FERNWOOD&CO

Kanopi

User guide

How to use Fernwood's team workspace, step by step.

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Every picture in this guide is from a practice copy filled with made-up example clients, projects and numbers. Your screens will show real Fernwood work.

Open Kanopi at app.fernwoodco.com · Updated November 24, 2026

1. Open Kanopi

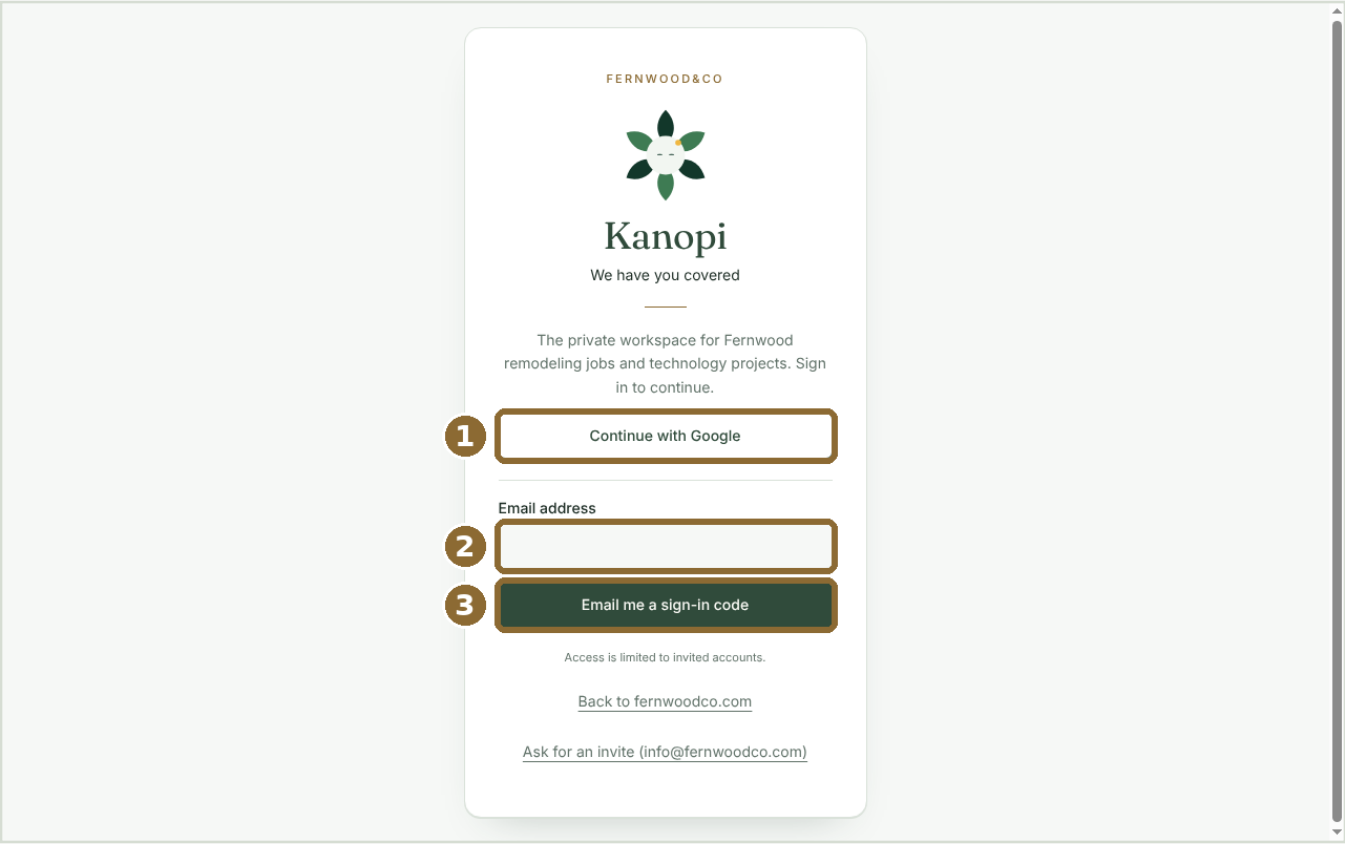
Kanopi is Fernwood's private workspace for jobs, clients, messages, quotes and receipts. It works on your phone and on a computer.

1. Open the web browser on your phone or computer (Safari, Chrome or Edge).
2. Type app.fernwoodco.com in the address bar and go.
3. If you see "Waking up Kanopi", wait a few seconds. Kanopi naps when nobody is using it.

TIP
On iPhone, tap Share, then "Add to Home Screen". Kanopi then opens from an icon like any app.

2. Sign in

There is no password to remember. Pick one of two ways.

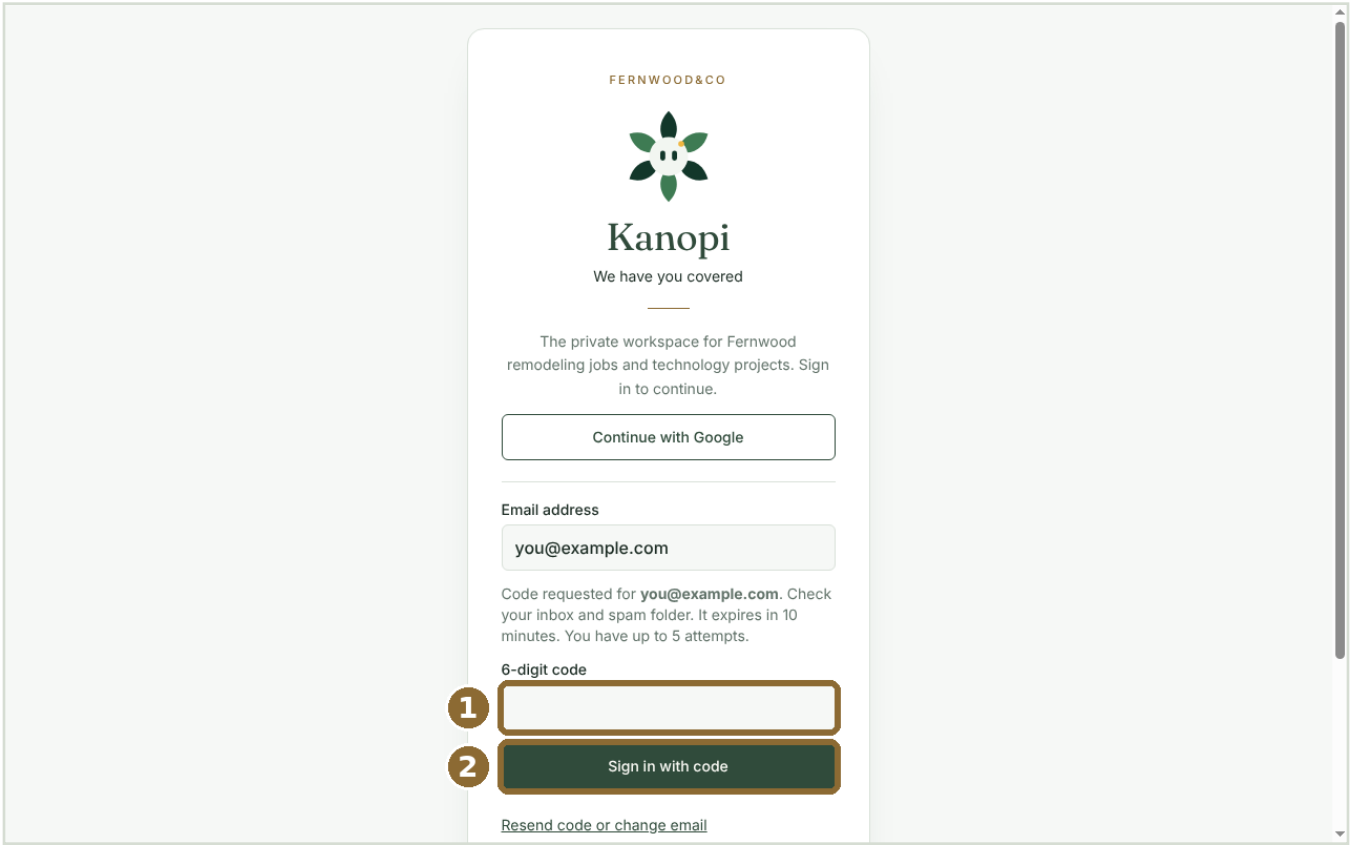


1. Easiest: tap Continue with Google and pick the Google account you were invited with.
2. Or type your email address in the Email address box.
3. Tap Email me a sign-in code. Kanopi emails you a 6-digit code.

TIP
Kanopi only lets in people who were invited. If it says you are not on the list yet, ask oZ to add your email.

3. Type the code from your email

Use this page only if you chose the email code. Open your email and find the message from Kanopi (check the spam folder if it is not there).

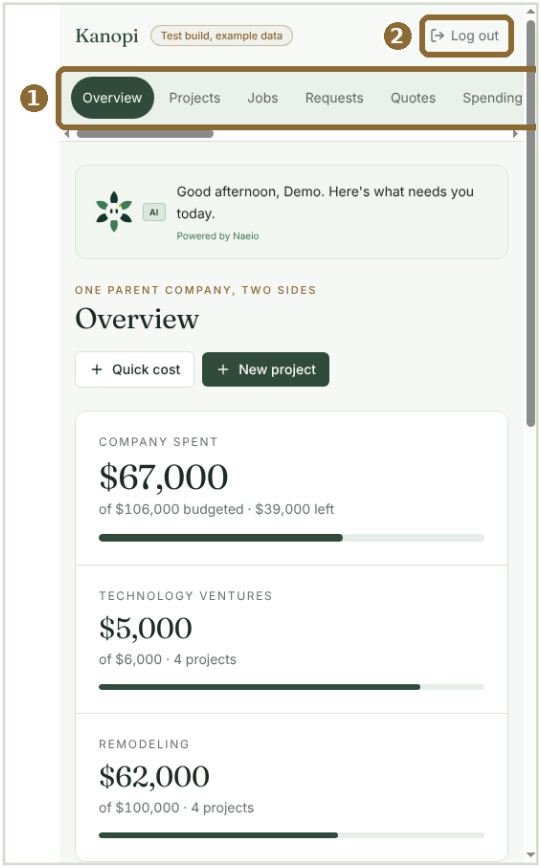


1. Type the 6 numbers into the 6-digit code box.
2. Tap Sign in with code.

TIP
A code works for 10 minutes and you get 5 tries. If it runs out, tap "Resend code or change email".

4. Find your way around

On a computer, the pages are in a menu down the left side. On a phone they look like this:



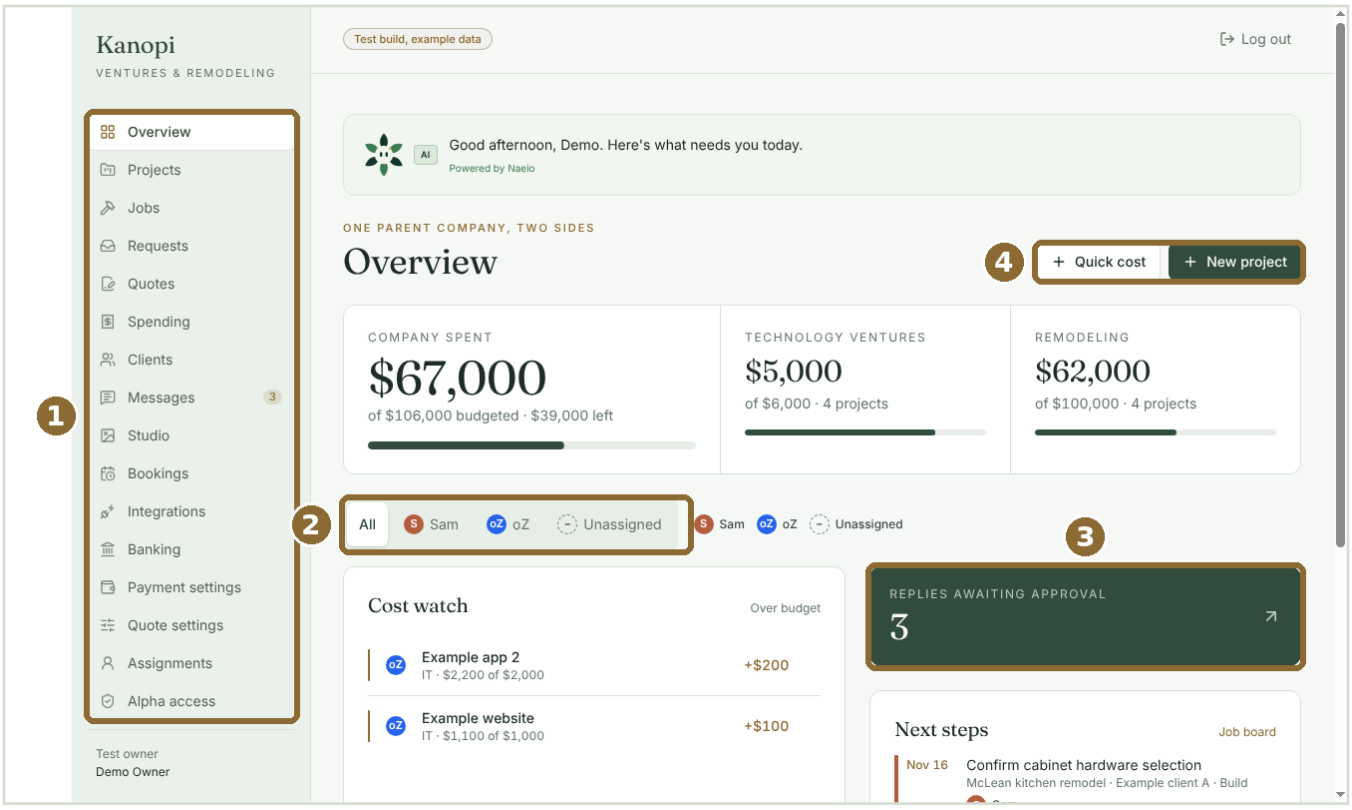
1. The pages are a row of tabs across the top. Swipe the row sideways to see them all.
2. Log out is at the top right. Use it when you finish on a shared computer.

TIP

Tap the word Kanopi at the top any time to go back to the Overview.

5. Overview: what needs you today

The first page you see. It sums up the whole business.

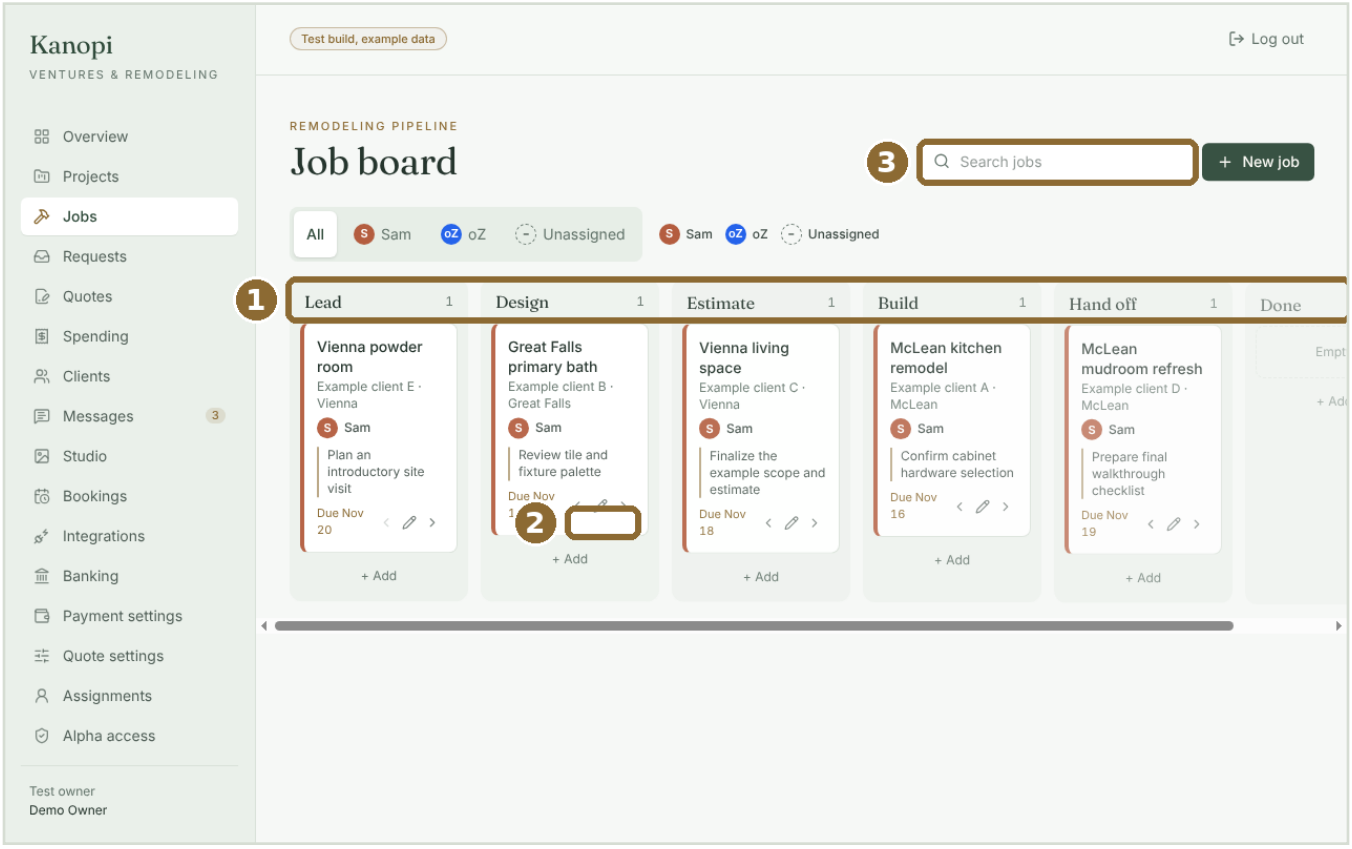


1. The menu takes you to every page. Owners see seven extra pages at the bottom (see the Owner pages part of this guide).
2. Tap your initial to see only the work assigned to you. Tap All to see everything.
3. Replies awaiting approval shows how many client replies are waiting for a yes. Tap it to go to Messages.
4. Quick cost records a cost in a few taps. New project starts a new project.

TIP
Scroll down for Next steps: the next job tasks, with the soonest date first.

6. Job board: move a job along

Every remodeling job is a card. The columns are the stages: Lead, Design, Estimate, Build, Hand off, Done.

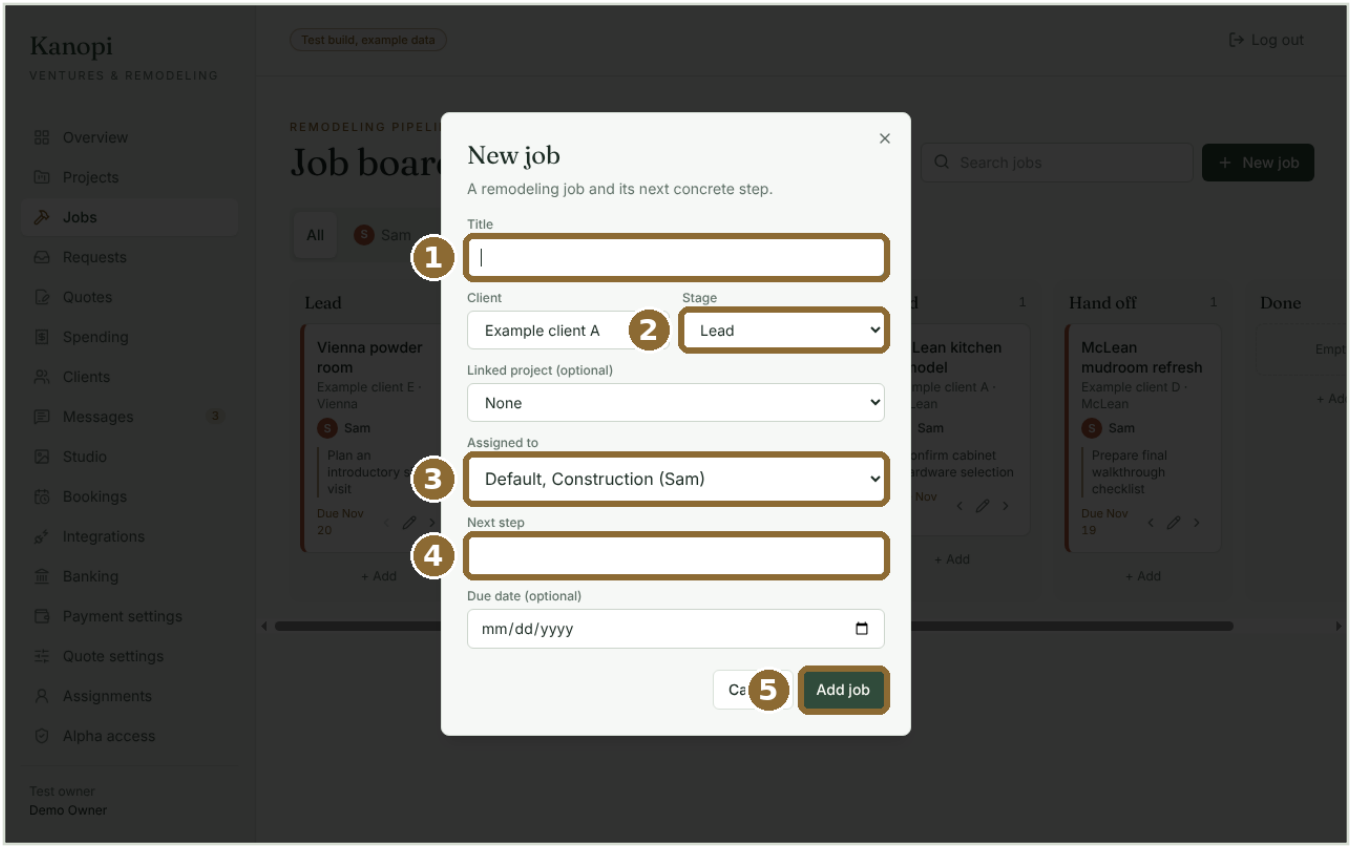


1. Find the job's card in its stage column. Swipe or scroll sideways to see all columns.
2. Tap the right arrow to move the card to the next stage, or the left arrow to move it back. Tap the pencil to edit it.
3. Looking for one job? Type part of its name in Search jobs.

TIP
Each card shows the next step and its due date, so you can see what comes next at a glance.

7. Add a new job

On the Job board, tap New job (top right). This form opens.



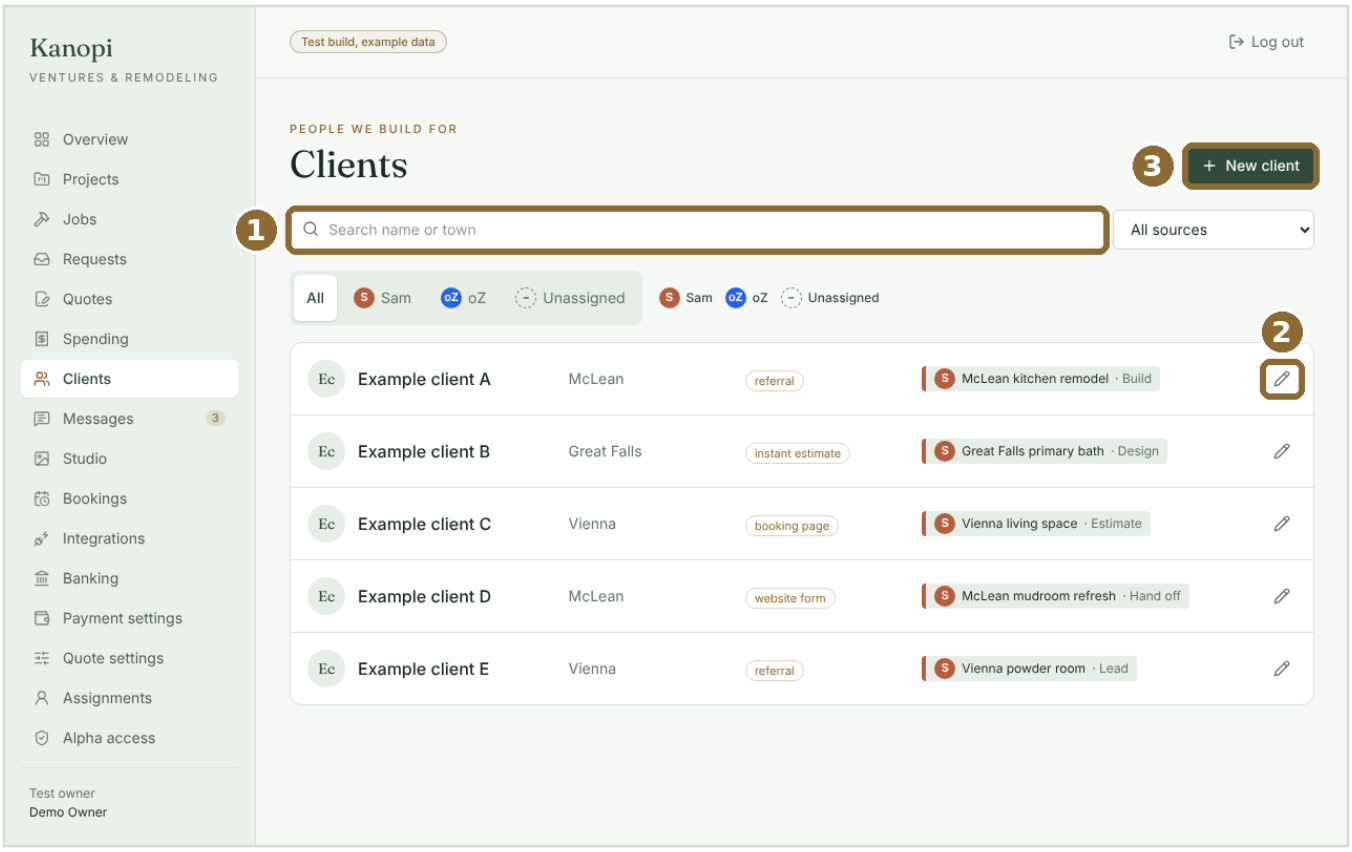
1. Title: a short name, like "Smith kitchen".
2. Pick the Client and the Stage it is in now. Linked project is optional: pick one only if the job belongs to a project.
3. Assigned to: who is handling it. Default picks the usual person for that kind of job.
4. Next step: the very next thing to do. Add a due date if there is one.
5. Tap Add job. Cancel closes the form without saving.

TIP

The client has to be in Kanopi first. If they are new, add them on the Clients page, then come back.

8. Clients

Everyone Fernwood builds for, with where they came from and their jobs.



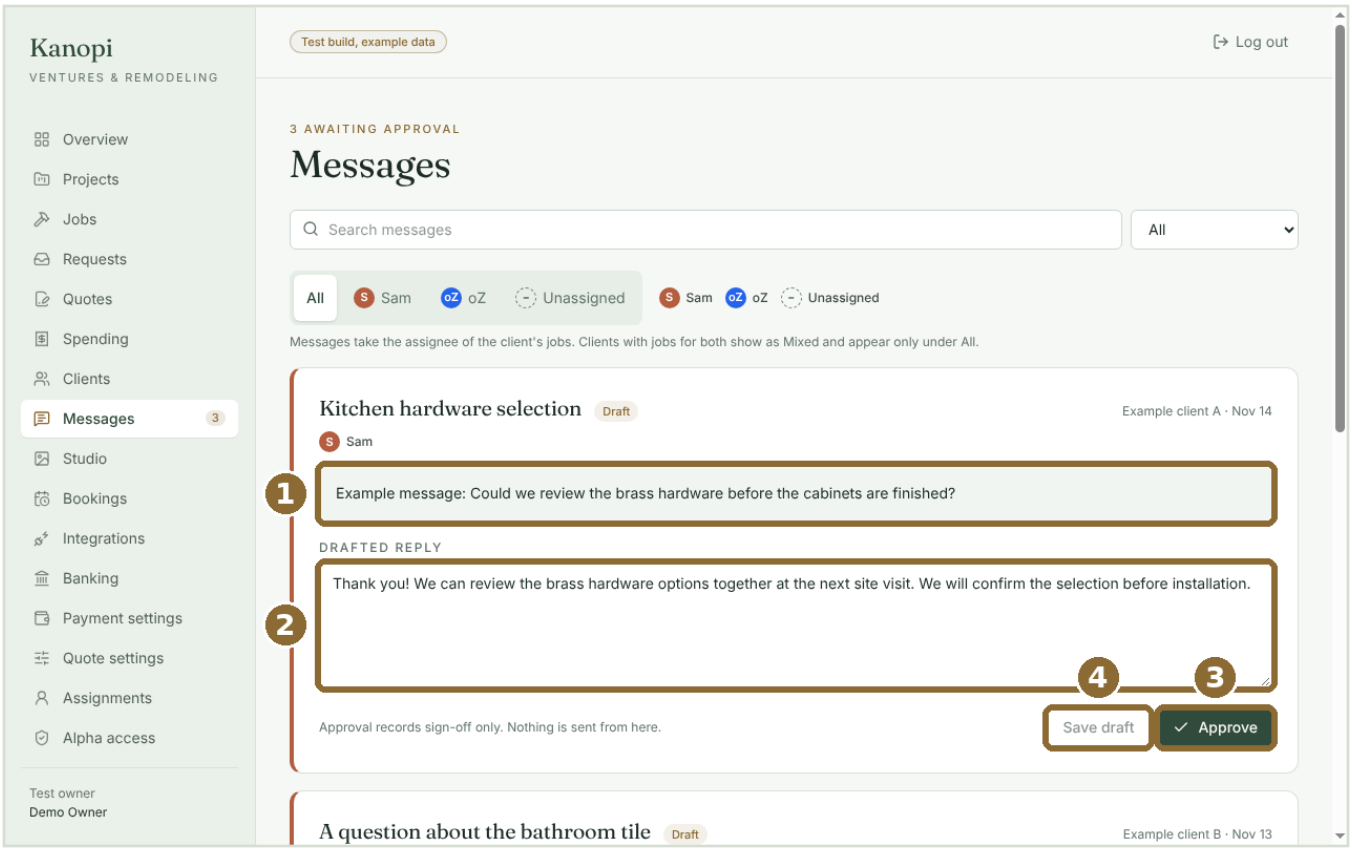
1. Type a name or town in the search box to find someone.
2. Tap the pencil on a row to fix a name, town or other details.
3. Tap New client to add someone new.

TIP

The small tag (referral, website form, booking page) shows how the client found Fernwood.

9. Messages: check and approve replies

Client messages with a reply already drafted for you.



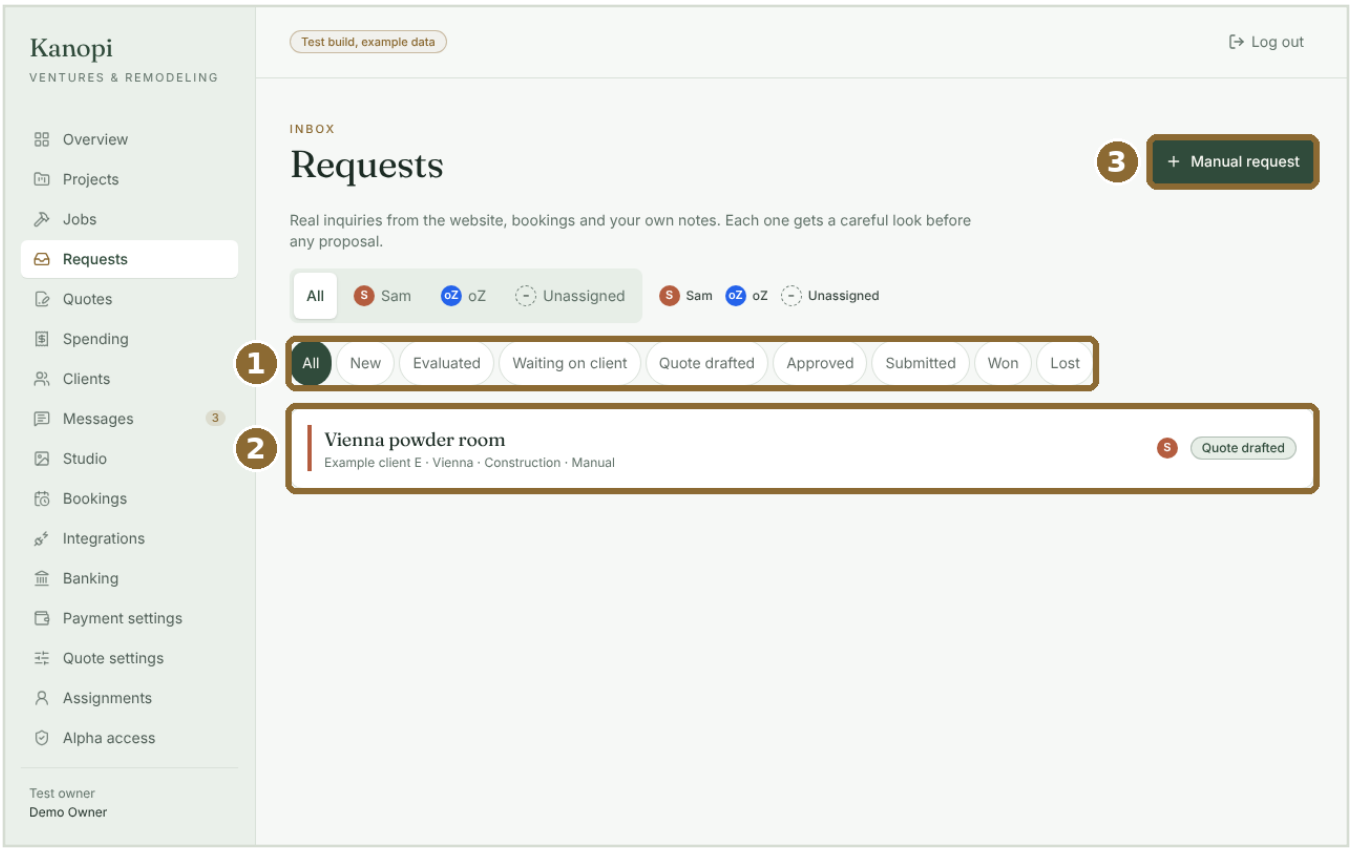
1. Read what the client wrote (the shaded box).
2. Read the drafted reply. Tap into it to change any words.
3. Happy with it? Tap Approve. Then copy the reply and send it to the client yourself, from your own email or phone.
4. Changed it but not ready? Tap Save draft.

TIP

Kanopi does not send replies. Approve marks the reply as OK'd so everyone knows it is ready to go.

10. Requests: new inquiries

Inquiries from the website, bookings and notes you add yourself.

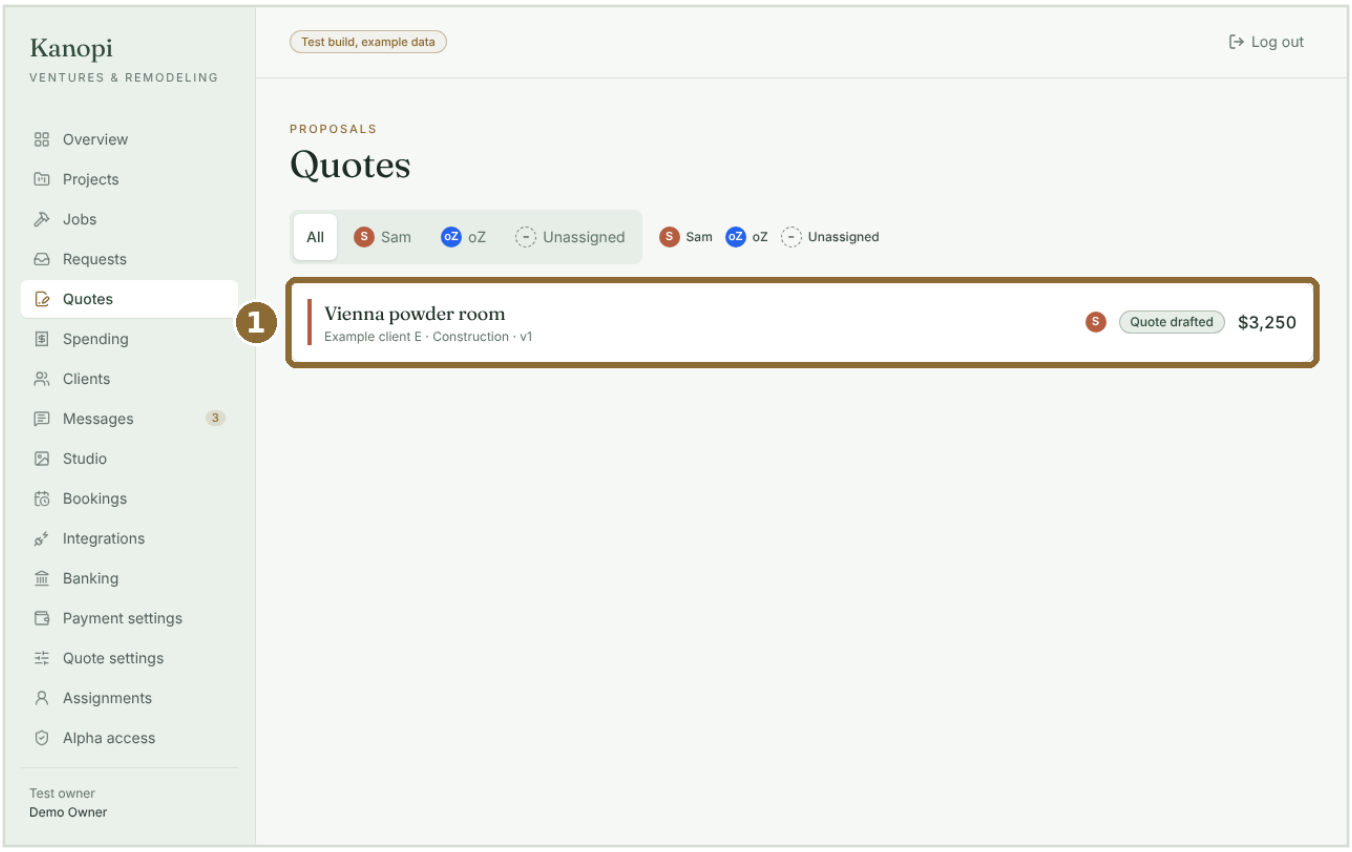


1. Tap a status (New, Waiting on client, Quote drafted and so on) to narrow the list.
2. Tap a request to open it. You will see what they asked, notes, and buttons to email them a question or build a quote.
3. Took a call or met someone? Tap Manual request to write it down.

TIP
Kanopi never emails anyone by itself. "Approve and open in mail app" opens your own email with the message ready, so you can check it and press Send.

11. Quotes

Proposals for clients, with their status and total.



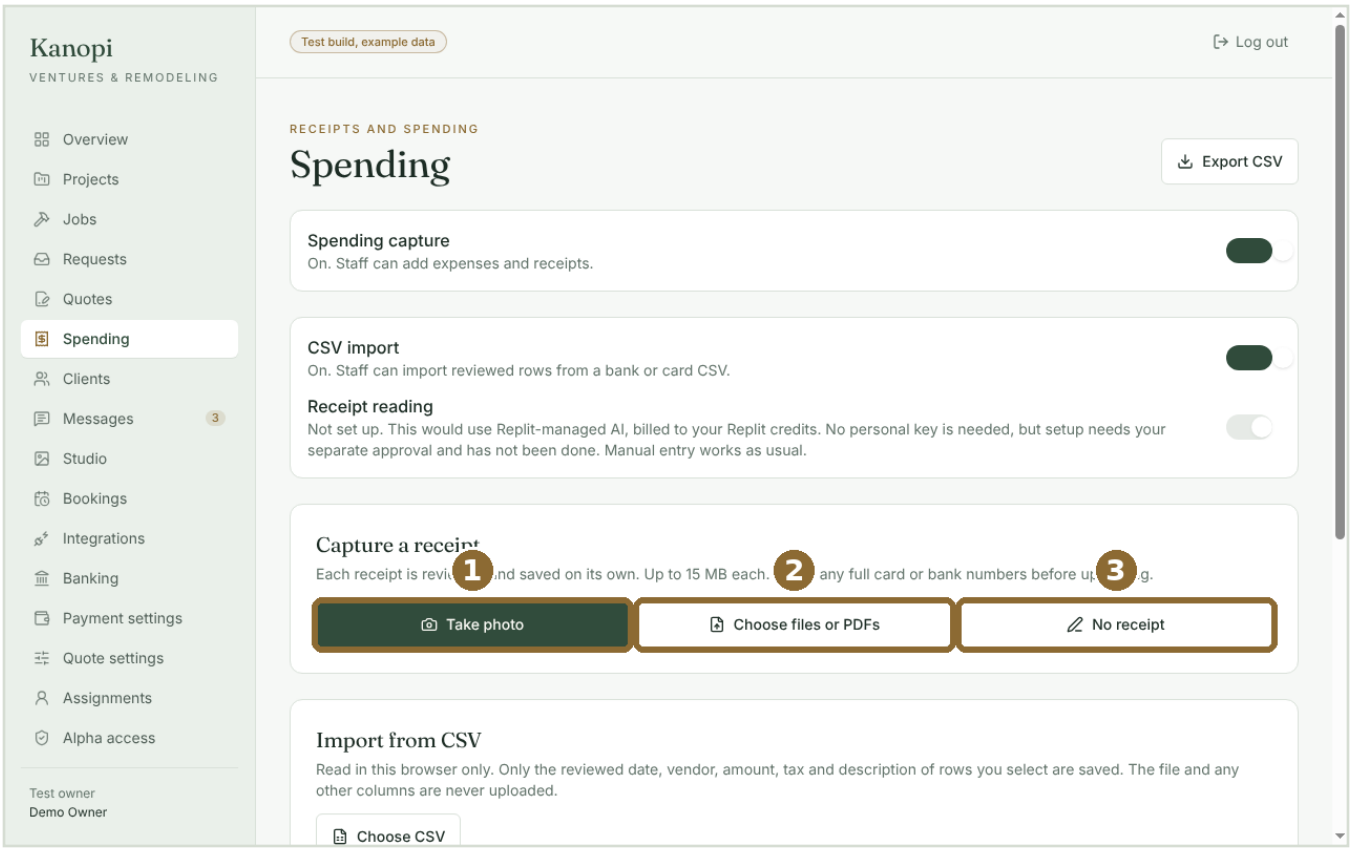
1 Tap a quote to open it and read the full proposal.

TIP

Quotes start from a request: open the request and tap Build quote.

12. Spending: start a receipt

Keep every job receipt in one place. Pick how you want to add it:



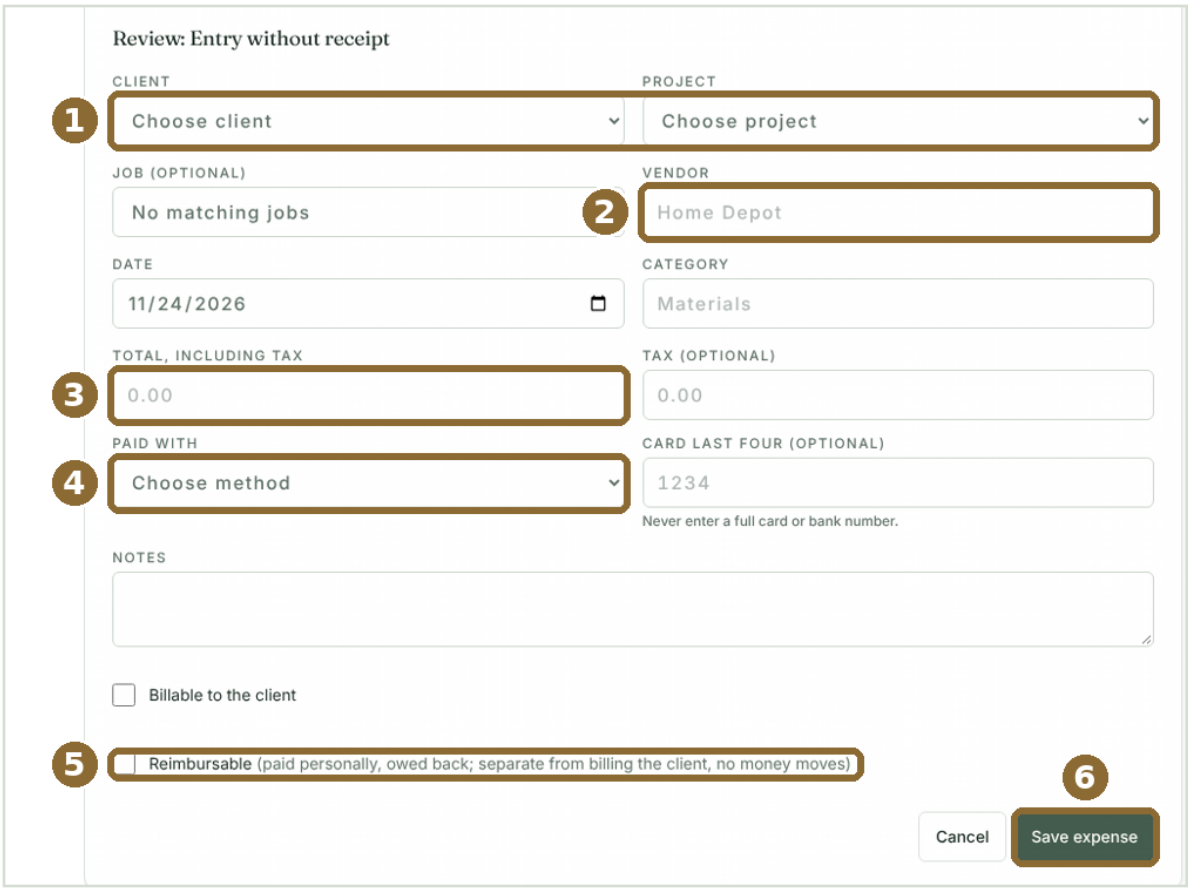
1. At the store, tap Take photo and take a picture of the receipt.
2. Already have it as a file or PDF? Tap Choose files or PDFs.
3. No receipt? Tap No receipt. The same form opens either way (next page).

TIP

As an owner you also see switches at the top that turn these features on or off for the team. Leave them on. Export CSV downloads a spreadsheet of saved expenses, and Import from CSV brings rows in from a bank or card file; you can ignore both.

13. Spending: fill in the receipt

This form opens under the buttons after you add a photo, a file or no receipt.

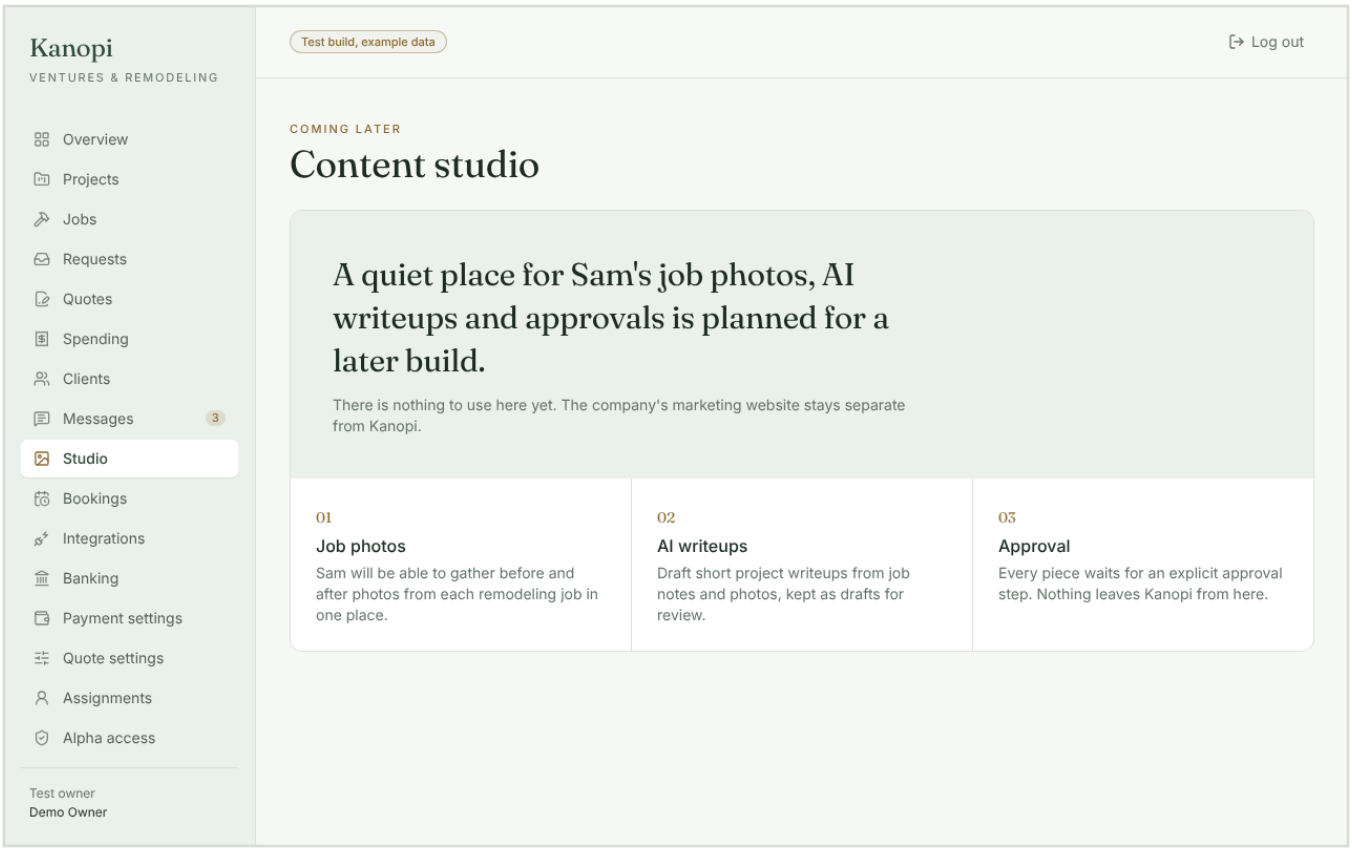


1. Pick the Client and the Project the money was spent on.
2. Vendor: the store or company you paid.
3. Total, including tax: the full amount on the receipt.
4. Paid with: how you paid.
5. Paid with your own money? Tick Reimbursable so it shows as owed back to you.
6. Tap Save expense.

TIP
Cover any full card or bank number before you take the photo, and only ever type the last four digits of a card.

14. Studio: coming later

A place for job photos and short write-ups is planned. There is nothing to do here yet.



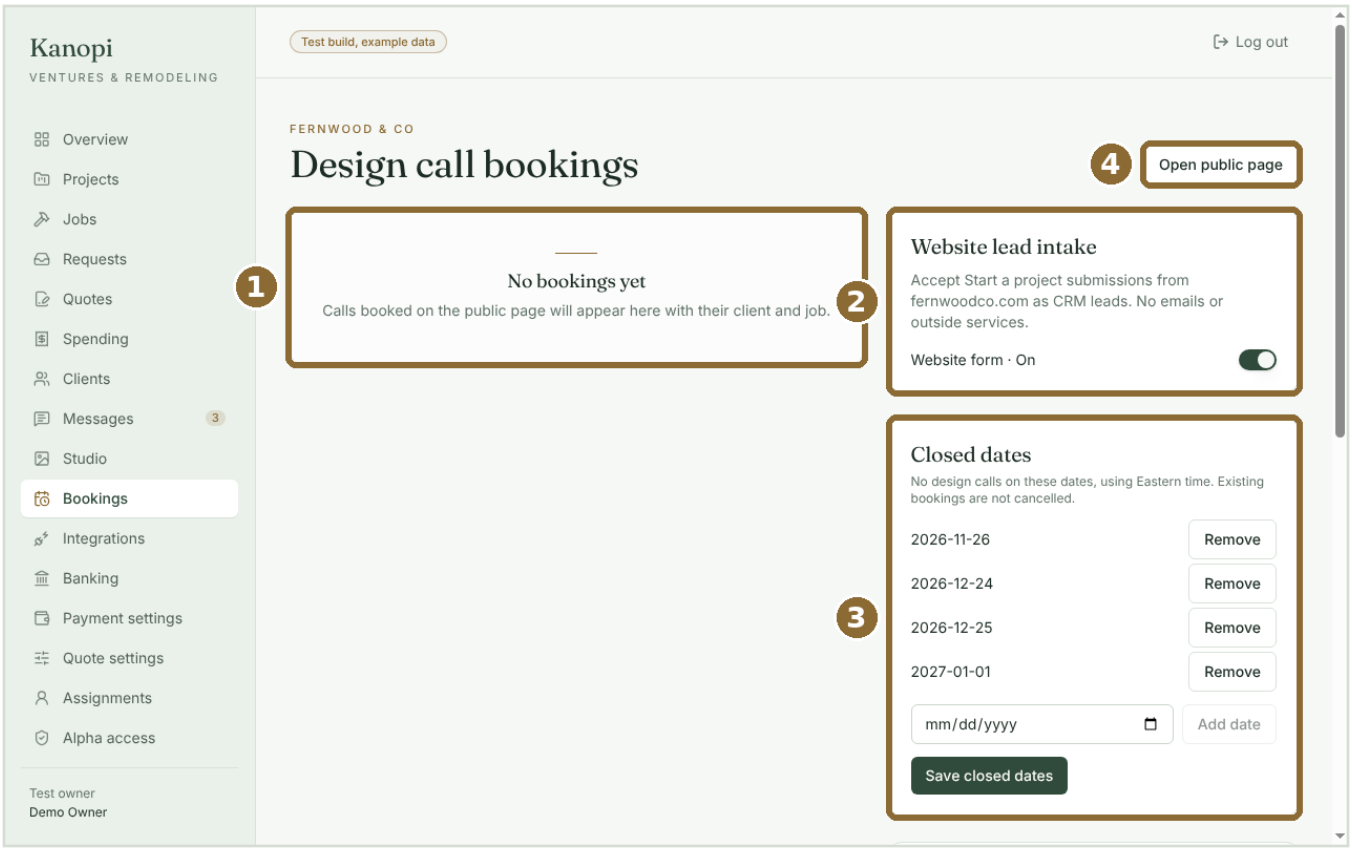
15. Owner pages

As an owner you see seven more pages at the bottom of the menu: Bookings, Integrations, Banking, Payment settings, Quote settings, Assignments and Alpha access. Most are set once. A change here applies to everyone, so agree changes with oZ first.

TIP
In the pictures that follow, the practice copy has nothing connected. On your Kanopi, QuickBooks and the bank feed show as connected.

16. Bookings: design calls

Design calls that people book on Fernwood's public booking page.



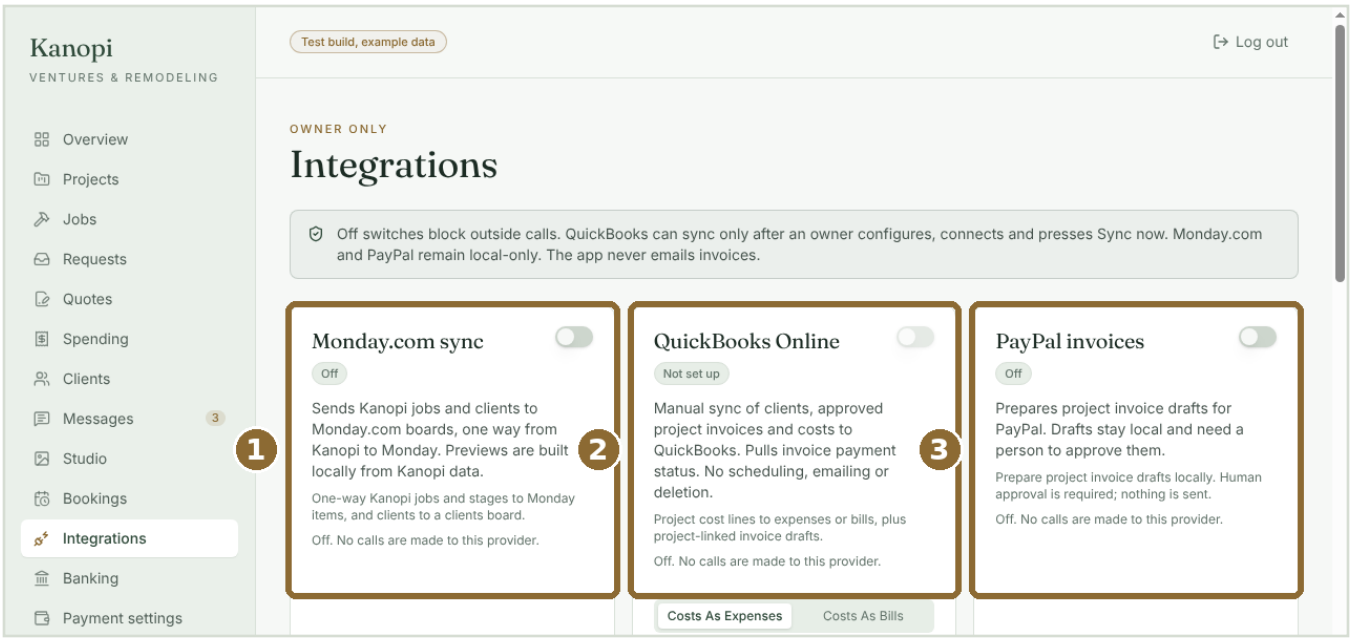
1. New bookings appear here with their client and job.
2. Website lead intake: when On, "Start a project" forms from fernwoodco.com arrive in Kanopi as new leads.
3. Closed dates: days with no calls (holidays). Add a date, then tap Save closed dates.
4. Open public page shows the booking page clients see.

TIP

Scroll down for Weekly hours, the times people can book. Change a day's hours, then tap Save hours.

17. Integrations: QuickBooks and others

Links between Kanopi and other services. Each one has an on/off switch.

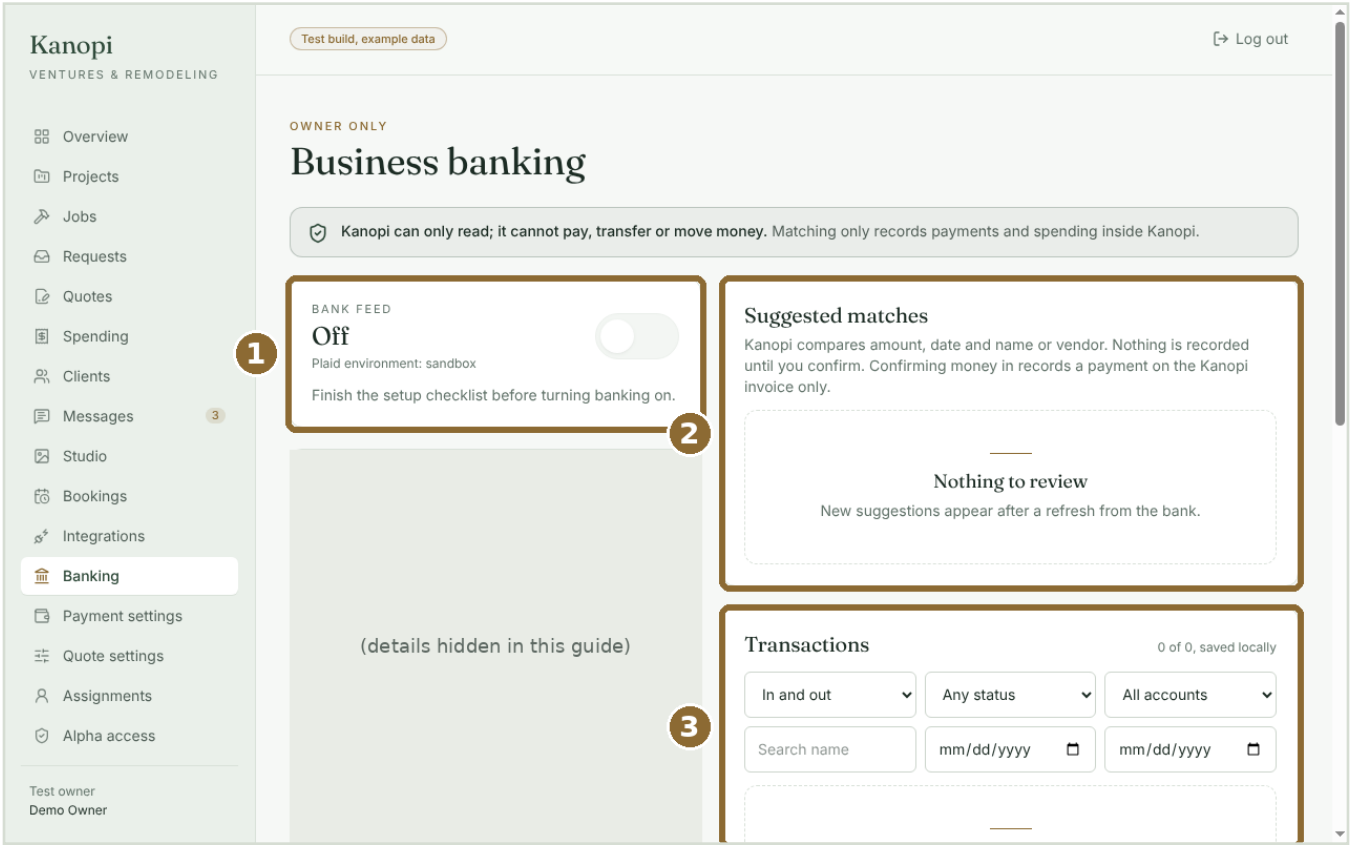


1. Monday.com sync: off. It is not in use.
2. QuickBooks Online: sends clients, approved invoices and costs to QuickBooks only when someone taps Sync now.
3. PayPal invoices: prepares invoice drafts inside Kanopi only.

TIP
Leave these switches as they are unless oZ asks. Kanopi never emails invoices from here.

18. Banking: the bank feed

Shows business bank transactions so payments and receipts can be matched. Kanopi can only read the bank. It cannot pay, transfer or move money.

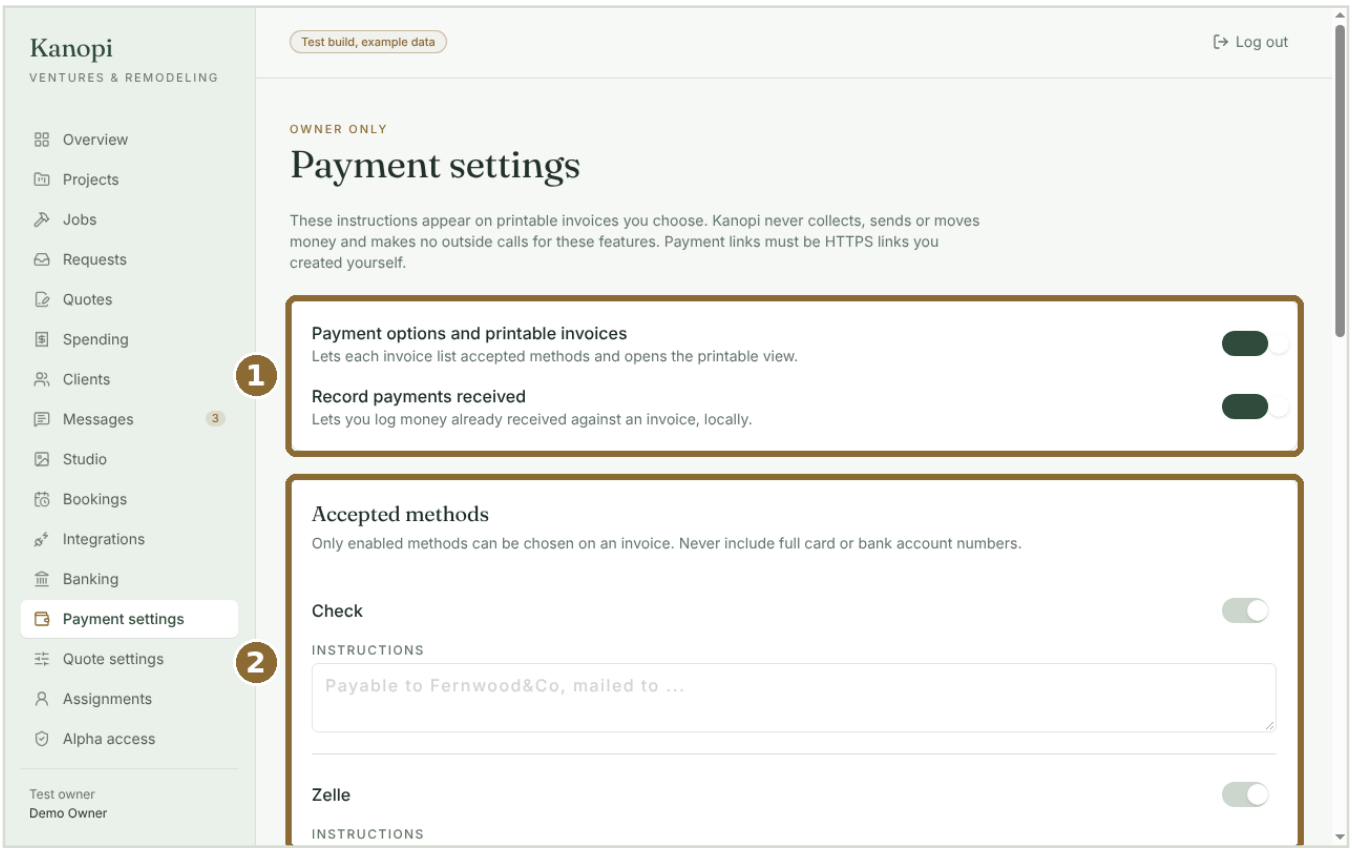


1. Bank feed: the on/off switch for reading the bank.
2. Suggested matches: Kanopi pairs a bank line with an invoice or receipt. Nothing is recorded until you confirm.
3. Transactions: search and filter what came in and went out.

TIP
Confirming a match only records it inside Kanopi. No money moves.

19. Payment settings

How clients can pay you, as printed on invoices. Kanopi never collects or moves money.

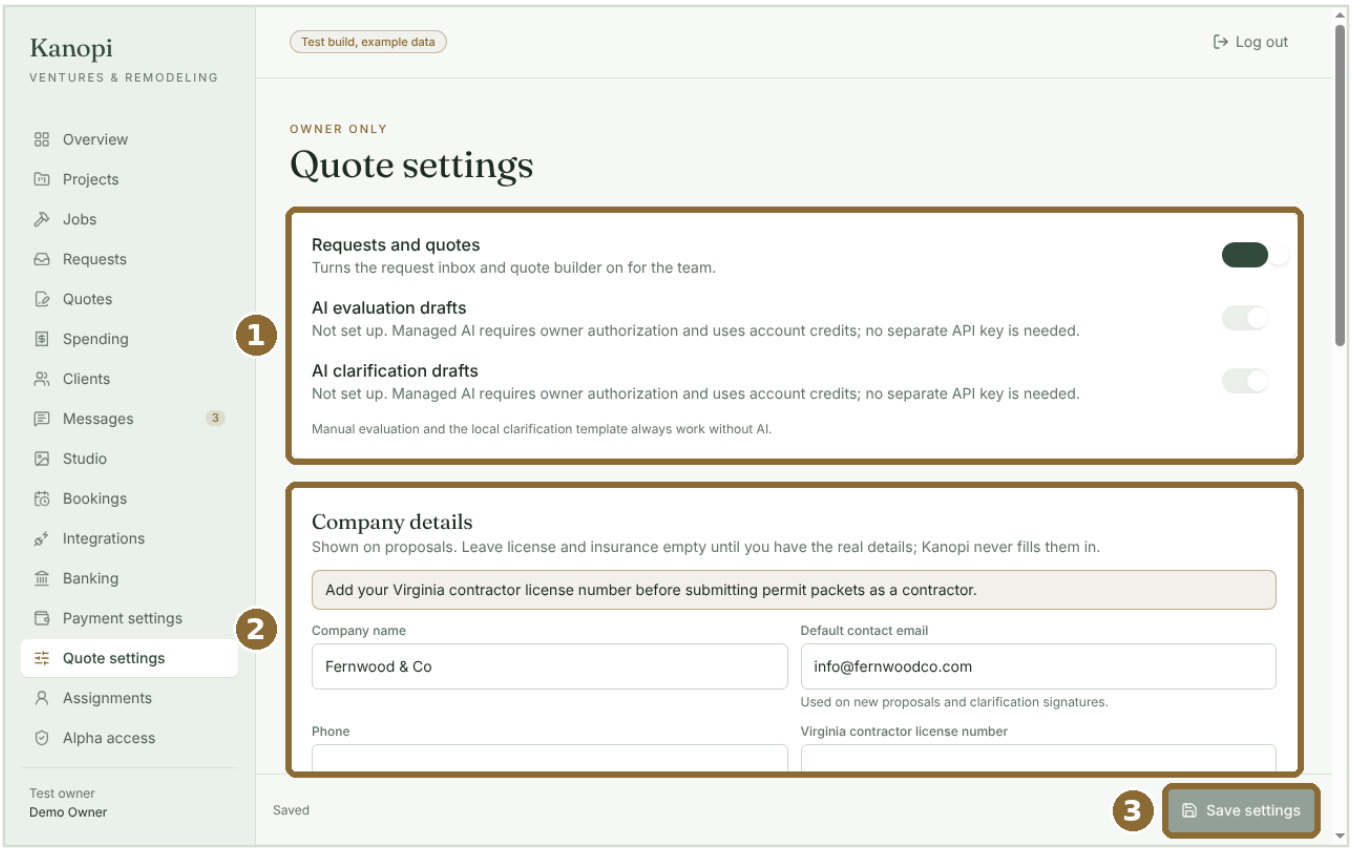


1. Two switches: show payment options on printable invoices, and let you log payments already received.
2. Accepted methods: turn on each way you accept payment (check, Zelle and others) and type the instructions clients should follow.

TIP
Never type a full card or bank account number into the instructions.

20. Quote settings

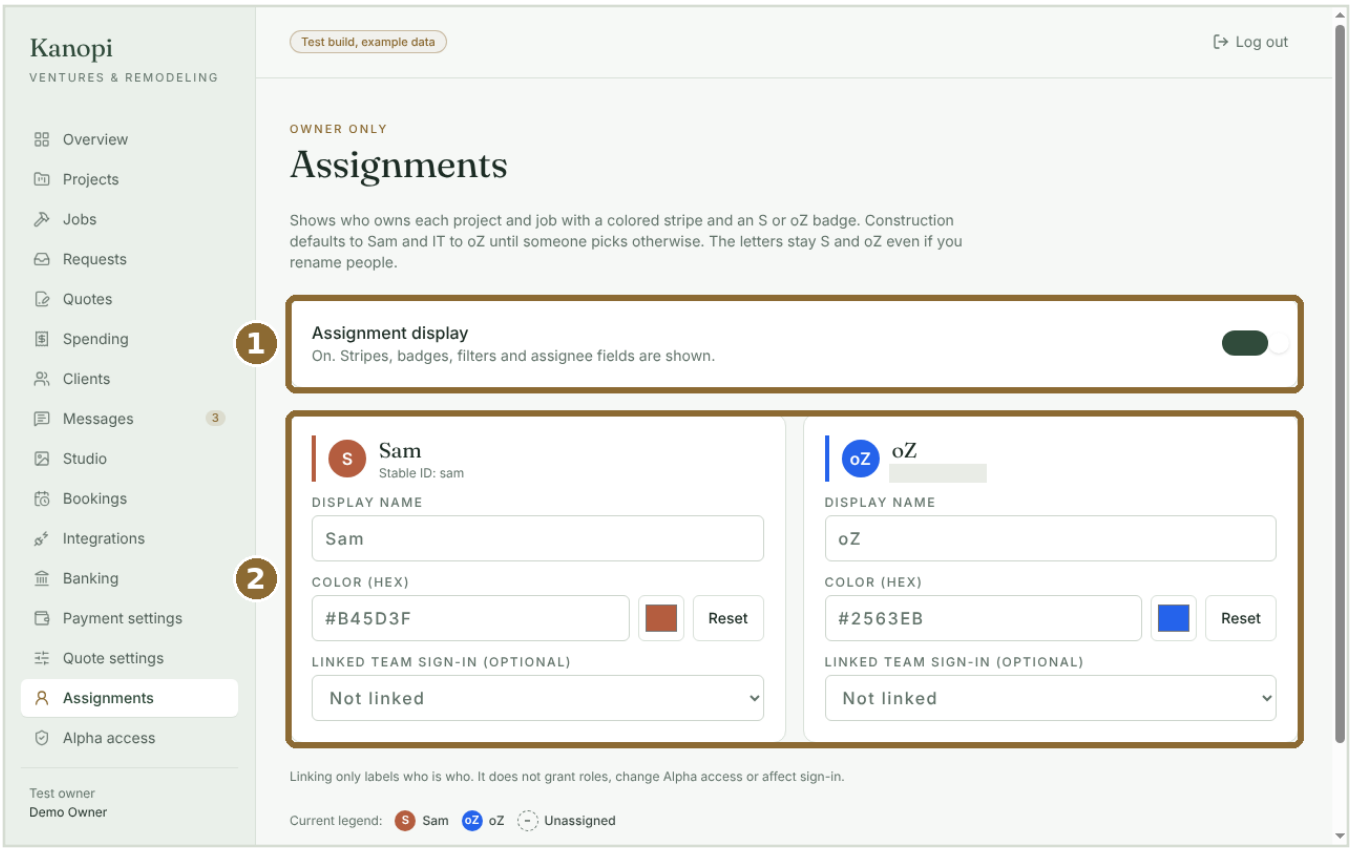
What goes on every proposal.



1. Switches: keep Requests and quotes on. The AI helpers are not set up and are not needed.
2. Company details: the name, email, phone, license and insurance shown on proposals. Fill these in only with real, current details.
3. Tap Save settings when you are done.

21. Assignments: who owns what

Controls the colored S and oZ badges on jobs, clients and projects.

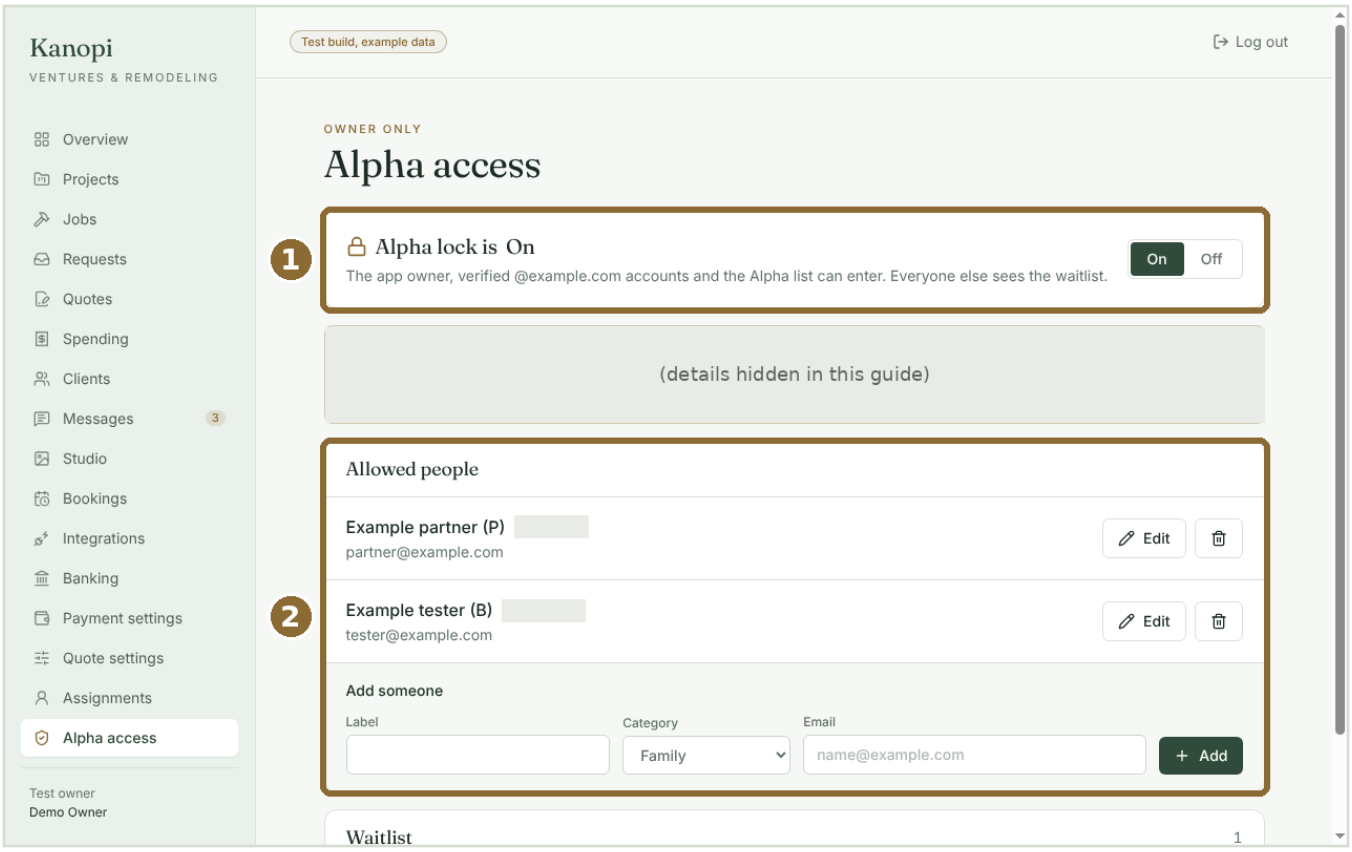


1. Assignment display: keep it On to see who owns each job.
2. Change a display name or color here. Remodeling defaults to S and IT to oZ.

TIP
This only changes labels. It does not change who can sign in.

22. Alpha access: who can sign in

Kanopi is invite-only. This page decides who gets in.



1. Alpha lock: keep it On so only invited people can enter.
2. Allowed people: add someone with a label and their email, then tap Add. Edit or remove people with the buttons on each row.

TIP

Scroll down for the Waitlist: people who asked to join. Add them above if they should get in.

23. Help

Stuck or something looks wrong?

1. Ask oZ.
2. Or email info@fernwoodco.com.

TIP
Looking around is always safe. Kanopi never sends anything to clients by itself.