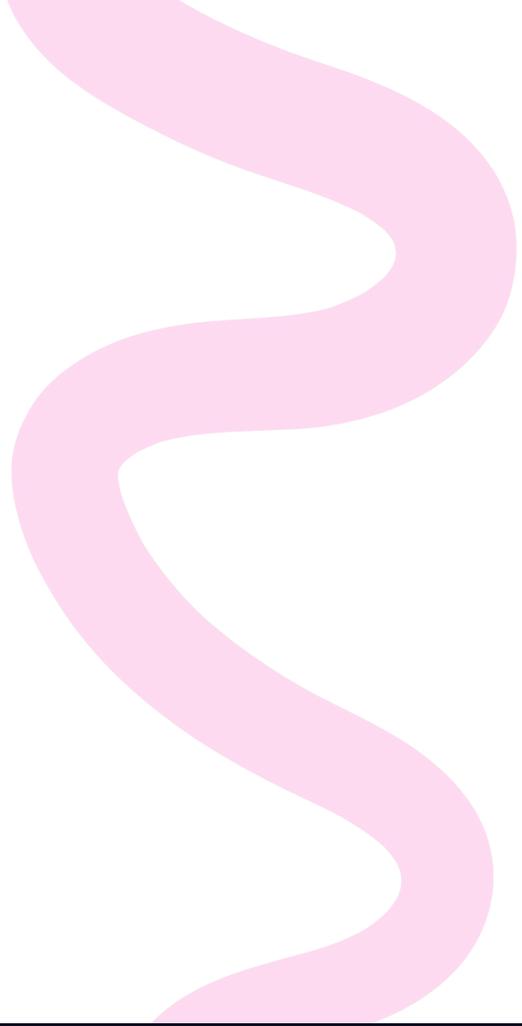


teamwork.com

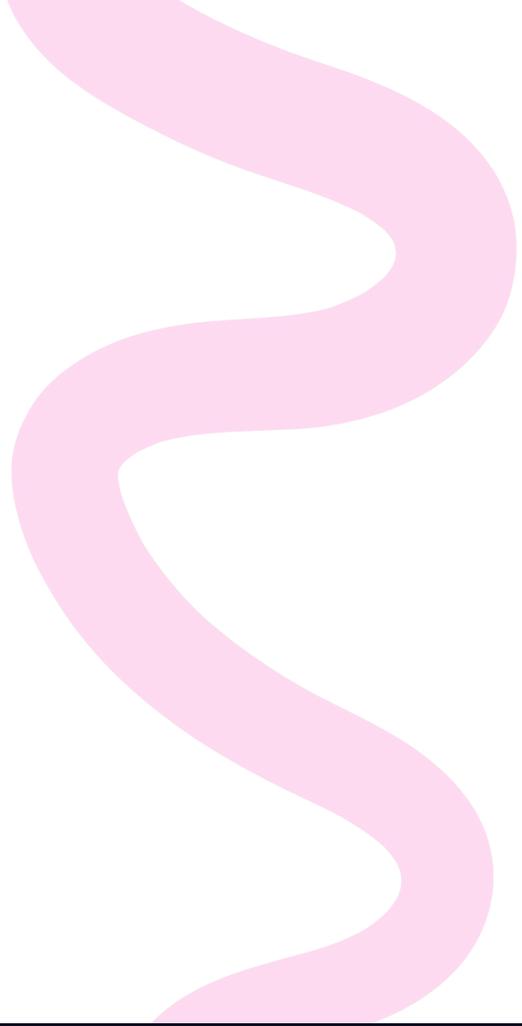
# Product Roadmap

Q1 2026



Q4 2025

# Recently released



Q4 2025

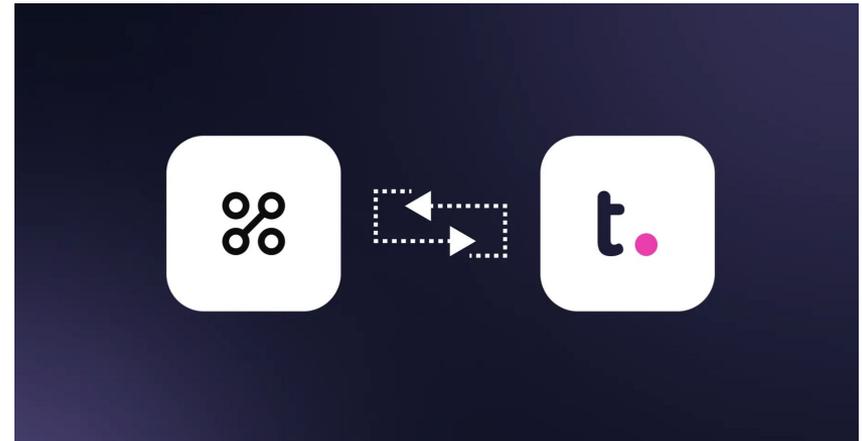
# TeamworkAI

# ✨ Teamwork.com-ChatGPT Connector

Securely bring your projects, tasks, and updates into ChatGPT, making it easier to plan, write, and collaborate without switching tabs.

Why you'll love it:

- Seamlessly access and use Teamwork.com data inside ChatGPT—no more switching between apps to plan, write, or collaborate.
- Use real project context to generate proposals, analyze resourcing options, summarize work, or draft deliverables with meaningful, data-driven responses.



Status:  Live  Coming Soon

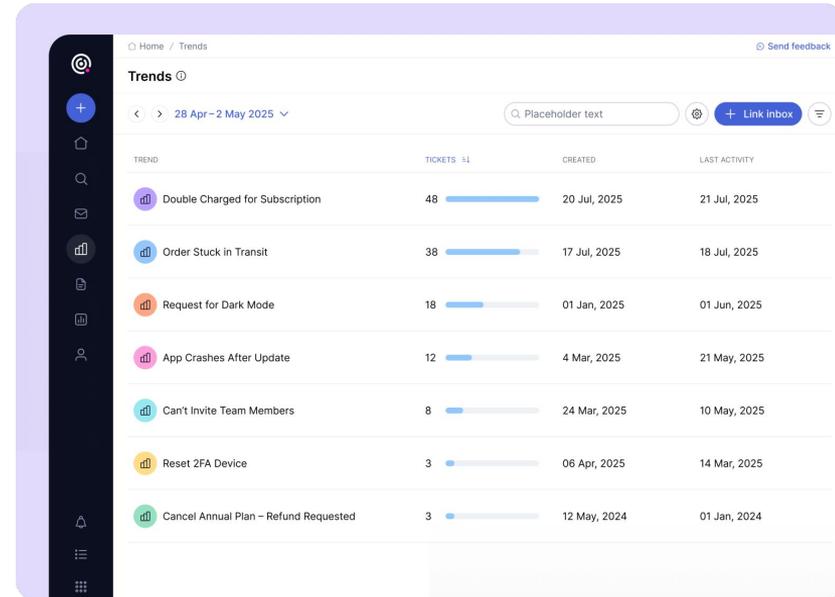
# ✨ Trends

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



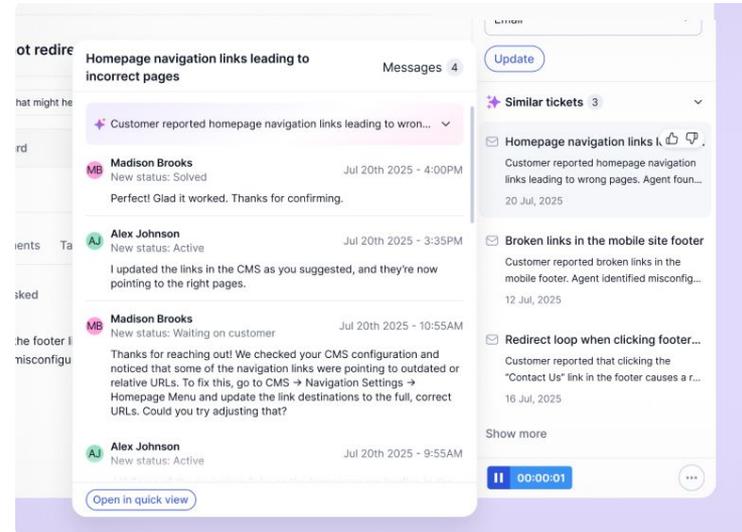
# Similar Tickets

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

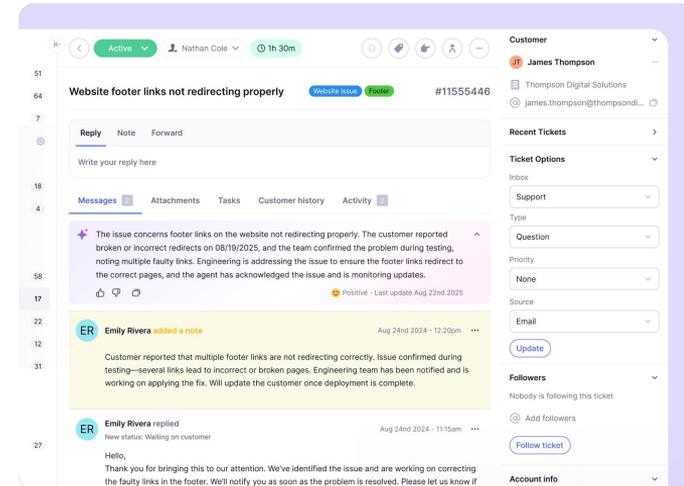


# ✨ Ticket Summarization

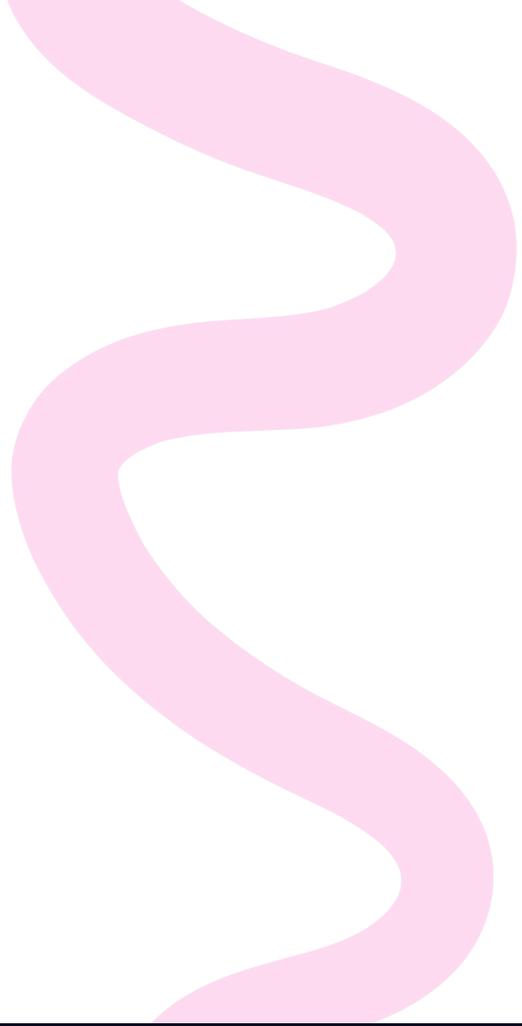
When reviewing or handing off a ticket, Teamwork Desk automatically creates a smart summary of everything that's happened so far so you can understand the full context in seconds.

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



Q4 2025

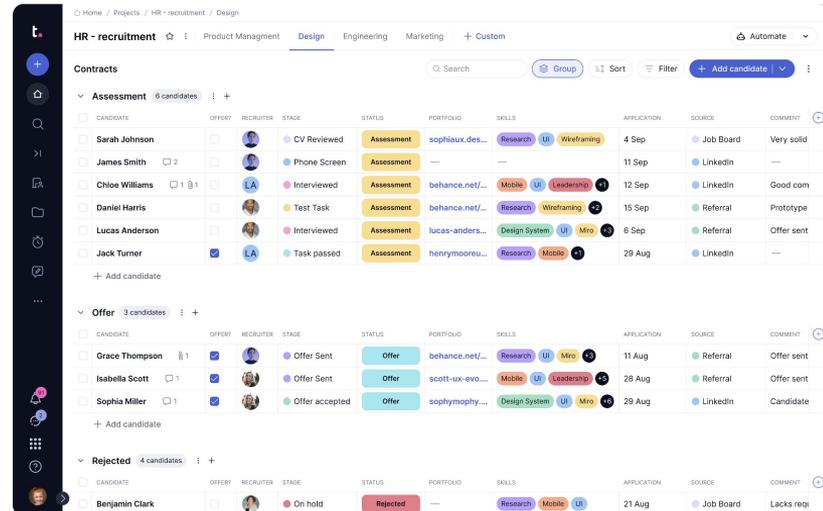
# Manage client work

# 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!



Deliver

Grow

Scale

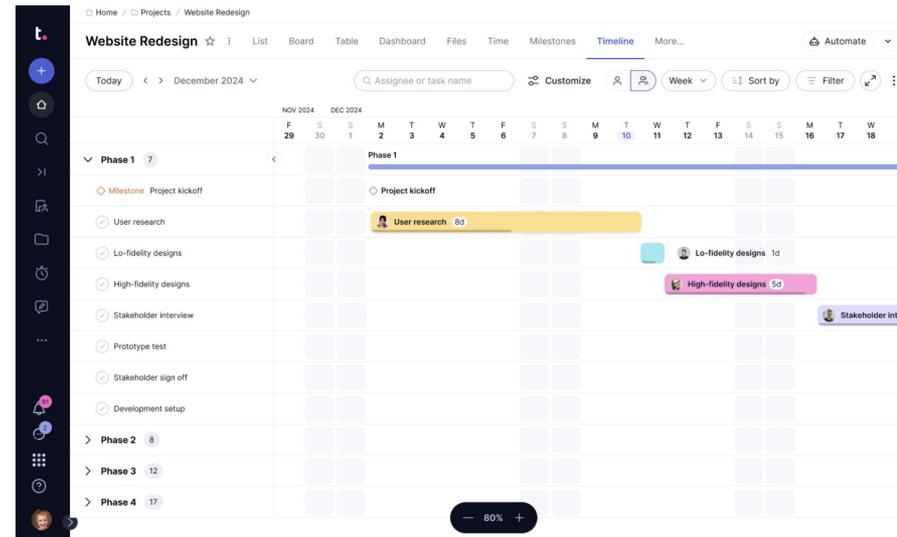
Status: ● Live ● Coming Soon

# Timeline View

Introducing 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.



Deliver

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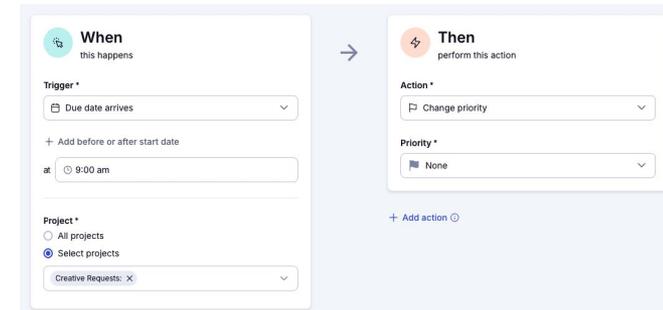
Status:  Live  Coming Soon

# 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



Deliver

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Scale

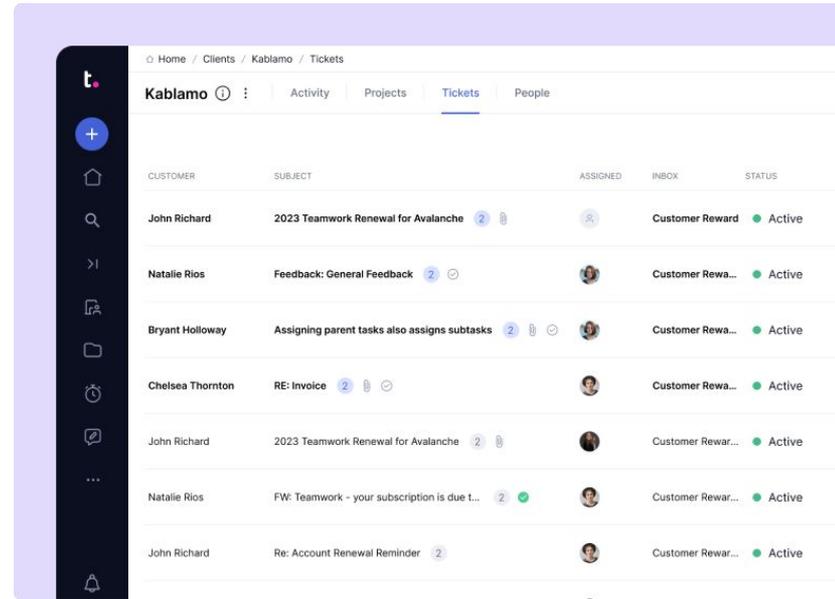
Status:  Live  Coming Soon

# Connecting a Desk inbox to a project

Quickly connect tickets from a Desk inbox directly to a project. Save yourself and team time by setting it once!

Why you'll love it:

- Perfect for when tickets from an inbox need to be visible within a project.
- Create a single source of truth, with communication available directly in the project.
- Quickly reply to your clients, or collaborate using notes all within one place.



All Plans

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

The screenshot shows a ticket list in Teamwork Desk. The interface includes a 'Send feedback' link and a '+ New ticket' button. The ticket list has columns for 'ASSIGNED', 'STATUS', 'SLA', 'ID', and 'CREATED'. Tickets are categorized as 'Waiting on customer (12)' and 'Closed (28)'. A tooltip is shown over the '30m' SLA indicator for a ticket, displaying two due dates: 'First time reply due' (14 Oct, 2025 11:30AM) and 'Total resolution time due' (16 Oct, 2025 11:30AM). Ticket titles include 'Issue on new landing page', 'Email campaign not sending', 'Slow time on homepage', 'System went offline after the latest plugin update', and 'Content dates not reflecting on live site'.

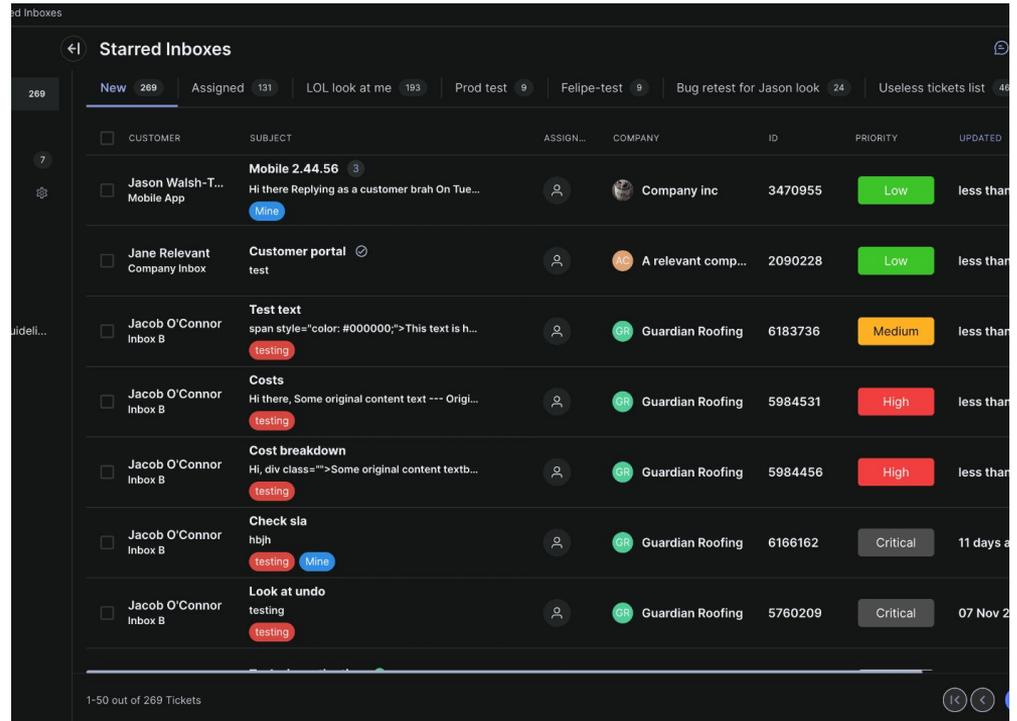
# Desk Dark Mode

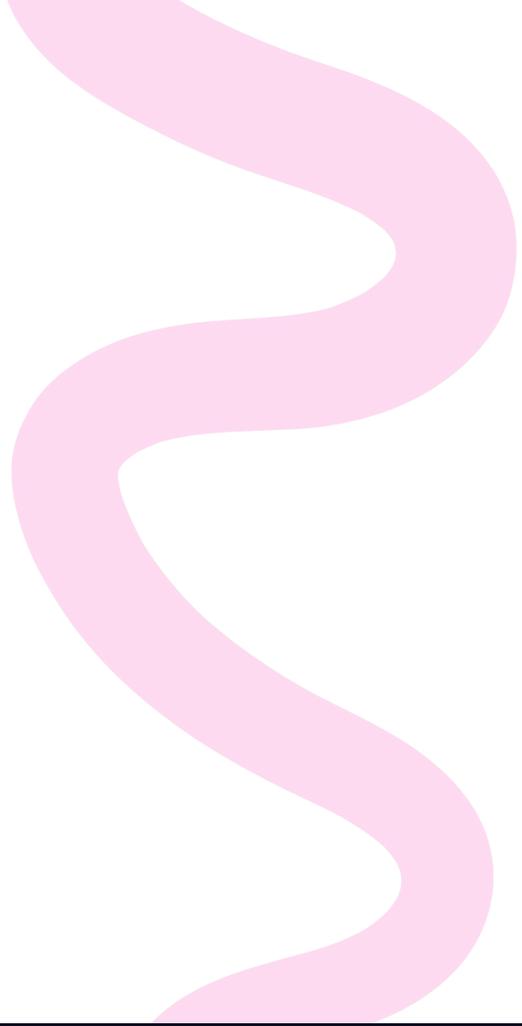
You asked, and we heard you! Dark Mode for Desk is out for early access.

Why you'll love it:

- Your team can choose which theme they prefer, so everybody can work through their tickets in comfort.
- Aligns with themes available in Teamwork.com to save you needing to adjust when switching between platforms.

Status:  Live  Coming Soon





Q4 2025

# Plan resources

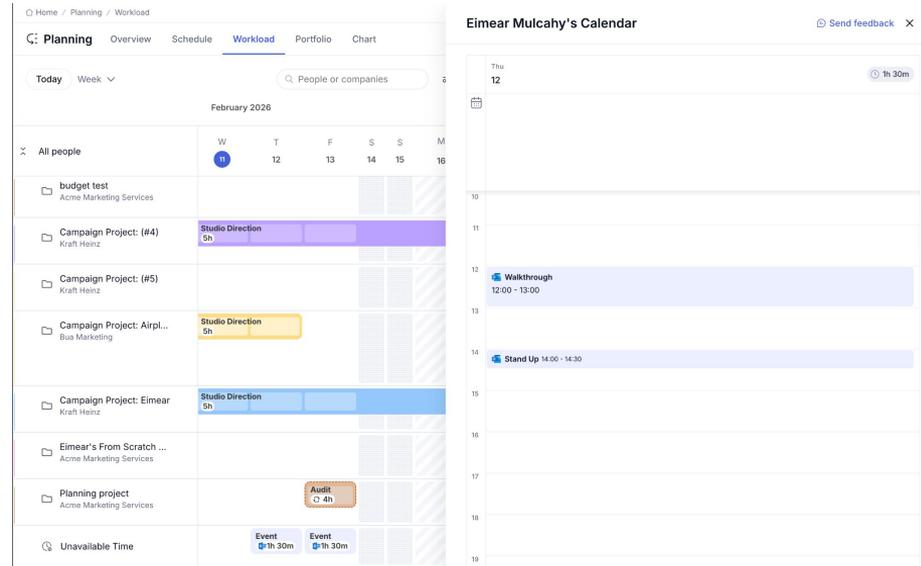
# Outlook in Planning

## 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

Scale

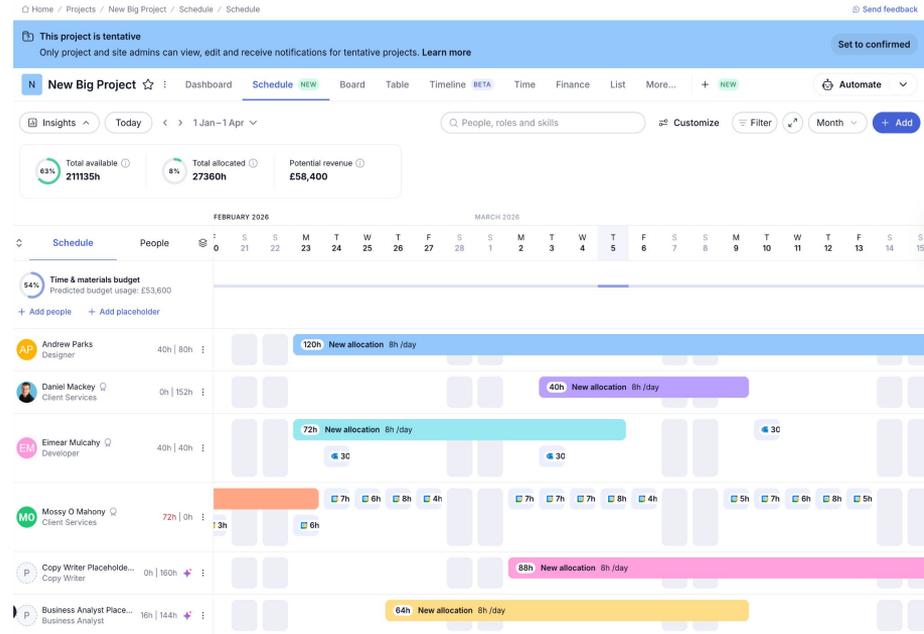
Status:  Live  Coming Soon

# 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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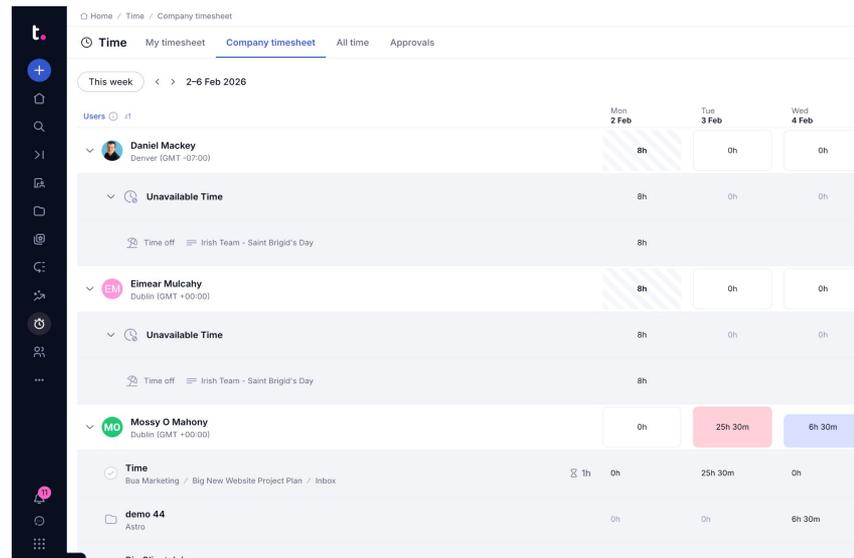
Status:  Live  Coming Soon

# Time Off in Timesheets

Stop chasing hours that were never meant to be logged - Time off now live directly inside Timesheets!

Why you'll love it:

- No more chasing time on public holidays. If a public holiday is set globally, it now shows directly in Timesheets.
- More accurate time tracking: Logged hours are automatically contextualised with time off.
- Cleaner weekly reviews: Instantly understand why hours weren't logged.
- More trustworthy reporting: Time data now reflects reality, without manual checks.



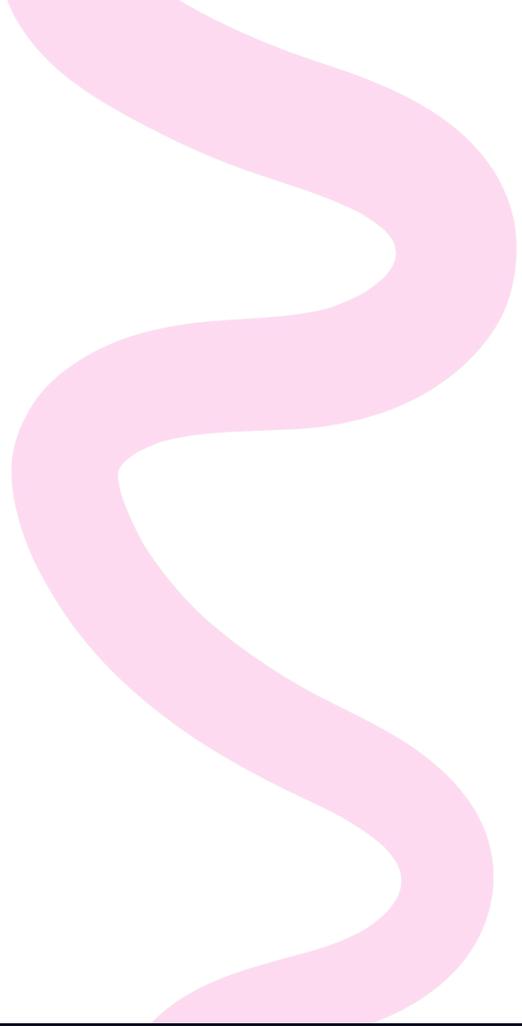
		Mon 2 Feb	Tue 3 Feb	Wed 4 Feb
Users	#1			
✓ Daniel Mackey Denver (GMT -07:00)		8h	0h	0h
✓ Unavailable Time		8h	0h	0h
Time off	Irish Team - Saint Brigid's Day	8h		
✓ Eimear Mulcahy Dublin (GMT +00:00)		8h	0h	0h
✓ Unavailable Time		8h	0h	0h
Time off	Irish Team - Saint Brigid's Day	8h		
✓ Mossy O Mahony Dublin (GMT +00:00)		0h	25h 30m	6h 30m
Time	Bus Marketing / Big New Website Project Plan / Inbox	1h	0h	25h 30m
demo 44 Astoria		0h	0h	6h 30m
Bin Client Job				

Deliver

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Scale

Status:  Live  Coming Soon



Q4 2025

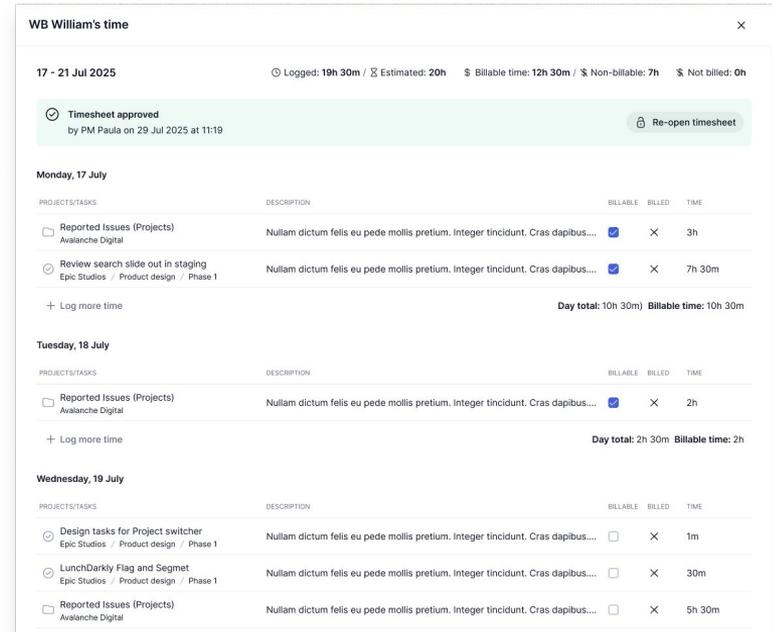
# **Make projects profitable**

# 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
<input type="checkbox"/> Reported Issues (Projects) Avalanche Digital	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3h
<input checked="" type="checkbox"/> Review search slide out in staging Epic Studios / Product design / Phase 1	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7h 30m
+ Log more time		Day total: 10h 30m Billable time: 10h 30m		

**Tuesday, 18 July**

PROJECTS/TASKS	DESCRIPTION	BILLABLE	BILLED	TIME
<input type="checkbox"/> Reported Issues (Projects) Avalanche Digital	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2h
+ Log more time		Day total: 2h 30m Billable time: 2h		

**Wednesday, 19 July**

PROJECTS/TASKS	DESCRIPTION	BILLABLE	BILLED	TIME
<input checked="" type="checkbox"/> Design tasks for Project switcher Epic Studios / Product design / Phase 1	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1m
<input checked="" type="checkbox"/> Lunch/Darkly Flag and Sagemat Epic Studios / Product design / Phase 1	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30m
<input type="checkbox"/> Reported Issues (Projects) Avalanche Digital	Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5h 30m

Deliver

Grow

Scale

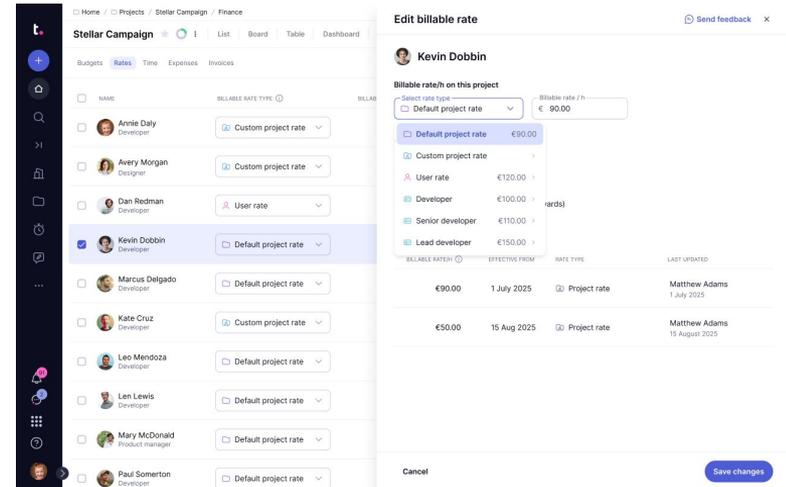
Status:  Live  Coming Soon

# 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 placeholders) 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

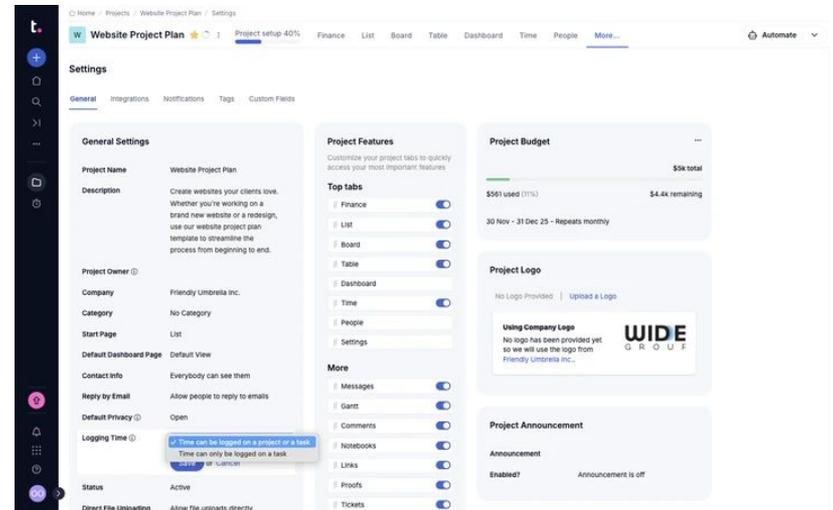
Status:  Live  Coming Soon

# Make task selection mandatory when logging time

Now you have the option to mandate that a task needs to be included in every single time log.

Why you'll love it:

- Help with specificity, and ensure time logs are affiliated with actual, unique tasks.
- More granular time logging control and rules to better understand your team's time.
- Manage these preferences project-by-project for utmost flexibility

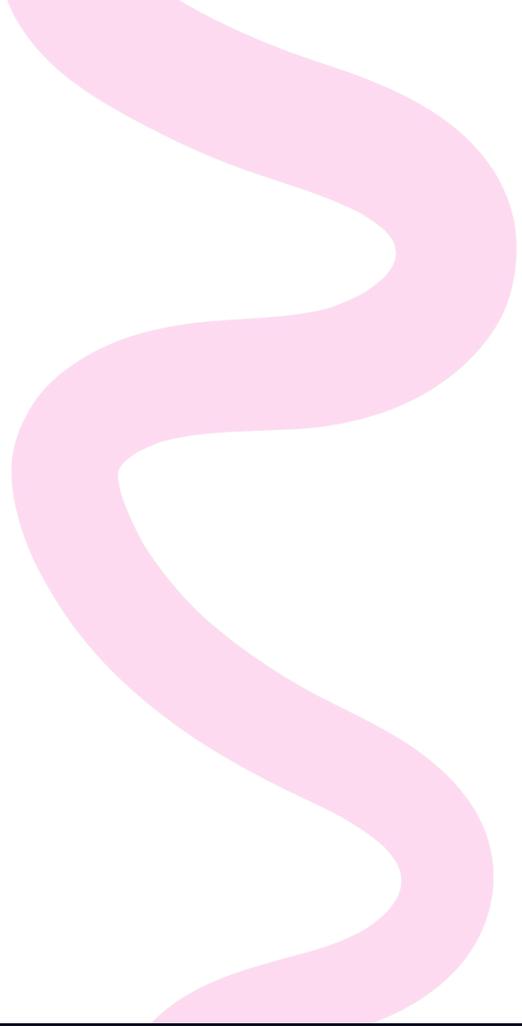


Deliver

Grow

Scale

Status:  Live  Coming Soon



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.

CLIENT	BUDGET STATUS	BUDGET AMOUNT (B)	BUDGET AMOUNT (H)	USED VS REMAINING BUDGET	BILLABLE TOTAL	PROFIT	BILLABLE TIME
Eco Marketing	Mixed	\$16,731	240h	52% / 48%	\$22,150	\$6,140	585h
Cross-Platform Mobile App	Mixed	\$120,550	100h	74% / 26%	\$17,150	\$3,148	496h
Time & materials	Upcoming	—	100h	40% / 60%	\$5,000	\$2,850	80h
Discovery & Design	—	—	20h	95% / 5%	\$900	\$497	20h
Tech implementation	—	—	853h	100% / 0%	\$1,250	\$497	30h
Testing	—	—	40h	400% / 0%	\$1,000	\$497	30h
Retainer	Ended	\$110,500	—	19% / 81%	\$860	\$497	400h
Fixed fee	Active	\$1,150	—	19% / 81%	€10,000	\$1,034	12h
Outside budget	—	—	—	—	\$1,000	\$1,034	4h
SEO Campaign	Mixed	\$4,181	50h	52% / 48%	\$1,000	\$3,000	4h
<b>21 Total</b>		<b>\$ 103,842.00</b>	<b>1000 h</b>	<b>52% / 48%</b>	<b>\$ 36,243.00</b>	<b>\$ 41,844.00</b>	<b>430 h</b>

Deliver

Grow

Scale

Status: ● Live ○ Coming Soon

# Advanced Filtering

Get more control over how data is surfaced in your Custom Reports and the Budget Insights Report.

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

Grow

Scale

Status:  Live  Coming Soon

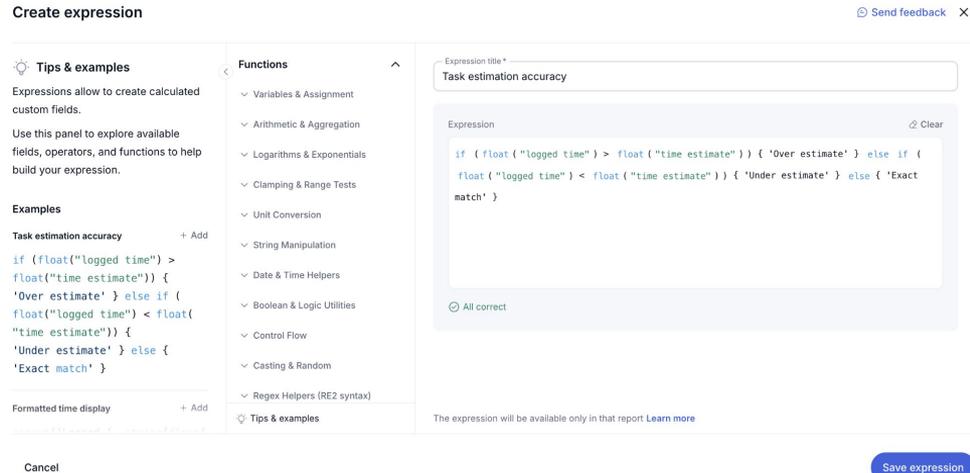
*\*Advanced filtering will be extended to remaining pre-canned reports in the coming months*

# Expression Builder

Create calculated fields directly in your reports so you can turn raw project data into meaningful, customized insights without leaving the reporting experience.

Why you'll love it:

- Build custom expressions using existing fields, operators, and functions with a more intuitive UI.
- Explore guided tips, examples, and functions to create calculations with confidence.
- Tailor reports to match how your team measures success.



**Create expression** Send feedback

**Tips & examples**  
Expressions allow to create calculated custom fields.  
Use this panel to explore available fields, operators, and functions to help build your expression.

**Examples**

Task estimation accuracy + Add

```
if (float("logged time") > float("time estimate")) { 'Over estimate' } else if (float("logged time") < float("time estimate")) { 'Under estimate' } else { 'Exact match' }
```

Formatted time display + Add

**Functions**

- Variables & Assignment
- Arithmetic & Aggregation
- Logarithms & Exponentials
- Clamping & Range Tests
- Unit Conversion
- String Manipulation
- Date & Time Helpers
- Boolean & Logic Utilities
- Control Flow
- Casting & Random
- Regex Helpers (RE2 syntax)
- Tips & examples**

Expression title \*  
Task estimation accuracy

Expression Clear

```
if ( float ( "logged time" ) > float ( "time estimate" ) ) { 'Over estimate' } else if ( float ( "logged time" ) < float ( "time estimate" ) ) { 'Under estimate' } else { 'Exact match' }
```

All correct

The expression will be available only in that report [Learn more](#)

Cancel Save expression

Deliver

Grow

Scale

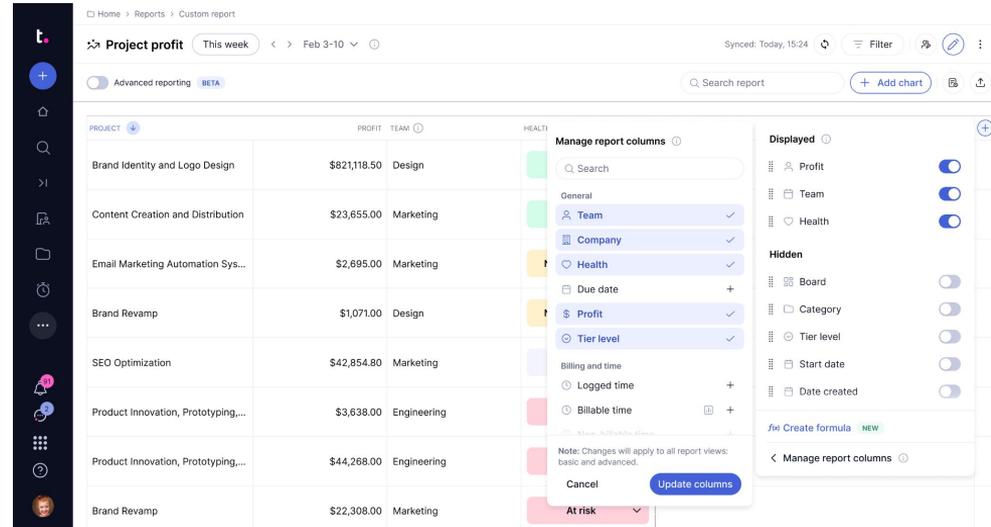
Status:  Live  Coming Soon

# Custom Reports management

Now it's easier than ever to manage your custom reports with improved editing options!

Why you'll love it:

- Faster edits in real time: reorder and toggle existing columns on/off with speed.
- Clear visibility into the latest sync, so you know the last time the data was updated
- Quick access to the Formula Builder for Scale accounts.
- Extended access: Custom Reports now offer 3 years range.



Project profit | This week | Feb 3-10 | Synced: Today, 15:24 | Filter | Add chart

Advanced reporting BETA | Search report | Add chart

PROJECT	PROFIT	TEAM	HEALTH
Brand Identity and Logo Design	\$821,118.50	Design	Green
Content Creation and Distribution	\$23,655.00	Marketing	Green
Email Marketing Automation Sys...	\$2,695.00	Marketing	Yellow
Brand Revamp	\$1,071.00	Design	Yellow
SEO Optimization	\$42,854.80	Marketing	Grey
Product Innovation, Prototyping...	\$3,638.00	Engineering	Pink
Product Innovation, Prototyping...	\$44,268.00	Engineering	Pink
Brand Revamp	\$22,308.00	Marketing	Pink

**Manage report columns**

Search

General

- Team
- Company
- Health
- Due date
- Profit
- Tier level

Billing and time

- Logged time
- Billable time

Note: Changes will apply to all report views: basic and advanced.

Cancel | Update columns

At risk

**Displayed**

- Profit
- Team
- Health

**Hidden**

- Board
- Category
- Tier level
- Start date
- Date created

Create formula NEW

Manage report columns

Deliver

Grow

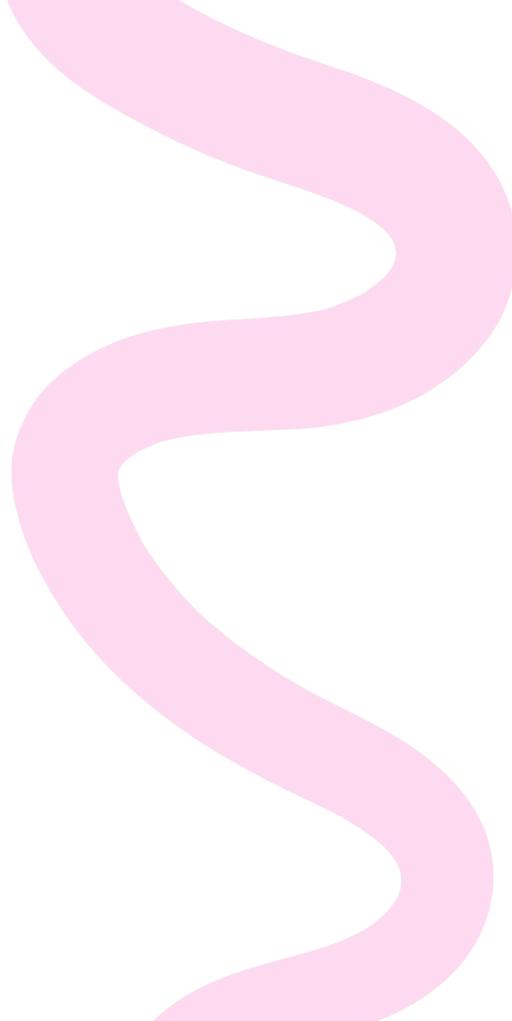
Scale

Status:  Live  Coming Soon



Q1+

**Coming  
soon**



## **Early access:**

- New navigation
- Task details layout
- Emailing comments from tasks
- Project Health insights panel



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—can catch you up on important project activity and required actions, summarize your notifications, join your meetings and take notes, plan your week, and more!
- **Flo**—your project management assistant—can conduct project health checks, alert you to risks, create client-facing updates, and more.
- Plus, many more AI Teammates are coming in the next quarter—including assistants for resource management, financial management, and even a custom assistant to cater for custom jobs and workflows.



Deliver    Grow    Scale

Status:  Live  Coming Soon

Catch me up on the latest updates from my projects

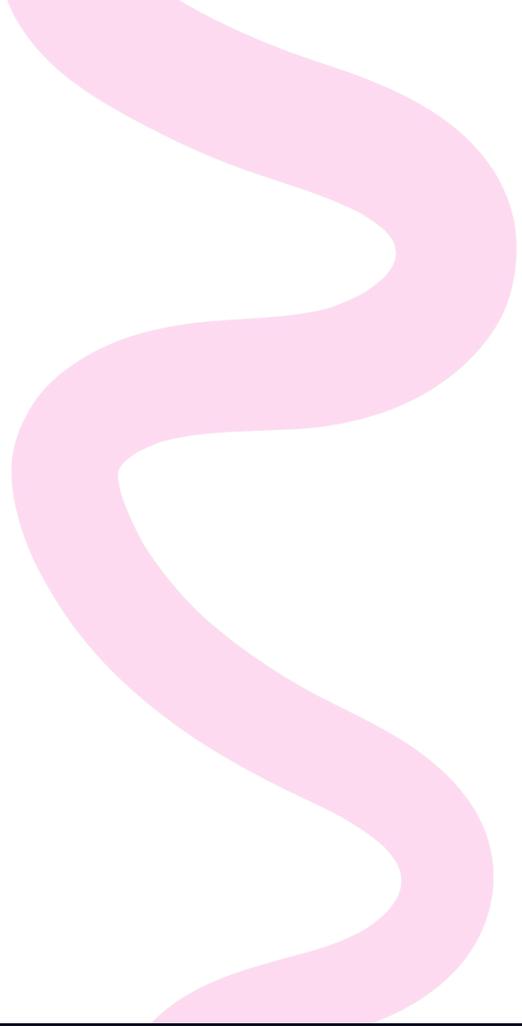
✦ Run job

**Scout 2:45pm**  
Catch me up is complete, here's a quick rundown of what's happening.

**Priority Items**

- Finalize onboarding flow redesign by Friday
- Prepare demo assets for next week's stakeholder review
- Resolve outstanding API performance issues

Highlight priorities



Q1+ 2026

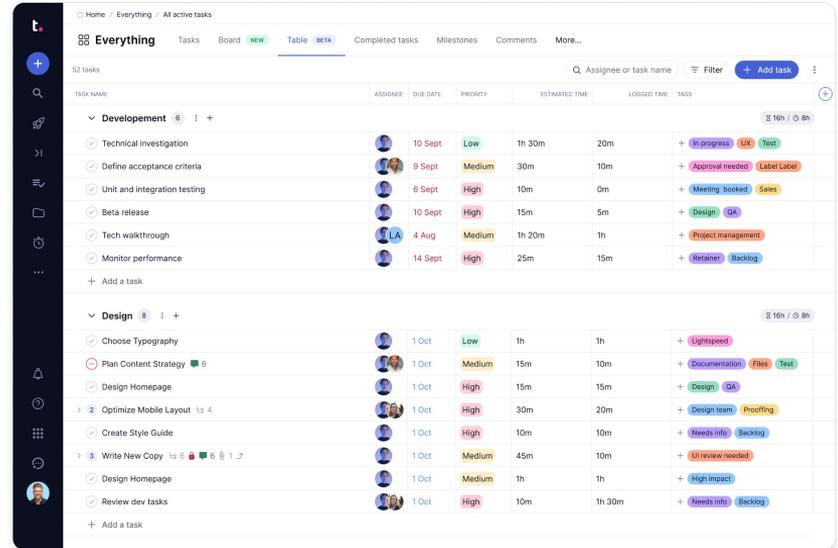
# Manage client work

# 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

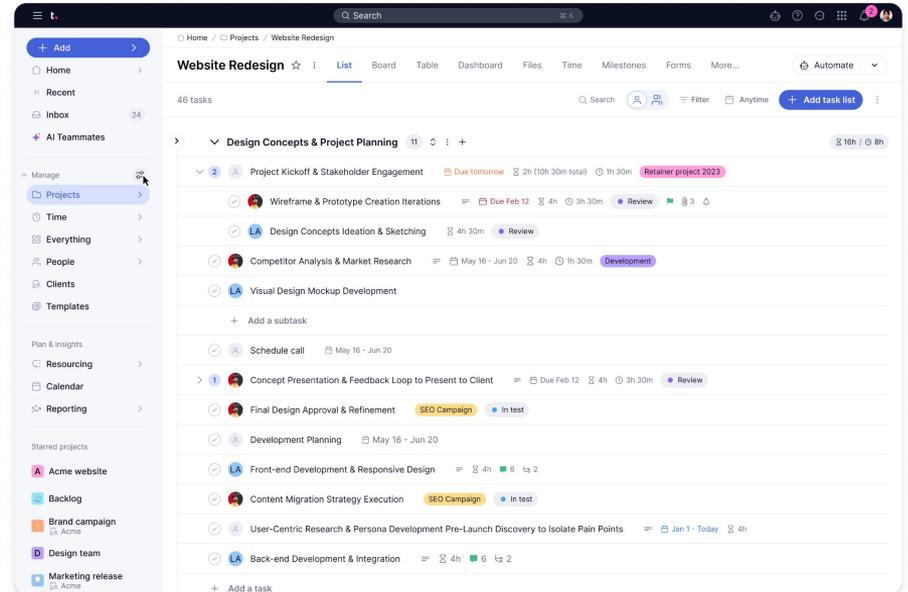
Status:  Live  Coming Soon

# 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

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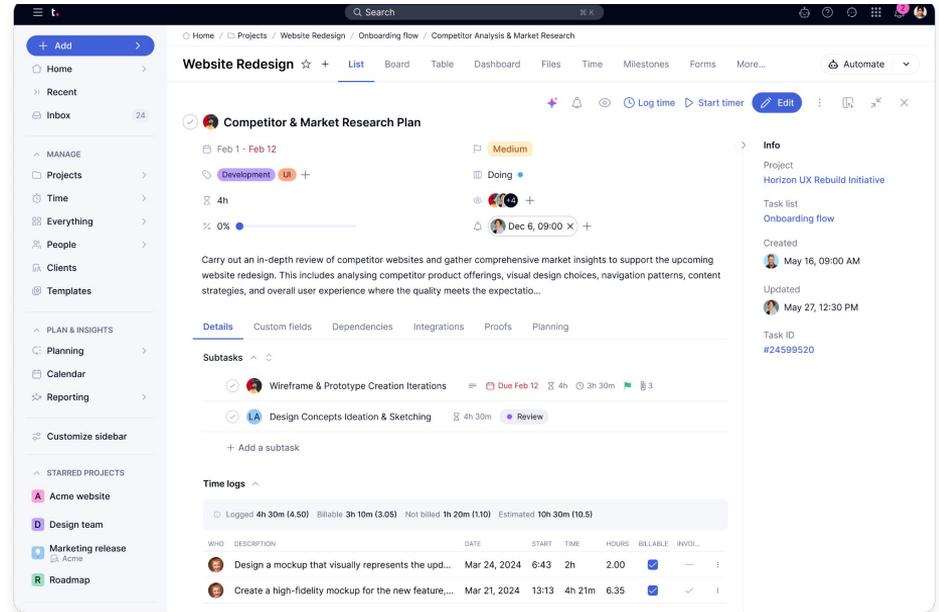
Status:  Live  Coming Soon

# 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

Grow

Scale

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.

Deliver

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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



Brand new feature



Enhancement

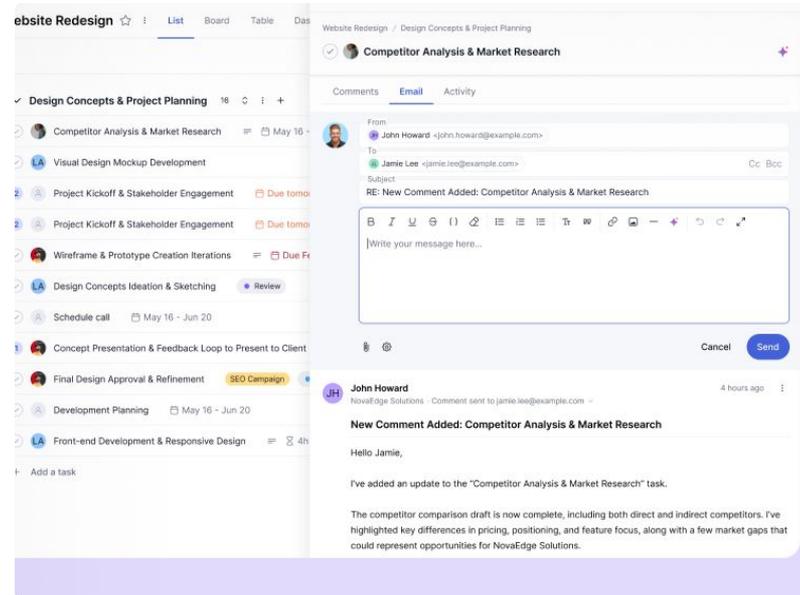
# Task email integration

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



# 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 view in Teamwork.com. The task is titled "ct Planning" and has 11 tasks. It is categorized under "Market Research" and "Development". The task is due tomorrow and has a status of "Development". A modal view is open, showing a ticket titled "Service Not Working as Expected". The ticket details include a description, tags (Tag 1, Long tag 2, Tag 3, Long tag 4, +1), and a table of ticket information.

Customer	Agent	Inbox	Status
JW Jason Walsh	VK Vasil Kamaras...	Support	Active

The modal also shows a table of ticket information:

Ticket #	Last updated	Client
87047750	Dec 16, 14:53	Client name

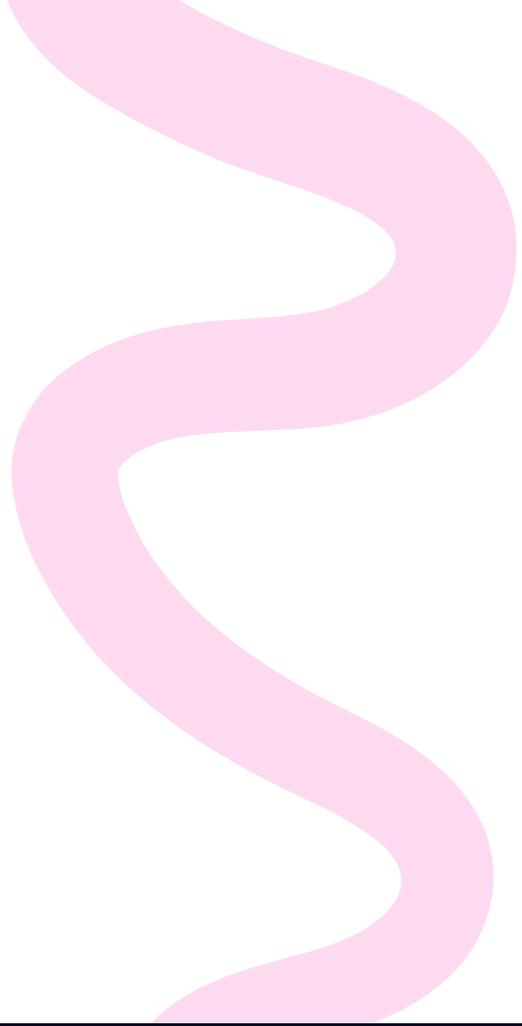
At the bottom of the modal, there are buttons for "View all tickets" and "Open in quick view".

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Status: ○ Live ● Coming Soon



Q1+ 2026

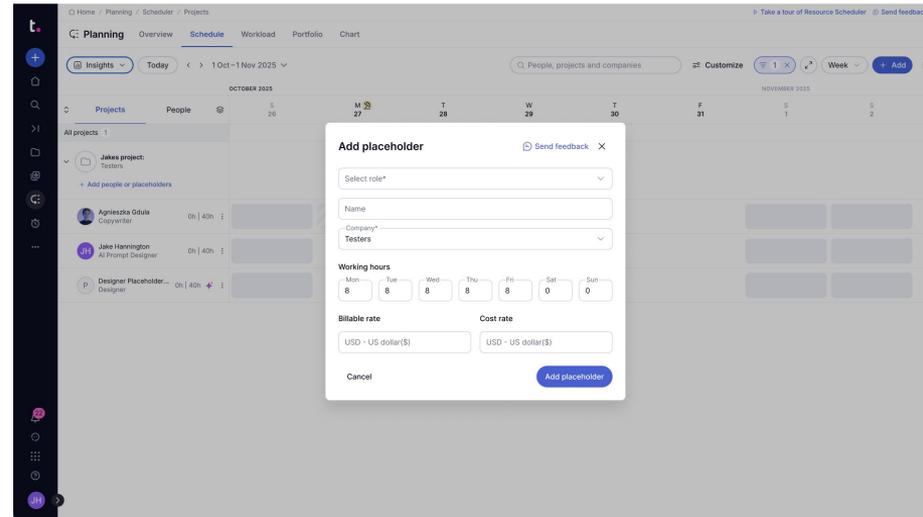
# Plan resources

# 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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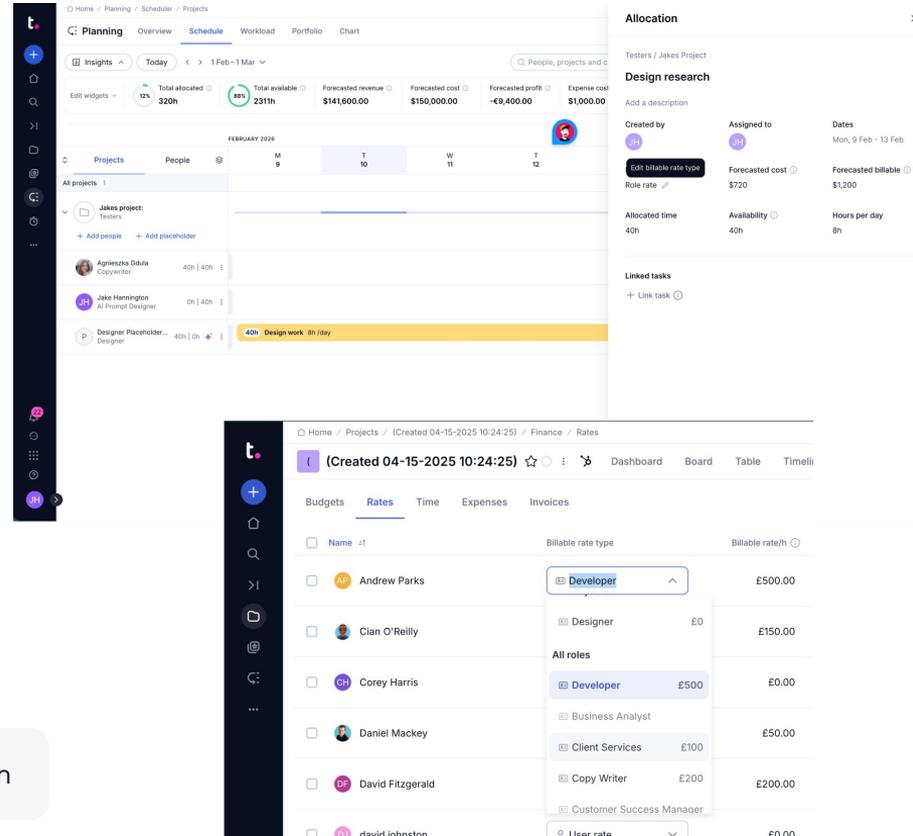
Status:  Live  Coming Soon

# 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 'Planning' view for a project named 'Jakes project'. It features a Gantt chart for February 2024 with columns for Monday (9h), Tuesday (10h), Wednesday (11h), and Thursday (12h). A task bar for '40h Design work' is highlighted in yellow. The right sidebar shows an 'Allocation' panel for 'Testers / Jakes Project' with a 'Design research' task. It lists 'Created by' (Jakes), 'Assigned to' (Jakes), 'Role rate' (\$720), 'Forecasted cost' (\$1,200), 'Forecasted revenue' (\$14,100.00), 'Forecasted cost' (\$150,000.00), 'Forecasted profit' (-€9,400.00), and 'Expense cost' (\$1,000.00). The bottom screenshot shows a 'Rates' configuration page for a user named 'David Fitzgerald'. It lists various roles and their corresponding billable rates per hour: Developer (£500.00), Designer (£0.00), Business Analyst (£50.00), Client Services (£100.00), Copy Writer (£200.00), and Customer Success Manager (£0.00). A dropdown menu is open, showing 'Developer' selected with a rate of £500.00.

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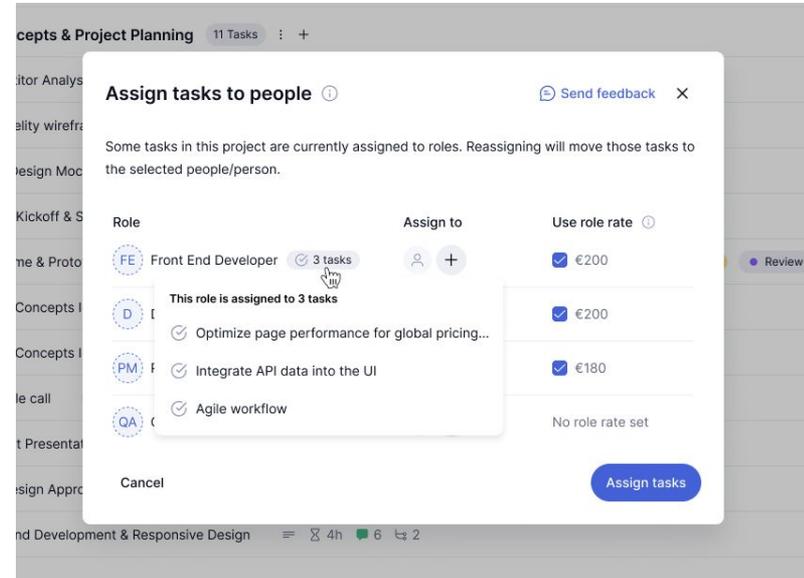
Status:  Live  Coming Soon

# 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.



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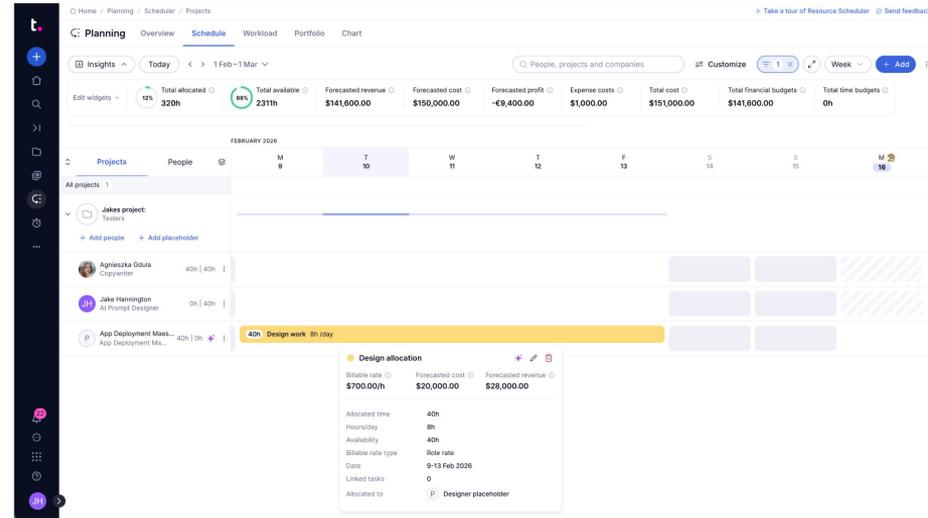
Status:  Live  Coming Soon

# 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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Scale

Status:  Live  Coming Soon

# Financial Insights in Scheduler

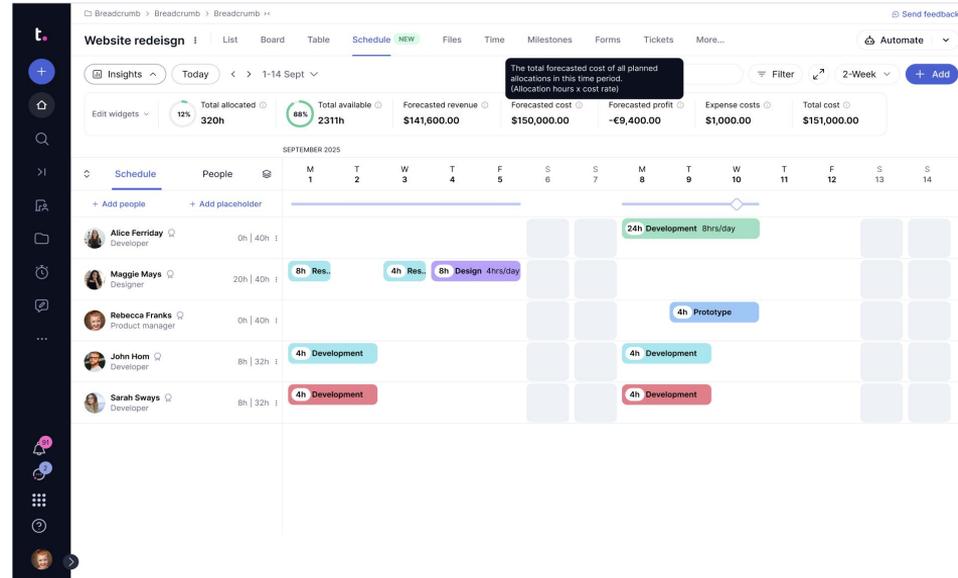
Minimise resource allocation and profit impact while scheduling

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!

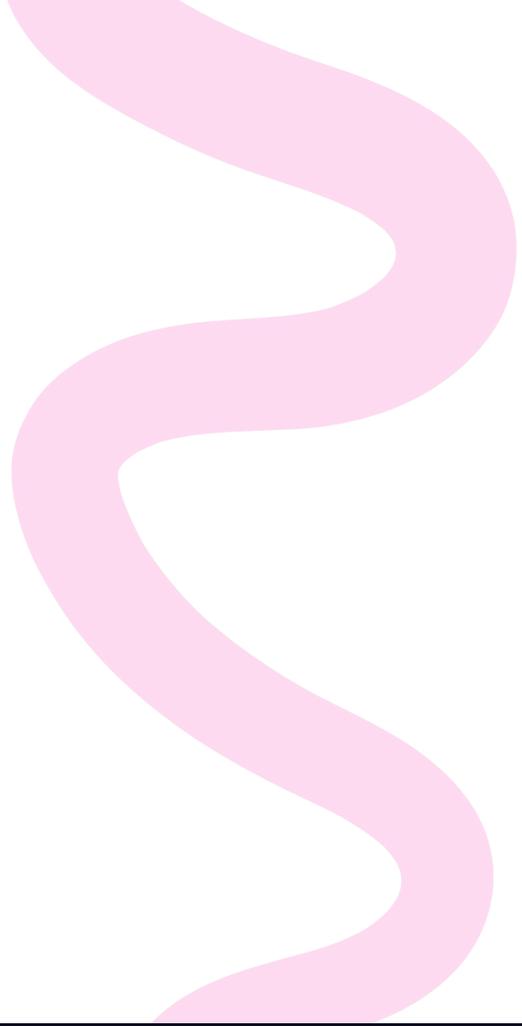


Deliver

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Scale

Status:  Live  Coming Soon



Q1+ 2026

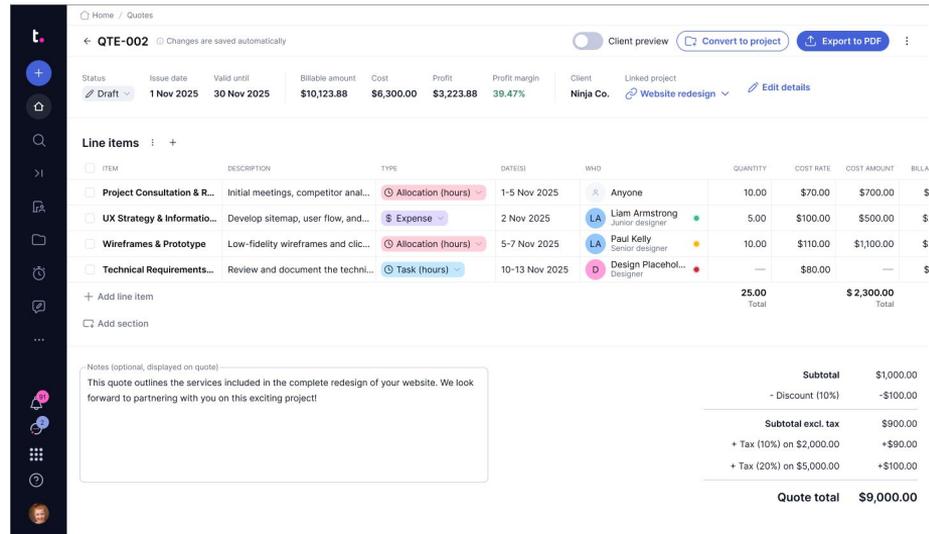
# **Make projects profitable**

# 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  Edit details

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

ITEM	DESCRIPTION	TYPE	DATE(S)	WHO	QUANTITY	COST RATE	COST AMOUNT	BELA
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	LA Liam Armstrong Junior designer	5.00	\$100.00	\$500.00	\$
Wireframes & Prototype	Low-fidelity wireframes and clic...	Allocation (hours)	5-7 Nov 2025	LA Paul Kelly Senior designer	10.00	\$110.00	\$1,100.00	\$
Technical Requirements...	Review and document the technic...	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>

Deliver

Grow

Scale

 Status:  Live  Coming Soon

# Client based 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/H, and Client Rate/H.

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

Deliver

Grow

Scale

Status:  Live  Coming Soon



Q1+ 2026

# Track performance

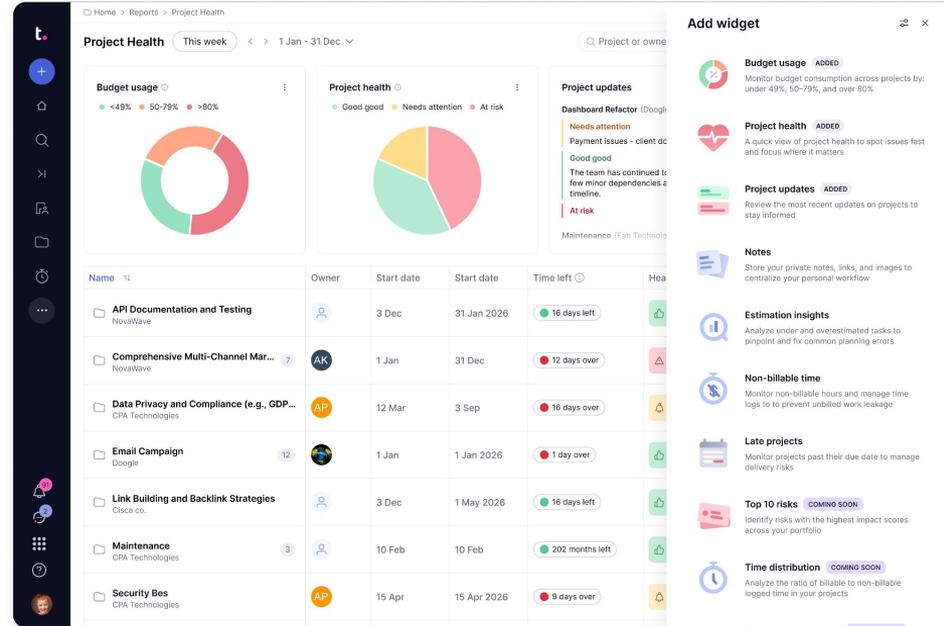
# Project Health Insights

Soon you'll 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

# Thank You!

