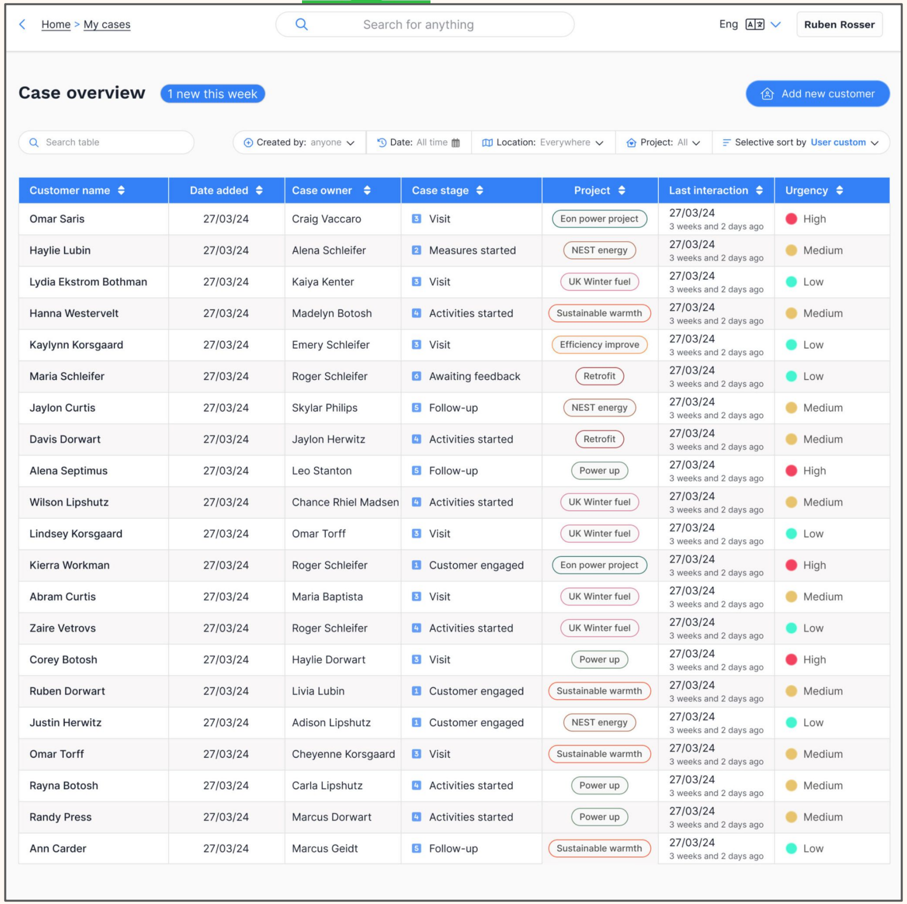
Nook

New user training

[TEMPLATE]



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 Geidt	Follow-up	Sustainable warmth	27/03/24 3 weeks and 2 days ago	Low

January 2026

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

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Designer

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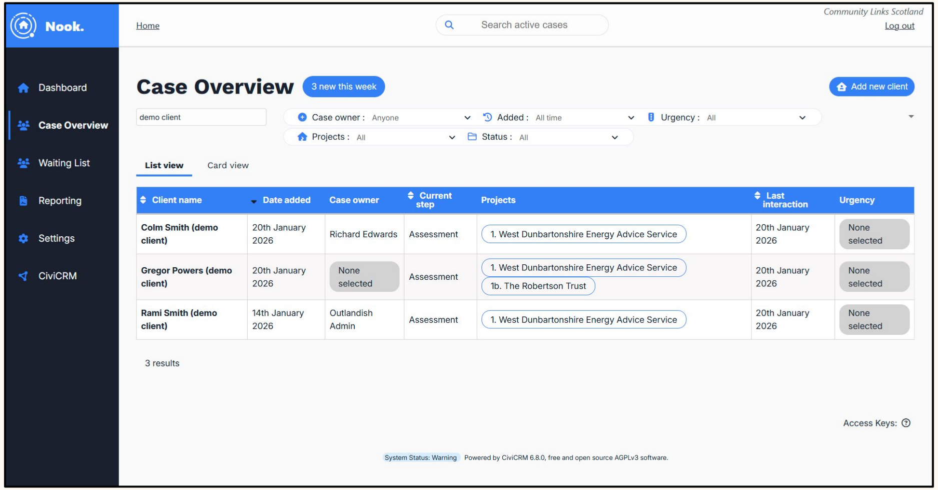
Branding

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

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:

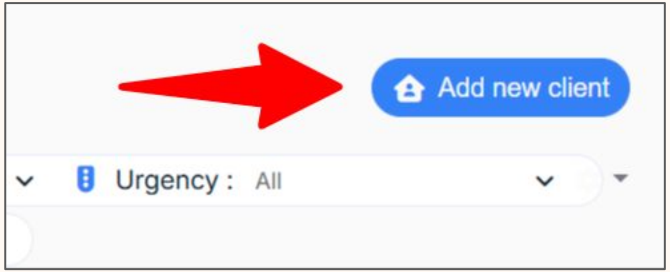
1. New cases

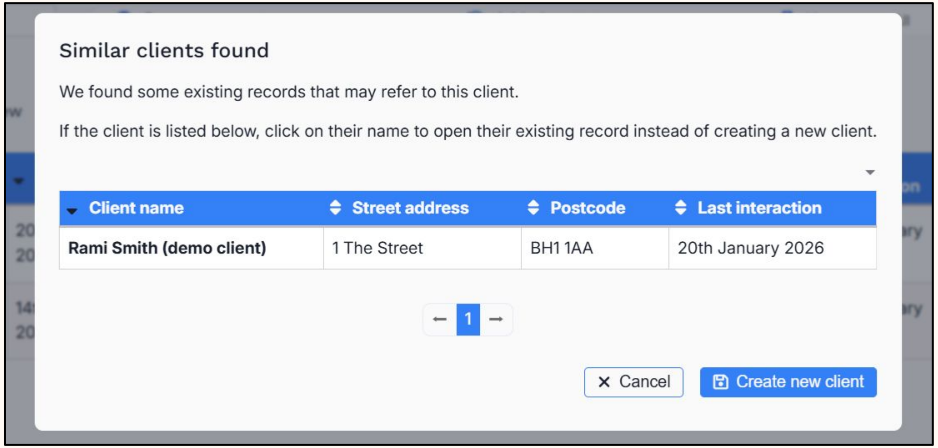
To manually add a case:

➔ 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:

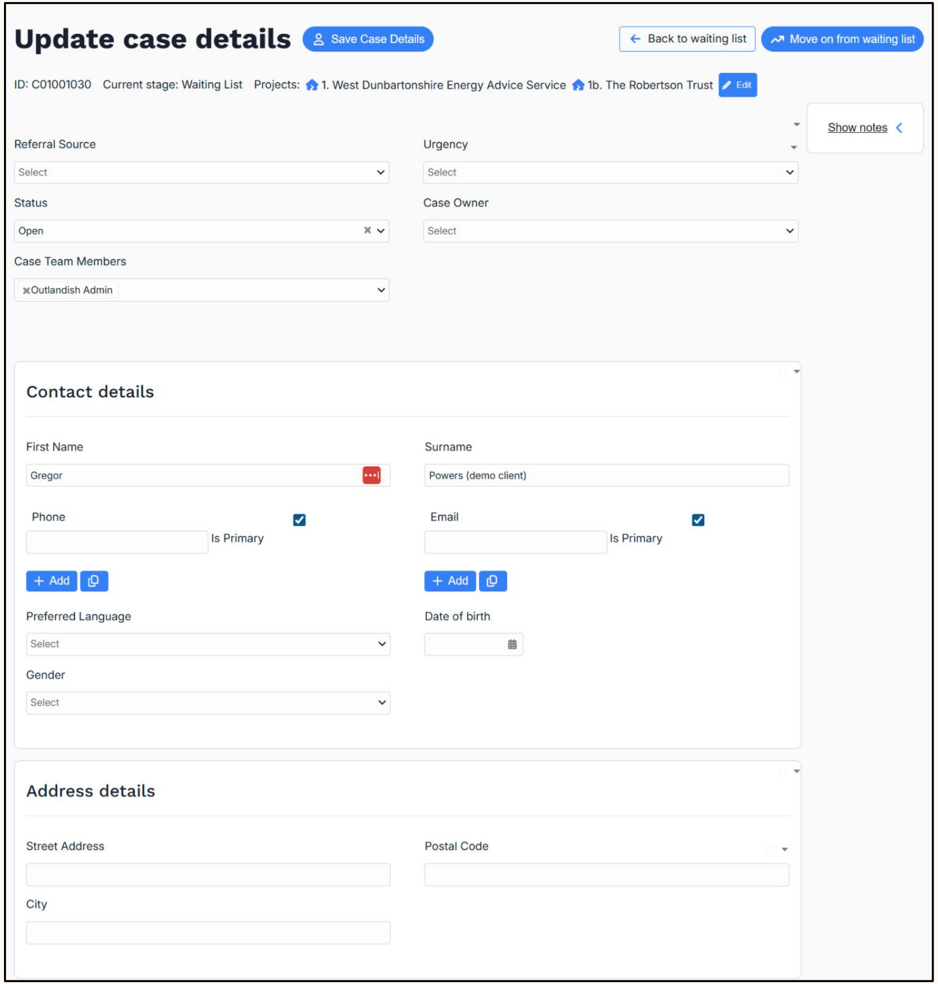
1. New cases

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!)



Case management:

1. New cases

Activity: Let’s create a case together.

Case management:

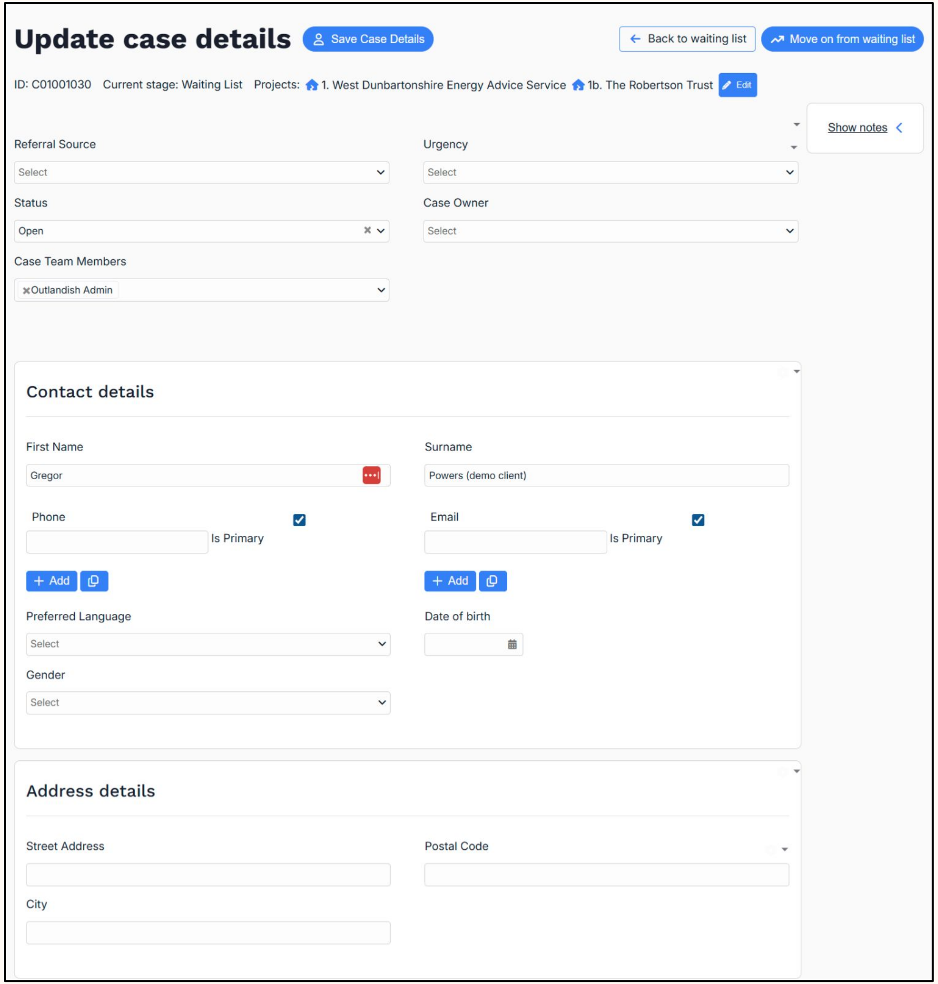
1. Referral forms

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]



Case management:

2. Triaging & updating a case

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

Case management:

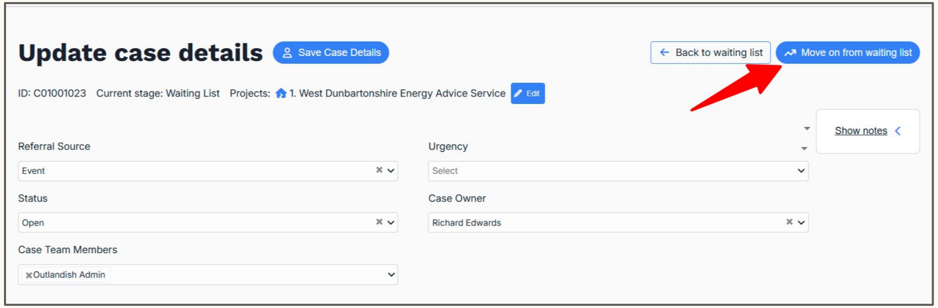
2. Triaging & updating a case

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.



Case management:

2. Triaging & updating a case

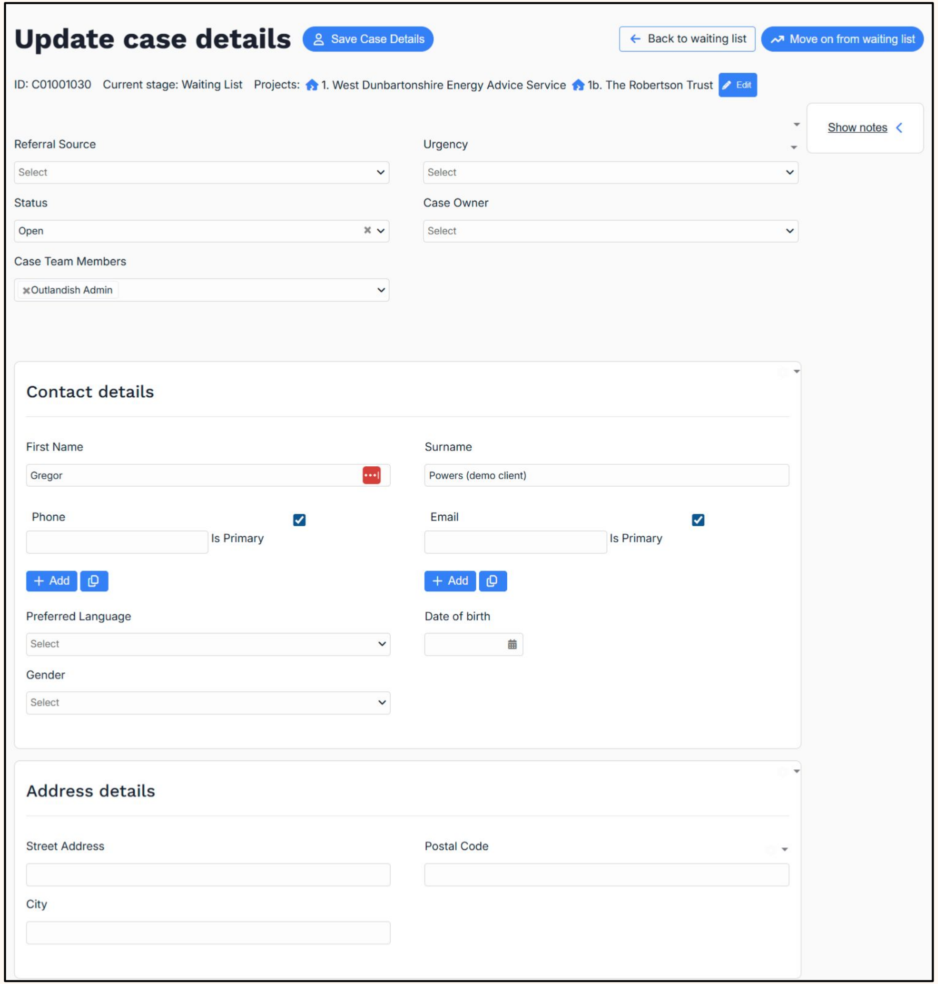
Editing a case record:

➔ 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!



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

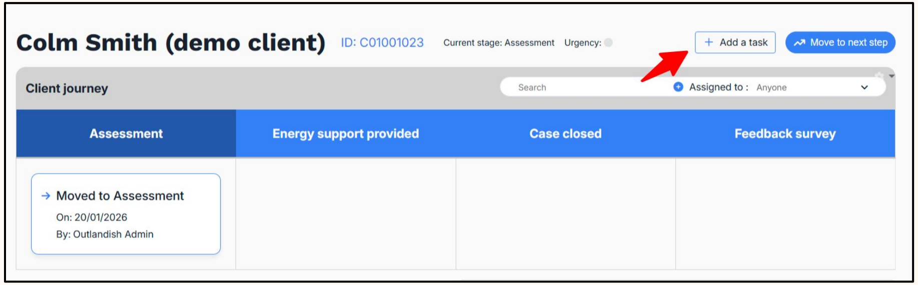
To add a Task to a case:

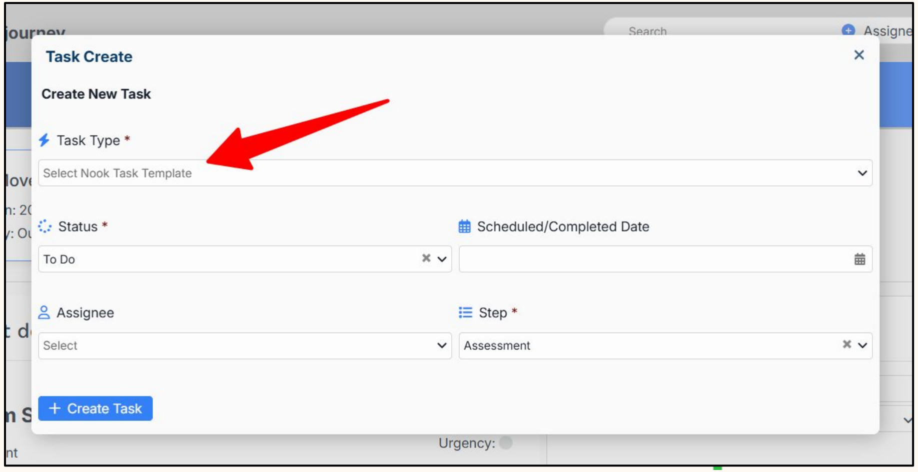
➔ Go into the client's Case Record -> Click the **Add Task** button

➔ 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

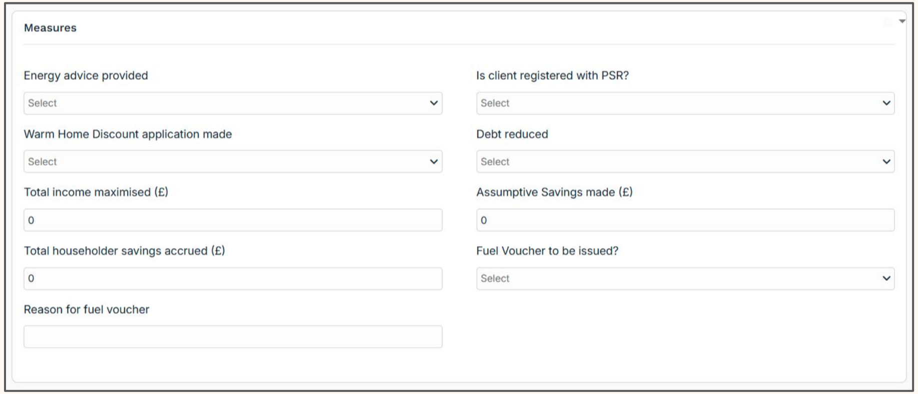
Case management:

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)



Case management:

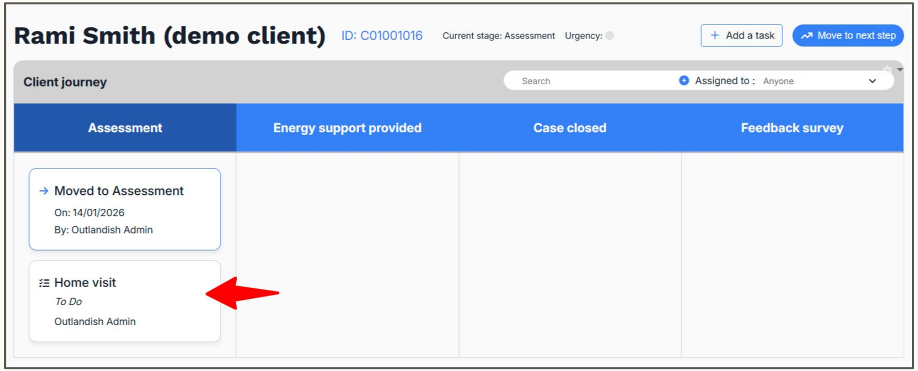
4. Recording your measures taken

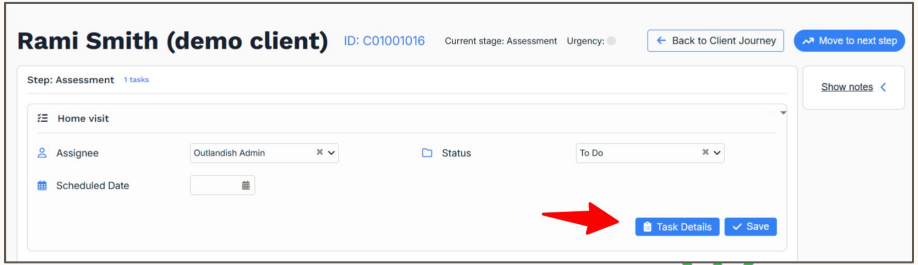
Recording measures taken as part of a Task:

➔ *= 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





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

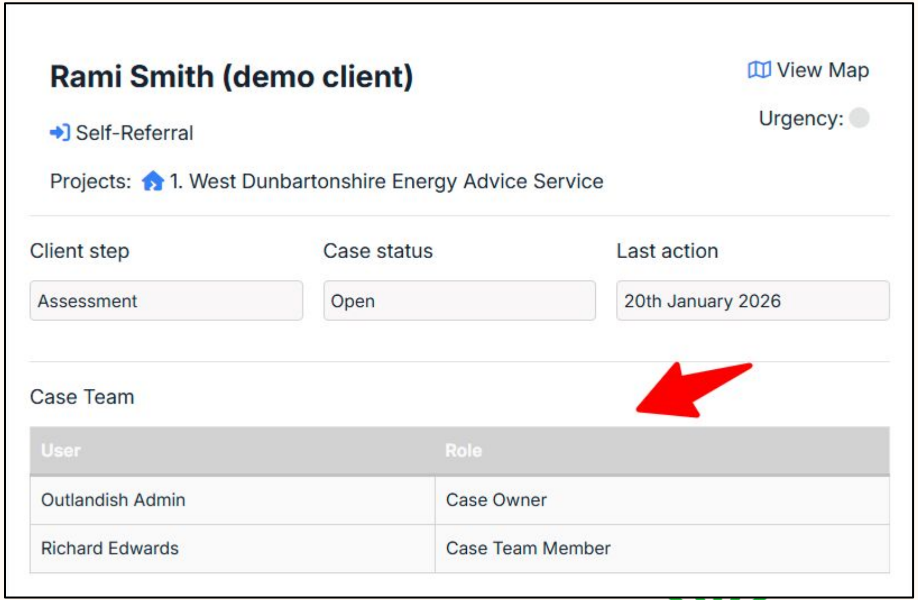
➔ *Case Team* = Case Owner + Members

➔ 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

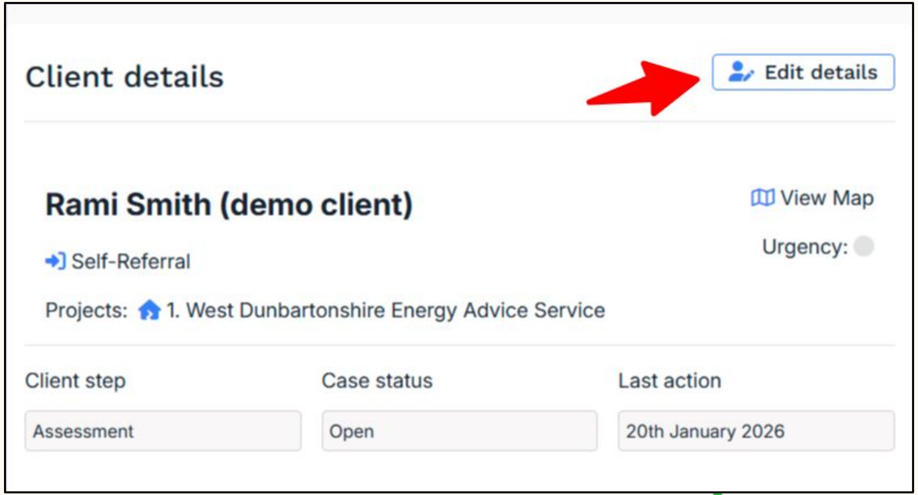


Case management:

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!

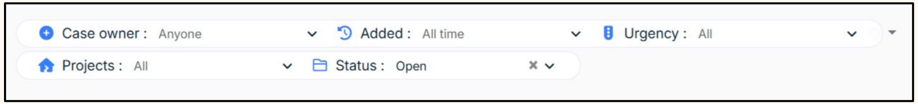


Case management:

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])

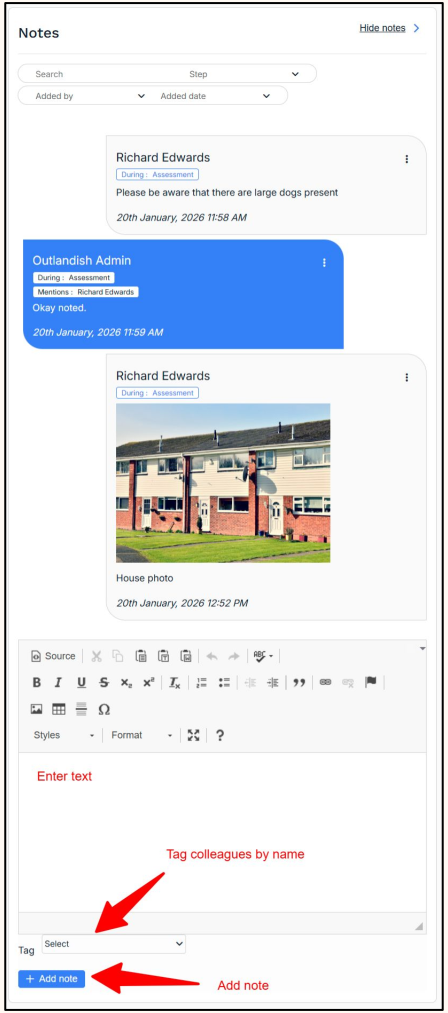


Case management:

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**.



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:

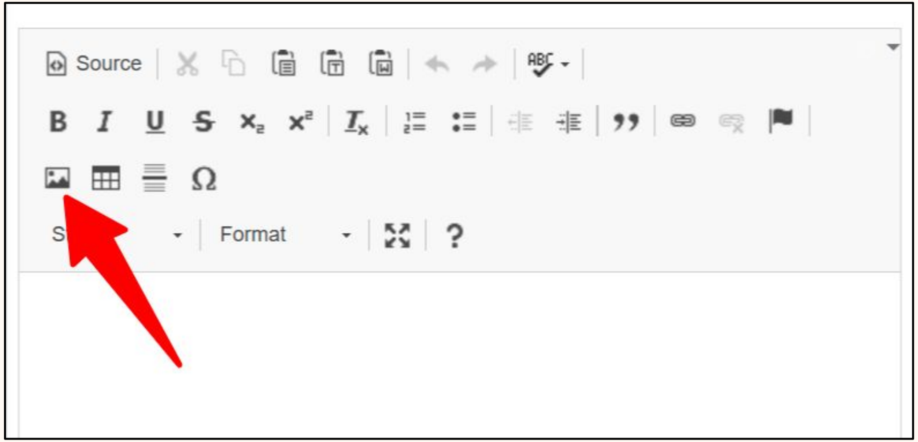
7. Notes

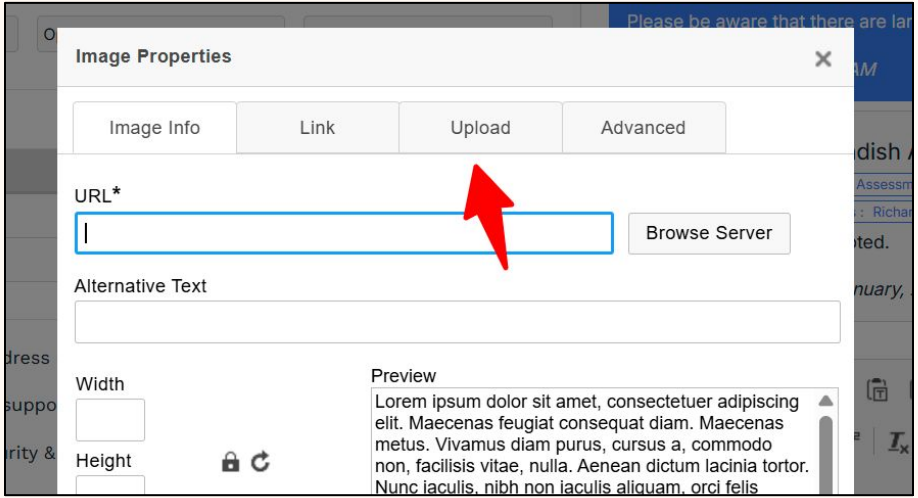
Adding an image to the Notes:

➔ 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.



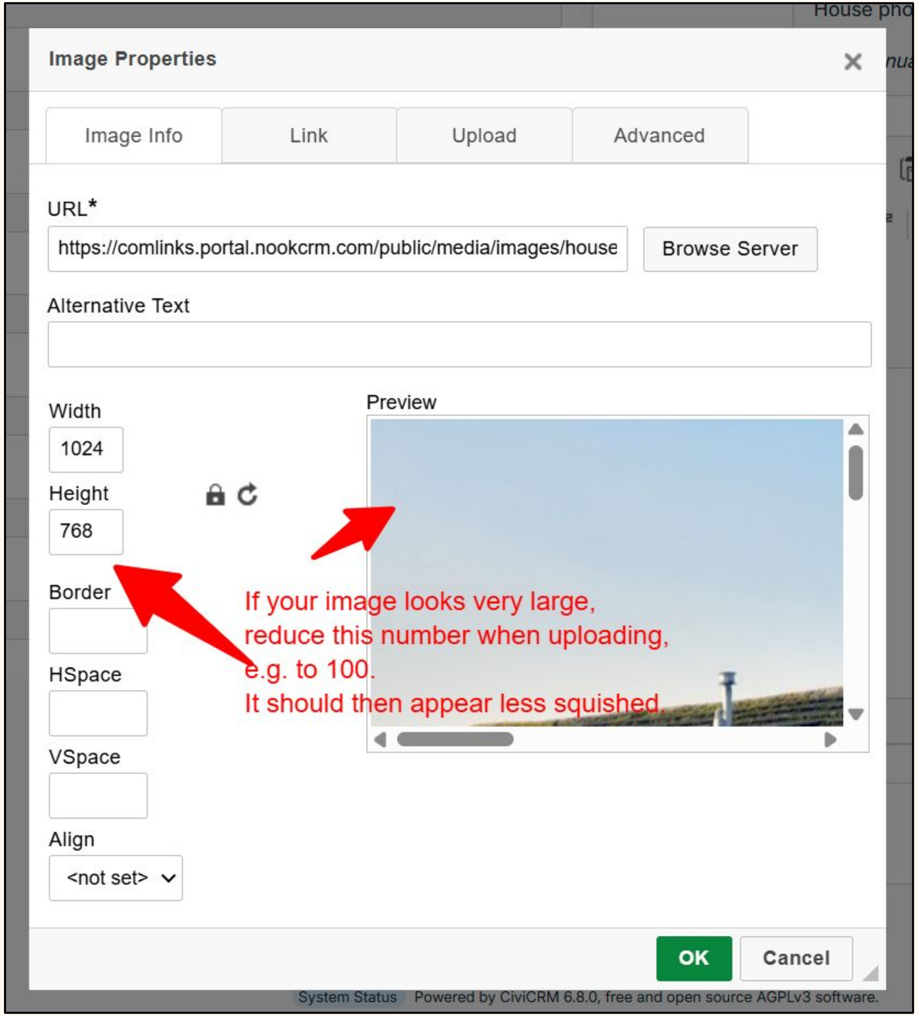


Case management:

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

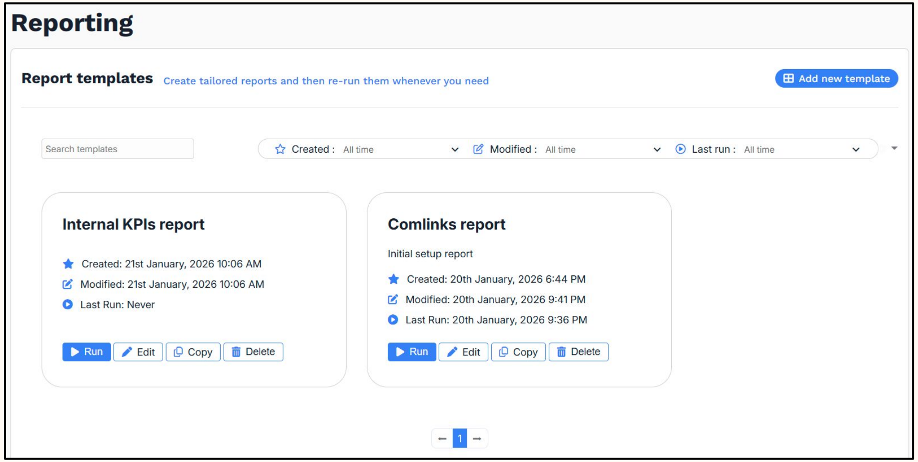
Nook management:

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.



Nook management:

9. Reporting

Report Templates:

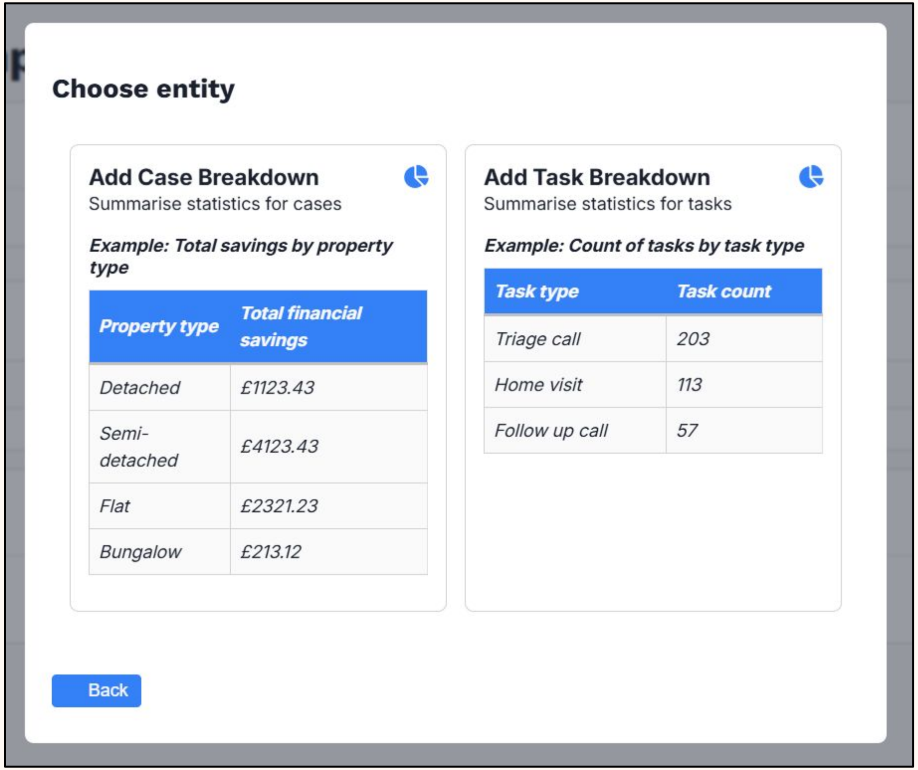
Nook reporting uses “blocks”. These become tabs in your exported spreadsheet.

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.



Nook management:

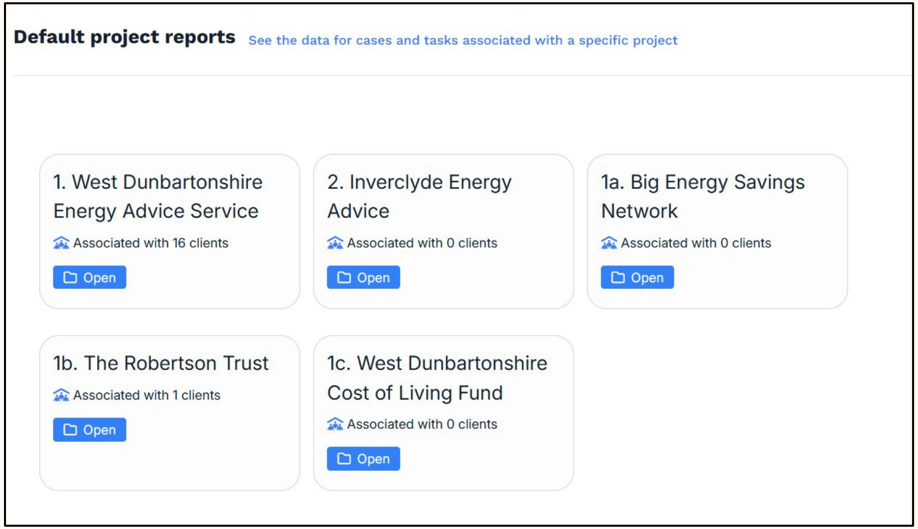
9. Reporting

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.



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

- ➔ 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