting list' buttons.
- Case Identification:** ID: C01001030, Current stage: Waiting List, Projects: 1. West Dunbartonshire Energy Advice Service, 1b. The Robertson Trust, with an 'Edit' link.
- Referral Source:** Select dropdown.
- Urgency:** Select dropdown.
- Status:** Open (with a close button).
- Case Owner:** Select dropdown.
- Case Team Members:** Outlandish Admin (with a close button).
- Contact details:** A tabbed section with the following fields:
  - First Name: Gregor
  - Surname: Powers (demo client)
  - Phone: (input field with 'Is Primary' checked, '+ Add', and 'Edit' buttons)
  - Email: (input field with 'Is Primary' checked, '+ Add', and 'Edit' buttons)
  - Preferred Language: Select dropdown.
  - Date of birth: (input field with a calendar icon)
  - Gender: Select dropdown.
- Address details:** A tabbed section with the following fields:
  - Street Address: (input field)
  - Postal Code: (input field)
  - City: (input field)

# 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

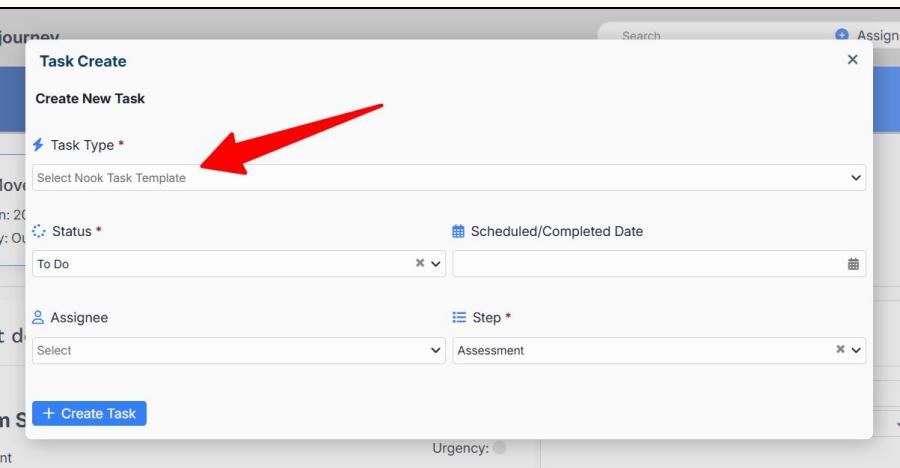
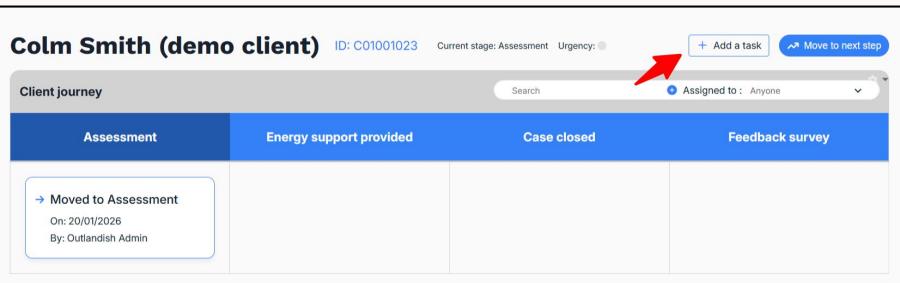


## Case management:

### 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)

Measures

Energy advice provided	Is client registered with PSR?
Select	Select
Warm Home Discount application made	Debt reduced
Select	Select
Total income maximised (£)	Assumptive Savings made (£)
0	0
Total householder savings accrued (£)	Fuel Voucher to be issued?
0	Select
Reason for fuel voucher	

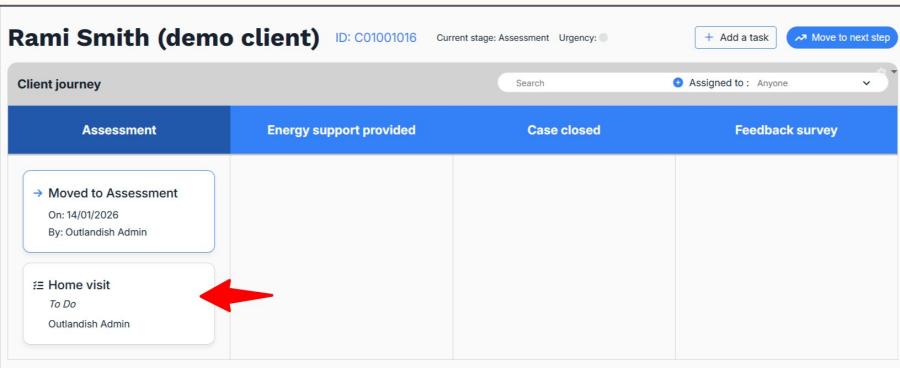


# Case management:

## 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

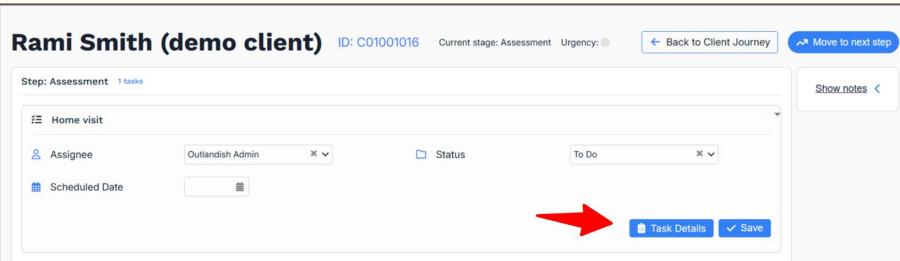


Rami Smith (demo client) ID: C01001016 Current stage: Assessment Urgency: Low

+ Add a task Move to next step

Client journey

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



Rami Smith (demo client) ID: C01001016 Current stage: Assessment Urgency: Low

Step: Assessment 1 tasks

Back to Client Journey Move to next step

Show notes

☰ Home visit

Assignee	Outlandish Admin	Status
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 Urgency: ⚡

Self-Referral

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

Rami Smith (demo client)

View Map

Urgency:

Self-Referral

Projects: 1. West Dunbartonshire Energy Advice Service

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

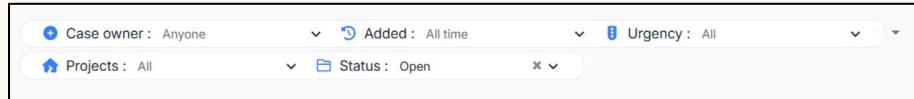


# Case management:

## 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])



# 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**.

The image shows a screenshot of a software interface for managing notes. At the top, there is a search bar with dropdowns for 'Search', 'Step', 'Added by', and 'Added date'. Below this is a 'Notes' section with a header for 'Richard Edwards' and a note: 'Please be aware that there are large dogs present' from '20th January, 2026 11:58 AM'. The next section is for 'Outlandish Admin' with a note: 'Okay noted.' from '20th January, 2026 11:59 AM'. Below these is a 'House photo' with a thumbnail image of a brick building and the caption 'House photo' from '20th January, 2026 12:52 PM'. At the bottom is the 'Notes' editor, which includes a rich text editor toolbar, a text input field with placeholder 'Enter text', and a 'Tag colleagues by name' section. Two red arrows point to the 'Select' dropdown in the 'Tag' section and the 'Add note' button at the bottom of the editor.

# 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.*

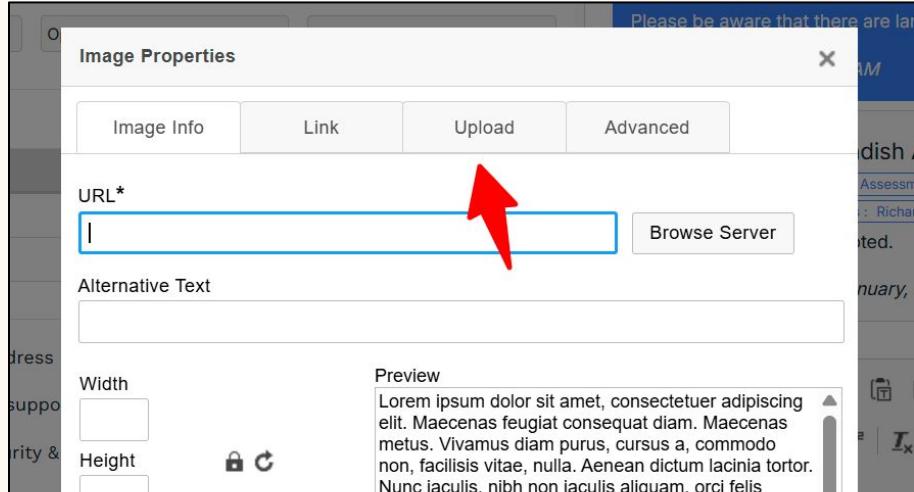
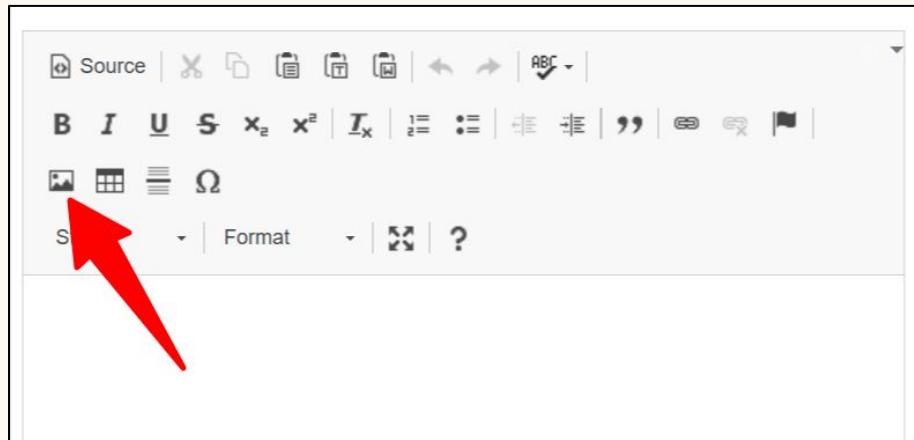
# Case management:

## 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.*

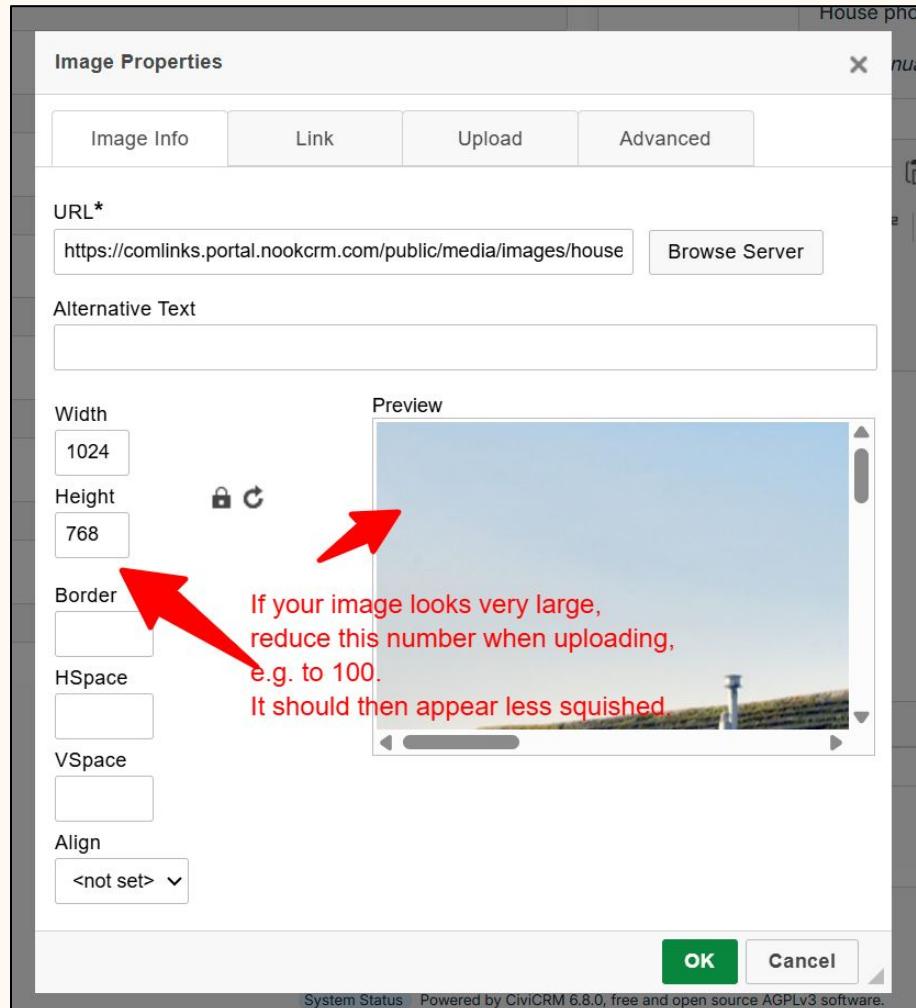


# Case management:

## 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.*



# 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.

**Reporting**

**Report templates** Create tailored reports and then re-run them whenever you need [Add new template](#)

Search templates Created : All time Modified : All time Last run : All time

**Internal KPIs report**

Created: 21st January, 2026 10:06 AM  
Modified: 21st January, 2026 10:06 AM  
Last Run: Never

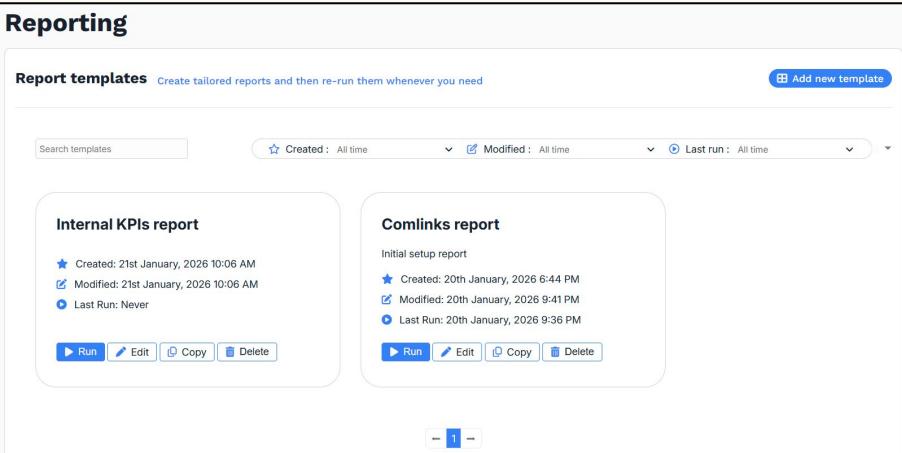
[Run](#) [Edit](#) [Copy](#) [Delete](#)

**Comlinks report**

Initial setup report  
Created: 20th January, 2026 6:44 PM  
Modified: 20th January, 2026 9:41 PM  
Last Run: 20th January, 2026 9:36 PM

[Run](#) [Edit](#) [Copy](#) [Delete](#)

- 1 -



# 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.

The screenshot shows a 'Choose entity' interface with three main sections:

- Add Case Breakdown**: Summarise statistics for cases. Example: Total savings by property type. The table shows financial 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. The table shows task counts by type:

Task type	Task count
Triage call	203
Home visit	113
Follow up call	57
- A third section is partially visible, showing a table structure with columns for 'Task type' and 'Task count'.

A 'Back' button is located at the bottom left of the interface.

# 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

- 1. West Dunbartonshire Energy Advice Service  
Associated with 16 clients  
[Open](#)
- 2. Inverclyde Energy Advice  
Associated with 0 clients  
[Open](#)
- 1a. Big Energy Savings Network  
Associated with 0 clients  
[Open](#)
- 1b. The Robertson Trust  
Associated with 1 clients  
[Open](#)
- 1c. West Dunbartonshire Cost of Living Fund  
Associated with 0 clients  
[Open](#)

# 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)

