

teamwork.com

# Product Roadmap

Q2 2026

# Your host & speakers



**Sinead Jones**  
Product Manager

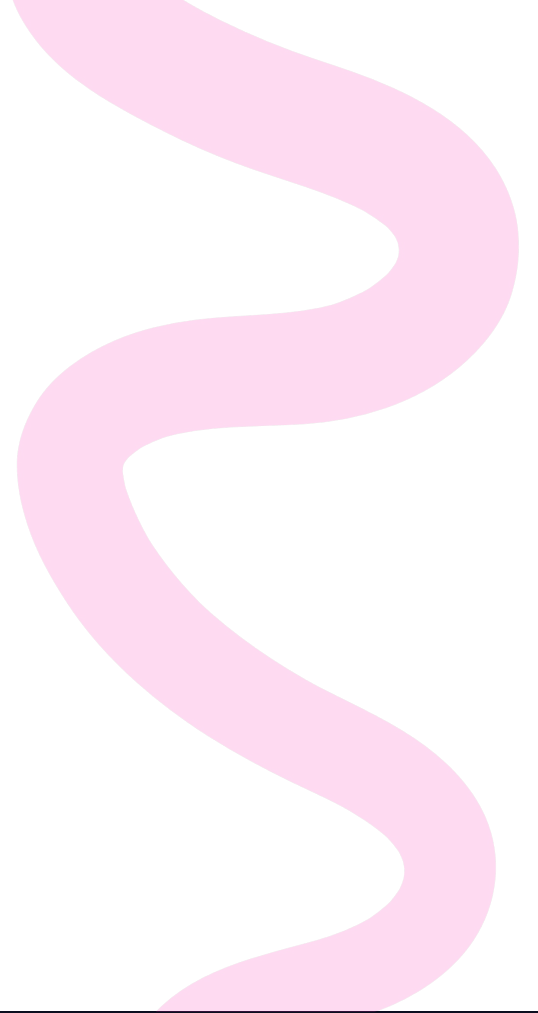



**Janelle Santi**  
Product Marketing Manager



**Laura Adams**  
Product Manager

**Our mission is to make  
client-work teams  
everywhere, **efficient,**  
**organized, profitable,**  
and **happy.****





**Combining powerful  
project management  
and streamlined  
operations.**

A thick, light pink decorative swirl or ribbon-like graphic that starts from the left edge and curves upwards and to the right, ending near the top center of the frame.

**Profit from every  
client demand.**

# Agenda

- Recently released features
- Coming soon features
- And more
- Q&A



# How to participate today



## Q&A

Use the Q&A to ask your questions



## Emojis

Use emojis to show us your reactions



## Chat

Use the chat to say hello or leave a comment

# Recording

**We are recording and it will be emailed  
in a few days - not to worry!**



Q1 2026

# Recently released



Q1 2026

# TeamworkAI

# AI Teammates

AI Teammates are pre-built into Teamwork.com, helping you plan and prioritize smarter, execute faster, and deliver more profitably.

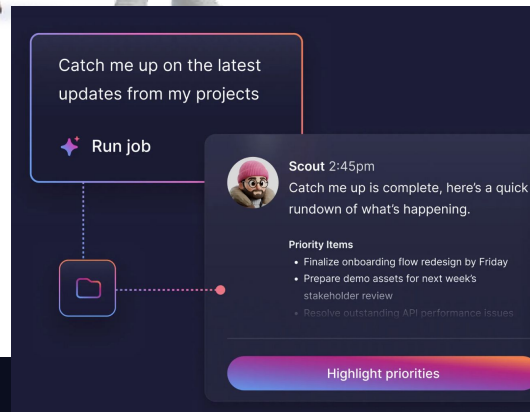
Why you'll love them:

- **Scout** — your personal assistant who can catch you up on important project activity and required actions, summarize your notifications, join your meetings and take notes, and plan your week.
- **Flo** — your project management assistant who can conduct project health checks, alert you to risks, and create client-facing updates.
- Plus, more AI Teammates are on their way — including assistants for resource management, financial management, and even a custom assistant (**Jack**) to cater for custom jobs and workflows.



**Deliver**   **Grow**   **Scale**

Status:  Live    Coming Soon



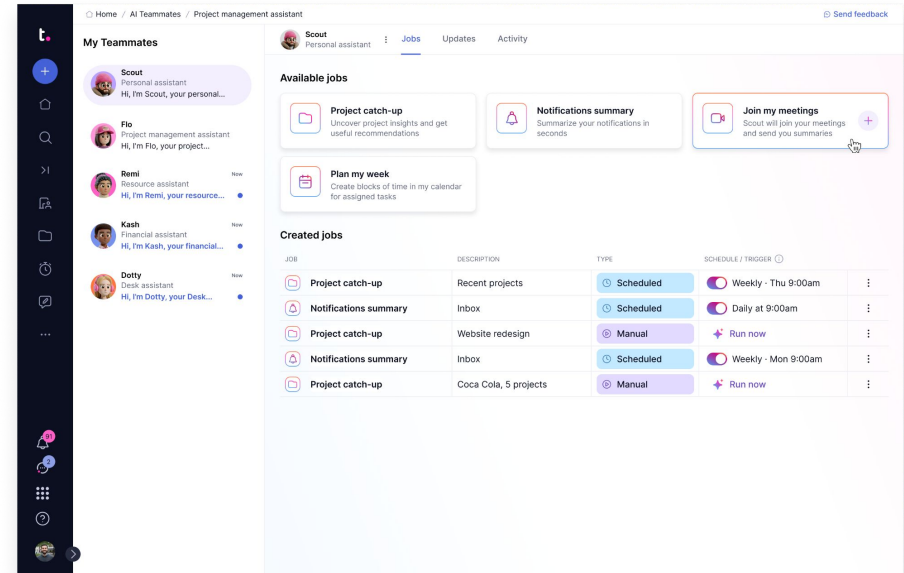
# AI Teammates: Multi-instance jobs

Previously, each job could only run as a single instance—meaning one set of conditions, one configuration, one schedule. That made it impossible to reuse a job across different contexts.

Now you can run multiple instances of the same job, each with its own criteria and schedule.

Why you'll love it:

- Apply different filters or conditions per instance. Plus, schedule the same job to run differently for each client, project, or team



The screenshot displays the 'My Teammates' interface for a 'Project management assistant'. On the left, a list of team members includes Scout, Flo, Remi, Kash, and Doty. The main panel shows 'Available jobs' with three cards: 'Project catch-up', 'Notifications summary', and 'Join my meetings'. The 'Join my meetings' card is highlighted with a red box and a plus sign. Below, the 'Created jobs' table lists instances of these jobs with their descriptions, types, and schedules.

JOB	DESCRIPTION	TYPE	SCHEDULE / TRIGGER	
Project catch-up	Recent projects	Scheduled	Weekly - Thu 9:00am	⋮
Notifications summary	Inbox	Scheduled	Daily at 9:00am	⋮
Project catch-up	Website redesign	Manual	Run now	⋮
Notifications summary	Inbox	Scheduled	Weekly - Mon 9:00am	⋮
Project catch-up	Coca Cola, 5 projects	Manual	Run now	⋮

Deliver

Grow

Scale

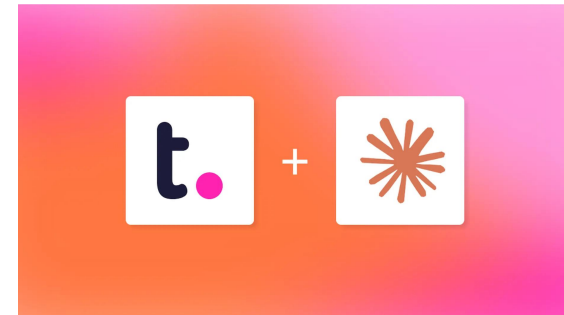
Status:  Live  Coming Soon

# New MCP capabilities

Connect Claude, ChatGPT, or any MCP-enabled assistant directly to Teamwork.com. With 80+ tools spanning Projects, Desk, and Spaces, your AI can read, create, update, and manage work through natural language.

Why you'll love it:

- Spin up projects, tasks, and milestones from a meeting note or client brief
- Clone projects from templates to standardize delivery in seconds
- Move tasks through workflow stages, reassign owners, and update priorities on the fly
- Run timers + log time to tasks through your assistant (no UI clicks needed)
- Ask "Who's overloaded this week?" and get a workload view across teams
- Triage, reply to, and reassign Desk tickets without opening the inbox
- Author and publish Spaces documentation directly from chat



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Status:  Live  Coming Soon

# Desk AI

Moving from reactive ticketing to predictive resolution. These features don't just save time, they use your data to make every agent your best agent.

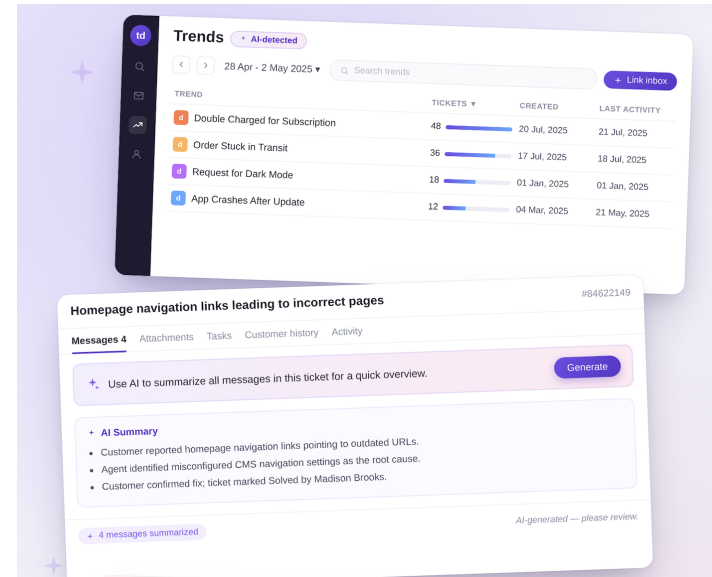
Why you'll love it:

- Instant clarity with AI summaries.
- Proactive trend detection.
- Using your similar tickets to predict how to answer tickets in the same trend.

Premium

Enterprise

Status: ● Live ● Coming Soon





Q1 2026

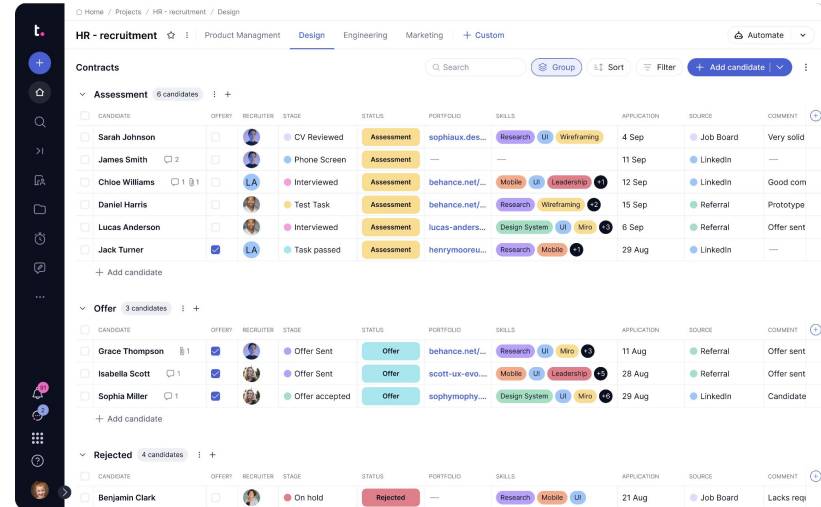
# Manage client work

# Custom Items

Manage more than tasks... much more! A brand new way to manage anything you need to within Teamwork.com.

Why you'll love it:

- Whether it's inventory, assets, employees, or contracts, you now have a way to capture and manage any items within Teamwork.com
- Create views of Custom Items that don't fit "neatly" into tasks by leveraging custom fields, custom groupings, and advanced filters and sorting
- Expand how you use Teamwork.com and ditch those Excel spreadsheets!



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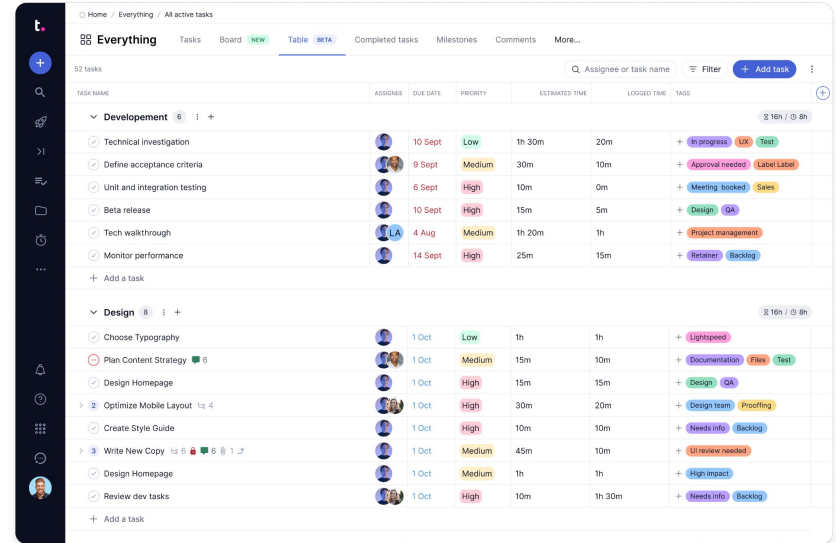
Status: ● Live ○ Coming Soon

# New Table View experience

An improved Table View experience for the **Everything** area of Teamwork.com.

Why you'll love it:

- A beautiful new Table View with swift cell interactions.
- Improved consistency with our other task views
- Introducing new functionality (such as “Group by”) to allow you to group by task attributes outside of “Date” and “Task List.”



Deliver

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Status:  Live  Coming Soon

# HubSpot app updates

These enhancements to your workflow action make project setup faster, more structured, and fully aligned with how you plan work.

Why you'll love it:

- Set project budgets at creation for better forecasting and profitability
- Define start/end dates to keep delivery on track (highly requested!)
- Instantly create new clients when the project is created and link to the project

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Status:  Live  Coming Soon

Project Templates \*

Choose a value

Project Name

Enter a value

Project Target Date Type

Choose a value

Project Target Date

 DD/MM/YYYY

Project Status

Choose a value

Project Description

Enter a value

People

Choose a value

Project Category

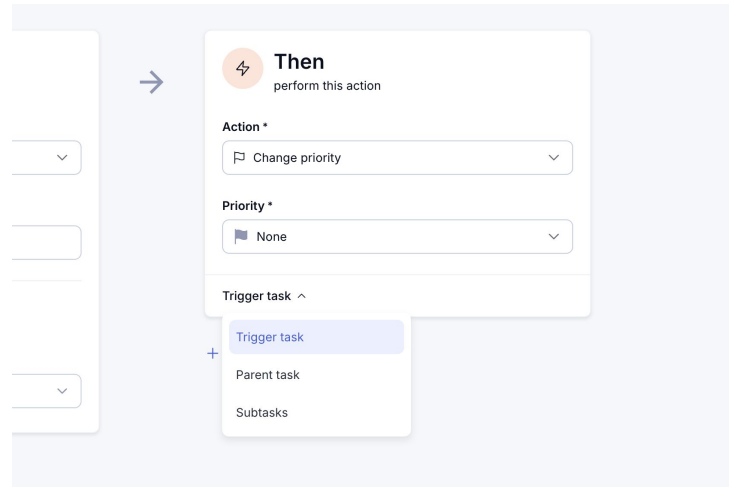
Choose a value

# Automations - action targeting

Take full control of your workflows by choosing exactly which tasks your automation actions should impact.

Why you'll love it:

- You're no longer limited to the task that started the automation. Move updates up to parents, down to subtasks, or across to newly created tasks
- Create a task and immediately perform follow-up actions on it all within a single automation



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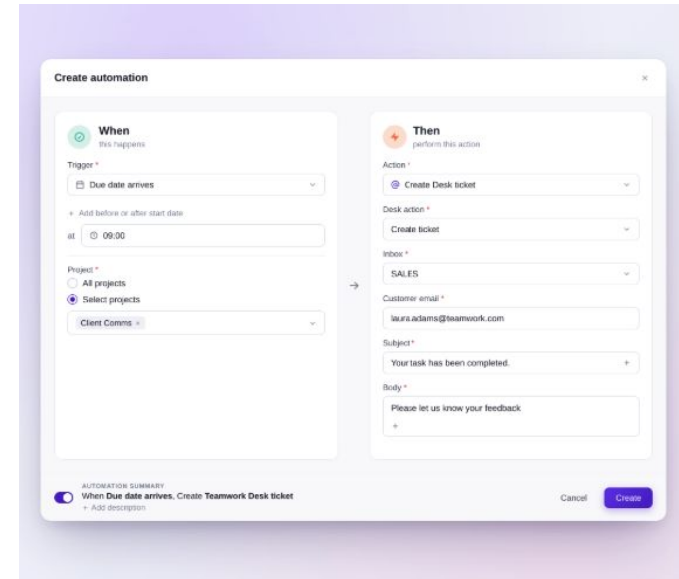
Status:  Live  Coming Soon

# Create tickets with automations

Automatically generate a Desk ticket directly from a Teamwork.com project trigger, ensuring your clients or internal teams are notified exactly when they need to be, without any manual data entry.

Why you'll love it:

- Connect your project items directly with your comms. When a task hits a specific stage in Teamwork.com, the corresponding ticket is already waiting or has sent
- You have total control over which projects trigger an action. It could be for a specific client, or ops board
- By pre-populating customer emails, subjects, and ticket bodies, you ensure that the support agent has all the context they need



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Status:  Live  Coming Soon

# Shareable Tickets

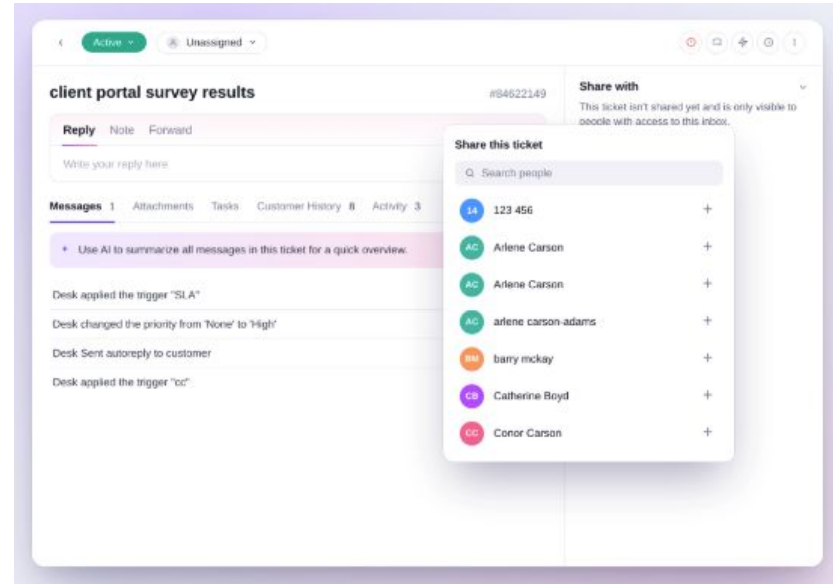
Provide controlled, surgical visibility. You can share a single, specific ticket with any user in your system, allowing them to collaborate, view context, and provide input without ever seeing the rest of your inbox.

## Why you'll love it

- Share sensitive or specific issues with subject matter experts without granting access to an entire inbox
- Centralized “Shared with Me” view so more more digging through emails or slack pings to find the ticket link
- Ticket sharing respects your existing setup.

All Plans

Status:  Live  Coming Soon





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# Plan resources

# Tentative Projects

Map out work before it's confirmed. Plan with flexibility, explore ideas, and prepare your team without committing to exact timelines or resources.

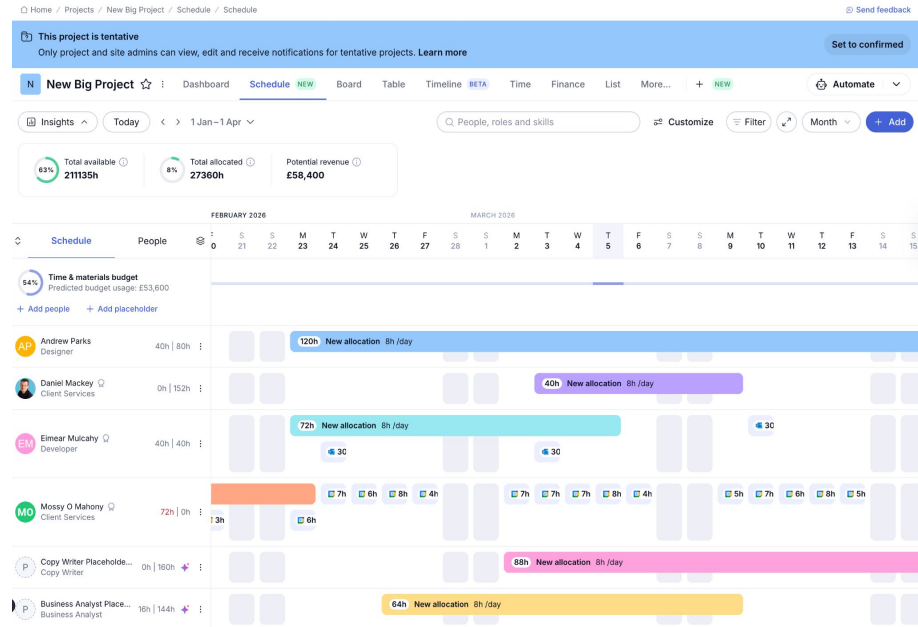
Why you'll love it:

- Create and update Tentative Projects from HubSpot
- Track and manage projects with a new field in the project creation process of “tentative” or “confirmed”
- Apply project templates when creating Tentative Projects
- Have a project-level scheduler right within the project to tentatively plan allocations and placeholders.
- Create new project templates based on tentative projects with the populated Schedule tab

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Status:  Live  Coming Soon



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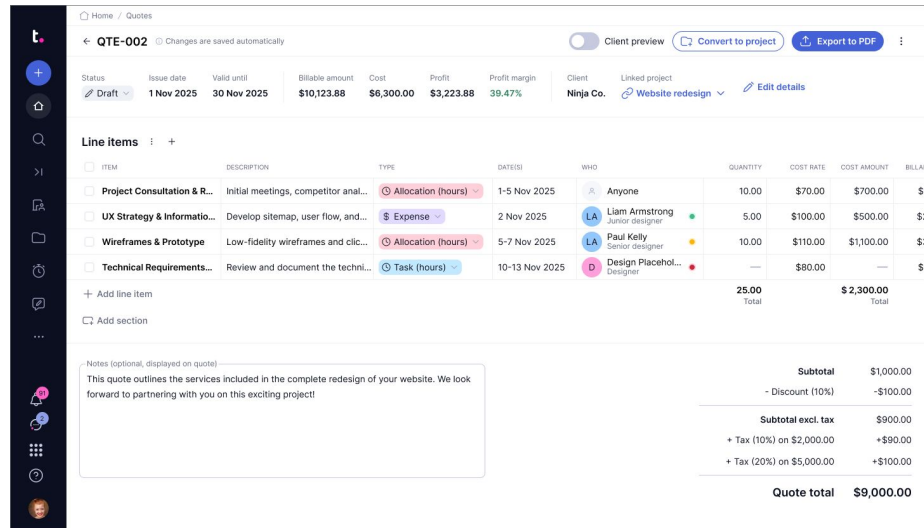
# **Make projects profitable**

# Quotes V3

Have more control over line items to create even more customizable Quotes. Understand your margins as you build to ensure a profitable project.

Why you'll love it:

- Line item specificity. Add tax or discount per line item for more granular control.
- Add line item categories to better group and organize your Quote.
- See gross margin and net margin per line (keep this internal only).
- Create a tentative or confirmed project directly from your Quote, mapping your line items to allocations, tasks or expenses.



Home / Quotes

← QTE-002 Changes are saved automatically

Client preview  Convert to project

Status: Draft Issue date: 1 Nov 2025 Valid until: 30 Nov 2025 Billable amount: \$10,123.88 Cost: \$6,300.00 Profit: \$3,223.88 Profit margin: 39.47% Client: Ninja Co. Linked project: Website redesign [Edit details](#)

**Line items**

ITEM	DESCRIPTION	TYPE	DATE(S)	WHO	QUANTITY	COST RATE	COST AMOUNT	BELA
<input type="checkbox"/>	Project Consultation & R...	Allocation (hours)	1-5 Nov 2025	Anyone	10.00	\$70.00	\$700.00	\$
<input type="checkbox"/>	UX Strategy & Informatio...	Expense	2 Nov 2025	LA Liam Armstrong Junior designer	5.00	\$100.00	\$500.00	\$
<input type="checkbox"/>	Wireframes & Prototype	Allocation (hours)	5-7 Nov 2025	LA Paul Kelly Senior designer	10.00	\$110.00	\$1,100.00	\$
<input type="checkbox"/>	Technical Requirements...	Task (hours)	10-13 Nov 2025	D Design Placehol... Designer	—	\$80.00	—	\$
+ Add line item					25.00		\$2,300.00	
					Total		Total	

+ Add section

Notes (optional, displayed on quote)

This quote outlines the services included in the complete redesign of your website. We look forward to partnering with you on this exciting project!

<b>Subtotal</b>	\$1,000.00
- Discount (10%)	-\$100.00
<b>Subtotal excl. tax</b>	\$900.00
+ Tax (10%) on \$2,000.00	+\$90.00
+ Tax (20%) on \$5,000.00	+\$100.00
<b>Quote total</b>	<b>\$9,000.00</b>

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 Status:  Live  Coming Soon

# Quote settings

More control over how quotes are numbered, presented, and priced - so they reflect your brand and your commercial model out of the box.

Why you'll love it:

- Automatic quote numbering with a customizable format
- Add a Statement of Work that prepends the line items on the Quote PDF
- Include signature fields directly on the Quote PDF for faster sign-off
- Set a default billable rate type for line items - user, role, or client rate

The screenshot shows the 'Quote settings' page in the Teamwork.com settings menu. The page is titled 'Quote settings' and includes a search bar at the top right. The main content area is divided into sections: 'Quote settings' (with a sub-header 'Define quote settings for all quotes created on this site.'), 'Automatically generate quote names' (checked), 'Prefix' (set to 'QTE-'), 'Naming pattern' (set to '- Year - Month - Day |'), and 'Default billable rate type' (set to 'User rate'). There are also options for 'Signatures on quote PDFs' (checked) and 'Prepend statement of work to quotes' (unchecked). A preview of a quote number 'QTE-001-2026-03-11' is shown below the naming pattern section.

Home / Settings

Settings General Subscription Time Logo Color theme Templates

Quote settings

Define quote settings for all quotes created on this site.

Automatically generate quote names ⓘ

Prefix Naming pattern

QTE- Counter - Year - Month - Day |

Year Month Day Client name

Preview: QTE-001-2026-03-11

Signatures on quote PDFs ⓘ

Prepend statement of work to quotes ⓘ

Default billable rate type ⓘ

User rate

Role rate

Client rate

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Status:  Live  Coming Soon

# Client Role Rates

Set and manage specific client base rates for each and every role in your organization.

## Why you'll love it:

- Set specific billable rates for each role in your organization at the client level.
- Enjoy increased flexibility on client projects to choose whether a person's logged time is charged out using their standard rate, project rate, role based rate or client based rate.

The screenshot displays the 'Role rates' page for the 'Coca Cola' client. The breadcrumb trail is 'Home / Clients / Coca Cola / Role rates'. The client name 'Coca Cola' is shown with the address 'Teamwork Campus One, Blackpool Retail Park, Blackpool, Cork' and an 'Edit client' button. Navigation tabs include Overview, Activity, Quotes, Projects, Time, Tickets, People, and Role rates. A search bar for roles is present. A notification banner reads: 'Introducing client role rates. Set client-specific rates that automatically override your standard rates across all of this client's projects.' Below this is a table with columns for Roles, People, Standard Rate/Hour, and Client Rate/Hour.

ROLES	PEOPLE	STANDARD RATE/H	CLIENT RATE/H
Designer		\$100.00	\$100.00
Engineer		\$150.00	\$150.00
Front end developer		\$140.00	\$140.00
Junior Engineer		\$100.00	\$100.00
Marketing manager		\$160.00	\$160.00

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Status:  Live  Coming Soon

# Logged time roll-up

Bringing greater visibility into actual time spent directly at the parent task level on **List view**

Why you'll love it:

- Adds logged time roll-up to parent tasks when subtasks have time logged
- Provides instant visibility of **planned vs actual time** (estimated vs logged) without digging into subtasks details
- Removes the need for manual updates on parent tasks to track totals

Logo Redesign 4 ✕ ⋮ +			
3	Parent Task	⌚ 0h (17h 30m total)	🕒 0h (10h 10m total) 🗒 3
✓	Sub Task 1	⌚ 2h 30m	🕒 1h ↕
✓	Sub Task 2	⌚ 10h	🕒 8h 10m ↕
✓	Sub Task 3	⌚ 5h	🕒 1h ↕

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# Track performance

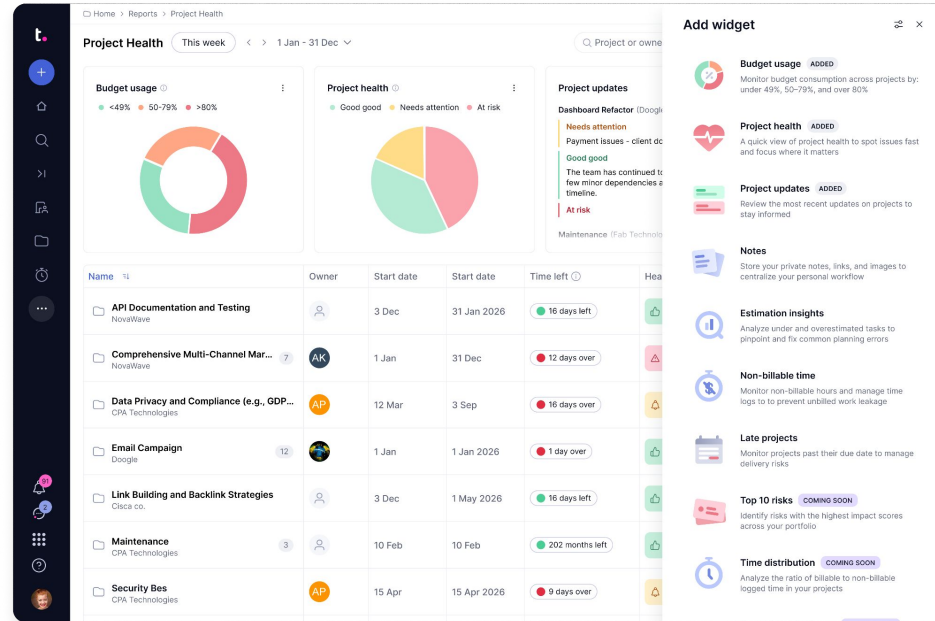
# Project Health Insights

Gain deeper visibility into your projects with a brand-new Insights Panel in the Project Health Report!

Why you'll love it:

- Add widgets for estimation insights, budget usage, time distribution, and more
- Customize widgets with visualizations and threshold-based colors
- View key insights layered on top of your existing Project Health Report

\*\*Widget availability based on subscription plan.



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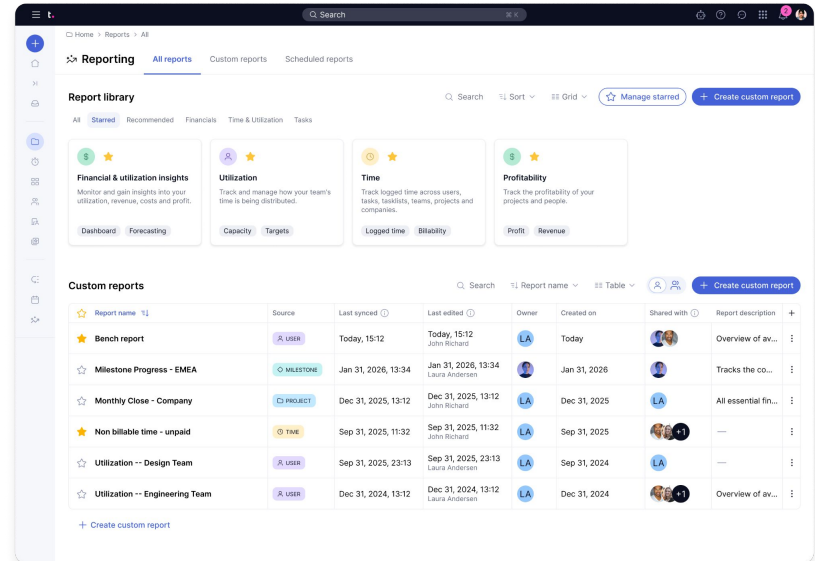
Status:  Live  Coming Soon

# Gallery updates

An uplifted UX and UI for the Reports gallery, bringing a smoother experience alongside some genuinely valuable feature additions.

Why you'll love it:

- Duplicate any pre-canned report as a Custom Report — add or remove columns, apply filters, and save your own version (a huge time-to-value win for Custom Reports!)
- Star your favorite reports for quick and easy access
- Switch between a new grid AND table layout to suit how you work
- Find everything you've built in a dedicated Custom Reports tab



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Status:  Live  Coming Soon



Q2+

**Coming  
soon**



## **Early access:**

- Assign Roles to tasks



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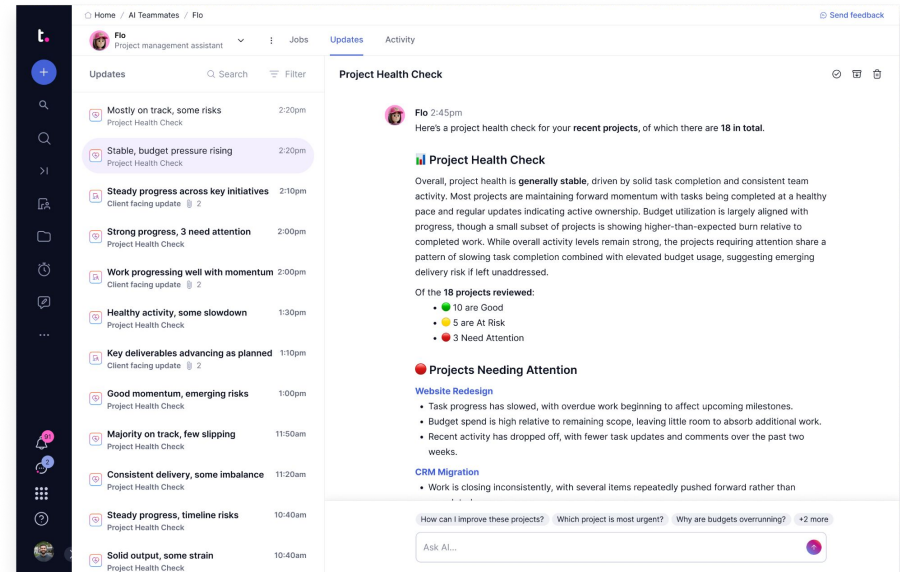
# TeamworkAI

# AI Teammates: Multi-channel updates

Today, every AI Teammate output lands in a single, blended stream—making it hard to find, read, or act on what matters. Soon, each job instance will have its own dedicated channel.

Why you'll love it:

- Dedicated channels per job instance for easier search and readability
- Have your AI Teammates take contextual action on outputs with point-and-click and/or chat-initiated follow-ups
- Kick off next steps right where the output lands, without context switching



Deliver

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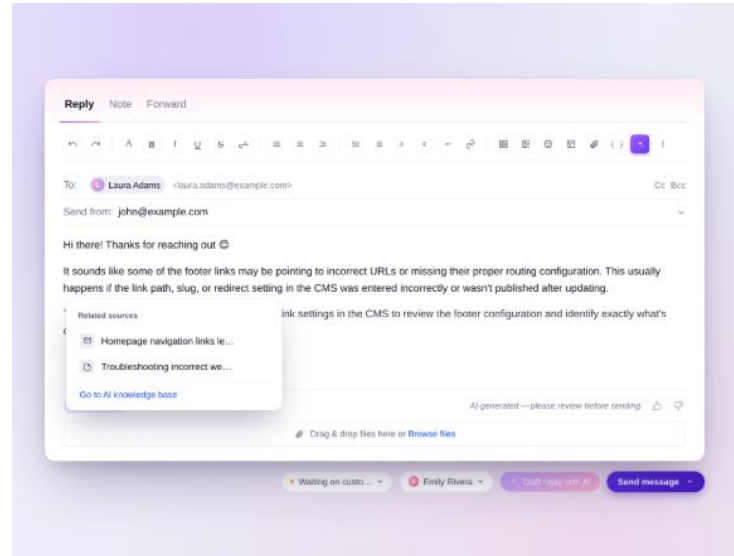
Status:  Live  Coming Soon

# Draft ticket responses with AI

Securely connecting your help docs, public policy links, and even your history of resolved tickets, our AI Teammate will generate high-context, accurate drafts instantly.

## Why you'll love it

- No more digging through tabs. The AI automatically scrapes your help centers and past resolved tickets to draft a response that's grounded in your actual business data
- Accuracy is paramount. Your agents get a fully editable draft and can see the exact source links used by the AI, ensuring every reply is verified and personalized before it hits the customer's inbox



Status:  Live  Coming Soon



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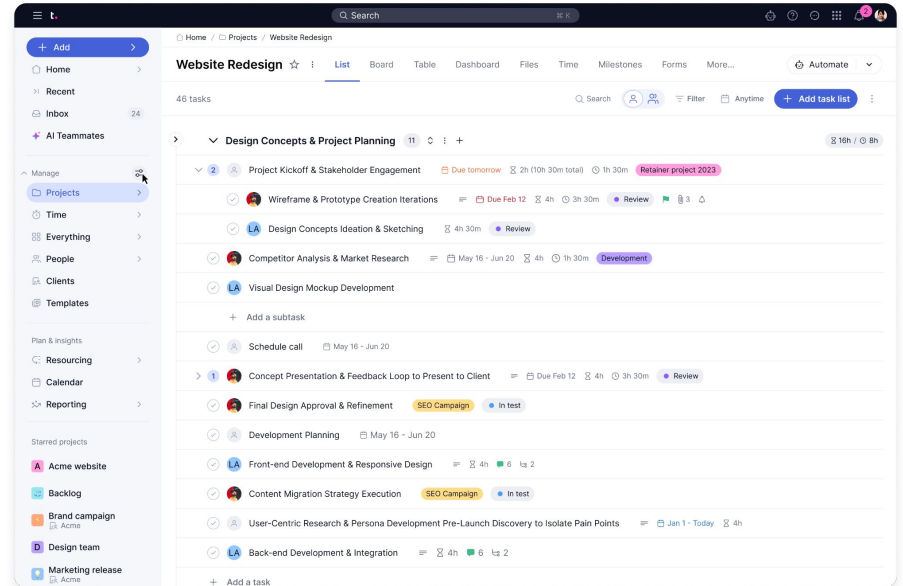
# Manage client work

# Navigation updates

A simpler, more focused navigation experience to get you where you need to go faster.

Why you'll love it:

- A streamlined UI that surfaces what matters most, with navigation organized around the things you come to Teamwork.com to do
- Customize your sidebar to fit your workflow - keep key items visible, move others to the *More* menu, or turn them off completely
- Quicker access to recent work, active tasks/projects, and information you use every day



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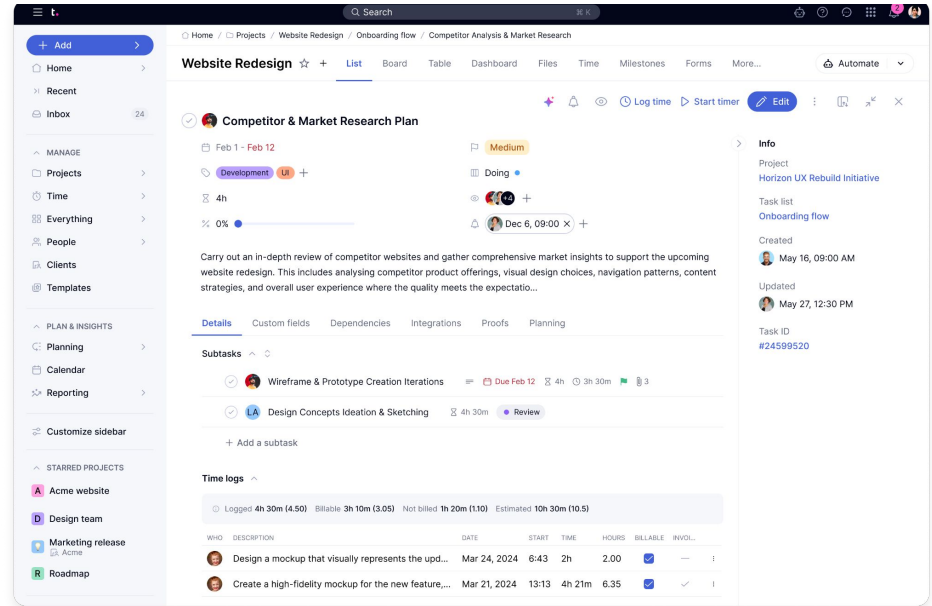
Status:  Live  Coming Soon

# Improved Task Details layout

A cleaner Task Details experience that helps you focus on the work, not the UI.

Why you'll love it:

- More intuitive experience that's faster to use and simpler for new teammates to learn
- Key task details are shown upfront with extra information tucked away until you need it
- A clearer layout, better spacing, and improved text make tasks easier to read at a glance



Deliver

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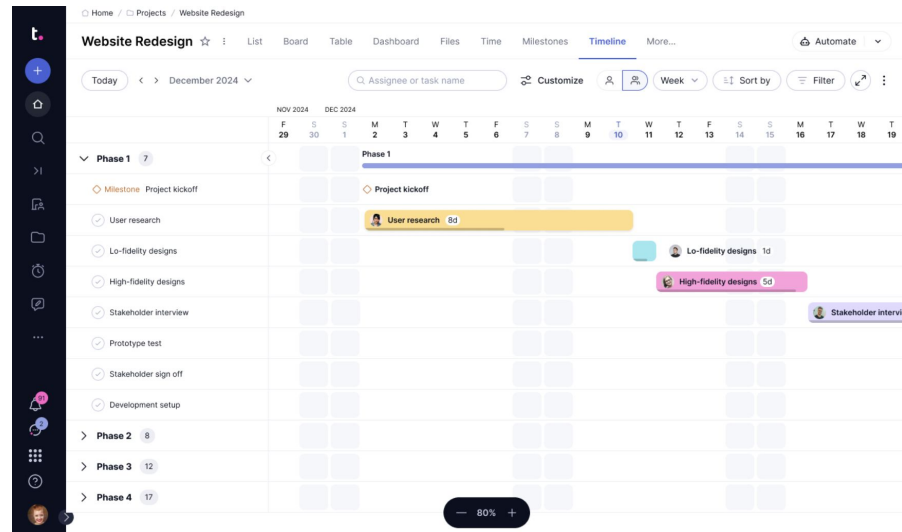
Status:  Live  Coming Soon

# Timeline View

A modern, reliable, and visual project view that makes it easier than ever to see your tasks, milestones, and dependencies at a glance.

Why you'll love it:

- See how tasks and milestones connect over time.
- Spot and add dependencies to plan smarter.
- Easily adjust schedules with simple drag-and-drop controls.
- Critical path for more accurate planning
- Customise how you view your tasks with colour customisation, gridlines and milestone visibility.



Deliver

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Status:  Live  Coming Soon



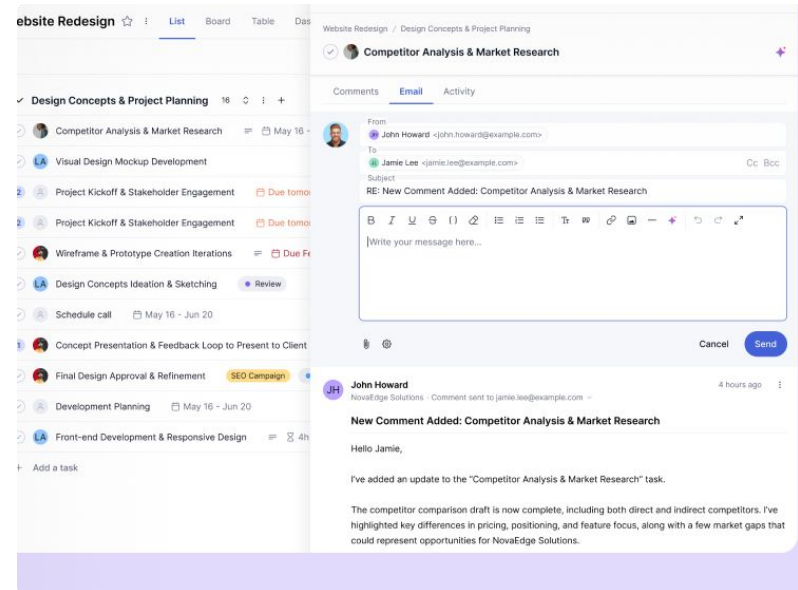
# Task email integration

Email clients directly from the task with an all new email integration for Outlook and Gmail!

Why you'll love it:

- Controlled at a site level
- Keep email and internal comments separate to enhance existing workflows
- Bring visibility to client communication regarding the task, keeping your whole team aligned

Status:  Live  Coming Soon

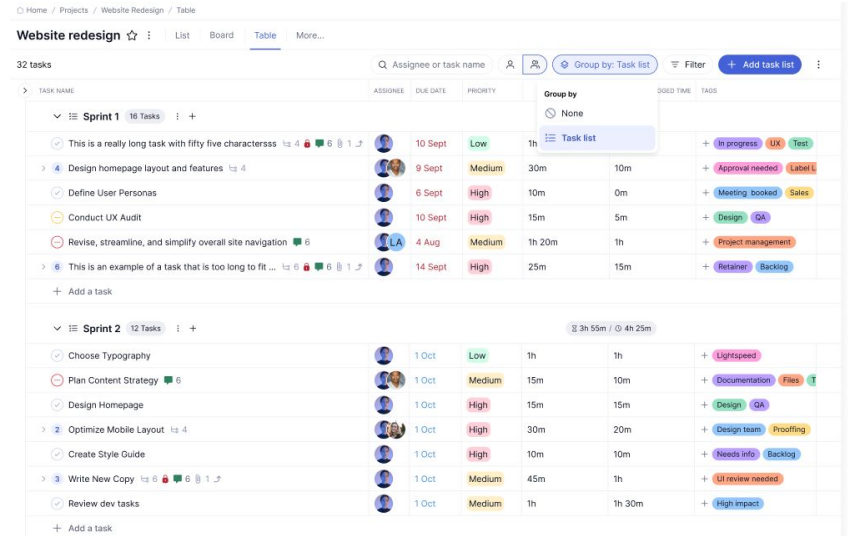


# New Table View experience (Project)

An enhanced Table View within individual **Projects** - bringing the same power and flexibility from Everything into a more focused, project-level experience.

Why you'll love it:

- Create and update tasks directly in the table without losing context
- Delivers a consistent experience across views with alignment to List and Everything Tables
- Offers flexible ways to view work with “Group by” options that fit your workflow



The screenshot displays a project table view for 'Website redesign'. The table is organized into sprints. The first sprint, 'Sprint 1', contains 16 tasks. The second sprint, 'Sprint 2', contains 12 tasks. Each task row includes a task name, assignee, due date, priority, and a 'Group by' dropdown menu. The 'Group by' menu is open, showing options like 'None' and 'Task list'. The table also includes columns for 'ASSIGNEE', 'DUE DATE', 'PRIORITY', 'GROUP BY', 'DUE TIME', and 'TAGS'. The interface includes search, filter, and 'Add task list' buttons.

TASK NAME	ASSIGNEE	DUE DATE	PRIORITY	GROUP BY	DUE TIME	TAGS	
<b>Sprint 1</b> 16 Tasks							
This is a really long task with fifty five characters	[Avatar]	10 Sept	Low	None	1h	[In progress] [UX] [Test]	
Design homepage layout and features	[Avatar]	9 Sept	Medium	Task list	30m	10m	[Approval needed] [Label L]
Define User Personas	[Avatar]	6 Sept	High		10m	0m	[Meeting booked] [Sales]
Conduct UX Audit	[Avatar]	10 Sept	High		15m	5m	[Design] [QA]
Revise, streamline, and simplify overall site navigation	[Avatar]	4 Aug	Medium		1h 20m	1h	[Project management]
This is an example of a task that is too long to fit ...	[Avatar]	14 Sept	High		25m	15m	[Retainer] [Backlog]
<b>Sprint 2</b> 12 Tasks							
Choose Typography	[Avatar]	1 Oct	Low		1h	1h	[Lightspeed]
Plan Content Strategy	[Avatar]	1 Oct	Medium		15m	10m	[Documentation] [Files]
Design Homepage	[Avatar]	1 Oct	High		15m	15m	[Design] [QA]
Optimize Mobile Layout	[Avatar]	1 Oct	High		30m	20m	[Design team] [Proofing]
Create Style Guide	[Avatar]	1 Oct	High		10m	10m	[Needs info] [Backlog]
Write New Copy	[Avatar]	1 Oct	Medium		45m	1h	[UI review needed]
Review dev tasks	[Avatar]	1 Oct	Medium		1h	1h 30m	[High impact]

Deliver

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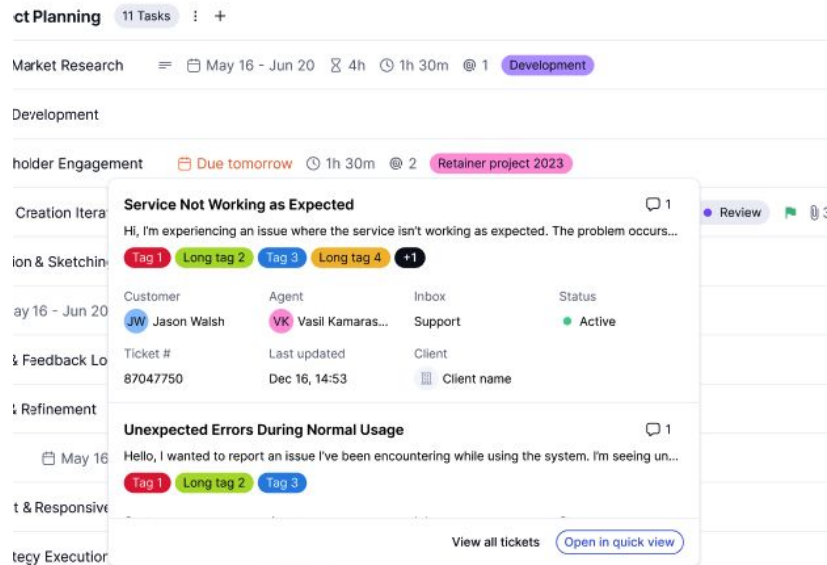
Status:  Live  Coming Soon

# Improved view of tickets in tasks

We're improving how tickets are surfaced in both Task Details and in task list views.

Why you'll love it:

- Include more of the information you need at a glance from the task list view
- Return ticket IDs and number of tickets—including in Task List Reports to help you prioritize faster
- Improve visibility of multiple tickets attached to a task so you can quickly see the status of each, and take action faster



The screenshot shows a task list interface. A task titled "Service Not Working as Expected" is highlighted, and a modal window is open over it. The modal displays the following information:

- Service Not Working as Expected** (with 1 comment)
- Message: "Hi, I'm experiencing an issue where the service isn't working as expected. The problem occurs..."
- Tags: Tag 1, Long tag 2, Tag 3, Long tag 4, +1
- Customer: JW Jason Walsh
- Agent: VK Vasil Kamaras...
- Inbox: Support
- Status: Active
- Ticket #: 87047750
- Last updated: Dec 16, 14:53
- Client: Client name
- Unexpected Errors During Normal Usage** (with 1 comment)
- Message: "Hello, I wanted to report an issue I've been encountering while using the system. I'm seeing un..."
- Tags: Tag 1, Long tag 2, Tag 3
- Buttons: "View all tickets" and "Open in quick view"

Deliver

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Status:  Live  Coming Soon



Q2+ 2026

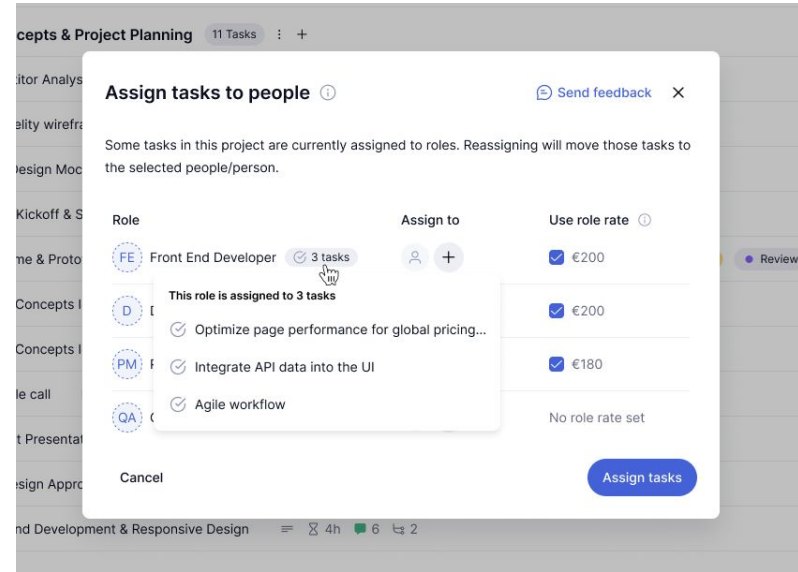
# Plan resources

# Role-based task assignment

Assign project tasks to roles. This allows teams to plan, and schedule work before staffing is confirmed, then seamlessly reassign to real users.

Why you'll love it:

- **Plan earlier with confidence:** Build full project plans without waiting for final staffing.
- **Quote and budget more accurately:** Use role-based rates for reliable early-stage pricing.
- **Reduce rework:** Easily reassign work from roles to real users via bulk task reassignment.



Deliver

Grow

Scale

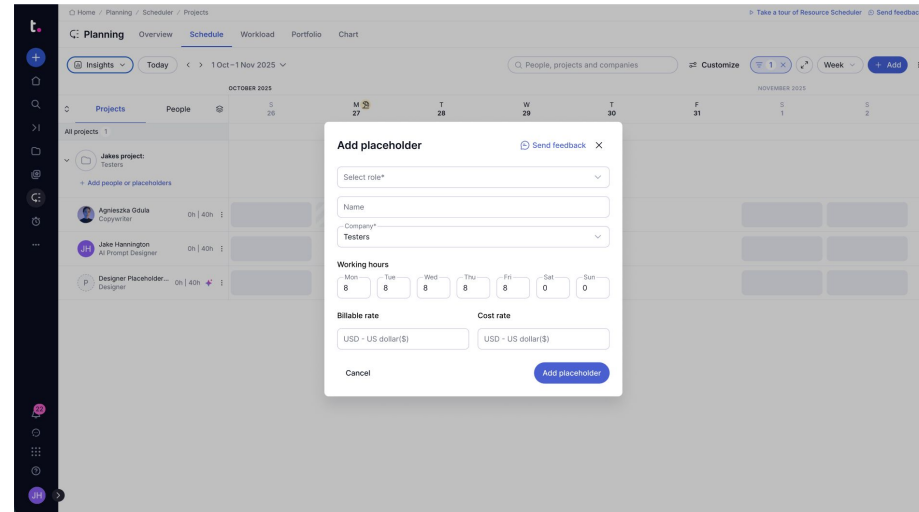
Status:  Live  Coming Soon

# Placeholder users

Placeholders are getting an upgrade to reflect real world scheduling!

Why you'll love it:

- Add the same placeholder across multiple projects
- Plan future hires more realistically
- Model project schedules before roles are filled
- Identify true headcount gaps earlier
- Schedule with working hours, cost & billable rates



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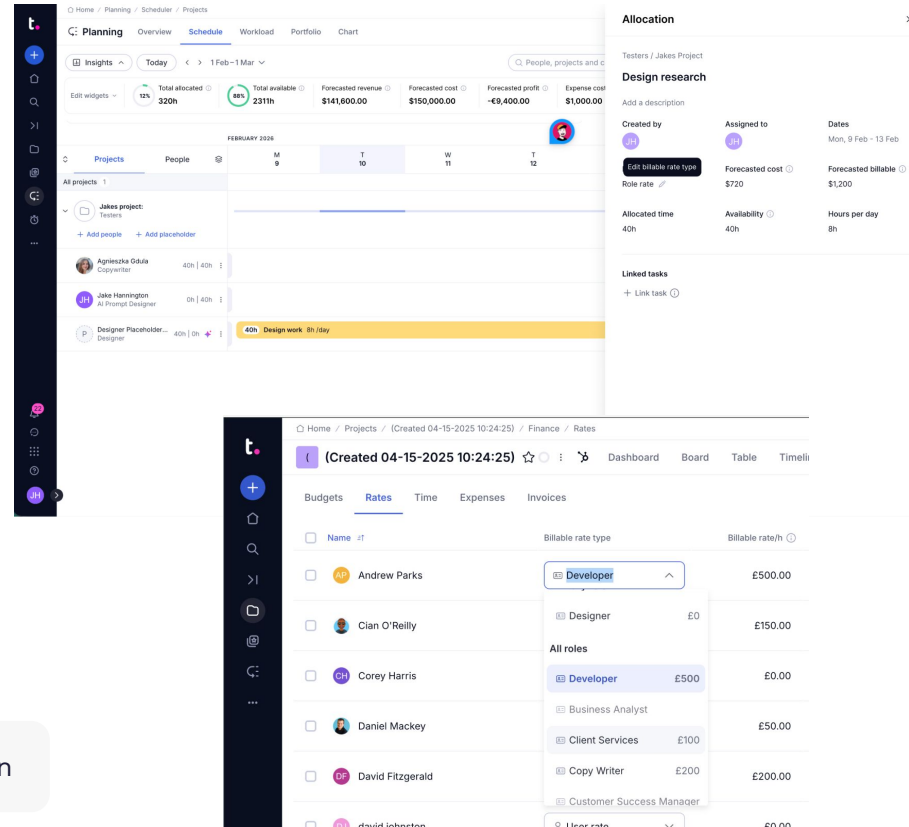
Status:  Live  Coming Soon

# Multiple Roles per user

Let your team wear different hats...per project.

Why you'll love it:

- Assign a different role per project
- Billable rates follow that role
- Allows for reflect real-world team flexibility
- Less work: No more duplicate users or manual rate overrides



The image displays two screenshots of the Teamwork.com interface. The top screenshot shows a project planning view for 'Jakes project' in February 2024. It features a Gantt chart and a table of resource allocation. The table shows three users: Agnieszka Gdula (Copywriter), Jake Harrington (AI Prompt Designer), and Designer Placeholder (Designer). A task '40h Design work' is assigned to the Designer Placeholder role. The right sidebar shows the 'Allocation' panel for the 'Design research' task, with a dropdown menu for 'Edit billable rate type' set to 'Designer'. The bottom screenshot shows the 'Rates' configuration page for a user. It lists various roles and their corresponding billable rates per hour. The 'Developer' role is selected, showing a rate of £500.00. Other roles include Designer (£150.00), Business Analyst (£50.00), Client Services (£100.00), Copy Writer (£200.00), Customer Success Manager, and User rate (£0.00).

Name	Billable rate type	Billable rate/h
Andrew Parks	Developer	£500.00
Cian O'Reilly	Designer	£150.00
Corey Harris	Developer	£0.00
Daniel Mackey	Business Analyst	£50.00
David Fitzgerald	Client Services	£100.00
david johnston	Copy Writer	£200.00
	Customer Success Manager	
	User rate	£0.00

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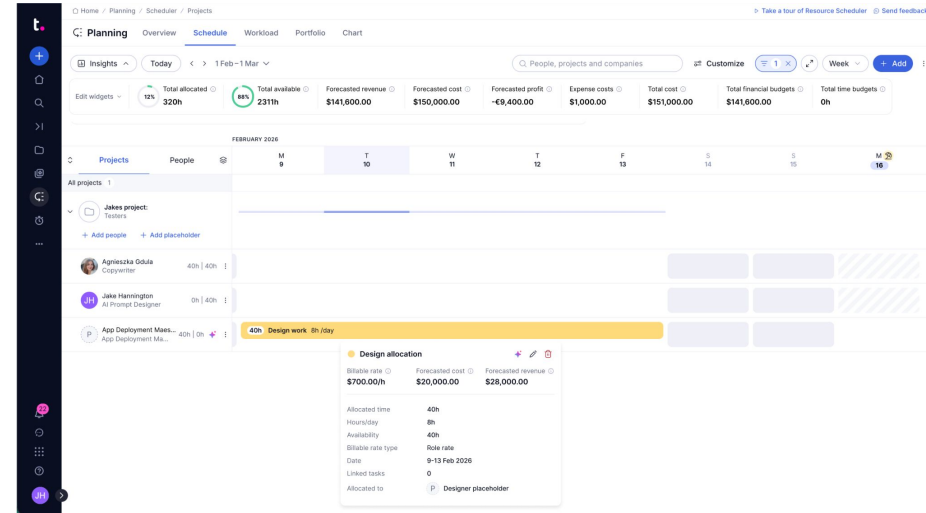
Status:  Live  Coming Soon

# Roles Based Rates in Scheduler

Understand financial impact while you schedule.

Why you'll love it:

- Role rates reflected directly in the Insights bar
- Forecasted cost and revenue shown per allocation for both users and placeholders
- See financial impact from day one, even when planning tentatively using templates



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Status:  Live  Coming Soon

# Financial insights in Scheduler

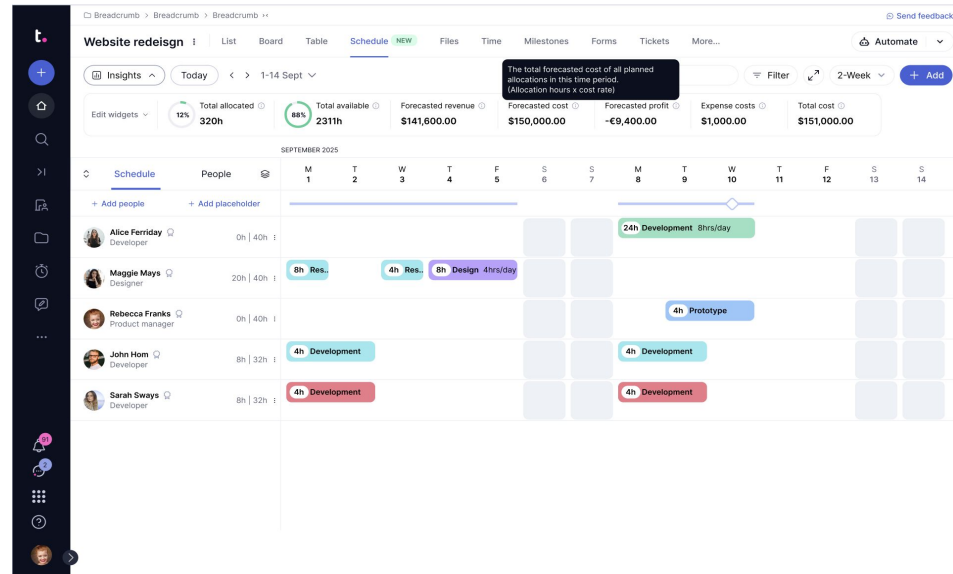
Minimise resource allocation and profit impact while scheduling

Why you'll love it:

4 new widgets inside a customisable insights bar

- Forecasted cost
- Expense costs
- Total cost
- Forecasted profit

No switching views, financial visibility directly in your planning workflow!



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Scale

Status:  Live  Coming Soon



Q2+ 2026

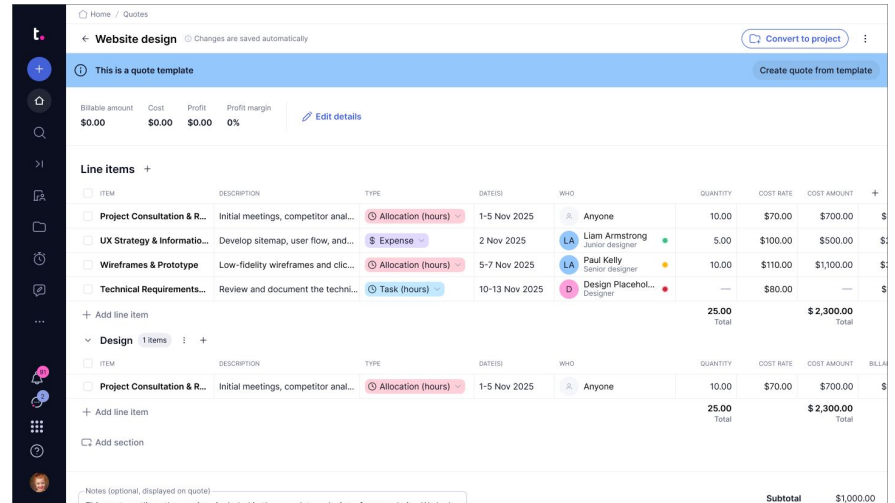
# **Make projects profitable**

# Quote templates

Save your most-used quotes as reusable templates or create new quote templates from scratch. Pull one off the shelf and only tweak the minor details.

Why you'll love it:

- Build a library of reusable quotes for common services
- Spin up a new quote from a template in seconds, then edit only what's changed
- Keep pricing, line items, and terms consistent across your company



Home / Quotes

Website design Changes are saved automatically Convert to project

This is a quote template Create quote from template

Billable amount	Cost	Profit	Profit margin	
\$0.00	\$0.00	\$0.00	0%	<a href="#">Edit details</a>

Line items +

ITEM	DESCRIPTION	TYPE	DATE(S)	WHO	QUANTITY	COST RATE	COST AMOUNT		
<input type="checkbox"/>	Project Consultation & R...	Initial meetings, competitor anal...	<span>Allocation (hours)</span>	1-5 Nov 2025	Anyone	10.00	\$70.00	\$700.00	\$
<input type="checkbox"/>	UX Strategy & Informati...	Develop sitemap, user flow, and...	<span>Expense</span>	2 Nov 2025	Liam Armstrong Junior Designer	5.00	\$100.00	\$500.00	\$
<input type="checkbox"/>	Wireframes & Prototype	Low-fidelity wireframes and clic...	<span>Allocation (hours)</span>	5-7 Nov 2025	Paul Kelly Senior Designer	10.00	\$110.00	\$1,100.00	\$
<input type="checkbox"/>	Technical Requirements...	Review and document the techn...	<span>Task (hours)</span>	10-13 Nov 2025	Design Placehol...	—	\$80.00	—	\$
+ Add line item						25.00		\$2,300.00	
						Total		Total	
Design 1 items +									
ITEM	DESCRIPTION	TYPE	DATE(S)	WHO	QUANTITY	COST RATE	COST AMOUNT	BILLA	
<input type="checkbox"/>	Project Consultation & R...	Initial meetings, competitor anal...	<span>Allocation (hours)</span>	1-5 Nov 2025	Anyone	10.00	\$70.00	\$700.00	\$
+ Add line item						25.00		\$2,300.00	
						Total		Total	
+ Add section									
Notes (optional, displayed on quote)									
								Subtotal	\$1,000.00

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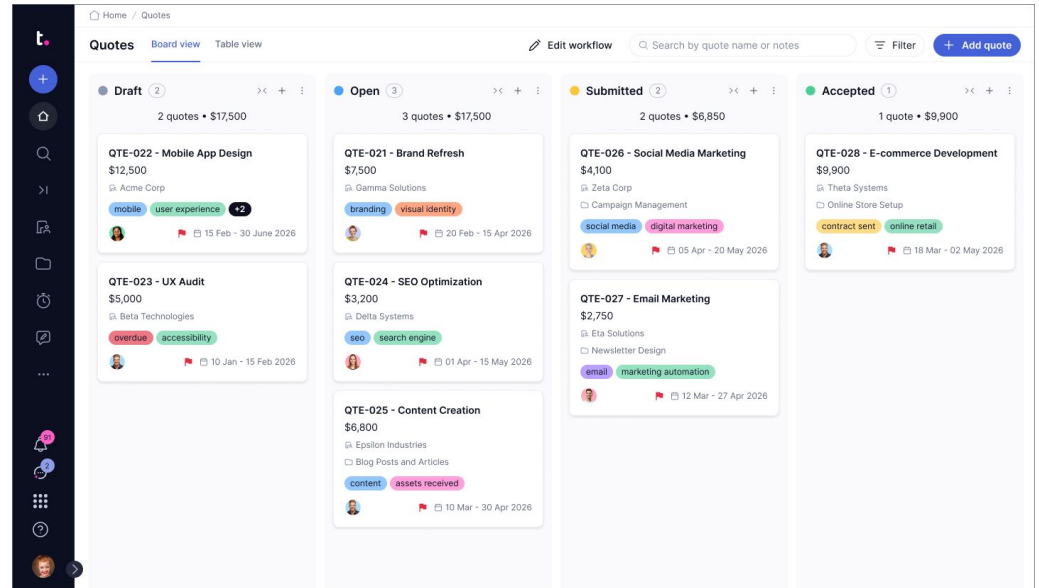
Status:  Live  Coming Soon

# New Quote views

New ways to view your quotes are coming alongside the existing list view. You'll soon be able to zoom out across clients and track quotes pipeline-style.

Why you'll love it:

- **Global view:** Every quote across every client in one place, for portfolio-level visibility
- **Board view:** A Kanban-style pipeline to track quotes through their stages at a glance



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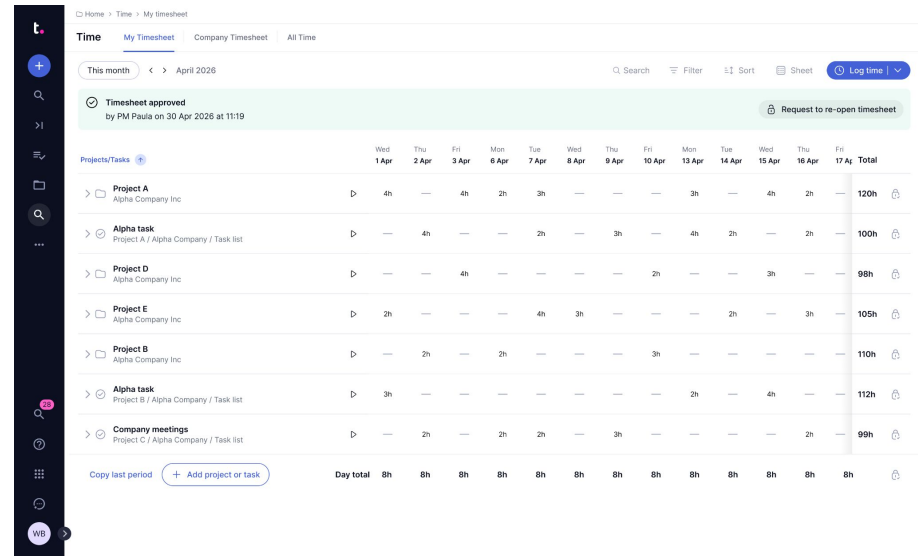
Status:  Live  Coming Soon

# Monthly time approvals

Until now, timesheets could only be reviewed, approved, and locked on a weekly cadence. For teams that run on monthly billing or reporting cycles, that meant extra work reconciling four weekly approvals into one monthly view.

Why you'll love it:

- Review, approve, and lock timesheets on a monthly cadence
- Align approvals with monthly billing, payroll, or client reporting cycles
- Cut admin overhead for finance and ops teams managing time at month-end



Time My Timesheet Company Timesheet All Time

This month < > April 2026

Timesheet approved by PM Paula on 30 Apr 2026 at 11:19

Request to re-open timesheet

Projects/Tasks	Wed 1 Apr	Thu 2 Apr	Fri 3 Apr	Mon 6 Apr	Tue 7 Apr	Wed 8 Apr	Thu 9 Apr	Fri 10 Apr	Mon 13 Apr	Tue 14 Apr	Wed 15 Apr	Thu 16 Apr	Fri 17 Apr	Total
Project A Alpha Company Inc	4h	—	4h	2h	3h	—	—	—	3h	—	4h	2h	—	120h
Alpha task Project A / Alpha Company / Task list	—	4h	—	—	2h	—	3h	—	4h	2h	—	2h	—	100h
Project D Alpha Company Inc	—	—	4h	—	—	—	—	2h	—	—	3h	—	—	98h
Project E Alpha Company Inc	2h	—	—	—	4h	3h	—	—	—	2h	—	3h	—	105h
Project B Alpha Company Inc	—	2h	—	2h	—	—	—	3h	—	—	—	—	—	110h
Alpha task Project B / Alpha Company / Task list	3h	—	—	—	—	—	—	—	2h	—	4h	—	—	112h
Company meetings Project C / Alpha Company / Task list	—	2h	—	2h	2h	—	3h	—	—	—	—	2h	—	99h
Copy last period + Add project or task	Day total	8h	8h	8h	8h	8h	8h	8h	8h	8h	8h	8h	8h	8h

Deliver

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Scale

Status:  Live  Coming Soon



Q2+ 2026

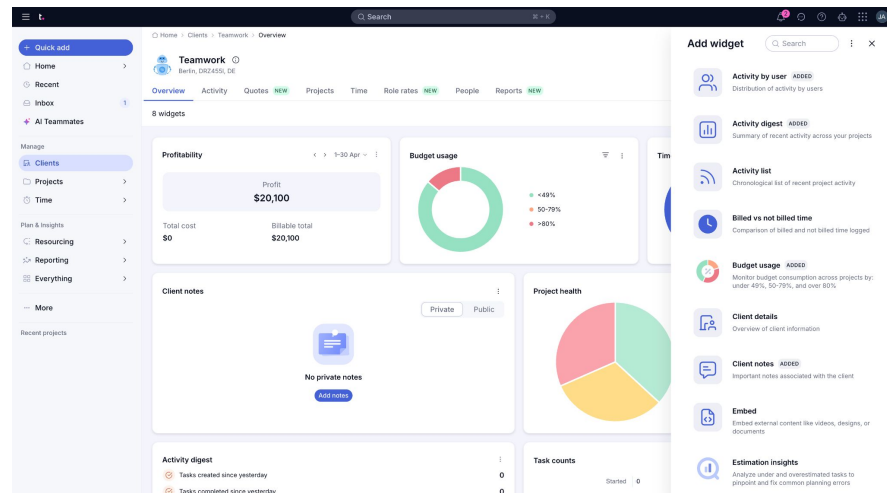
# Track performance

# Client overview dashboard

Understand client performance at a glance with a customizable dashboard in the Client Overview area.

Why you'll love it:

- Fully customizable dashboard, allowing to you to surface only the insights you need
- Chart layout options enable you to choose the correct layout for your data (table, pie chart, donut chart, etc.)
- Resizable widgets, giving you the power to build exactly the view you want!
- In-context drill downs — no more clicking around to get the info you need



Deliver

Grow

Scale

Status:  Live  Coming Soon



# Custom dashboards

Build a dashboard on a blank canvas, allowing you to build a landing page with the info you need.

Why you'll love it:

- Each team member can create a dashboard with the information they need to get their work done
- Identify issues, risks, actions, and blockers at a glance by surfacing the information you need in one place
- Contextual drill-downs to go from insight to action on the spot
- Choose from a wide-ranging library of widgets across many data points

Deliver

Grow

Scale

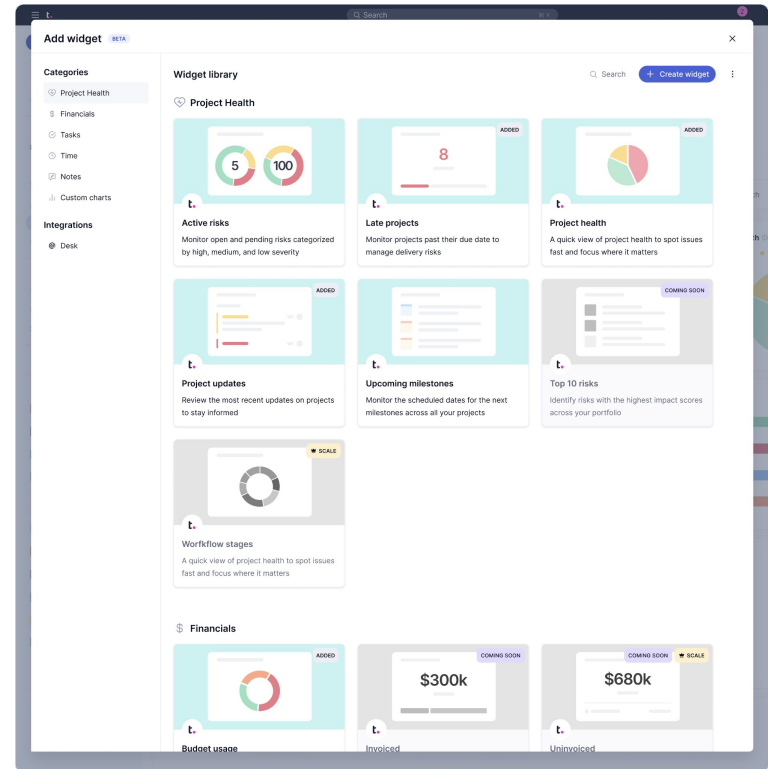
Status:



Live



Coming Soon



A thick, light pink decorative swirl or ribbon-like graphic that starts from the left edge and curves upwards and to the right, ending near the top center of the page.

**And more**



## **Early access:**

- Assign Roles to tasks



**Get in touch with us!**

# Upcoming Webinars

Live Webinar

May 7

8:00am PT / 11:00am ET / 4:00pm GMT+1

## Work smarter with TeamworkAI



Stephen O'Neill  
Group Product Manager



Renee Demaree  
Customer Success Manager



Live Webinar

May 28

8:00am PT / 11:00am ET / 4:00pm GMT+1

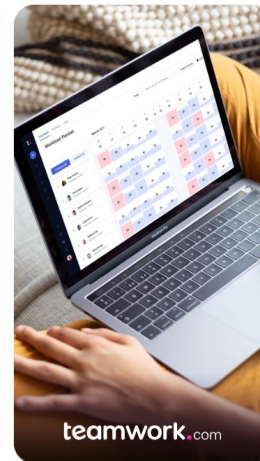
## 5 Tips + Tricks: Resource Management



Joff Dunleavy  
Customer Success Manager



Helen Chen  
Customer Education Manager



# Upcoming Webinars

**LIVE** MASTERCLASS

## YOUR CLIENT'S BUDGET IS SHRINKING

How to keep the work, without slashing prices

A promotional graphic for a live masterclass. At the top, it says "LIVE MASTERCLASS" with a pink dot next to "LIVE". Below that is the main title "YOUR CLIENT'S BUDGET IS SHRINKING" in large, bold letters, with "SHRINKING" in pink. Underneath the title is the subtitle "How to keep the work, without slashing prices". At the bottom, there are three headshots of the speakers: a woman with blonde hair wearing a patterned shirt, a man with grey hair wearing a dark suit, and a man with dark hair wearing a black t-shirt. The background of the graphic is light yellow with faint, stylized fingerprint patterns.

A thick, light pink decorative swirl starts from the left edge of the slide and curves upwards and to the right, ending near the top center.

# Q & A

# Thank You!

