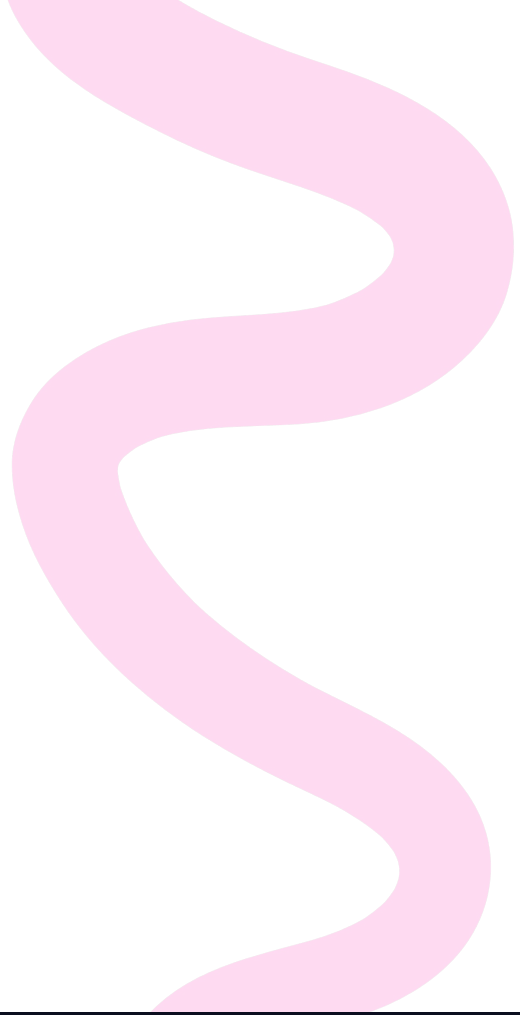


teamwork.com

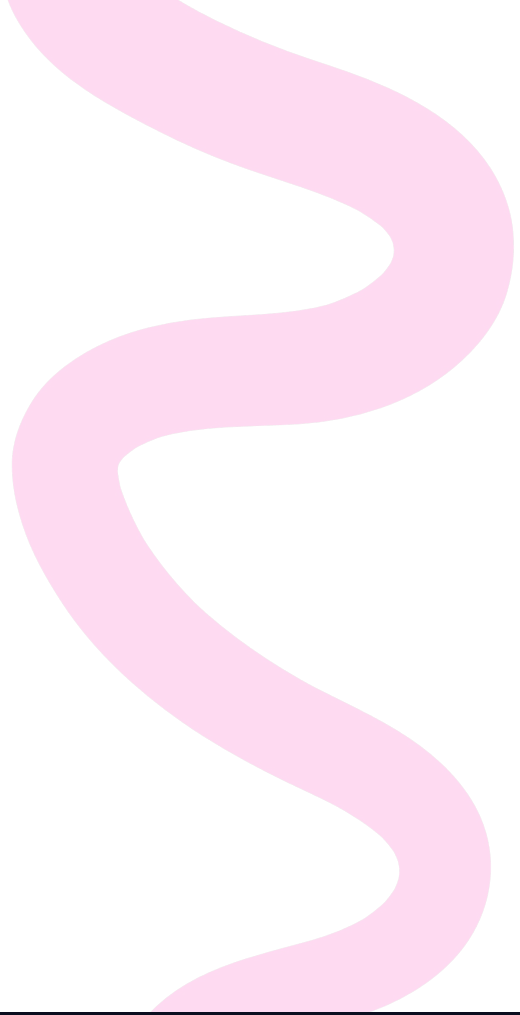
Product Roadmap

Q4 2025

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Q3 2025

Recently released

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Q3 2025

TeamworkAI

AI Comment Summarization

With just one click, instantly distill lengthy comment threads into concise, easy-to-digest summaries. Now with improved prompts and time filters for easier summarization!

Why you'll love it:

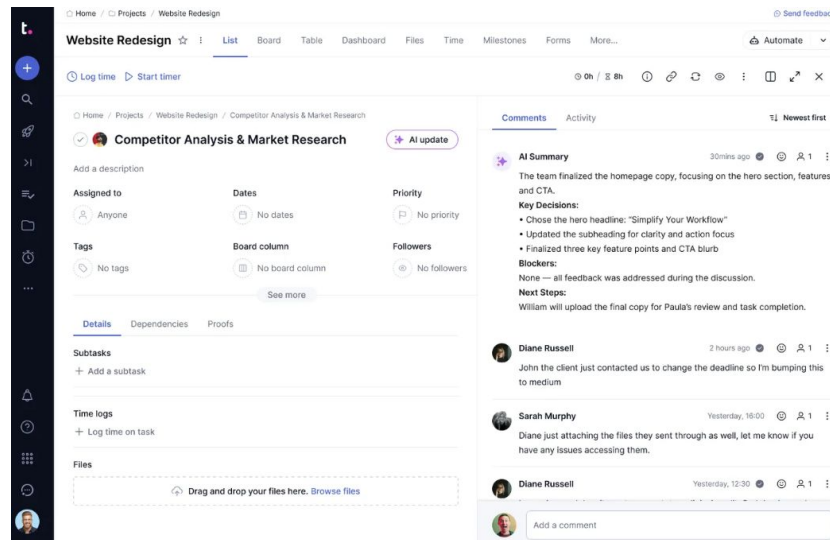
- Cut through the clutter in complex discussions
- Get up to speed on the latest thread updates in seconds
- Keep everyone aligned without the back-and-forth
- Ability to keep summaries private as your own personal recap

Deliver

Grow

Scale

Status:  Live  Coming Soon



✨ AI Filter Assistant

Brings natural language filtering to Task List View, making it easier and faster to find exactly what you need with simple text input. Now with an improved UX!

Why you'll love it:

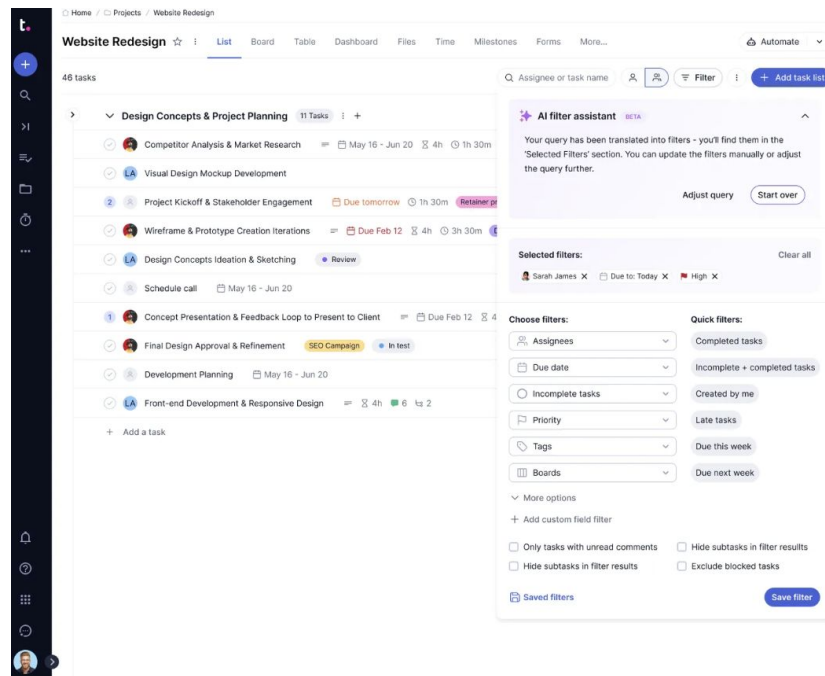
- Cuts search time by removing clicks, dropdowns, and multi-step filters
- Speeds up onboarding, especially for new and occasional users
- Increases productivity by keeping you in your flow, surfacing the work that matters most

Deliver

Grow

Scale

Status:  Live  Coming Soon

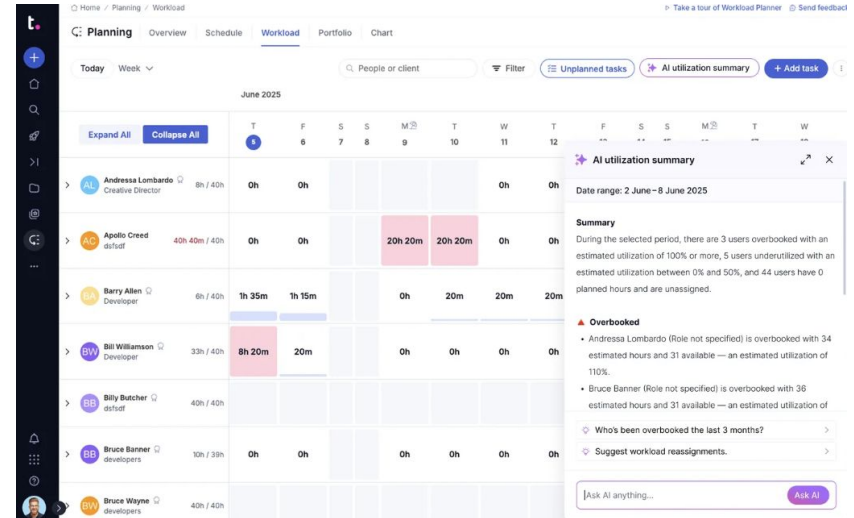


✨ AI Utilization Summary

Immediately discover which team members are over-capacity, underused, or unassigned.

Why you'll love it:

- Reassign work more effectively
- Spot gaps before they cause delays
- Optimize your resources for higher profitability



Deliver

Grow

Scale

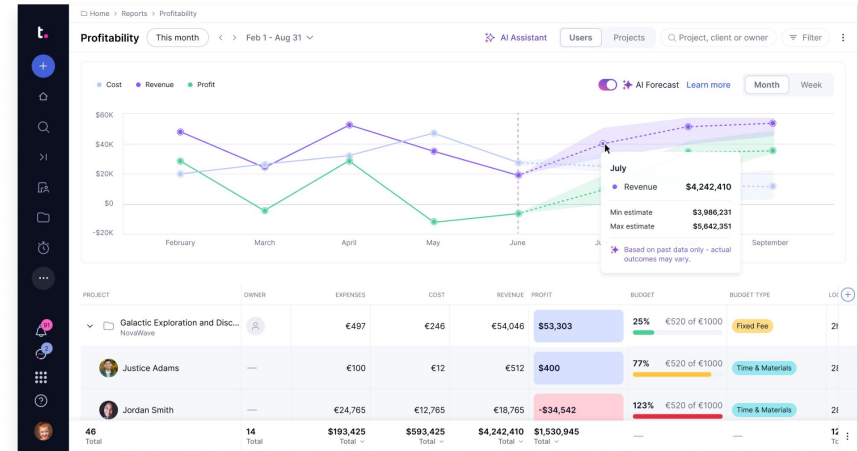
Status: ● Live ○ Coming Soon

✨ AI Profitability Forecaster

Take the guesswork out of planning with AI-generated forecasts for revenue, cost, and profit within the Profitability Report—all based on your historical data.

Why you'll love it:

- Anticipate what's ahead, whether you're aiming to grow or stay on track
- Spot projected trends in revenue, cost, and profit so you're never caught off guard
- Act early with AI-powered insights into upcoming risks and opportunities



Deliver

Grow

Scale

Status: ● Live ○ Coming Soon

✨ AI Project Wizard

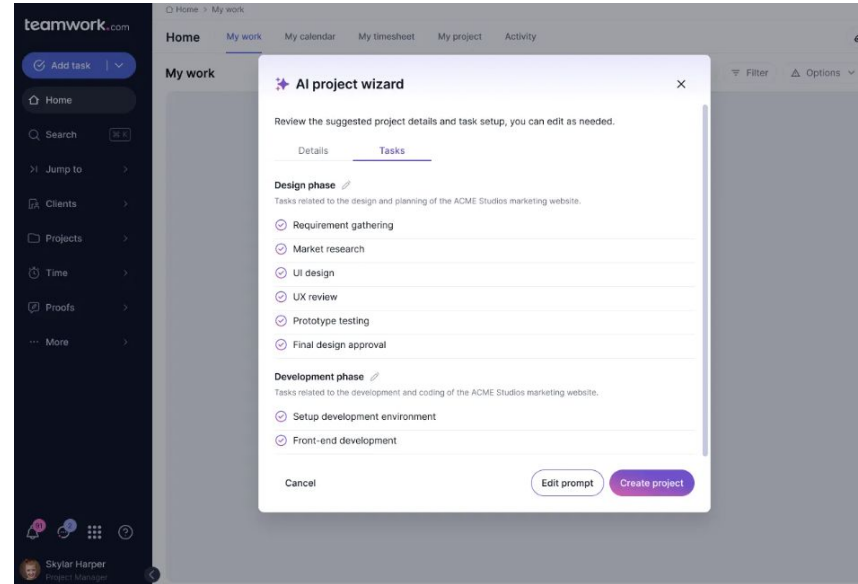
Automatically generate a new project with details like name, description, and tags—all based on a few prompts.

Why you'll love it:

- Simply paste in the details of your project brief
- From there, TeamworkAI puts together the project structure, including tasks and task lists
- Stay in control by reviewing and editing any details as needed

Deliver**Grow****Scale**

Status: ☒ Live ☐ Coming Soon

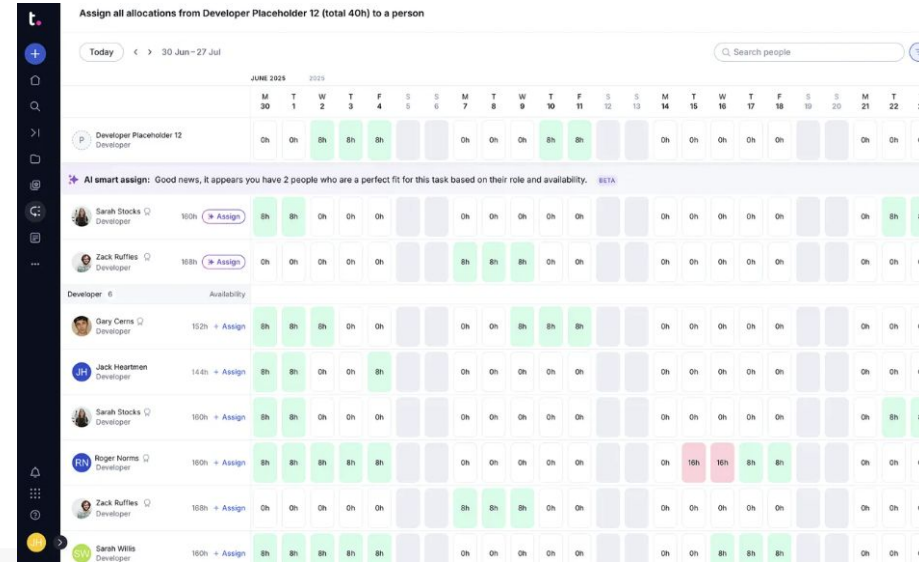


✨ AI Smart Scheduler

Transfer allocations from placeholders to users, then auto-generate tasks associated with those allocations.

Why you'll love it:

- Auto-assign work based on availability, roles, and timelines of allocations to give you the best people for the job in seconds
- Auto-generate tasks based on allocation to instantly populate within the Resource Scheduler
- Reassign work across named users within a project



Deliver

Grow

Scale

Status:  Live  Coming Soon

✨ MCP Server

Connect the Teamwork.com MCP server to your LLM client (like ChatGPT, MS Copilot, or Claude Desktop) to automate actions in Teamwork.com and Teamwork Desk.

Why you'll love it:

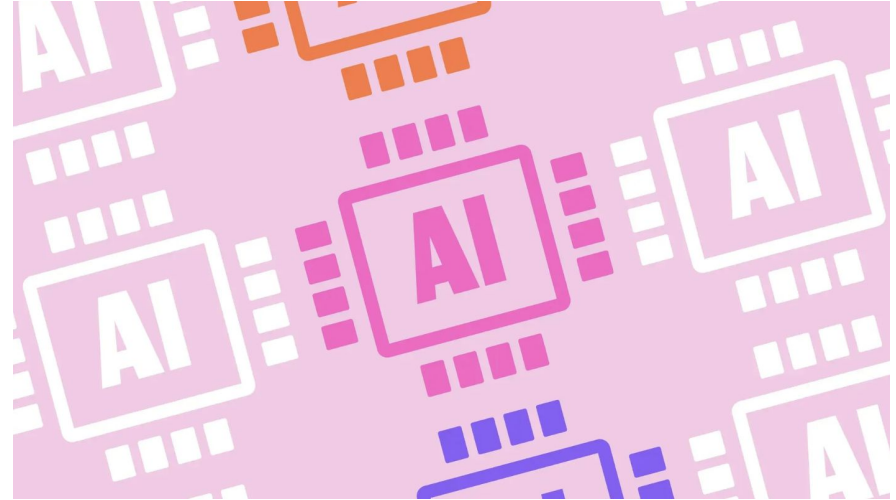
- Acts as a translator between your LLM, helping you interact with Teamwork.com data right where you work
- Lets you perform actions such as:
 - Creating or updating tasks and projects
 - Managing users, teams, and clients
 - Showing Desk tickets that meet specific criteria, plus tailored reporting metrics

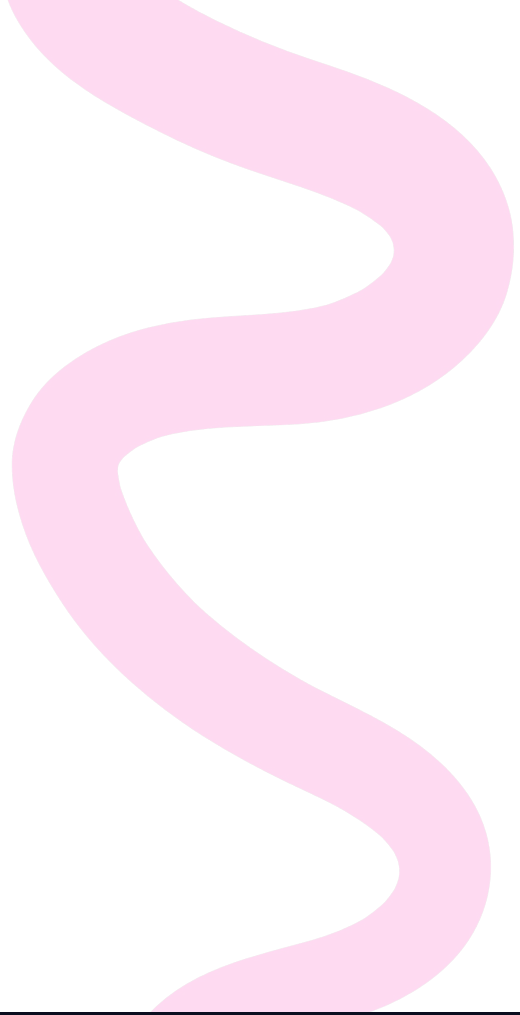
Deliver

Grow

Scale

Status: ☒ Live ☐ Coming Soon



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Q3 2025

Manage client work

Salesforce-Teamwork.com Custom Field Mapping

You can now configure custom field mappings between Salesforce opportunity custom fields and Teamwork.com project custom fields.

Why you'll love it:

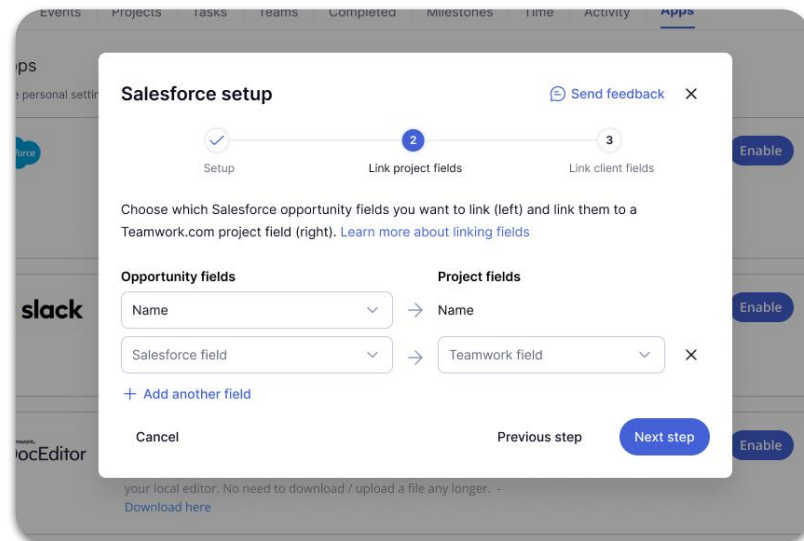
- Gives you greater flexibility and control over how your Salesforce data flows into Teamwork.com projects
- Ensures every project starts with the context you need

Deliver

Grow

Scale

Status:  Live  Coming Soon



Service-Level Agreements (SLAs)

Now you can easily define, track, and meet your client response time commitments, all within Teamwork Desk.

Why you'll love it:

- Never miss a deadline again — define and track SLA targets so your team knows exactly which tickets need attention first
- Deliver a more professional experience – consistent response times mean happier clients and stronger trust
- Stay accountable and transparent – managers and agents can see SLA countdowns and team priorities at a glance

Premium

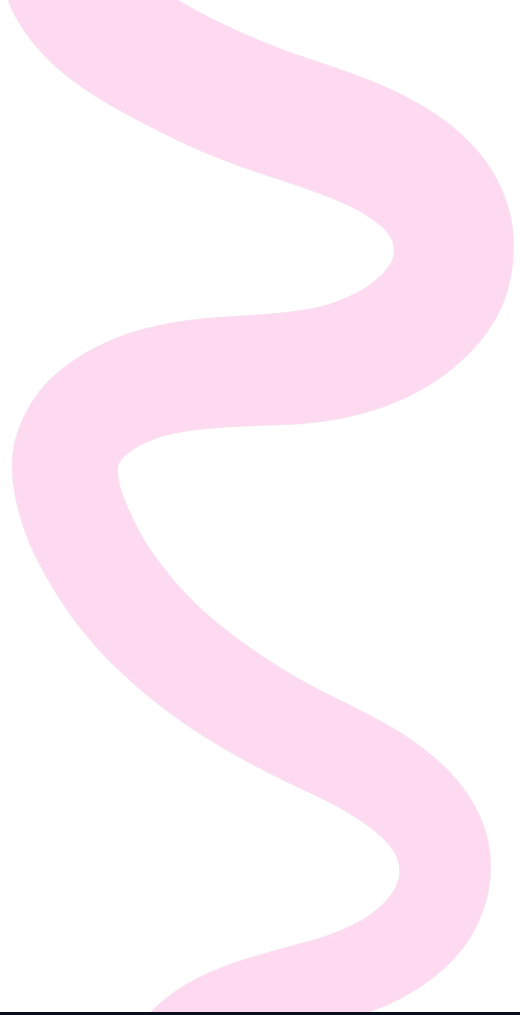
Enterprise

Status: ☒ Live ☐ Coming Soon

3) | Waiting on customer (12) | Closed (28)

Send feedback + New ticket

	ASSIGNED	STATUS	SLA ⌵	ID	CREATED ⊕
on new landing page s on our newly launched landing page are broken.... Link error +1		Active	15m	85764389	14 Oct 1
aign not sending iled email campaign isn't being sent out as expect... Marketing Mail server		Active	30m	85765428	14 Oct 1
rd time on homepage age is taking too long to load. Please optimize the... ng times Bug			First time reply due 14 Oct, 2025 11:30AM Total resolution time due 16 Oct, 2025 11:30AM	85765245	14 Oct 1
wn after plugin update 3 went offline after the latest plugin update. We n... Issue Plugin error		Active	1h 30m	53565428	14 Oct 1
dates not reflecting on live site cent content changes are not appearing on the liv... CMS problem		Active	1h 30m	82895428	14 Oct 1
login issue					

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Q3 2025

Plan resources

Gcal in Planning Views

Your team's commitments are now factored into their availability, giving you a more accurate view of capacity when scheduling work.

Why you'll love it:

- Meetings and OOO time from Gcal are now reflected in real time
- Avoid double-booking by seeing the full picture of your team's capacity
- Plan confidently with availability that actually reflects real-world capacity



Deliver

Grow

Scale

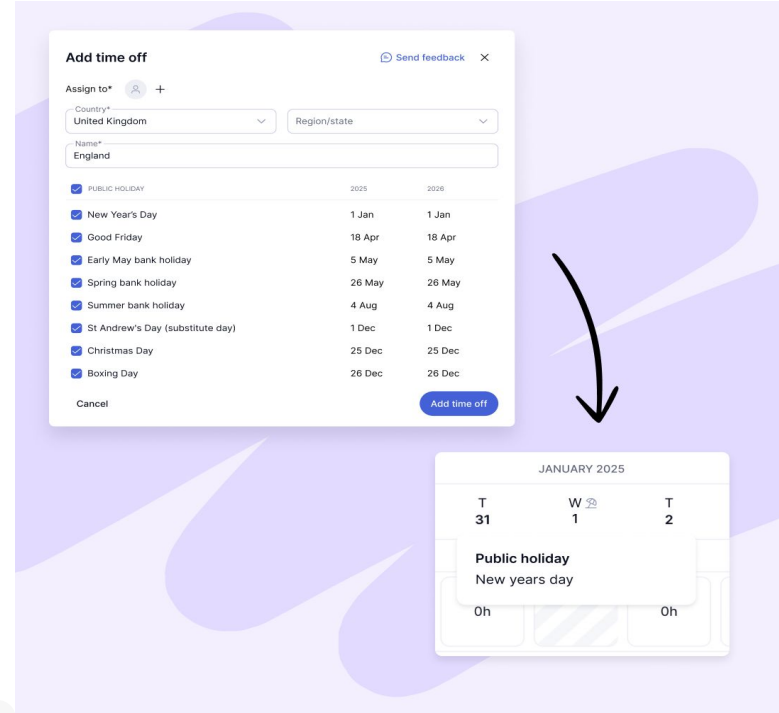
Status: ☒ Live ☐ Coming Soon

Time Off

Managing public holidays for your entire company just got easier!

Why you'll love it:

- Time off is automatically factored into team availability, helping you plan work around real time off
- Apply regional holidays to the whole company or to specific teams based on their location

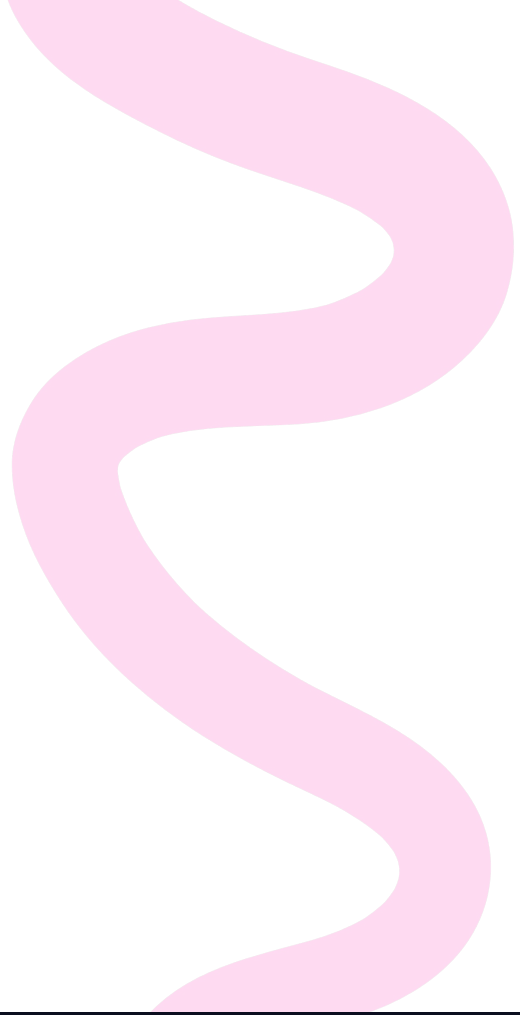


Deliver

Grow

Scale

Status: ☒ Live ☐ Coming Soon

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Q3 2025

Make projects profitable

Multi-currency

Official support for those that need to bill clients in a currency that's different from your installation's default

Why you'll love it:

- Create 1:1 relationships between new clients and their applicable currency
- Set specific billable rates for those currencies to ensure maximum profitability for each circumstance
- Set cost rates in the currency(ies) your employees get paid in and we'll convert where applicable
- Create expenses, quotes, invoices and more in the correct currency for each client
- Centralised reporting in your default currency

The screenshot shows the 'People' management page in Teamwork. It displays a list of 553 people with columns for Name, Type, Company, Role, and various billable/cost rates in different currencies. A user named Avery Morgan is highlighted, showing a '+ Set EUR' button next to their USD \$100 billable rate, indicating the ability to set specific rates for different currencies.

NAME	TYPE	COMPANY	ROLE	USD BILLABLE RATE	EUR BILLABLE RATE	GBP BILLABLE RATE	COST RATE / H
Dakota Gray	Admin	Zenithix	Senior designer	USD \$100	EUR €100	—	USD \$50
Avery Morgan	Account	Sunflower Energy	Junior Engineer	USD \$100	+ Set EUR	—	EUR €50
Alex Bailey	Admin	EcoFusion Ventures	Senior project manager	USD \$100	—	GBP £100	USD \$50
Dakota Gray	Contact	QuantaTech	Senior engineer	USD \$100	EUR €100	—	USD \$50
Avery Sullivan	Collaborator	AquaPulse	Senior marketing mana...	—	—	—	—
Dakota Gray	Contact	BioFusion	Senior marketing mana...	USD \$100	—	GBP £100	USD \$50
Morgan Parker	Admin	SolarLux	Engineer	—	—	—	—
Dakota Gray	Account	Glitzify	Principle engineer	—	—	—	—
Cameron Sullivan	Account	BioTech Creations	Principle designer	USD \$100	EUR €100	—	USD \$50
Casey Taylor	Collaborator	TechNova	Engineer	USD \$100	—	GBP £100	USD \$50

Deliver

Grow

Scale

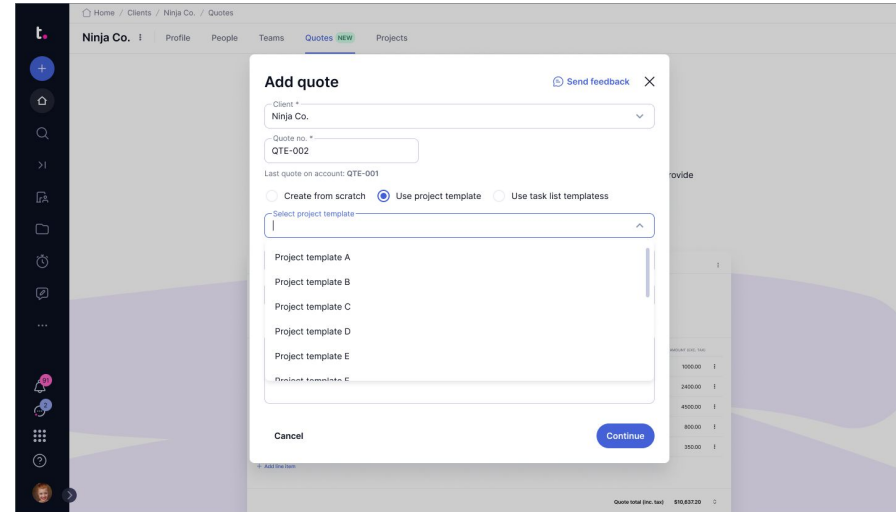
Status: ● Live ○ Coming Soon

Quotes V2

More options and less friction to create Quotes and easier flow to convert Quotes to actual work

Why you'll love it:

- Build a Quote based from an existing Project Template or Task List Templates
- Convert an accepted Quote directly into a Project and relevant tasks



Deliver

Grow

Scale

Status:



Live



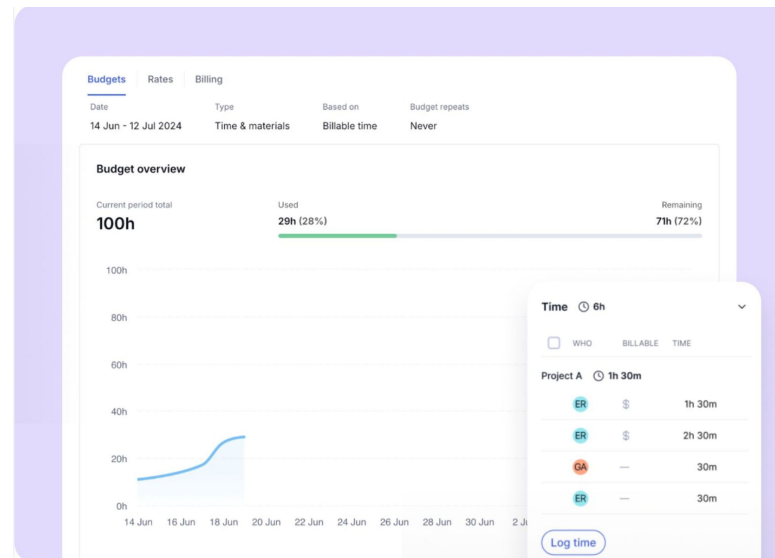
Coming Soon

Track Ticket Time in Teamwork.com

Time logging in Teamwork Desk has gotten a major upgrade. Automatically track time from ticket to project with minimal effort from your team.

Why you'll love it:

- Time can be automatically logged based on conditions set at a site level
- Linked to user rates, realize a true cost of work related to tickets and/or client communication with little-to-no manual effort
- Deduct time spent on client communication from budgets or retainers and see how profitable each client really is

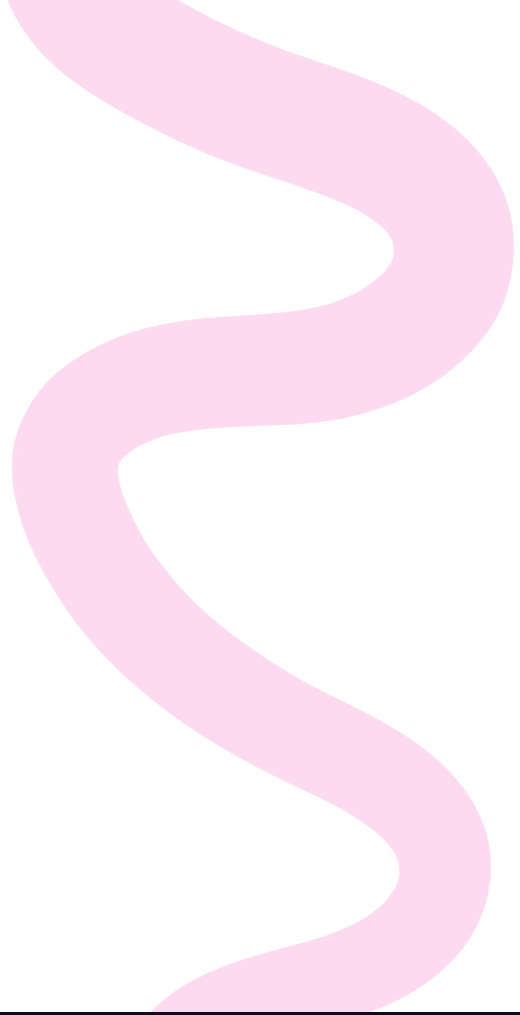


Pro

Premium

Enterprise

Status: ☒ Live ☐ Coming Soon

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Q3 2025

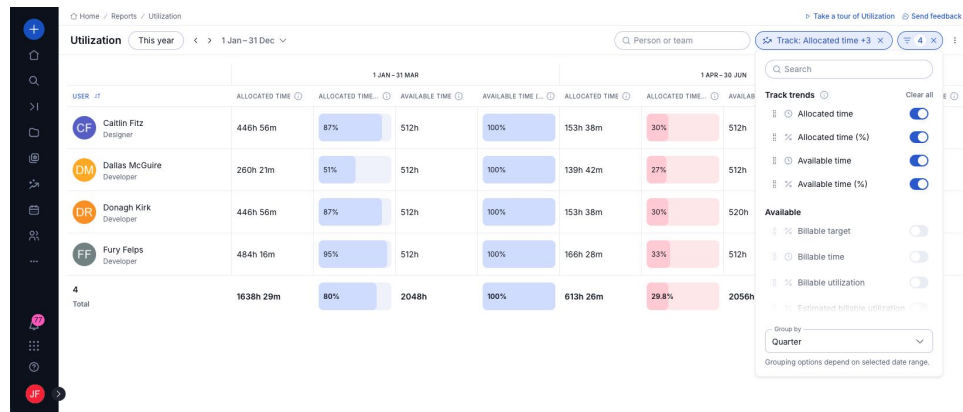
Track performance

Track Trends

Now available in the Utilization Report, Track Trends lets you compare performance over time, so you can catch shifts early and stay on target.

Why you'll love it:

- Compare data across key timeframes like DoD, WoW, MoM, and QoQ
- Select up to 4 metrics (like allocated time or available time) to track changes
- Uncover trends directly in Teamwork.com without exporting to Excel



Deliver

Grow

Scale

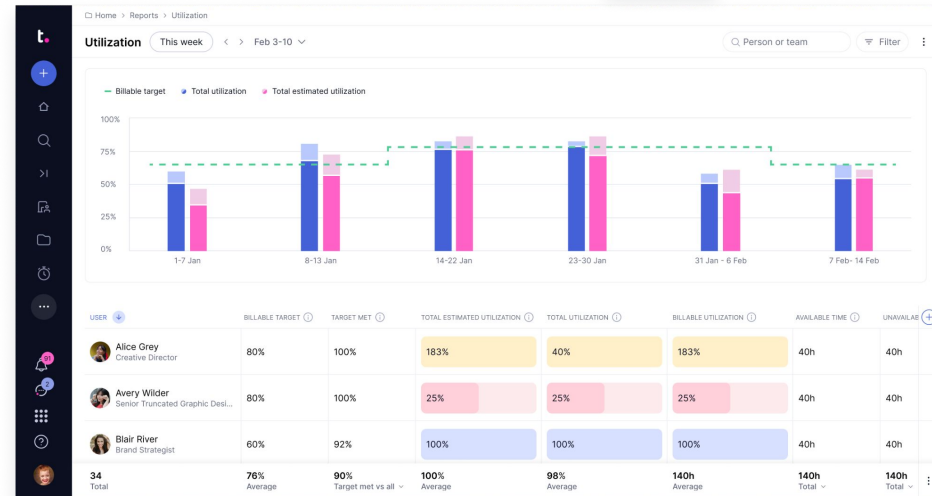
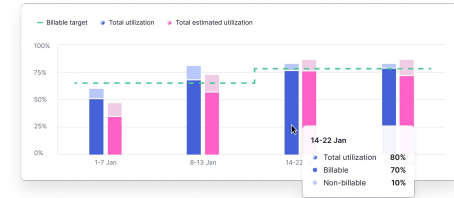
Status:  Live  Coming Soon

Utilization Chart

Gives you a clear, visual snapshot of how your team is performing against their billable targets at a glance.

Why you'll love it:

- The green dashed line shows your average billable target, so you can immediately see whether you're meeting, exceeding, or falling short
- Compare actual hours worked (blue) with estimated hours (pink) to track how plans align with reality
- Data-driven decisions: Use this visual to support conversations around workload, forecasting, or the need for additional support



Deliver

Grow

Scale

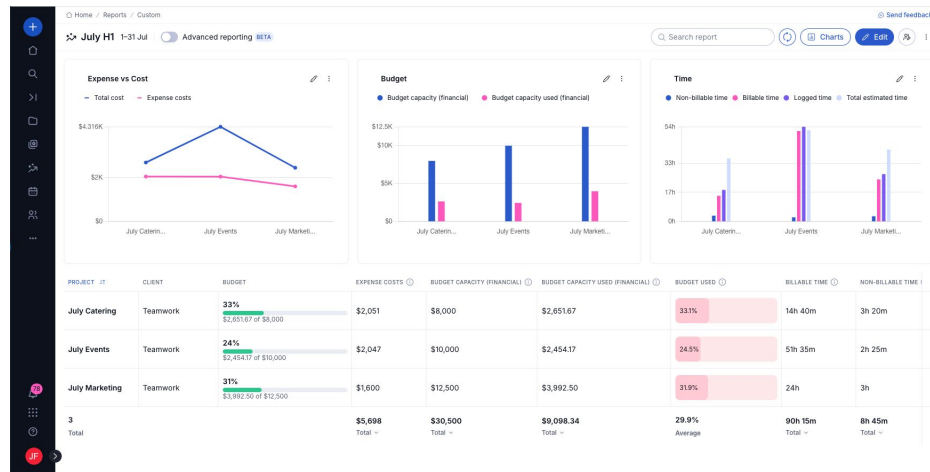
Status: ● Live ○ Coming Soon

Custom Report Charts

Now you can turn any custom report into a visual dashboard with charts, making it easier to spot trends and communicate results at a glance.

Why you'll love it:

- Use bar and line charts to visualize key metrics
- Add up to three visible charts to each custom report (and keep two on standby)
- **Grow users** can now include one chart per Custom Report, bringing richer data visualization to more teams



Deliver

Grow

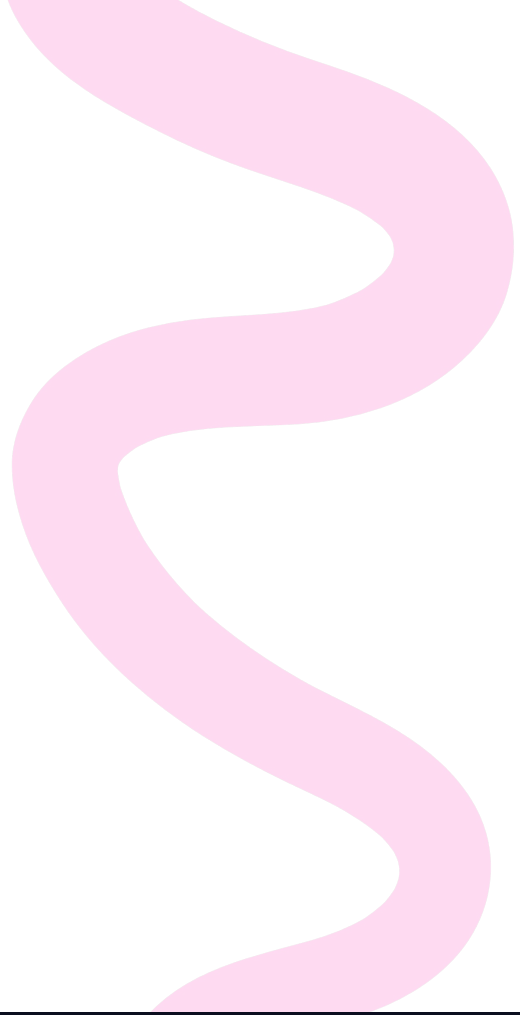
Scale

Status: ● Live ○ Coming Soon



Q4+

**Coming
soon**

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Q4+ 2025

TeamworkAI

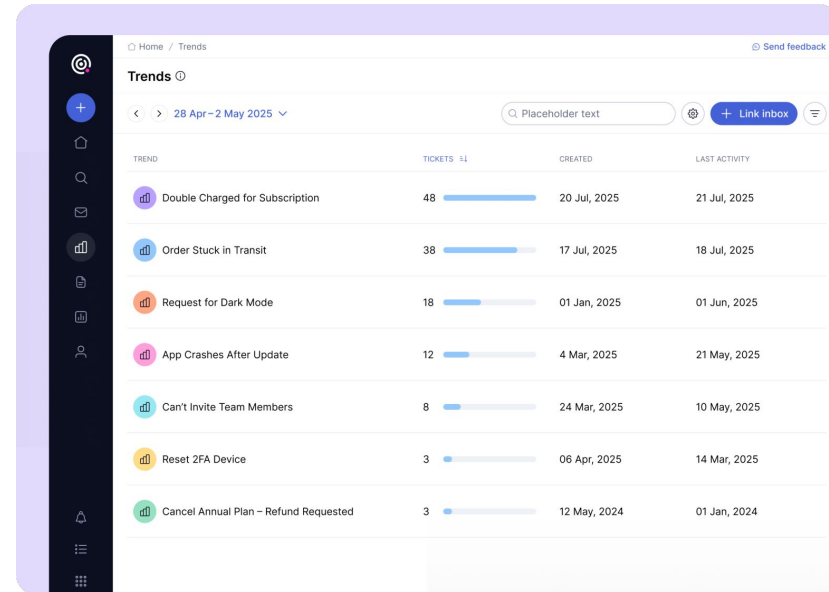
✨ Trends

Automatically group and summarize tickets into trends, so you can see what clients are really talking about and take action faster.

Why you'll love it:

- See top ticket trends at a glance to identify training gaps, documentation needs, or product issues
- Turn recurring client pain points into proactive improvements across your organization

Status: ☐ Live ☒ Coming Soon



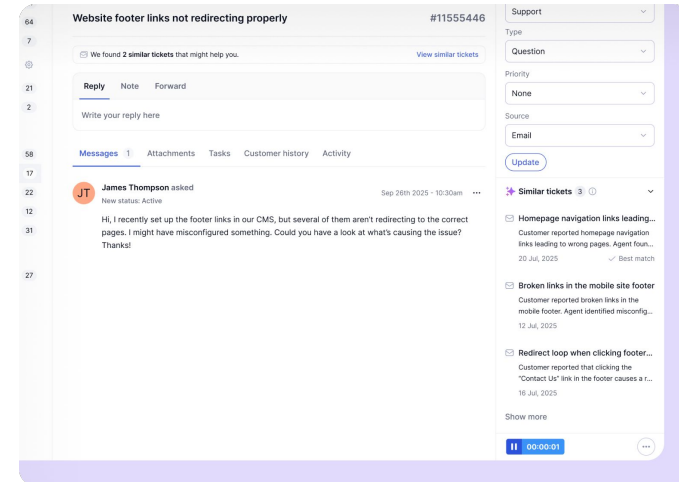
✨ Similar Tickets

Surface previously resolved tickets that match your current query, so your team can respond faster, more confidently, and more consistently.

Why you'll love it:

- Instant answers from past experience – see up to five previously resolved tickets related to the one you're working on
- Reply faster and more confidently – use proven responses from your own team to craft accurate, professional replies
- Train new starts effortlessly – give your whole team access to your help desk's collective knowledge, right inside every ticket

Status: ☐ Live ☒ Coming Soon



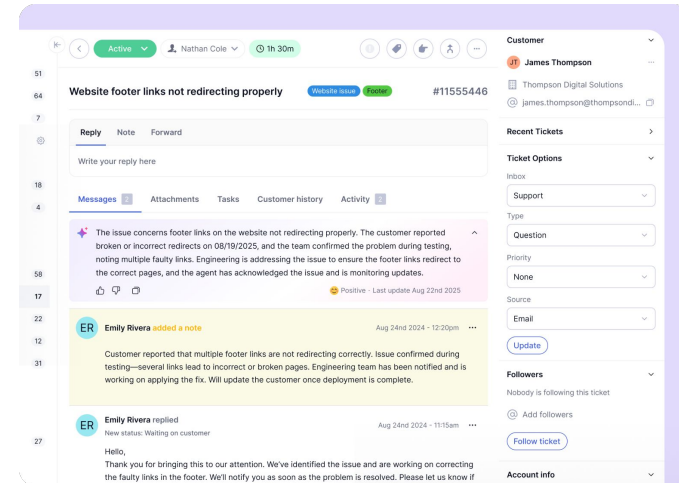
✨ Ticket Summarization

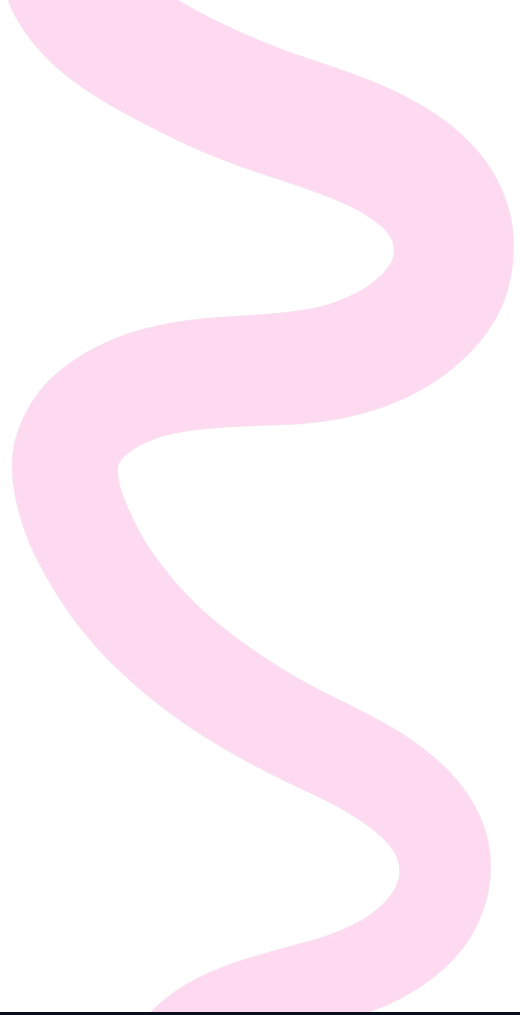
When reviewing or handing off a ticket, Teamwork Desk automatically creates a smart summary of everything that's happened so far — so you can understand the full context in seconds.

Why you'll love it:

- Catch up fast – quickly understand the ticket history without reading every message
- Seamless handovers – easily pass tickets between teams with clear, AI-generated summaries
- Save time and stay consistent – spend less time reading, more time resolving

Status: ☐ Live ☒ Coming Soon



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Q4+ 2025

Manage client work



Brand new feature

Enhancement

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!

Deliver

Grow

Scale

Status: ☐ Live ☒ Coming Soon

HR - recruitment

Contracts

Assessment 6 candidates

CANDIDATE	OFFER	RECRUITER	STAGE	STATUS	PORTFOLIO	SKILLS	APPLICATION	SOURCE	COMMENT
Sarah Johnson			CV Reviewed	Assessment	sophiaux.des...	Research UI Wireframing	4 Sep	Job Board	Very solid
James Smith	2		Phone Screen	Assessment			11 Sep	LinkedIn	
Chloe Williams	1		Interviewed	Assessment	behance.net/...	Mobile UI Leadership	12 Sep	LinkedIn	Good com
Daniel Harris			Test Task	Assessment	behance.net/...	Research Wireframing	15 Sep	Referral	Prototype
Lucas Anderson			Interviewed	Assessment	lucas-anders...	Design System UI Mix	6 Sep	Referral	Offer sent
Jack Turner			Task passed	Assessment	henrymoore...	Research Mobile	29 Aug	LinkedIn	

Offer 3 candidates

CANDIDATE	OFFER	RECRUITER	STAGE	STATUS	PORTFOLIO	SKILLS	APPLICATION	SOURCE	COMMENT
Grace Thompson	1		Offer Sent	Offer	behance.net/...	Research UI Mix	11 Aug	Referral	Offer sent
Isabella Scott	1		Offer Sent	Offer	scott-wk-eva...	Mobile UI Leadership	28 Aug	Referral	Offer sent
Sophia Miller	1		Offer accepted	Offer	sophymophy...	Design System UI Mix	29 Aug	LinkedIn	Candidate

Rejected 4 candidates

CANDIDATE	OFFER	RECRUITER	STAGE	STATUS	PORTFOLIO	SKILLS	APPLICATION	SOURCE	COMMENT
Benjamin Clark			On hold	Rejected		Research Mobile UI	21 Aug	Job Board	Lacks req



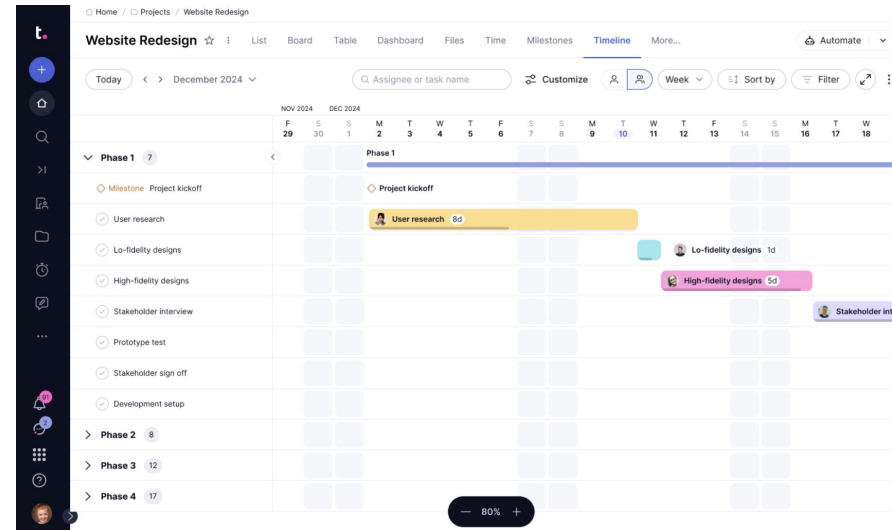
Timeline

We're excited to announce the release of Timeline: 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
- Designed to make project planning more intuitive and enjoyable.

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

Grow

Scale

Status: ☐ Live ☒ Coming Soon

Keep Tickets and Tasks in Perfect Sync

Now your Teamwork.com automations can update linked tickets automatically — keeping your client communication in sync with your project progress.

Why you'll love it:

- Stay up to date automatically – add a note to the linked ticket when a task is completed or updated.
- Respond faster to clients – trigger client updates directly from project actions, without intervention.
- Reduce manual effort – save time by removing repetitive updates between tasks and tickets

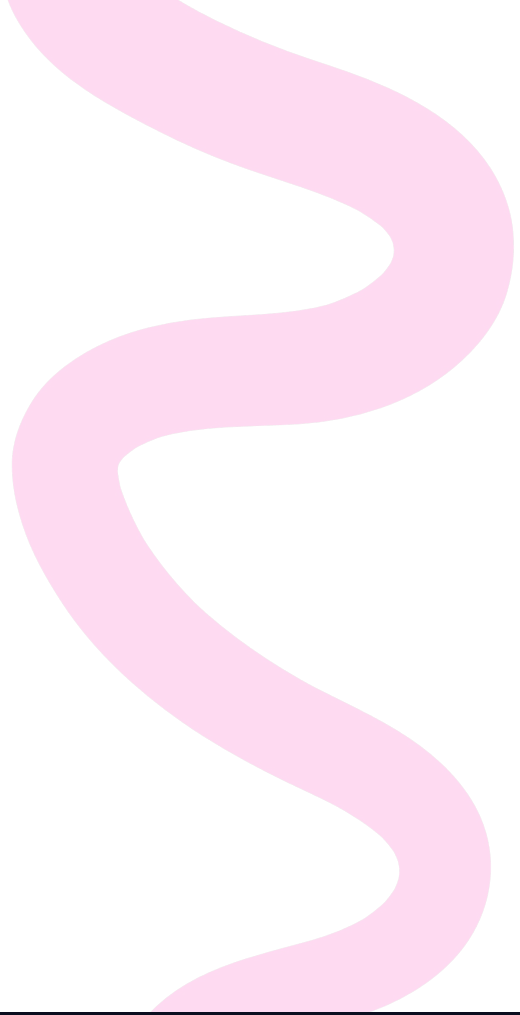
The screenshot displays the automation configuration interface. On the left, the 'When' section (labeled 'this happens') includes a 'Trigger *' dropdown set to 'Due date arrives', an option to 'Add before or after start date', a time field set to 'at 9:00 am', and a 'Project *' dropdown set to 'Creative Requests'. An arrow points to the right, where the 'Then' section (labeled 'perform this action') is located. It includes an 'Action *' dropdown set to 'Change priority' and a 'Priority *' dropdown set to 'None'. A '+ Add action' link is visible at the bottom of the 'Then' section.

Deliver

Grow

Scale

Status: ☐ Live ☒ Coming Soon

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Q4+ 2025

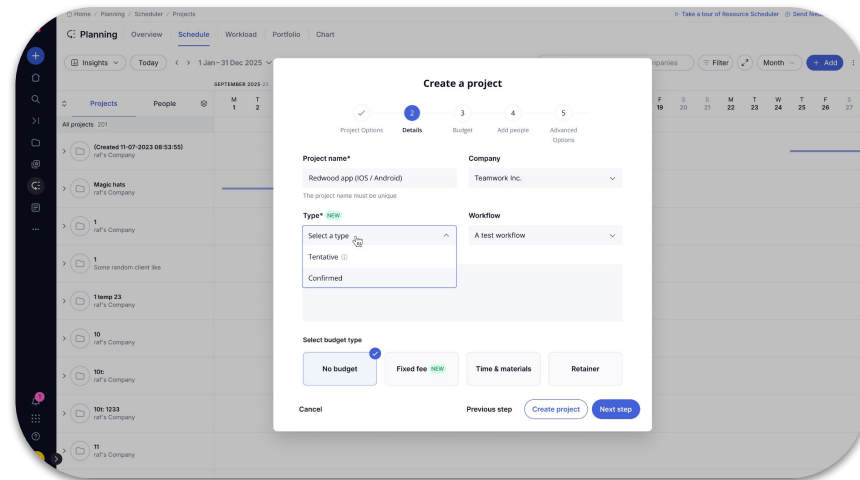
Plan resources

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



Deliver

Grow

Scale

Status:



Live



Coming Soon

Outlook in Planning Views

Your team's commitments are now factored into their availability, giving you a more accurate view of capacity when scheduling work.

Why you'll love it:

- Meetings and OOO time from Outlook are now reflected in real time
- Avoid double-booking by seeing the full picture of your team's capacity
- Plan confidently with availability that actually reflects real-world capacity

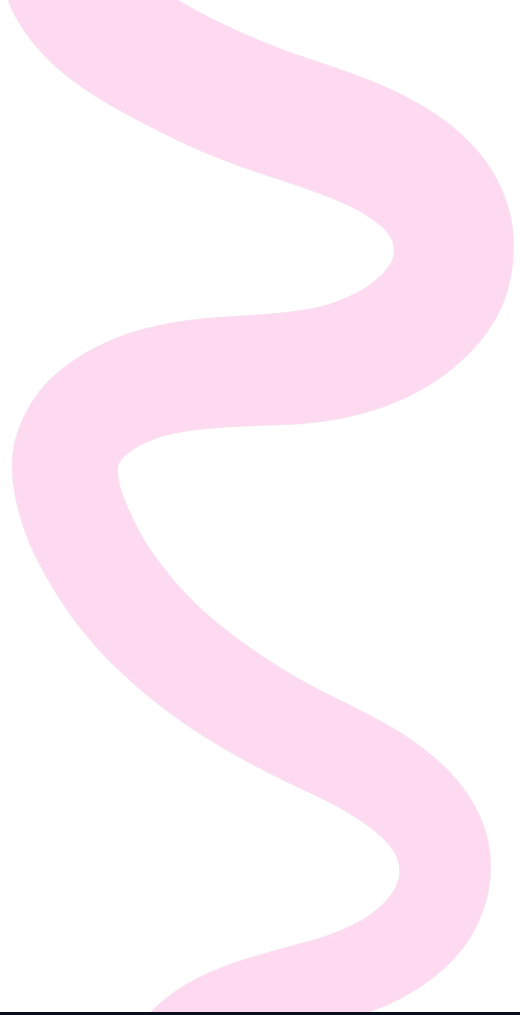


Deliver

Grow

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Status: ☐ Live ☒ Coming Soon

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Q4+ 2025

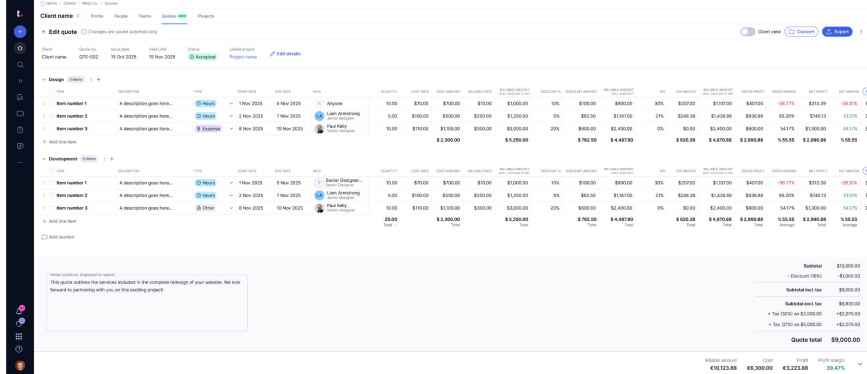
Make projects profitable

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:

- A global Quotes page to better manage and organize Quotes in your pipeline
- Line item specificity - add tax or discount per line item for more granular control
- 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



The screenshot displays the 'Edit quote' interface for a client named 'Client name'. It shows a table of line items with columns for description, time, start/end dates, and various financial metrics. Below the table is a summary section with a table of totals.

Line Item	Description	Time	Start Date	End Date	Rate	Quantity	Unit Price	Total Price	Net Price	Gross Margin	Net Margin
Line Item 1	A description goes here...	10 min	1 Nov 2023	6 Nov 2023	100.00	10	\$1,000.00	\$1,000.00	\$1,000.00	100%	100%
Line Item 2	A description goes here...	10 min	7 Nov 2023	7 Nov 2023	100.00	10	\$1,000.00	\$1,000.00	\$1,000.00	100%	100%
Line Item 3	A description goes here...	10 min	8 Nov 2023	10 Nov 2023	100.00	10	\$1,000.00	\$1,000.00	\$1,000.00	100%	100%
Subtotal						30.00	\$3,000.00	\$3,000.00	\$3,000.00	100%	100%
Tax						0.00	\$0.00	\$0.00	\$0.00	0%	0%
Grand Total						30.00	\$3,000.00	\$3,000.00	\$3,000.00	100%	100%

Deliver

Grow

Scale

Status:



Live



Coming Soon

Time Approvals V2

More effectively and efficiently review, manage, and approve your teams' timesheets to ensure the correct balance of billable client work.

Why you'll love it:

- Less clutter, more clarity: The capability to only see, review and approve only the timesheets for those that report to you
- Timesheet locking: You'll soon have the option to lock the timesheets you've already approved to prevent further unwanted amendments

WB William's time ×

17 - 21 Jul 2025 🕒 Logged: 19h 30m / ⚙ Estimated: 20h 💰 Billable time: 12h 30m / 💵 Non-billable: 7h 🚫 Not billed: 0h

🔒 Timesheet approved by PM Paula on 29 Jul 2025 at 11:19 🔓 Re-open timesheet

Monday, 17 July

PROJECTS/TASKS	DESCRIPTION	BILLABLE	BILLED	TIME
☐ Reported Issues (Projects) Avalanche Digital	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	☒	☐	3h
☒ Review search slide out in staging Epic Studios / Product design / Phase 1	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	☒	☐	7h 30m
+ Log more time				Day total: 10h 30m Billable time: 10h 30m

Tuesday, 18 July

PROJECTS/TASKS	DESCRIPTION	BILLABLE	BILLED	TIME
☐ Reported Issues (Projects) Avalanche Digital	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	☒	☐	2h
+ Log more time				Day total: 2h 30m Billable time: 2h

Wednesday, 19 July

PROJECTS/TASKS	DESCRIPTION	BILLABLE	BILLED	TIME
☒ Design tasks for Project switcher Epic Studios / Product design / Phase 1	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	☐	☐	1m
☒ LunchDarkly Flag and Segmet Epic Studios / Product design / Phase 1	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	☐	☐	30m
☐ Reported Issues (Projects) Avalanche Digital	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	☐	☐	5h 30m

Deliver

Grow

Scale

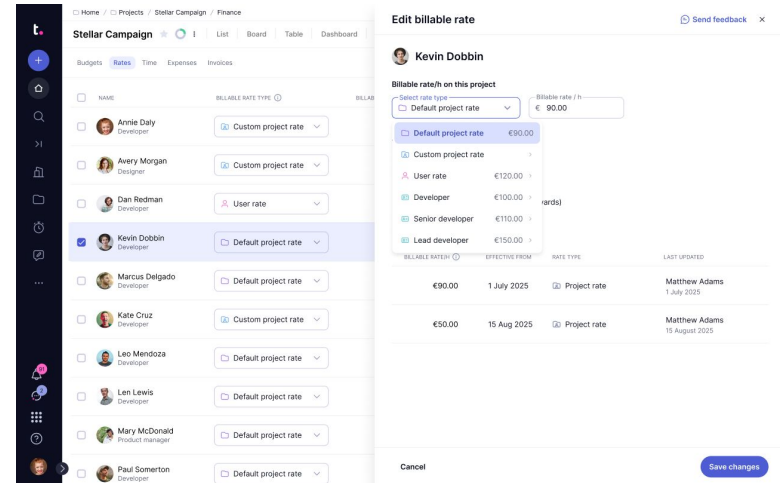
Status: ☐ Live ☒ Coming Soon

Role-Based Rates

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

Why you'll love it:

- Set representative cost rates for each role to assist in project planning and profitability forecasting
- Set specific billable rates for each role in your organization to elevate your planning game (with placeholder roles) and ensure easy to manage, more accurate billing practices.
- Enjoy increased flexibility with the ability to choose the preferred rate type to suit any situation; individual rates, role rates, custom project rates or a hybrid if the case demands it

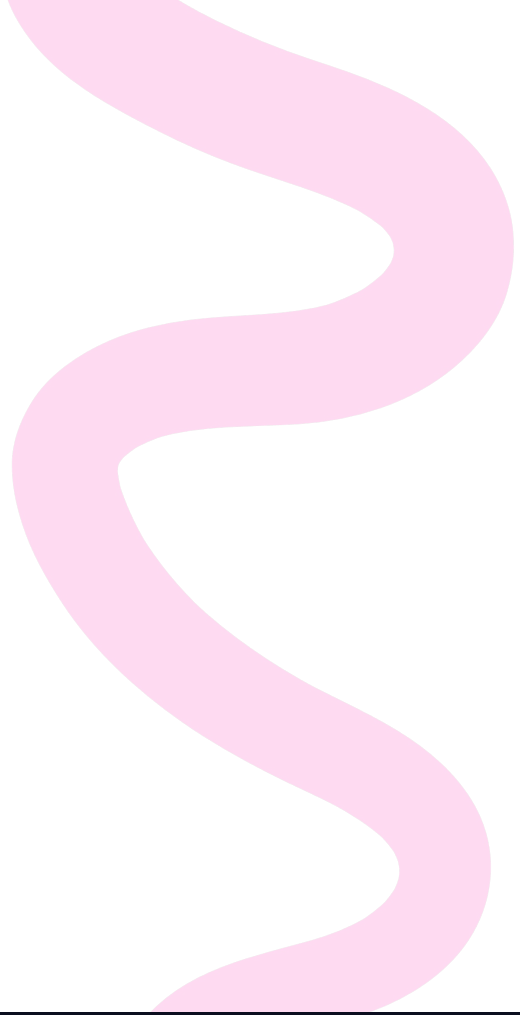


Deliver

Grow

Scale

Status: ☐ Live ☒ Coming Soon

A thick, light pink wavy line that starts at the top left and curves downwards and to the right, ending near the bottom center of the slide.

Q4+ 2025

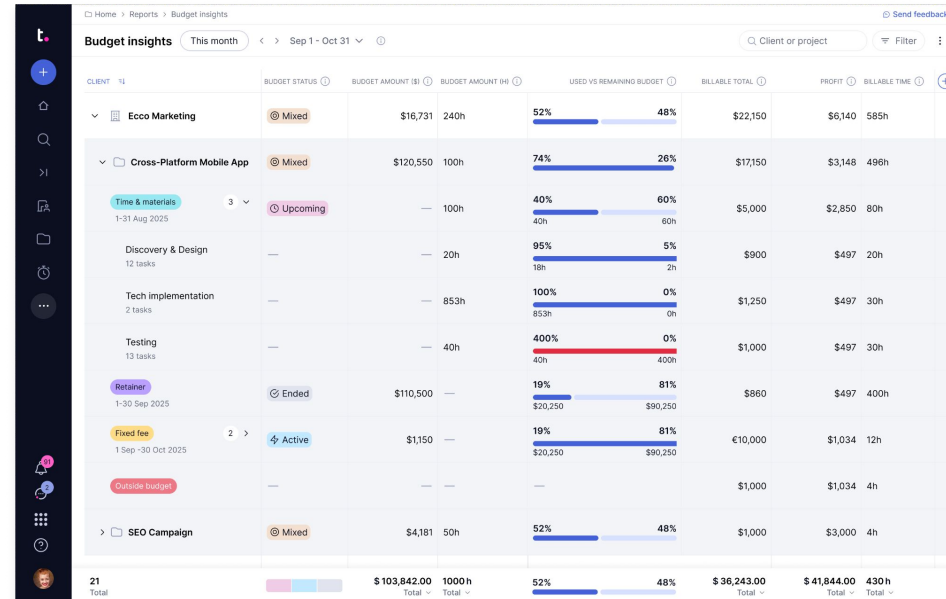
Track performance

Budget Insights Report

Now you can track all your project budgets in one place — including total amounts, usage, and remaining balances.

Why you'll love it:

- Drill down from the client level to see total project budgets, individual budgets, and associated task list budgets
- View active, ended, and upcoming budgets based on your selected date range
- Quickly identify any expenses or time logs that aren't linked to a budget



Deliver

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Scale

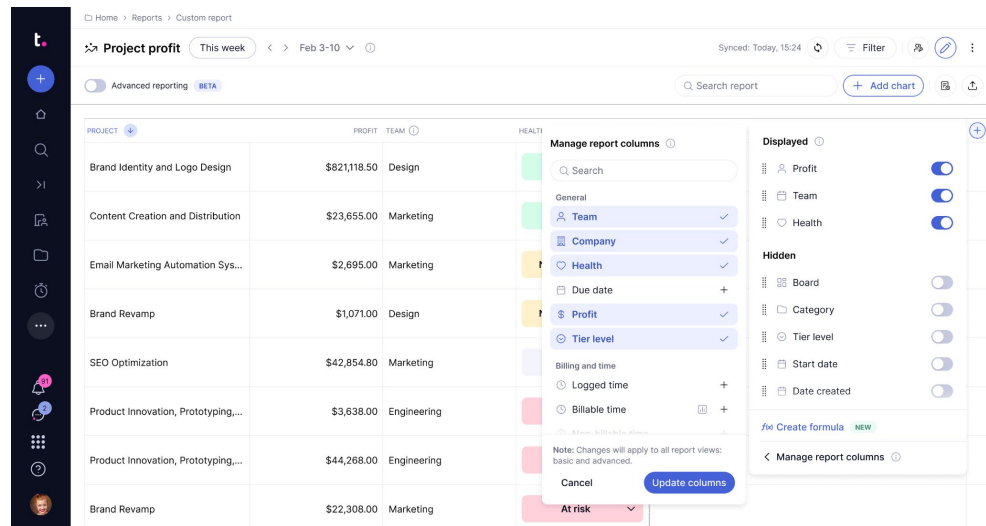
Status: ○ Live ● Coming Soon

Custom Reports Management

Soon it will be easier than ever to manage your custom reports with improved editing options!

Why you'll love it:

- See when your report was last updated with clearer sync information
- Quickly search for and manage columns directly within the report view
- Access the formula builder in standard reports and the expression builder in advanced reports (depending on your plan)



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Status:  Live  Coming Soon

Advanced Filtering

Get more control over how data is surfaced in your Custom Reports.

Why you'll love it:

- Combine conditions like “is,” “is not,” “is between,” “is after,” and more to zero-in on the data you need
- Layer multiple filters to narrow your data and highlight what matters most
- Instantly surface insights without needing to open a spreadsheet

Filters

Applied 5

[Send feedback](#) [Clear all](#)

Where	Project	contains	Q4-25	
AND	Client	starts with	Coca Cola	
AND	Project status	is	Active, Late	
AND	Due Date	is between	16 Oct – 31 Dec	
AND	Tag	is not	Internal Project	

[+ Add filter](#)

Deliver

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Scale

Status: ☐ Live ☒ Coming Soon

Thank You!

