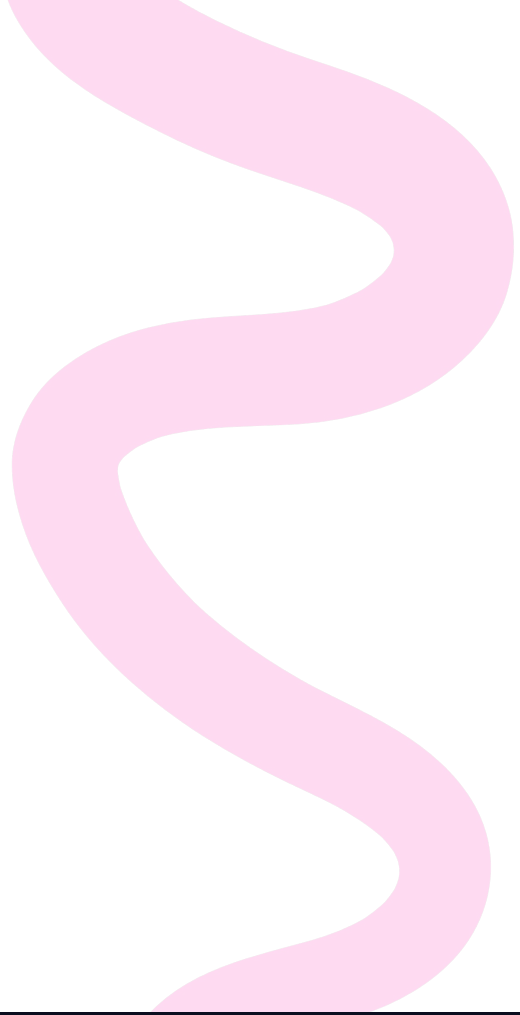


teamwork.com

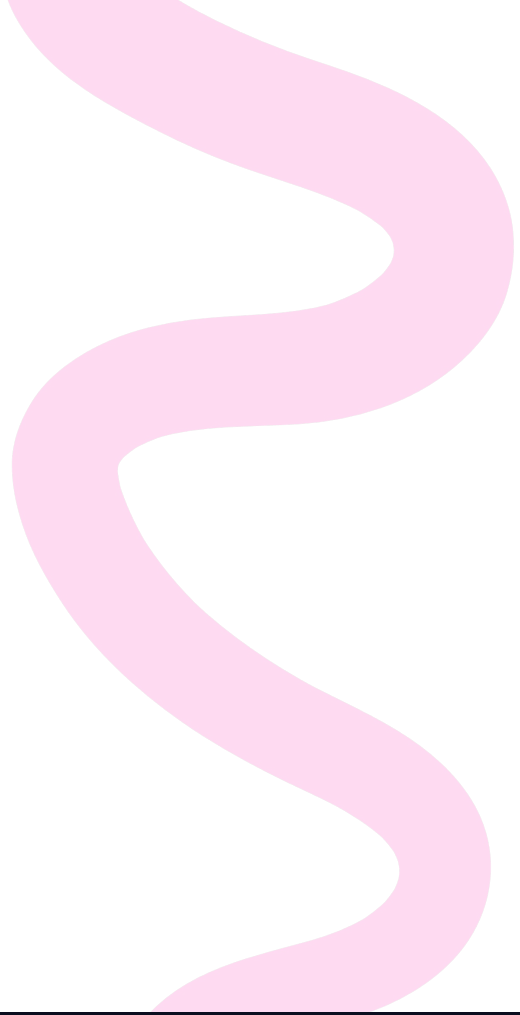
Product Roadmap

Q3 2026

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Q2 2026

Recently released

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Q2 2026

TeamworkAI



Brand new feature



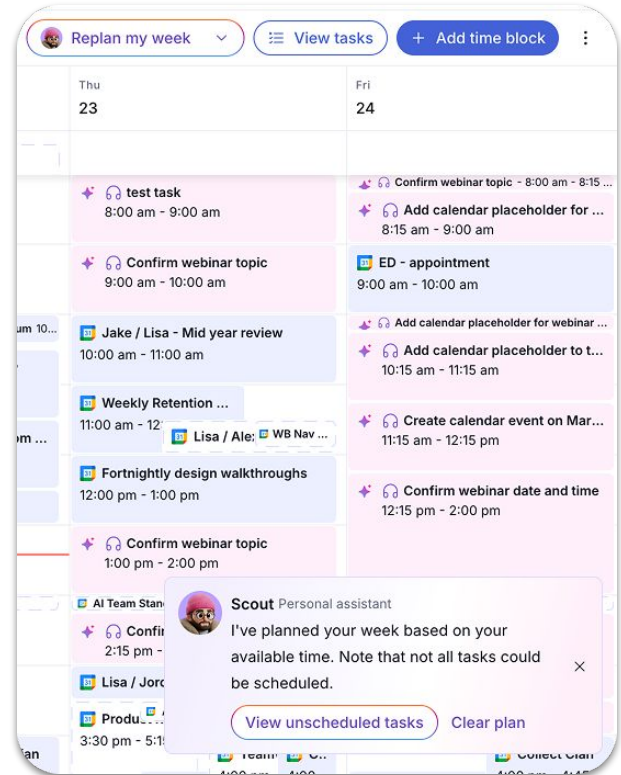
Enhancement

“Plan my week” in My Calendar

Plan your week in seconds with AI - let TeamworkAI automatically organize your priorities around your availability, deadlines, and workload in My Calendar.

Why you'll love it:

- **AI-powered weekly planning:** Scout analyzes your tasks, deadlines, and priorities to create a realistic plan for the week
- **Automatically schedule your work:** Fill your calendar around existing meetings and commitments
- **Save time and reduce admin:** Spend less time planning and more time getting work done
- **Stay focused on what matters:** Keep your most important tasks moving forward without manual juggling



Deliver

Grow

Scale

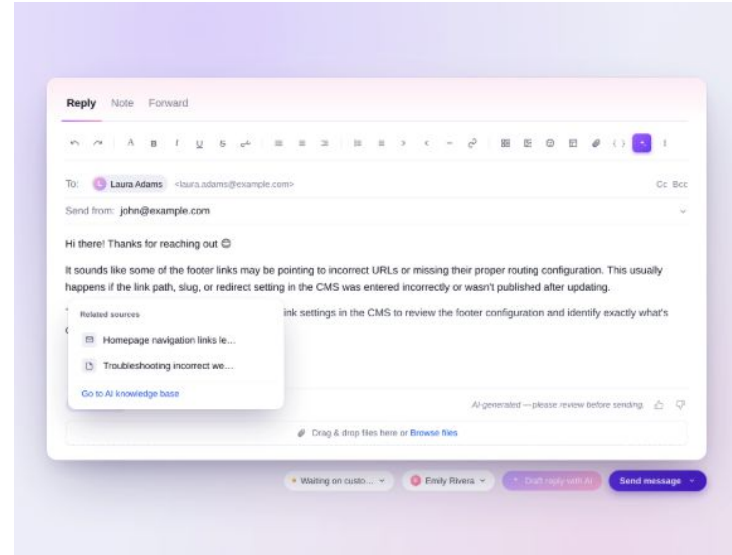
Status: ☒ Live ☐ Coming Soon

Draft ticket responses with AI

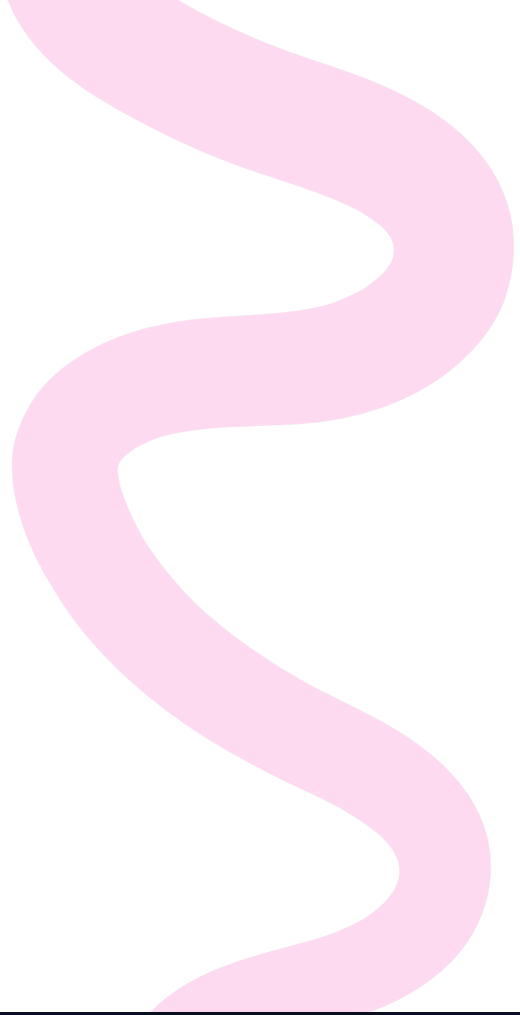
Securely connect your help docs, public policy links, and even your history of resolved tickets to generate high-context, accurate drafts instantly.

Why you'll love it

- **No more digging through tabs:** TeamworkAI 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 TeamworkAI, ensuring every reply is verified and personalized before it hits the customer's inbox



Status:  Live  Coming Soon

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Q2 2026

Manage client work

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

Deliver

Grow

Scale

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.

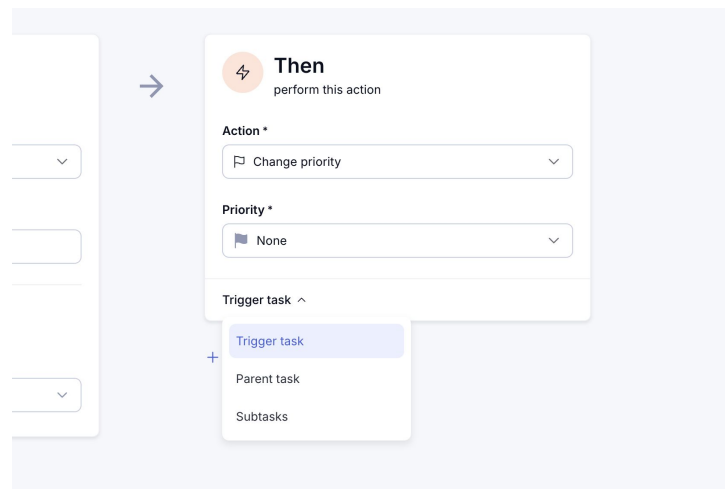
Why you'll love it:

- 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

Deliver

Grow

Scale

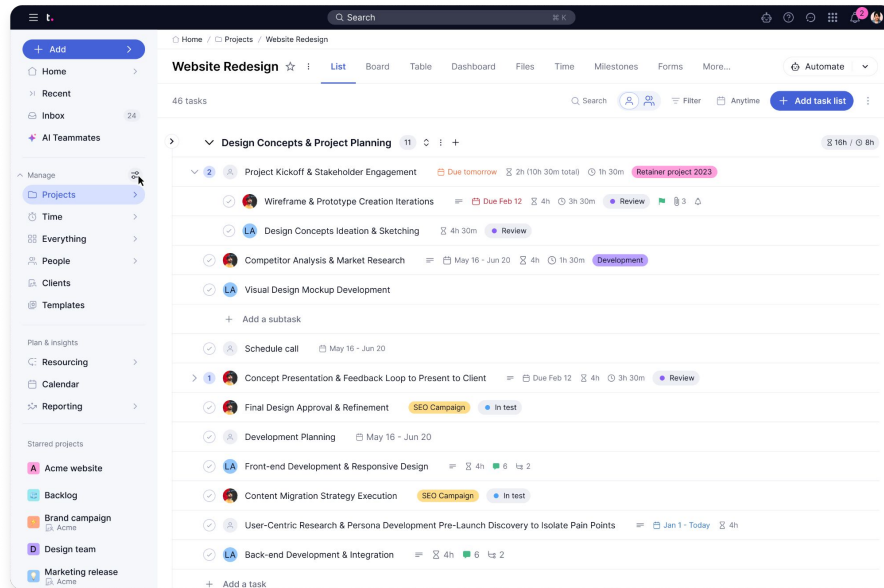
Status: ☒ Live ☐ Coming Soon

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



Deliver

Grow

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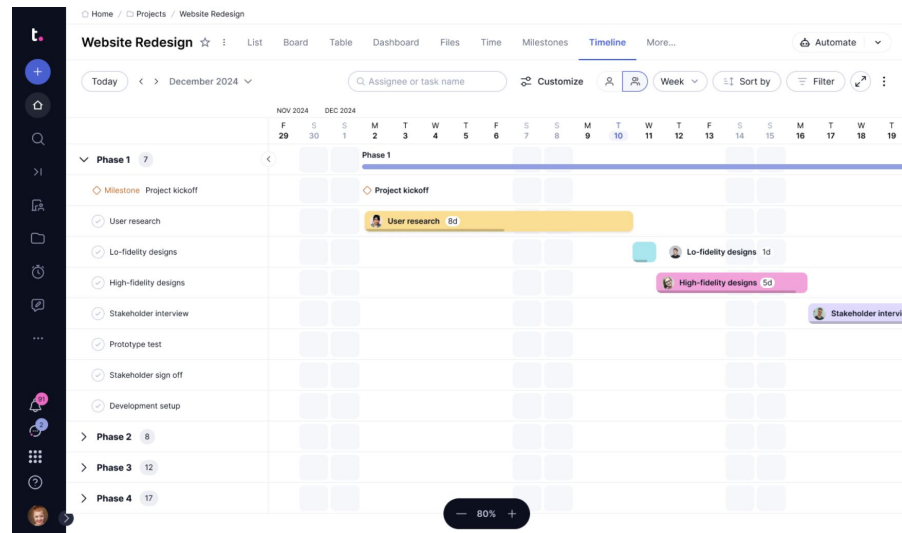
Status: ☒ Live ☐ Coming Soon

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:

- Export to PDF
- Undo/redo functionality
- Dragging mode for dependencies
- Timeline included in templates (coming soon!)



Deliver

Grow

Scale

Status:



Live



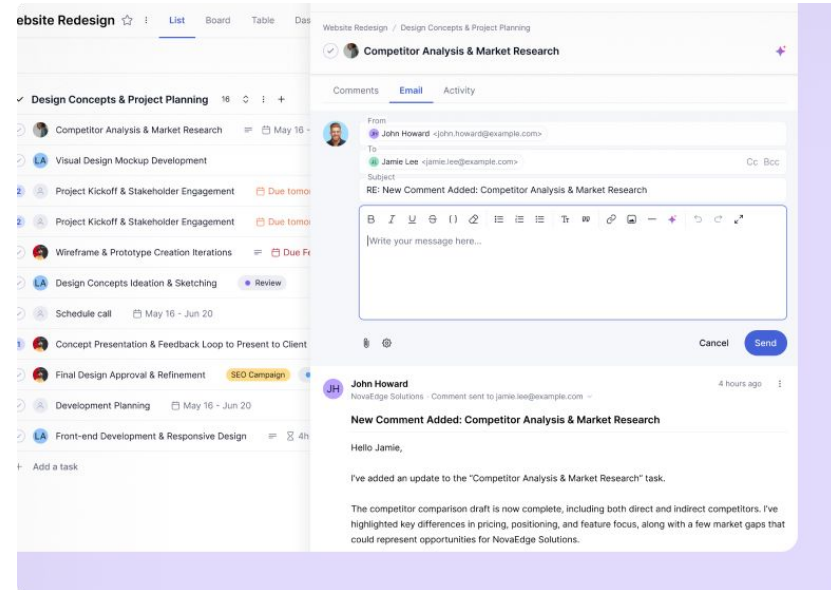
Coming Soon

Email connector in tasks

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

Why you'll love it:

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



Deliver

Grow

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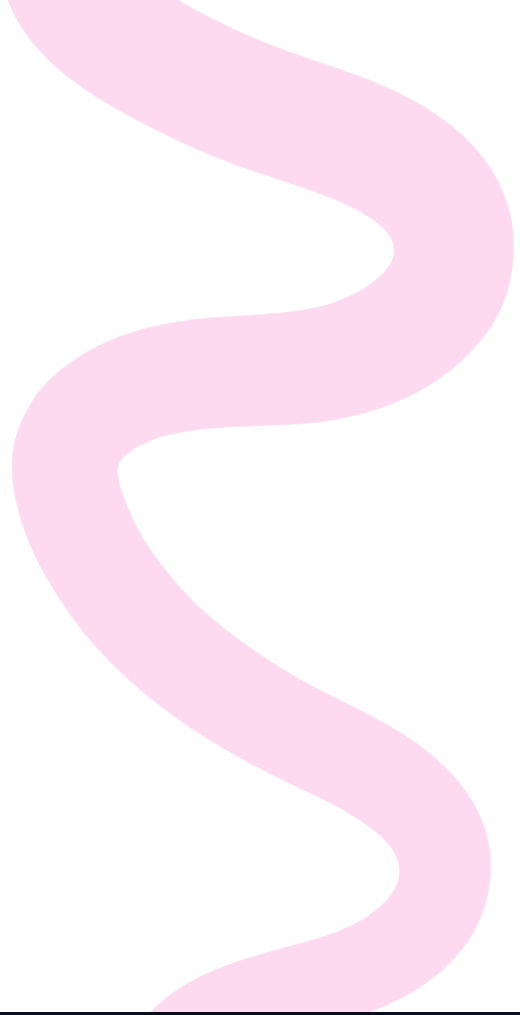
Status:



Live



Coming Soon

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Q2 2026

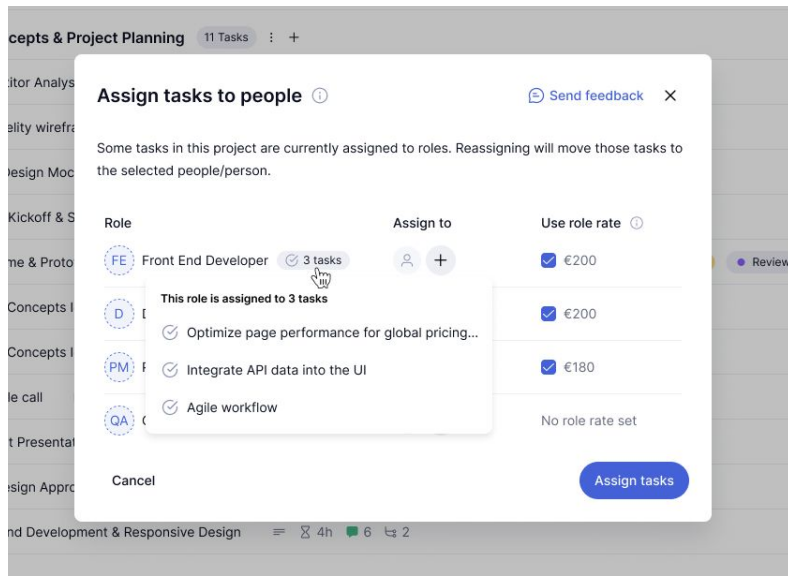
Plan resources

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

Financial insights in Scheduler

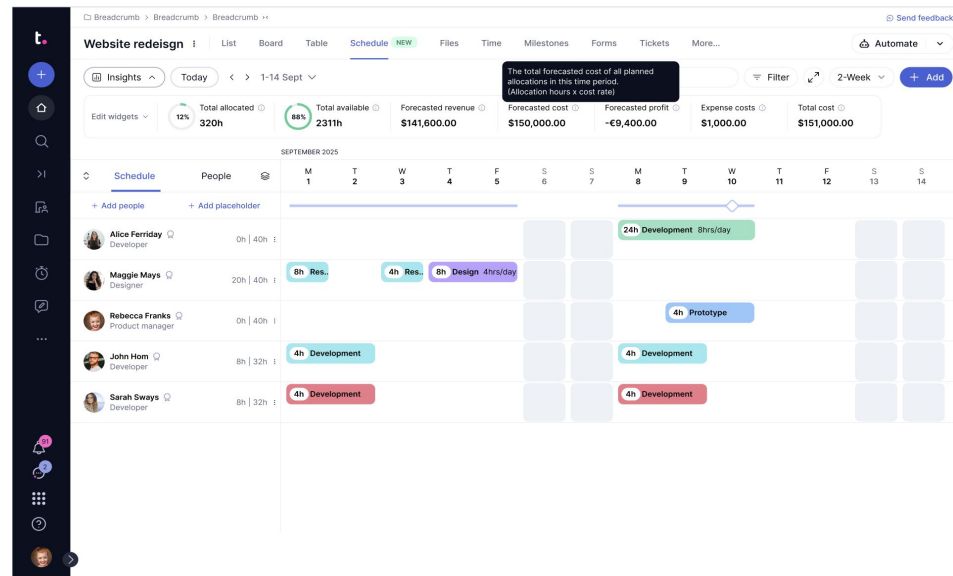
Minimise financial loss and maximise profit impact while scheduling

Why you'll love it:

New widgets inside a customisable insights bar

- Forecasted cost
- Expense costs
- Forecasted profit

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



Deliver

Grow

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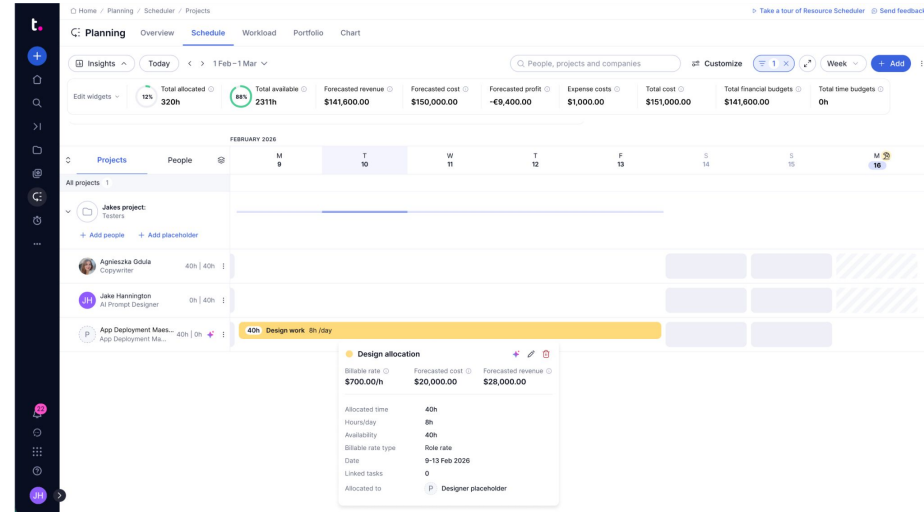
Status:  Live  Coming Soon

Role-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



Deliver

Grow

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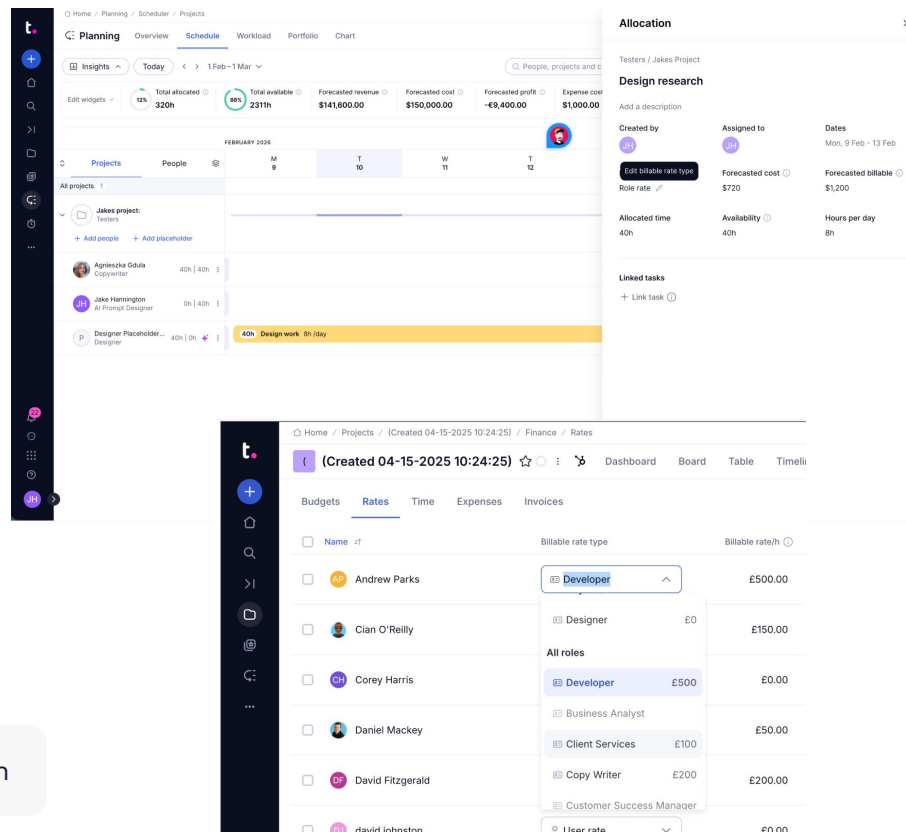
Status: ☒ Live ☐ Coming Soon

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 screenshot displays the Teamwork.com interface, highlighting the 'Multiple Roles per user' feature. The main view is the 'Planning' section, showing a calendar for February 2024. A project named 'Jakes project' is selected, and a task 'Design work' is assigned to 'Jake Hamington' (AI Prompt Designer) for 40 hours. A sidebar on the right shows the 'Allocation' for 'Jakes project', including 'Design research' and 'Design work'. A modal window is open, showing the 'Design research' task details, including 'Created by', 'Assigned to', 'Dates', 'Forecasted cost', 'Forecasted revenue', 'Forecasted cost', 'Expense cost', 'Allocated time', 'Availability', and 'Hours per day'. Below the main view, a table lists users and their roles, with a dropdown menu showing the 'Developer' role selected for 'Andrew Parks'.

Name	Billable rate type	Billable rate/h
Andrew Parks	Developer	£500.00
Cian O'Reilly	Designer	£0
Corey Harris	Developer	£500
Daniel Mackey	Business Analyst	£50.00
David Fitzgerald	Client Services	£100
David Johnston	Copy Writer	£200
David Johnston	Customer Success Manager	£200.00
David Johnston	User rate	£0.00

Deliver

Grow

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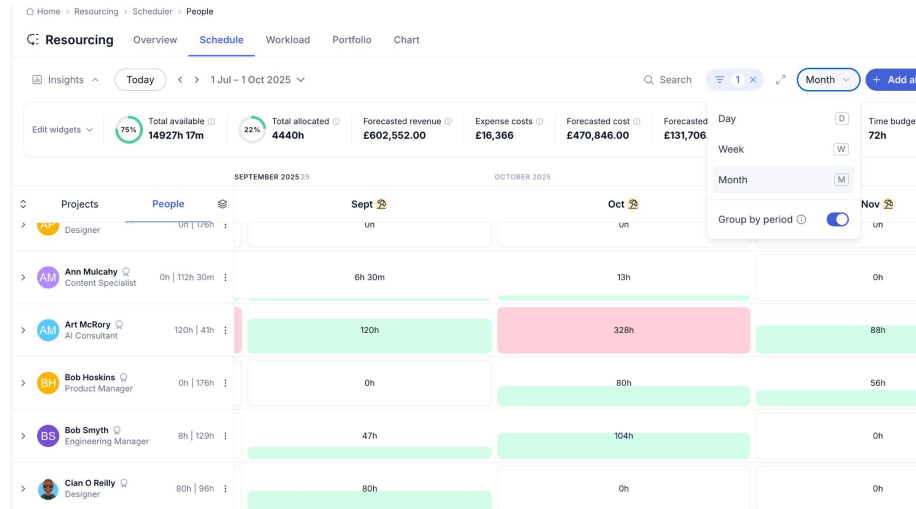
Status:  Live  Coming Soon

Group by week & month

Zoom your resourcing view in or out to plan at the level that suits the decision.

Why you'll love it:

- **Switch between week and month views**, so you can plan the detail of the coming weeks or the shape of the months ahead
- **Spot over and under allocation faster** by seeing capacity across the right time horizon
- **Plan long-term with confidence**, stepping back to the bigger picture without losing the detail

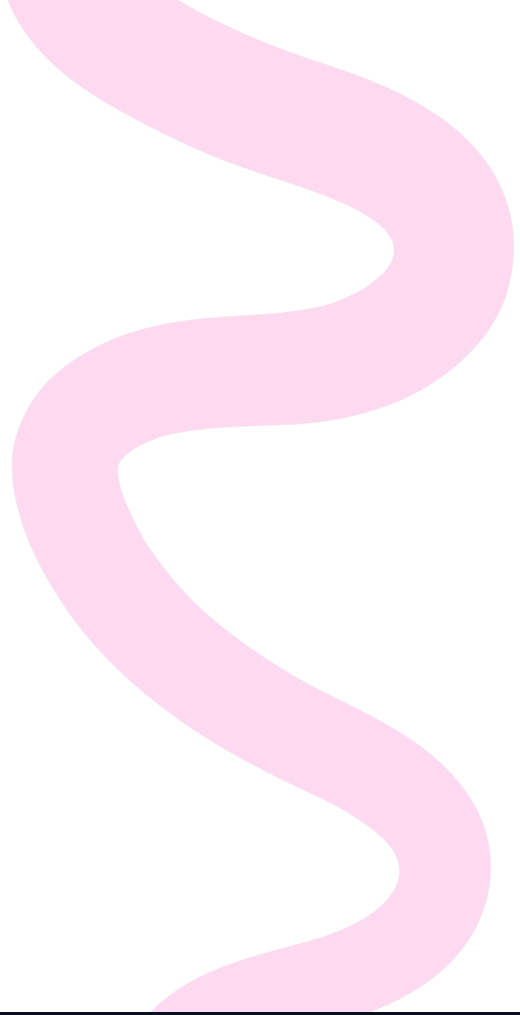


Deliver

Grow

Scale

Status: ☒ Live ☐ Coming Soon

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Q3 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	Edit details
\$0.00	\$0.00	\$0.00	0%	

Line items

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

Deliver

Grow

Scale

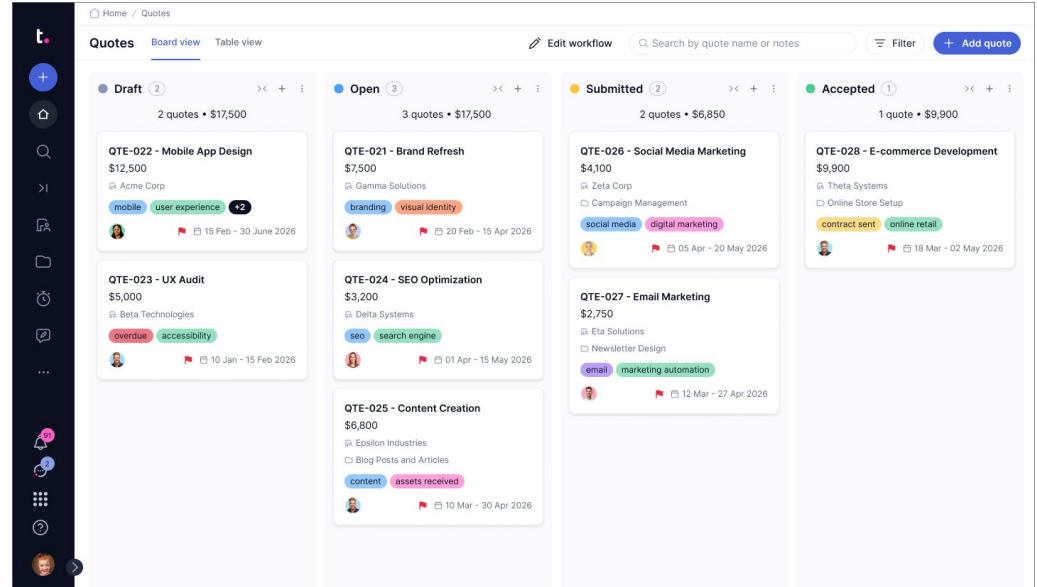
Status:  Live  Coming Soon

New Quote views

New ways to view your quotes are now live. You can now 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



Deliver

Grow

Scale

Status: ☒ Live ☐ Coming Soon

Quote preview customizations

Enjoy more flexibility over how details are presented in your Quotes. These finishing touches help reduce visual clutter, surface the most relevant info, and better tailor to the customer experience.

Why you'll love it:

- Reorder columns to hide sensitive info and create a natural flow
- Group sections by Section, Assignee, or Task
- Merge line items per section for a tidy rolled-up summary view

The screenshot shows the 'Export Quote' interface with a sidebar on the left for customizing the quote and a main preview area on the right.

Export Quote BETA

Export options

Export to: PDF

Grouping

Group by: Section

Sections Merge all line items

Line Items (no section) ☒ Merge

Design planning ☒ Merge

Discovery & strategy ☒ Merge

Customize columns

Description ☒

Type ☒

Quantity ☒

Billable rate ☒

Discount ☒

Tax ☐

Quote #QTE-2024-001

Issue date: 20 Jun 2026 Valid until date: 4 Jul 2026

Quote for:

GreenPeak Sports Technologies
12 Merrion Square North
Dublin 2
D02 XY45
Ireland
accounts@acmeinnovations.ie
+353 1 876 5432

BRIGHTFORGE CREATIVE LTD.
From
42 Sir John Rogerson's Quay
Grand Canal Dock
D02 R296
Ireland
hello@bfgdigital.ie
+353 1 912 3456

Line items

DESCRIPTION	QUANTITY	RATE	DISCOUNT	AMOUNT
Project discovery phase	3.50	1,000.00	—	\$1,307.00
Sub-total:				\$1,307.00

Design planning

DESCRIPTION	QUANTITY	RATE	DISCOUNT	AMOUNT
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Reset default view Export quote

Deliver

Grow

Scale

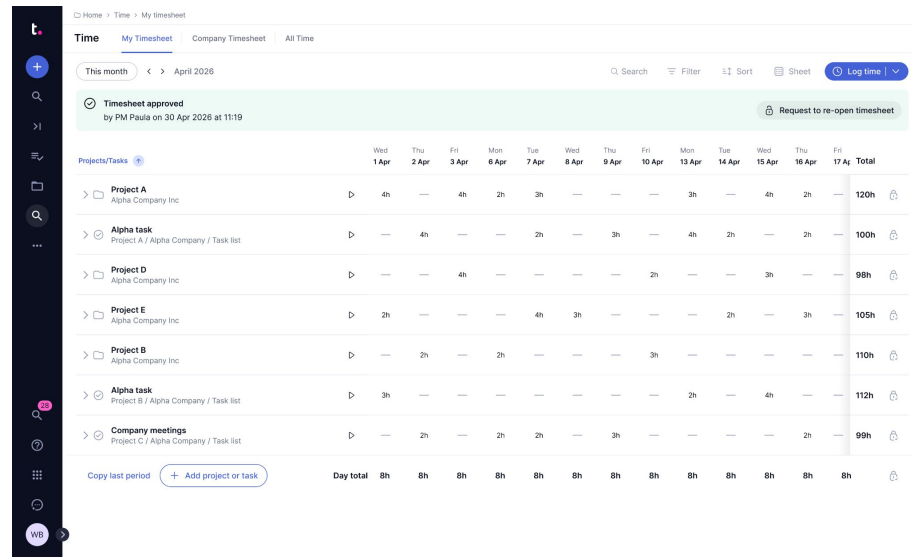
Status: ☒ Live ☐ Coming Soon

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



	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	+	+	+	+	+	+	+	+	+	+	+	+	+	+
Day total	8h	8h	8h	8h	8h	8h	8h	8h	8h	8h	8h	8h	8h	8h

Deliver

Grow

Scale

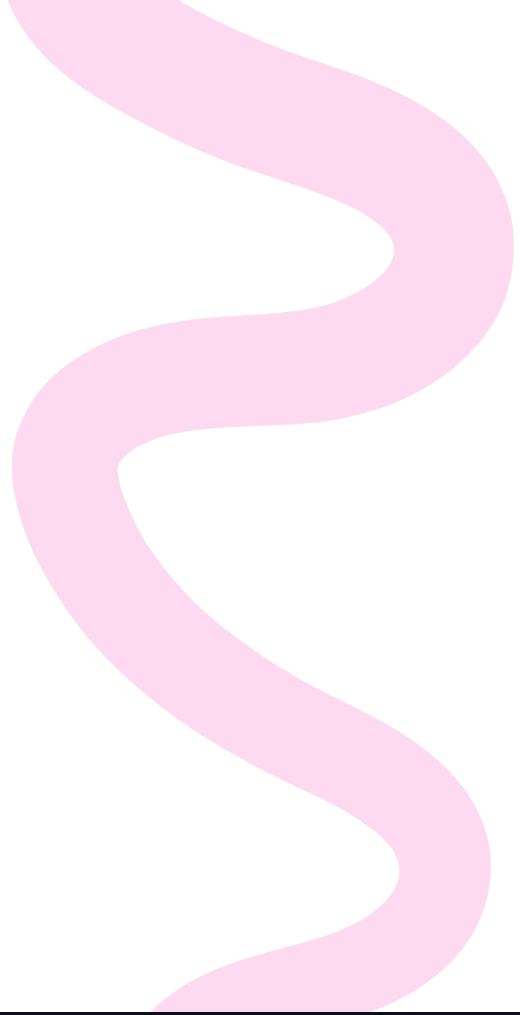
Status:



Live



Coming Soon

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Q2 2026

Track performance

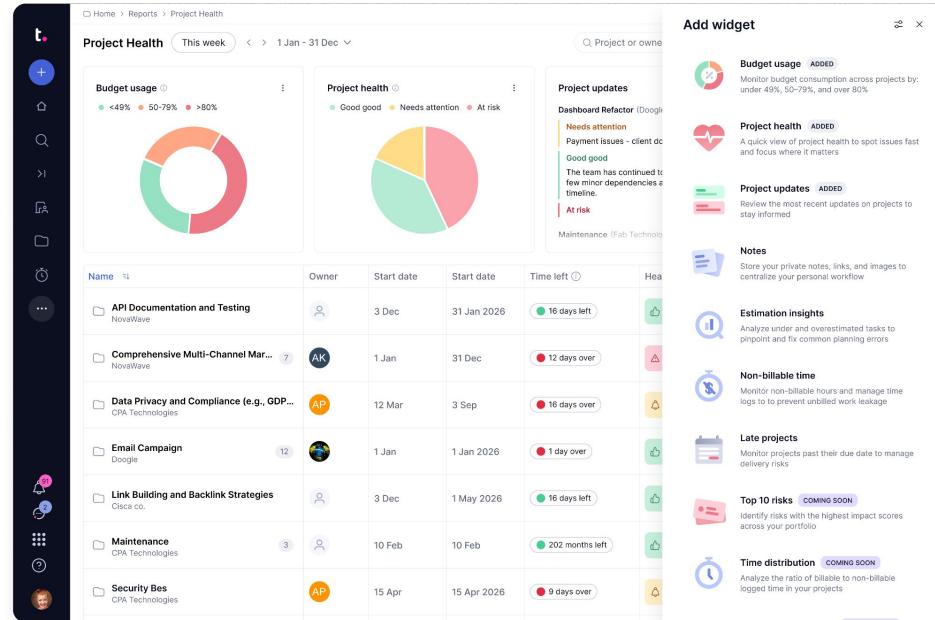
Project Health Insights

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.



Deliver

Grow

Scale

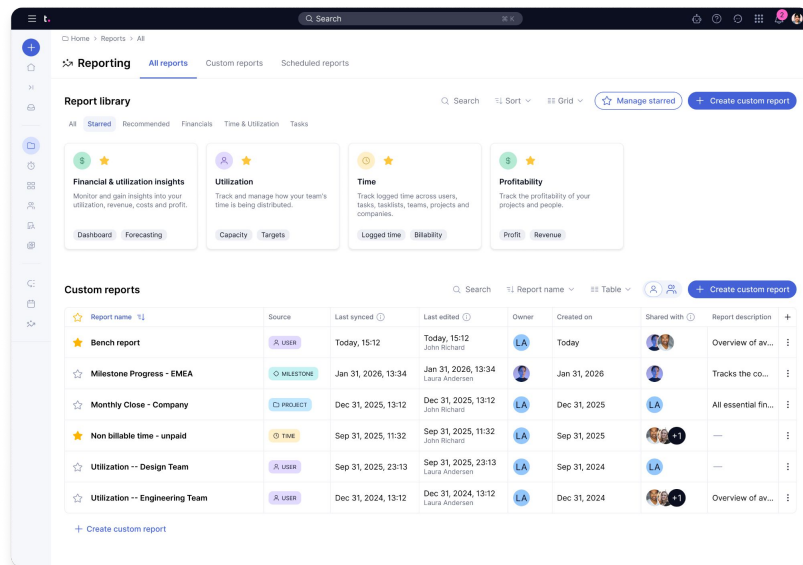
Status: Live Coming Soon

Reporting 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



Deliver

Grow

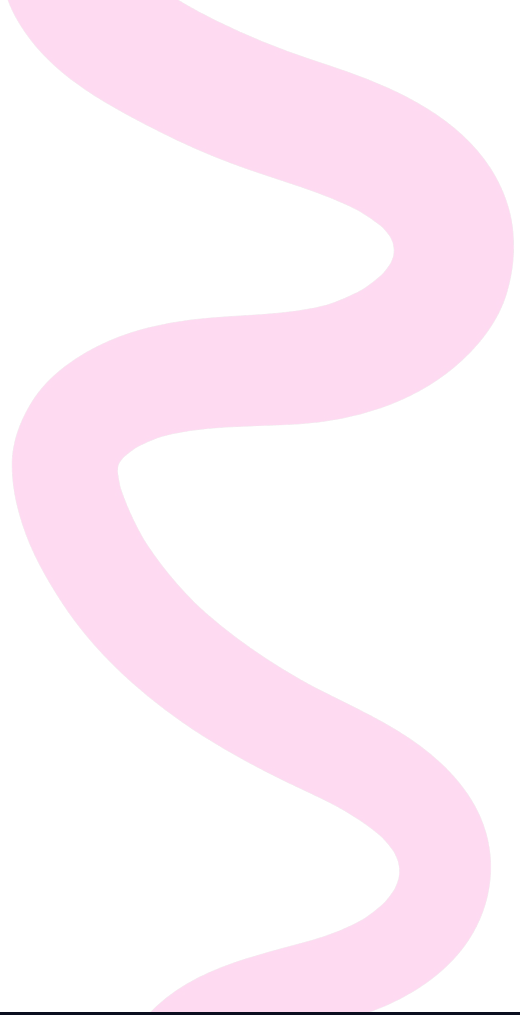
Scale

Status:  Live  Coming Soon



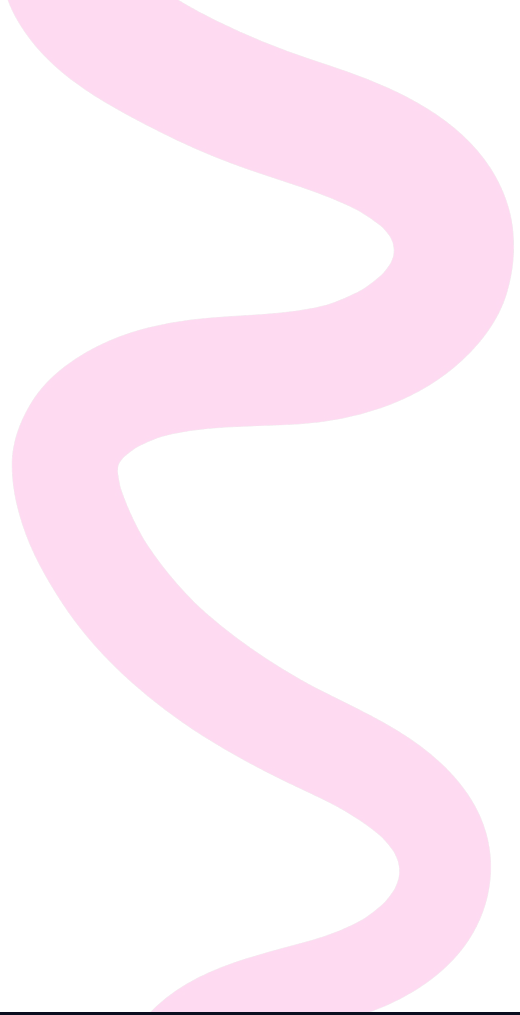
Q3+

**Coming
soon**

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Early access:

- New Table View (Project)
- Task-email integration
- Client Portal

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Q3+ 2026

TeamworkAI



Brand new feature



Enhancement

Ask AI

Find answers, take action, and stay productive without leaving your flow.

Why you'll love it:

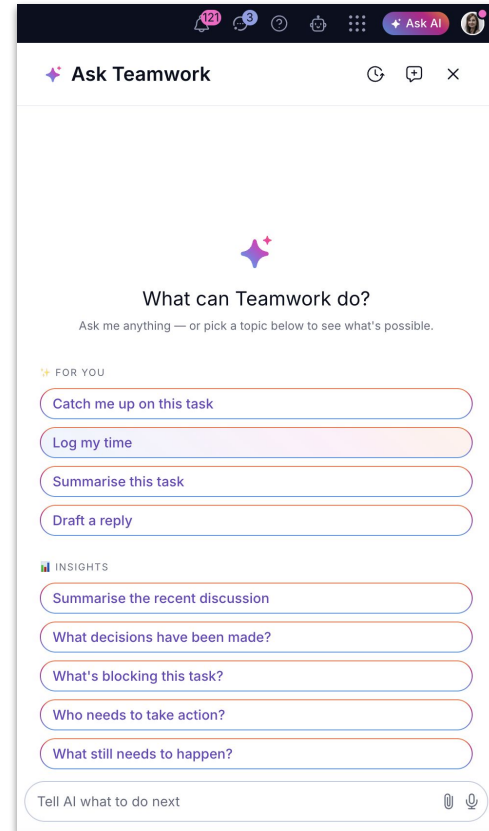
- **Ask in plain English:** Get instant answers from your live Teamwork.com data
- **Find work faster:** Locate tasks, projects, deadlines and updates without searching
- **Log time in seconds:** Add or bulk log time with a simple request
- **Take action instantly:** Create or edit tasks, update work, reply to comments, and draft project updates

Deliver

Grow

Scale

Status: ☐ Live ☒ Coming Soon



AI time logging

Describe your day in plain English, and TeamworkAI will draft accurate time logs for you to review.

Why you'll love it:

- **Just describe your work:** No need to find tasks or fill out forms
- **Log time in seconds:** TeamworkAI matches work to the right tasks and projects
- **Review before submitting:** Edit anything before your time is logged.
- **Catch up with ease:** Log a full day or multiple entries in one request

The screenshot displays the 'Log time' interface with a 'Manual' and 'Chat' tab. The 'Chat' tab is active, showing a draft of a time log. The draft text reads: 'Log 30 minutes on the task "AI entry points".' Below this, a message from the AI assistant states: 'Here's your draft: 30 minutes today on AI entry points (UI/UX Debt project), marked billable since that's the project's default. Heads up — I found you already logged 1h on this same task today (created at 12:06 local time), so double-check this isn't a duplicate before saving. Let me know if you'd like me to adjust anything!'. At the bottom of the chat area is a text input field with the placeholder 'Tell me about your day...' and a microphone icon. To the right of the chat area, a section titled 'Time logs to create' shows a single log entry for 'AI entry points' (UI/UX Debt) with a duration of '30m' and a time range of '9:00 am–9:30 am Today'. The entry is marked as 'Billable'. At the bottom right, a summary shows 'Total time 30m' and a 'Start over' button, followed by a large 'Log time' button.

Deliver

Grow

Scale

Status: ☐ Live ☒ Coming Soon

Meet Jack, our newest AI Teammate

Jack lets you build custom workflows that connect Teamwork.com with the tools you use, automating the way your business gets work done.

Why you'll love it:

- **Connect Teamwork to the tools you already use**, like Xero, QuickBooks, HubSpot and MS Dynamics, and pull that data into your projects
- **Set up workflows that run automatically**, so things flow into Teamwork without anyone copying them in manually
- **Go beyond our built-in integrations:** Fill the gaps and handle logic that's specific to how your business works

Deliver

Grow

Scale

Status: ☐ Live ☒ Coming Soon

Create custom job

**Jack**
Connect your apps, automate your tasks, and save time.

Job name

Description
What does this job do?

Cancel [Save & open editor](#)





Brand new feature



Enhancement

Meet Remi, your Resource assistant

Remi is your personal assistant for resource planning. She'll help you staff projects in seconds, balancing your team's capacity against what matters most!

Why you'll love it:

- **Schedule your projects:** tell Remi what matters most (time, cost, or profit) and she'll propose the optimal schedule for your team
- **Protect your margins** by factoring in billable rates, cost rates, and utilization targets before work ever starts
- **Spot bottlenecks** before they happen, so you can rebalance workloads instead of firefighting mid-project.

Schedule with Remi

Which project?

Select a project

What matters most?



Time

Finish fastest



Cost

Lowest spend



Profit

Max margin

Options

☐ Allow multiple assignees per task

Defaults

Default task estimate (if unset)

2.5h or 2h 30m

Default cost rate (if unset)

0

Default billable rate (if unset)

0

Default utilisation target (if unset)

% 80

Bottleneck threshold

% 80

Cancel

Plan my project



Add-on

Status: ☐ Live ☒ Coming Soon



Brand new feature



Enhancement

Meet Dotty, your Desk assistant

Dotty is your personal assistant for all things Desk. She'll help you be more efficient and ensure you have all information on hand when responding to client requests.

Why you'll love it:

- **Build your knowledge base** using historical tickets, help docs, and external links so replies are based on **your** content
- **Let Dotty propose replies** based on what worked before and your knowledge base, then edit and send, cutting time spent drafting responses
- **Spot trends across your tickets automatically**, so you can surface patterns to product and fix issues before they become problems.

Add-on

Status:



Live



Coming Soon

Website footer links not redirecting properly

#11555446

Reply Note Forward

Write your reply here

Messages 1 Attachments Tasks Customer history Activity

The customer reports that several footer links configured in the CMS are redirecting to incorrect pages and requests assistance in identifying the misconfiguration.

Positive - Last update Sep 26th 2026

Incorrect navigation links Messages 4

Customer reported homepage navigation links leading to wrong pages. Agent found outdated URLs in the CMS navigation menu and instructed the customer to update the link destinations themselves. Customer confirmed the fix.

Madison Brooks New status: Solved Jul 20th 2025 - 4:00PM

Perfect! Glad it worked. Thanks for confirming.

Alex Johnson New status: Action Jul 20th 2025 - 3:35PM

Updated the links in the CMS as you suggested, and they're now pointing to the right pages.

Madison Brooks New status: Waiting on customer Jul 20th 2025 - 10:55AM

Thanks for reaching out! We checked your CMS configuration and noticed that some of the navigation links were pointing to outdated or relative URLs. To fix this, go to CMS > Navigation Settings > Homepage Menu and update the link destinations to the full, correct URLs. Could you try adjusting that?

Alex Johnson Jul 20th 2025 - 9:55AM

Open in quick view

None

Source

Email

Update

I found 3 similar tickets

Homepage navigation links i, Customer reported homepage navigation links leading to wrong pages. Agent fo... 20 Jul, 2025

Broken links in the mobile site footer Customer reported broken links in the mobile footer. Agent identified misconfig... 12 Jul, 2025

Redirect loop when clicking footer... Customer reported that clicking the "Contact Us" link in the footer causes a r... 16 Jul, 2025

Show more





Brand new feature



Enhancement

Auto-suggested replies

Dotty draft responses automatically, going off of trends she's confident answering.

Why you'll love it:

- **Faster replies, stronger relationships:** Routine, FAQ-style tickets get an instant draft, so clients hear back in a fraction of the time, keeping client relationships healthy.
- **Nothing sends without you:** AI proposes, your team decides. Every reply sits in review until a human approves it, so you get the speed of automation with none of the "did the bot really just say that?" risk.
- **Free your team for the complex work:** Dotty takes the repetitive questions out of the queue, so your team gets their time back for the high-value problems that actually need a human.

Add-on

Status: ☐ Live ☒ Coming Soon



Dotty

Desk assistant

Auto-suggest replies successfully enabled for this topic

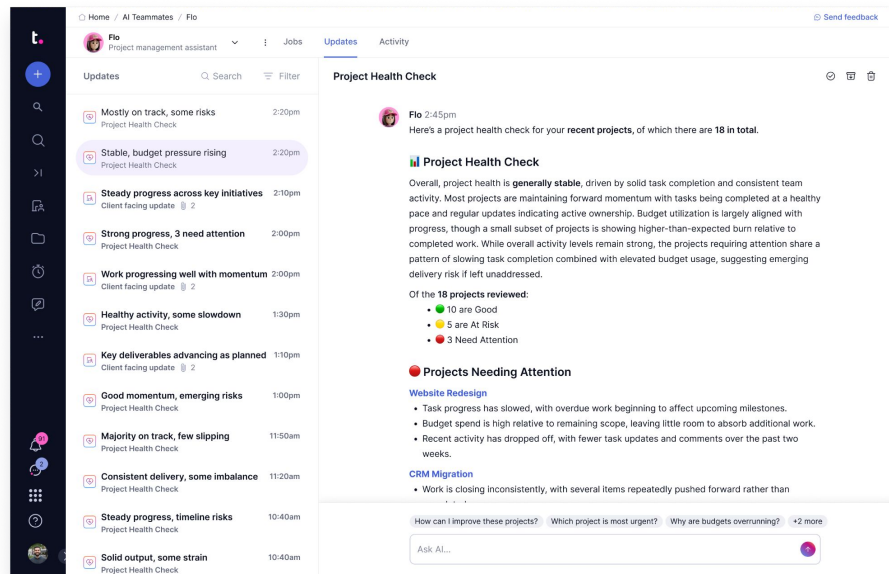


AI Teammates: Multi-channel updates

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

Grow

Scale

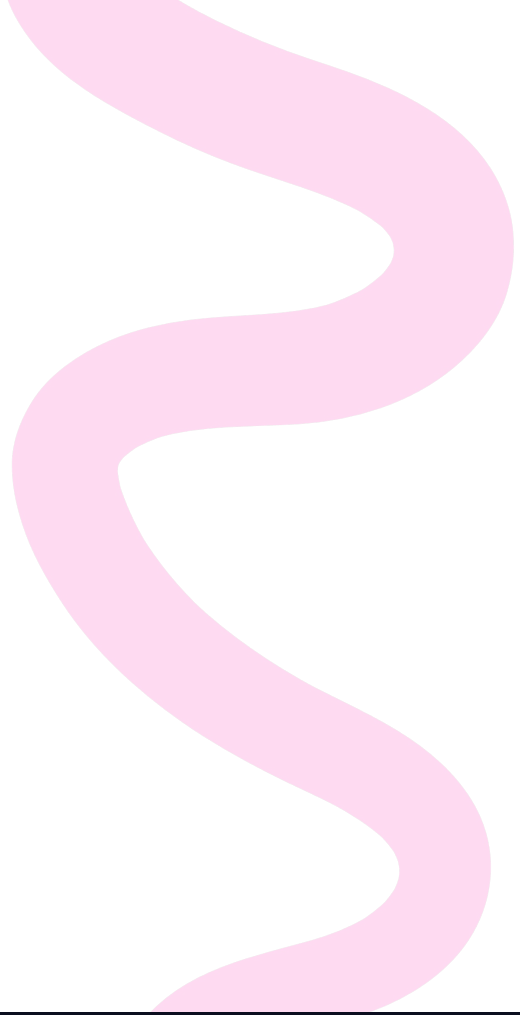
Status:



Live



Coming Soon

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Q3+ 2026

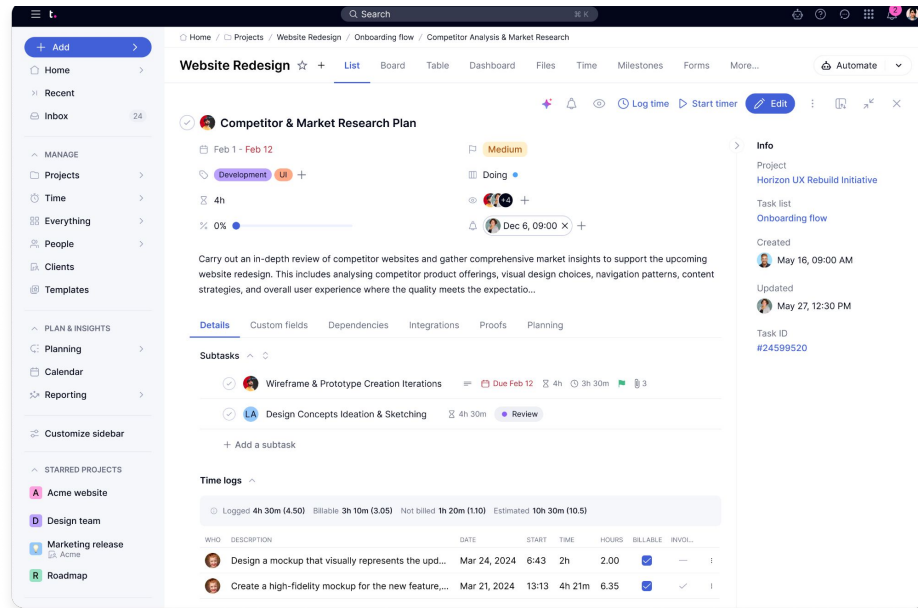
Manage client work

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



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Status: ☐ Live ☒ Coming Soon

New Table View experience

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 shows a 'Table' view within a 'Website redesign' project. It displays a list of tasks with columns for task name, assignee, due date, priority, and time. A 'Group by' dropdown menu is open, showing options like 'None' and 'Task list'. The tasks are organized into two sprints: 'Sprint 1' and 'Sprint 2'. Each task row includes a checkbox, a task description, an assignee icon, a due date, a priority level (Low, Medium, High), and a time estimate. To the right of each task, there are additional status tags and links for more details.

TASK NAME	ASSIGNEE	DUE DATE	PRIORITY	GROUP BY	DETD TIME	TAGS
Sprint 1 16 Tasks						
✓ This is a really long task with fifty five characters	[Avatar]	10 Sept	Low	Task list	1h	+ In progress UX Test
> 4 Design homepage layout and features	[Avatar]	9 Sept	Medium		30m	+ Approval needed Label L
✓ Define User Personas	[Avatar]	6 Sept	High		10m	+ Meeting booked Sales
🕒 Conduct UX Audit	[Avatar]	10 Sept	High		15m	+ Design QA
🔄 Revise, streamline, and simplify overall site navigation	[Avatar]	4 Aug	Medium		1h 20m	+ Project management
> 6 This is an example of a task that is too long to fit ...	[Avatar]	14 Sept	High		25m	+ Retainer Backlog
+ Add a task						
Sprint 2 12 Tasks						
✓ Choose Typography	[Avatar]	1 Oct	Low		1h	+ Lightspeed
🕒 Plan Content Strategy	[Avatar]	1 Oct	Medium		15m	+ Documentation Files
✓ Design Homepage	[Avatar]	1 Oct	High		15m	+ Design QA
> 2 Optimize Mobile Layout	[Avatar]	1 Oct	High		30m	+ Design team Proofing
✓ Create Style Guide	[Avatar]	1 Oct	High		10m	+ Needs info Backlog
> 3 Write New Copy	[Avatar]	1 Oct	Medium		45m	+ UI review needed
✓ Review dev tasks	[Avatar]	1 Oct	Medium		1h	+ High impact
+ Add a task						

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

[Desk Feedback] 356200 - irishguidedogs2.teamwork.com 7

Hi Sudesh, Thank you for the reply. I do apologise for the delay. Our team are still looking into this issue. As soon as we have an update I will let you know. If you have...

Support - Bug Desk feedback widget Support - SLA 2 Inbox: Desk +3

Customer	Agent	Inbox	Status
SH Sudesh Hendr...	JH John Horgan	Customer Support	● Bug Report
Ticket #	Last updated		
92963458	20 Jul 2026, 16:48		

[View all tickets](#) [+ Create a ticket](#)

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Status: ☐ Live ☒ Coming Soon

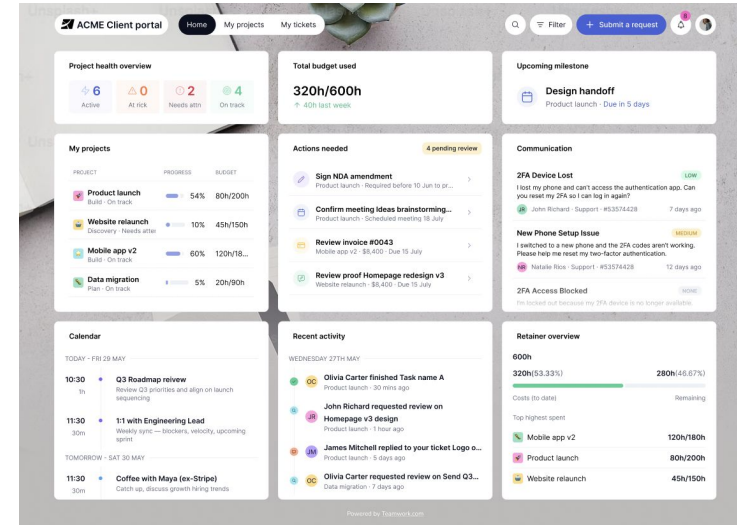
Client Portal

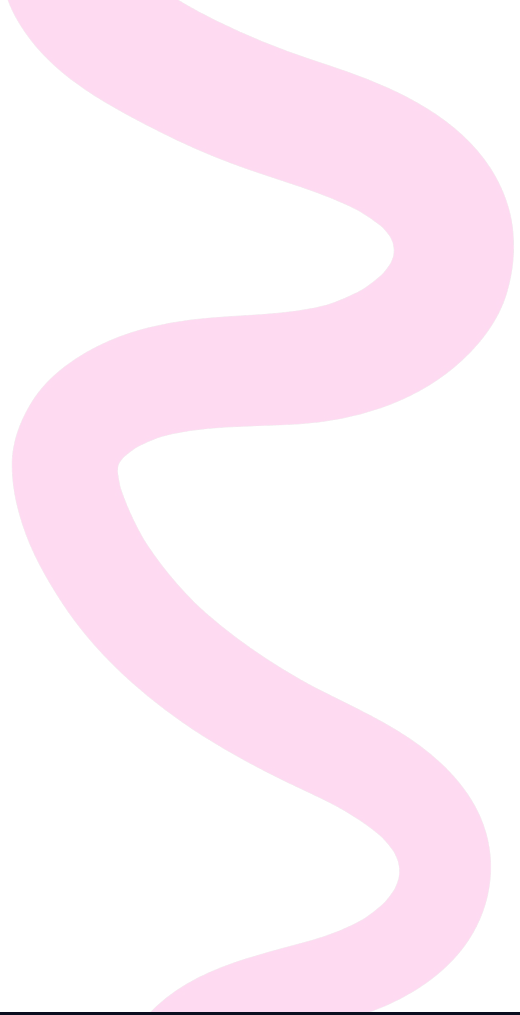
Real-time work visibility your clients actually trust — without the manual reporting.

Why you'll love it

- **Reclaim hours every week:** Stop building weekly status emails, Excel dashboards, and manual summaries. Your team can reclaim this time
- **Strengthen client relationships through transparency:** Clients see real-time project progress, upcoming milestones, and open requests in one place. It builds trust, reduces "where are we?" emails, and gives you a competitive advantage when renewing contracts
- **Look professional and stay in control:** A branded, customizable portal that reflects your org's identity not Teamwork.com's internal UI. You decide what clients see and keep your internal workflows completely separate and hidden.

Status: ○ Live ● Coming Soon



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Plan resources

Placeholder users

Placeholders are going global!

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

Deliver

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Status: ☐ Live ☒ Coming Soon

Add placeholder

[Feedback](#) ✕

Planning with placeholders

A stand-in for a future person. They keep your plans and forecasts on track until the right person is confirmed. [Learn more](#)

Role*

AI Consultant

Name*

New Hire

Skills

AI ✕

Client Briefing ✕

Forecasting ✕

Working hours

Sun

0

Mon

8

Tue

8

Wed

8

Thu

8

Fri

8

Sat

0

Cancel

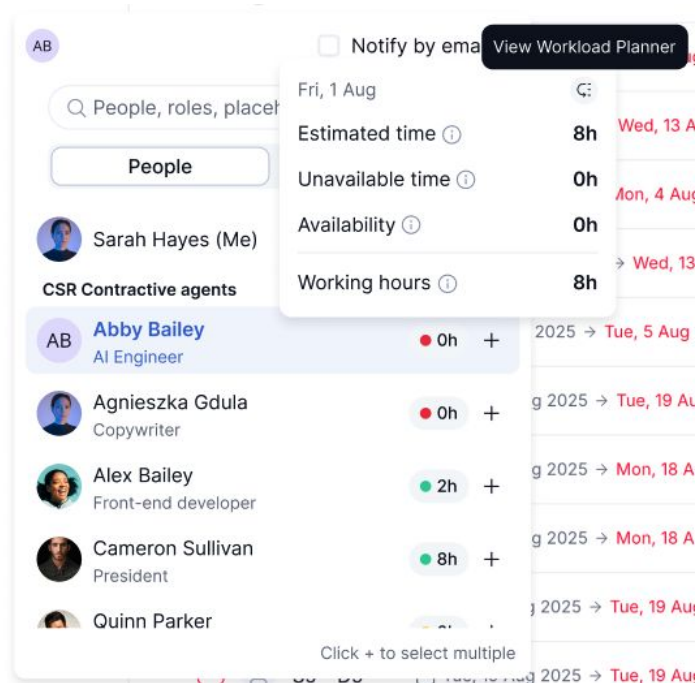
Add placeholder

Aligning Core and Planning Views

See who actually has capacity before you assign work, right where you're assigning it.

Why you'll love it:

- **Assign with capacity in view:** see each person's availability as you assign a task, so you're not guessing who has room.
- **Surface allocations and split capacity in task details,** showing who's working on on what and any linked allocations directly on the task.
- **Plan and deliver in sync,** closing the gap between your planning view and the work you're actually assigning.



Deliver

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Status: ☐ Live ☐ Coming Soon

Service Lines

Service lines bring structure to how you manage the services you deliver to clients. Instead of tracking work project by project, you organize it around the services your business is built on, and see how each one is really performing.

Why you'll love it:

- **Manage your business by the services you deliver**, not just a list of projects, so revenue, hours, and margin roll up to the service level
- **Understand which services are worth investing in**, spotting where you're delivering profitably and where delivery is eating into margin

Total revenue		Avg. margin		Most profitable	
\$412,600		34%		SEO	
Service line	Projects	Revenue	Billable hours	Margin	Trend
● SEO	14	\$128,400	1,240	42%	↗ +6%
● Paid media	9	\$96,200	870	38%	↗ +3%
● Web development	11	\$104,900	1,610	27%	— 0%
● Creative and design	7	\$54,300	690	24%	↘ -4%
● Content marketing	6	\$28,800	410	18%	↘ -7%

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Status: ☐ Live ☒ Coming Soon

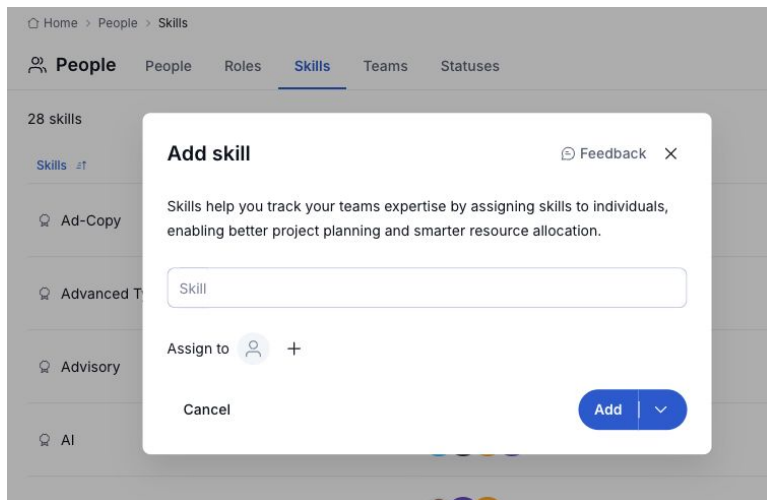
Skills matrix

Skills matrix

Assign work based on who's actually equipped to do it. The skills matrix will allow you to map skills and proficiency levels across your team, so the right people land on the right projects.

Why you'll love it:

- **Build a live view of your team's skills**, from design to development to client management, all in one place
- **Staff projects with confidence** by matching task requirements to people with the right skills and availability
- **Spot skill gaps early**, so you can plan hiring and training before they slow down delivery

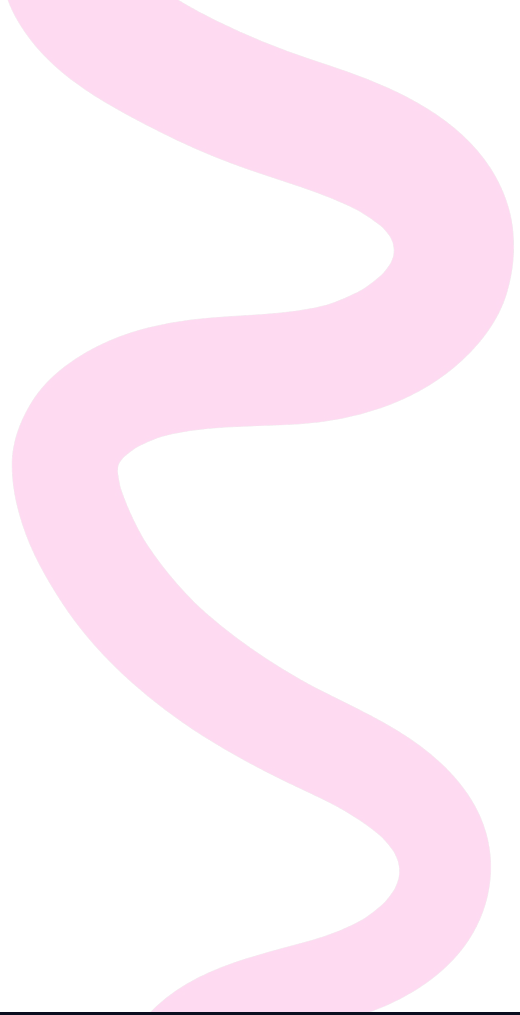


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Status: ☐ Live ☒ Coming Soon

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Q3+ 2026

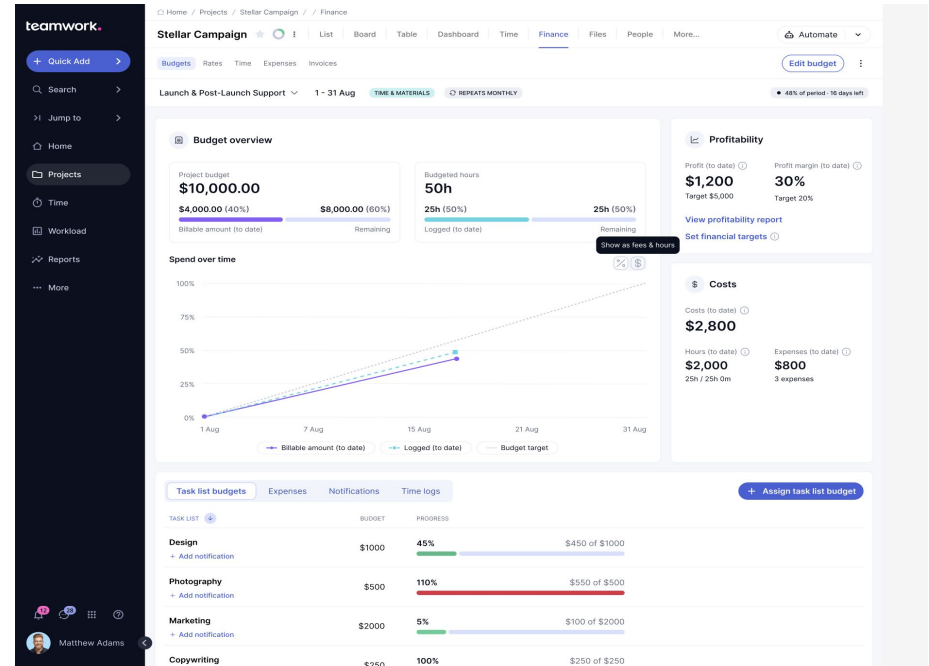
Make projects profitable

Dual Budgets

One project budget, tracking hours and fees at the same time.

Why you'll love it

- See hours and fees progress side-by-side, no more juggling two views
- No more splitting the picture between Teamwork and a spreadsheet
- One place to track the full financial picture of a project
- Time logged updates both targets automatically, no double entry



Deliver

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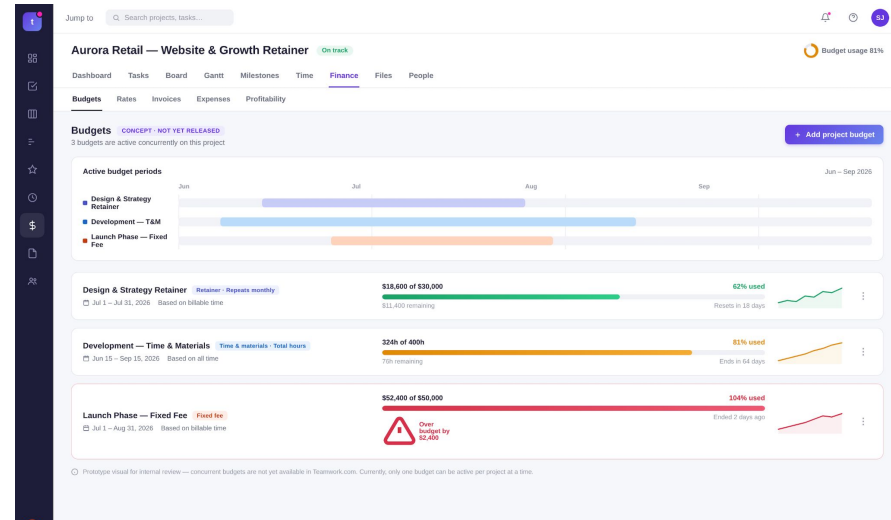
Status: ○ Live ● Coming Soon

Concurrent Budgets

Run multiple budgets on the same project at the same time.

Why you'll love it

- Track separate budgets for different phases or workstreams, without one project's budget muddying another
- Keep each piece of work accountable to its own numbers



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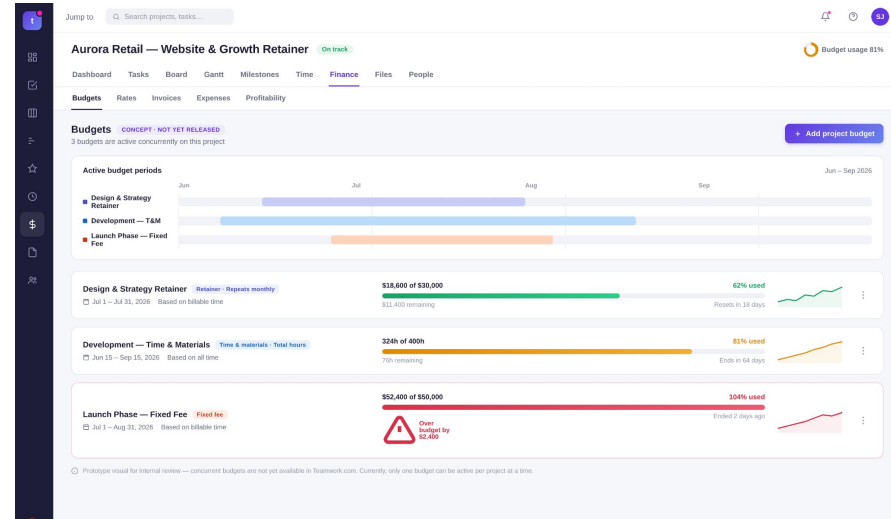
Status: ☐ Live ☒ Coming Soon

Sub Budgets

Break one budget down into smaller budgets underneath it.

Why you'll love it

- See spend and progress at a more granular level, per tasklist, milestone, or service line
- Roll everything back up into the parent budget for the full picture



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Status: ○ Live ● Coming Soon

Project-level multi-currency

Give each project its own currency, even when they're under the same client.

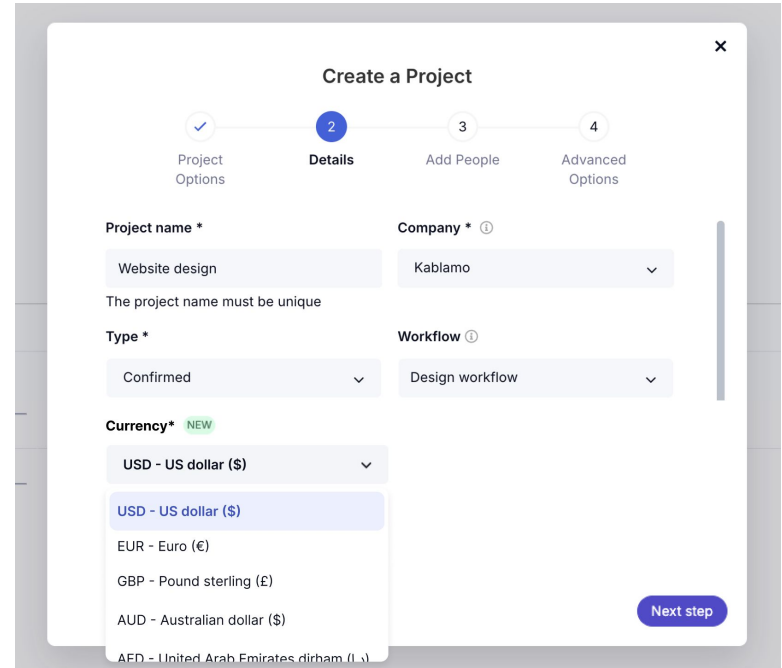
Why you'll love it

- Choose the appropriate currency for each project, regardless of the client's default currency
- Support global clients more flexibly by managing projects in the currencies they actually operate in

Deliver

Grow

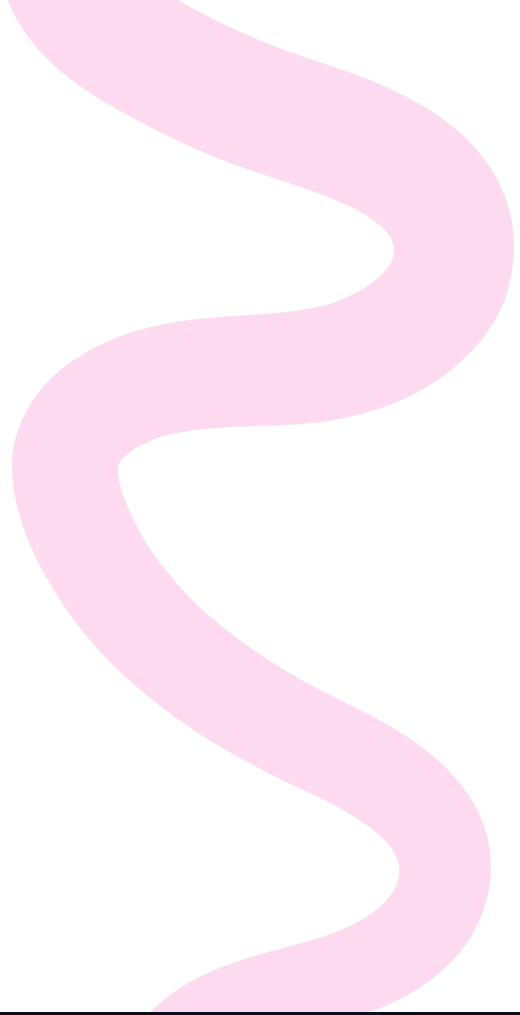
Scale

Status:  Live  Coming Soon

The screenshot shows the 'Create a Project' dialog with a progress bar at the top indicating four steps: 1. Project Options (completed), 2. Details (current step), 3. Add People, and 4. Advanced Options. The 'Details' section contains the following fields:

- Project name ***: Text input with 'Website design'. A note below states 'The project name must be unique'.
- Company ***: Dropdown menu with 'Kablamo' selected.
- Type ***: Dropdown menu with 'Confirmed' selected.
- Workflow**: Dropdown menu with 'Design workflow' selected.
- Currency***: Labeled with a green 'NEW' tag, it has a dropdown menu currently showing 'USD - US dollar (\$)'. An expanded list below shows other options: 'USD - US dollar (\$)', 'EUR - Euro (€)', 'GBP - Pound sterling (£)', 'AUD - Australian dollar (\$)', and 'AED - United Arab Emirates dirham (AED)'.

A 'Next step' button is located at the bottom right of the dialog.

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Q3+ 2026

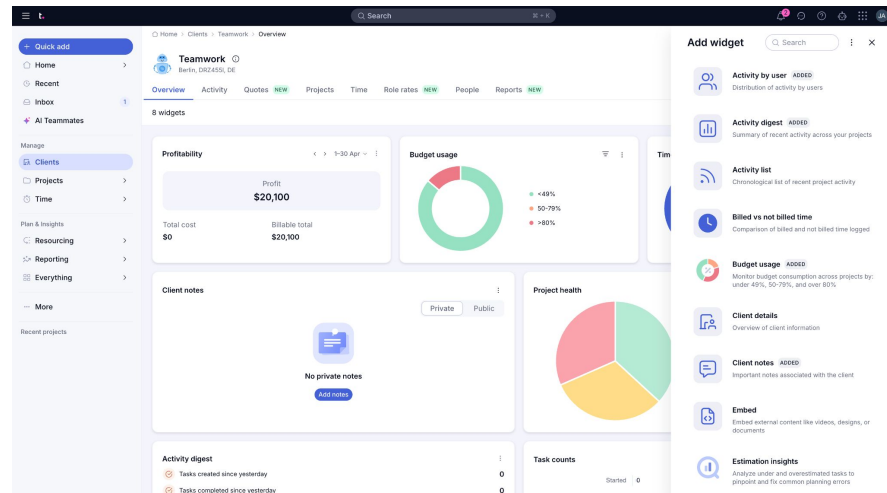
Track performance

Client Overview dashboard

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

Why you'll love it:

- Fully customisable 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



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Scale

Status:  Live  Coming Soon



Custom dashboards

Build a dashboard with the information you need.

Why you'll love it:

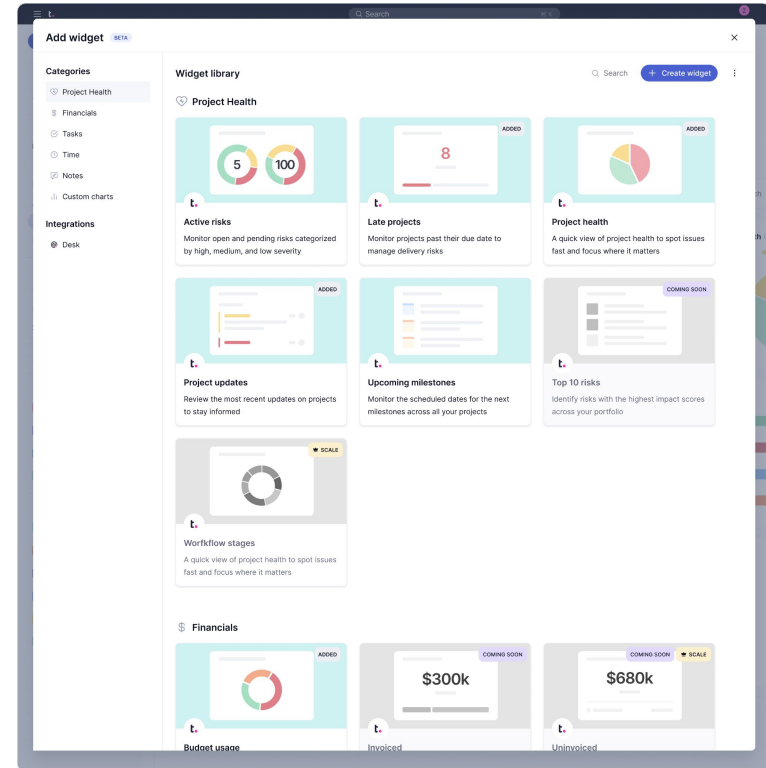
- Each team member can create a dashboard with the information they need to get their work done
- Identify issues, risks, actions, and blockers at a glance by surfacing the information you need in one place
- Contextual drill-downs to go from insight to action on the spot
- Choose from a wide-ranging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

Deliver

Grow

Scale

Status: ☐ Live ☒ Coming Soon



Thank You!

