

teamwork.com

Product Roadmap

Q3 2025

Your host & speakers



Eimear Mulcahy
Senior Product Manager




Janelle Santi
Product Marketing Manager



Amy Collins
Product Manager

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

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

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

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**Profit from every
client demand.**

Agenda

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



How to participate today



Q&A

Use the Q&A to ask your questions



Emojis

Use emojis to show us your reactions



Chat

Use the chat to say hello or leave a comment

Recording

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

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Q2 2025

Recently Released

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Q2 2025

TeamworkAI

AI Comment Summarization

With just one click, instantly distill lengthy comment threads into concise, easy-to-digest summaries.

Why you'll love it:

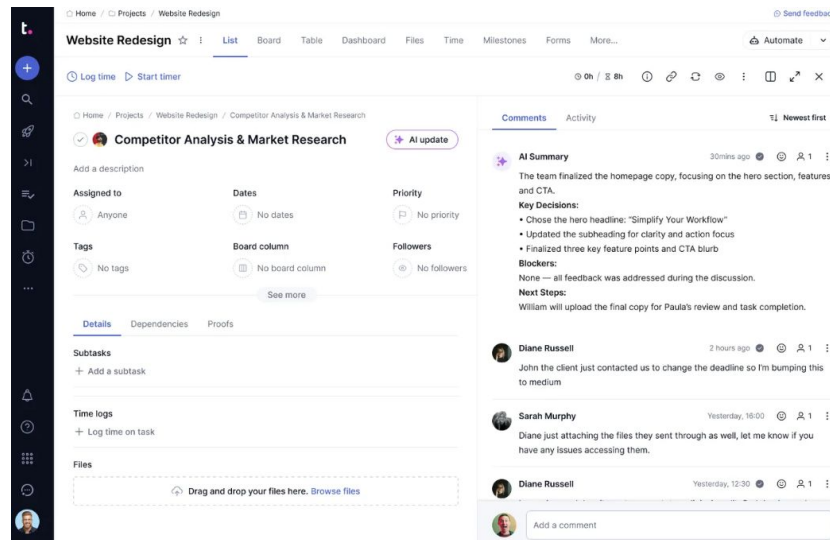
- Cut through the clutter in complex discussions
- Get up to speed on the latest thread updates in seconds
- Keeping everyone aligned without the back-and-forth
- Ability to keep it private as your own personal recap

Deliver

Grow

Scale

Status:  Live  Coming Soon

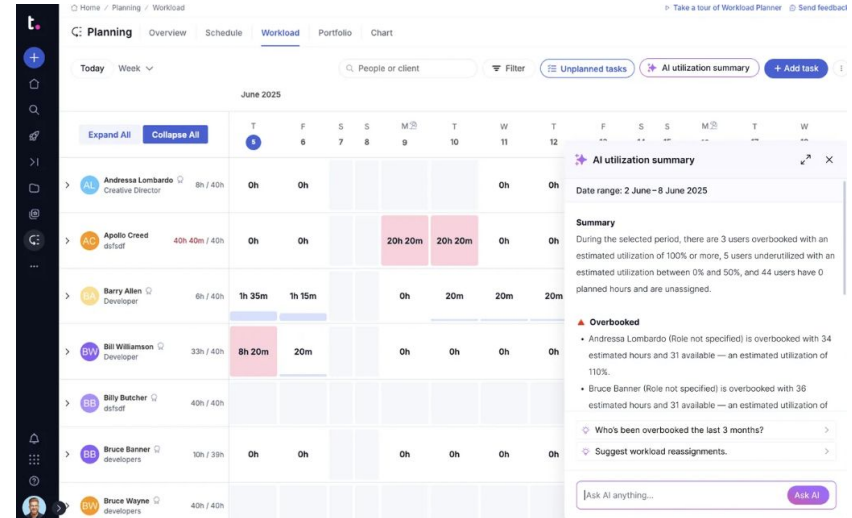


AI Utilization Summary

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



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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.

Why you'll love it:

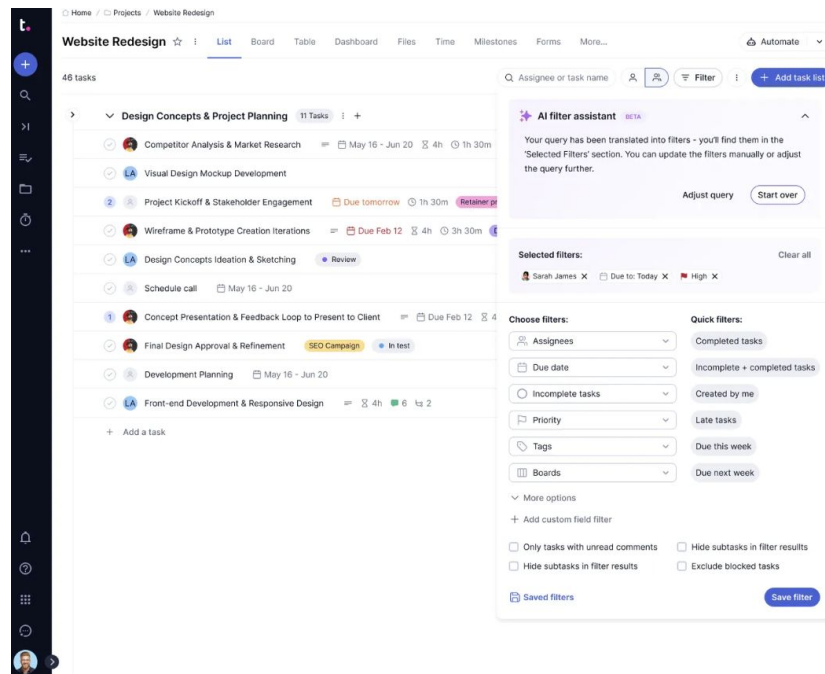
- Cuts search time by removing clicks, dropdowns, and multi-step filters
- Speeds up onboarding, especially for new and occasional users
- Increases productivity by keeping you in your flow, surfacing the work that matters most

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Status:  Live  Coming Soon



AI Expense Autofill

Improved expense creation and management functionalities, while saving time along the way.

Why you'll love it:

- Just upload an attachment and TeamworkAI will auto-populate expense fields
- Save time and log expenses more efficiently
- Photo evidence validates the expense even further

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Status: ☒ Live ☐ Coming Soon

Add expense NEW

 Send feedback 

 Save time with AI  BETA

Upload an image to autofill your expense

Try AI autofill

Budget period *

Date *
23 Apr 2025

SO +

\$ Total cost *

☐ Billable

Category *

Title

Description

 Drag and drop your files here. [Browse files](#)
Max: 4 files | 100MB per file

Cancel

Save & add another

Add expense

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Q2 2025

Manage client work

Outlook Calendar Sync

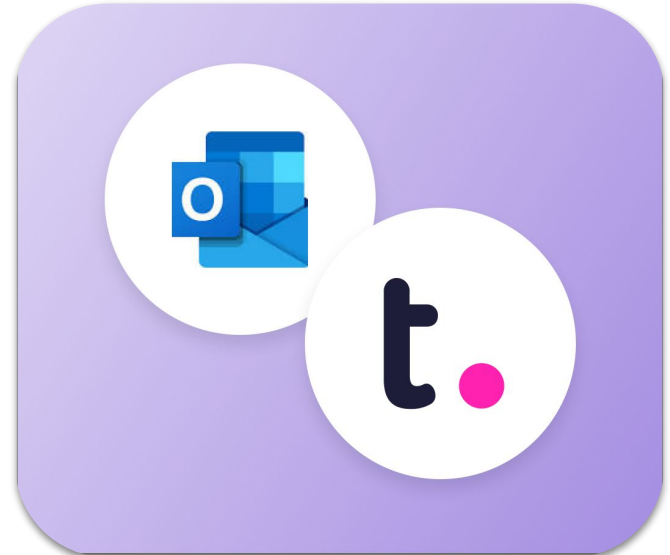
Seamlessly connect your Outlook calendar to Teamwork.com to automatically sync, update, and manage events and tasks—all in one place.

Why you'll love it:

- Plan your day more efficiently by visualizing your entire schedule in your My Calendar view
- Any changes made in Outlook are instantly reflected in Teamwork.com, ensuring your schedule is always up to date

Deliver**Grow****Scale**

Status: ☒ Live ☐ Coming Soon

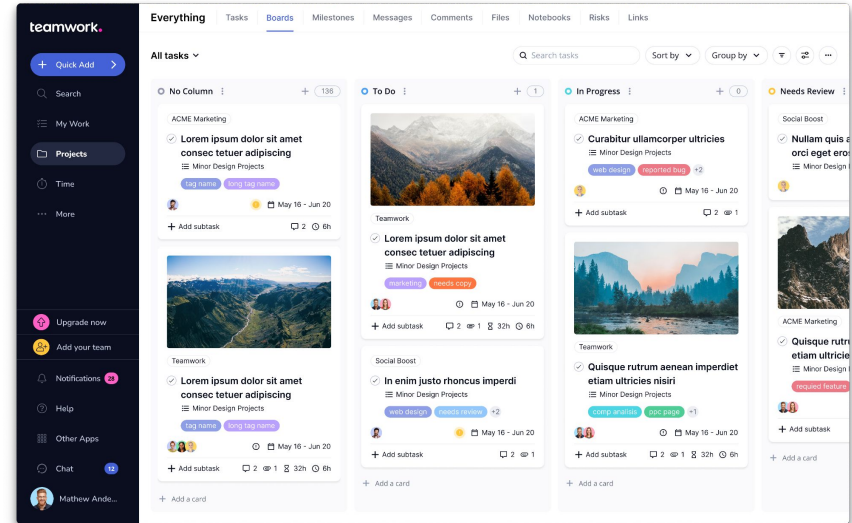


New Boards UI & Workflows

Improved consistency and visibility into your work across projects.

Why you'll love it:

- Create shared Workflows to ensure alignment in how your projects are run
- View task progress across Projects to understand the status of all of your work
- Integrated workflow automations to save you time and manual work



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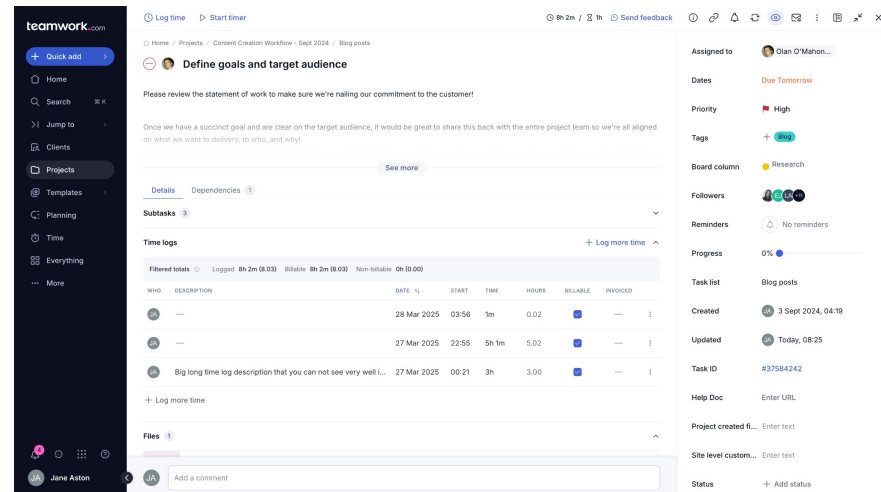
Status: 🟡 Live 🟠 Coming Soon

Improved Task Details

An updated Task Details panel and full Task Details page across Teamwork.com for quicker, easier, and more consistent insights into your tasks!

Why you'll love it:

- Easier updating of tasks with inline editing (fewer clicks!)
- Choose from three new Task Details layouts, so you can focus on the task information that's most important to you
- Most meaningful information at your fingertips
- Consistency in how you view your tasks across Teamwork.com



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Status:  Live  Coming Soon

Task and List View Improvements

We've been working on some advanced UX improvements to improve the experience with List View and Task Details!

Why you'll love it:

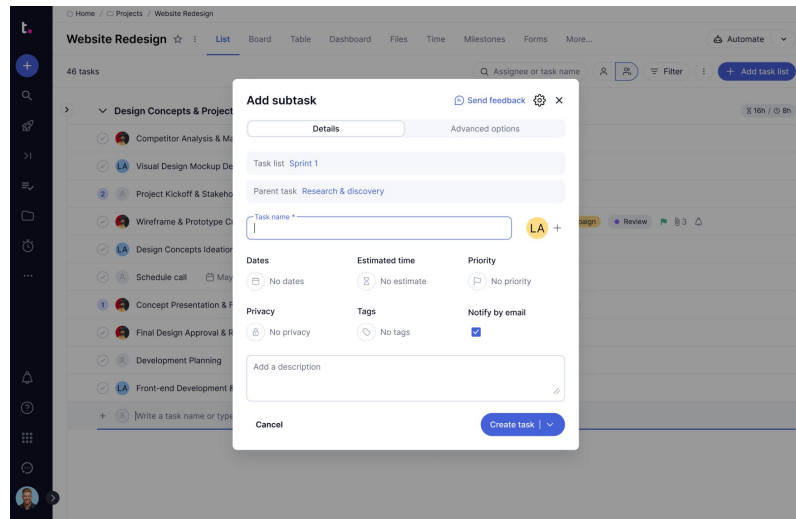
- Advanced “Add task” option to add all task info before hitting save
- Advanced subtask management and creation in Task Details
- Improved file experience, including more file info and shareable link
- Improved date interactions and day preview inline

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Status:  Live  Coming Soon



Required Project Custom Fields

Ensure essential data is captured upfront with required custom fields, streamlining project creation for a smoother, more structured experience.

Why you'll love it:

- Guarantees that critical project information is always captured
- Reduces cumbersome back-and-forth corrections, saving you time
- Standardized setup ensures smooth project creation across teams

Assign a custom field

DOB	Enter a number	<input checked="" type="checkbox"/> Required
Require assistance?	Choose an option... ▼	<input type="checkbox"/> Required
+ Add another custom field		

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Status: ☒ Live ☐ Coming Soon

Dark Mode

Customize your interface experience and stay focused with our sleek, modern Dark Mode—designed for your comfort and efficiency.

Why you'll love it:

- Less strain, more comfort: Dark Mode reduces eye fatigue while you work
- Enhanced focus: A distraction-free experience for deep work
- Improved customization: View Teamwork.com the way you want!

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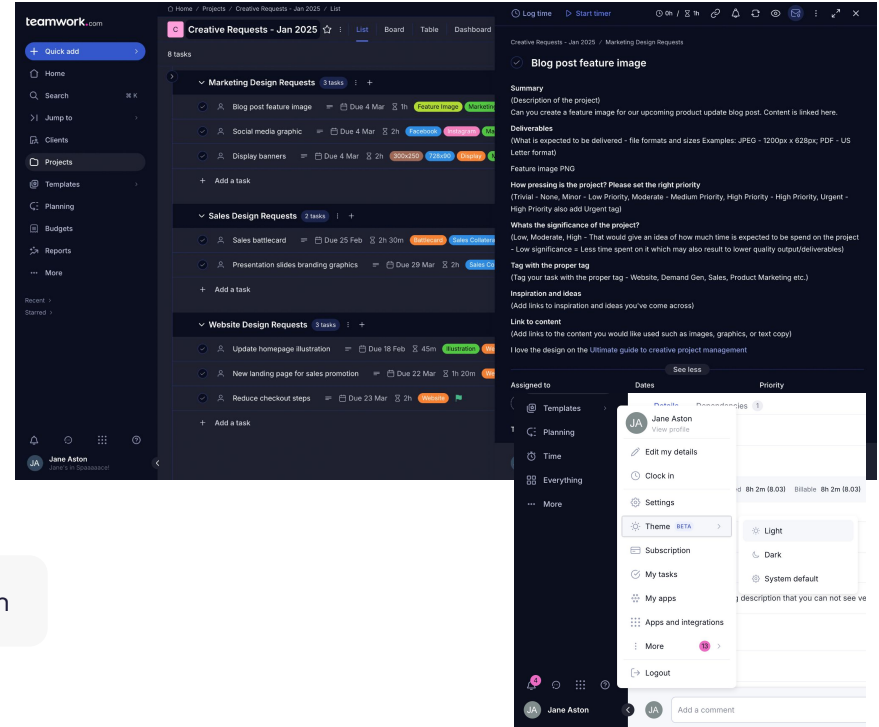
Status:



Live



Coming Soon

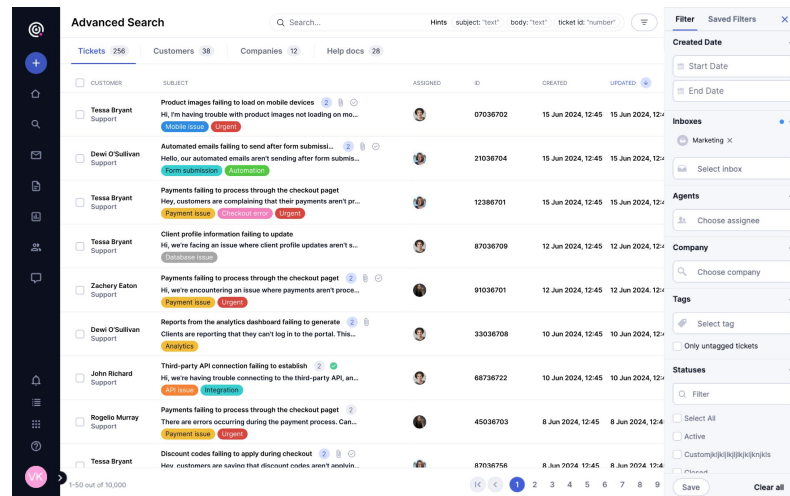


Desk Search Improvements

Search has gotten an uplift, making it easier to find the information you're looking for.

Why you'll love it:

- Additional filters allow you to narrow your search
- Improved advanced search page makes it easy to find the right information ASAP
- Improved recency showing the most relevant search results first



Starter

Pro

Premium

Enterprise

Status:  Live  Coming Soon

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Q2 2025

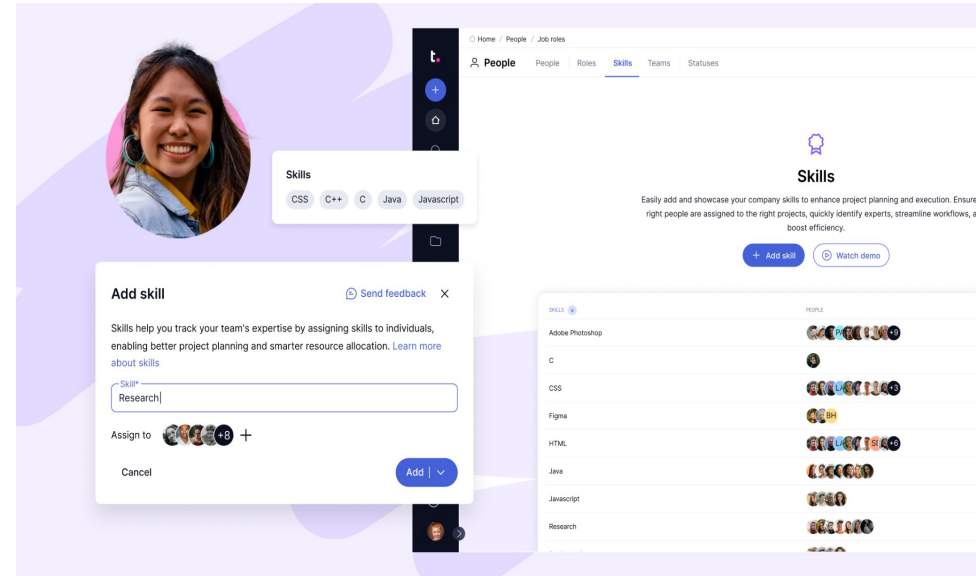
Plan resources

Skills

Introducing Skills to Planning views! Assign the right people to the right work based on their strengths, experience, and expertise

Why you'll love it:

- Plan for the resources you need by skill - Match the right people to the right work
- Reduce time spent manually searching for the best fit and ensure optimal resource utilization
- Gain a clear overview of your team's skills, making it easier to fill gaps and plan for future needs



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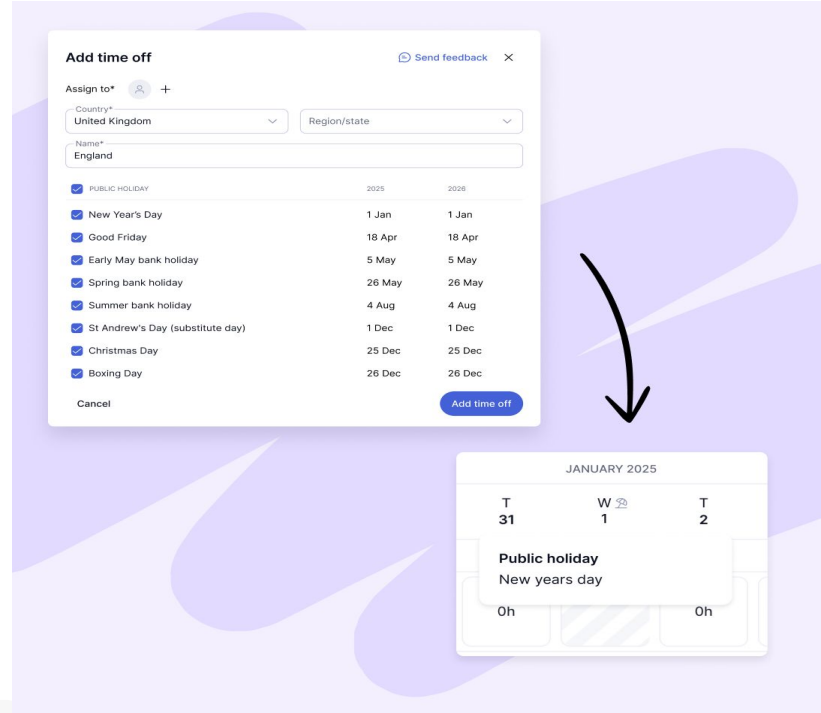
Status: ☒ Live ☐ Coming Soon

Time Off

Managing regional 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



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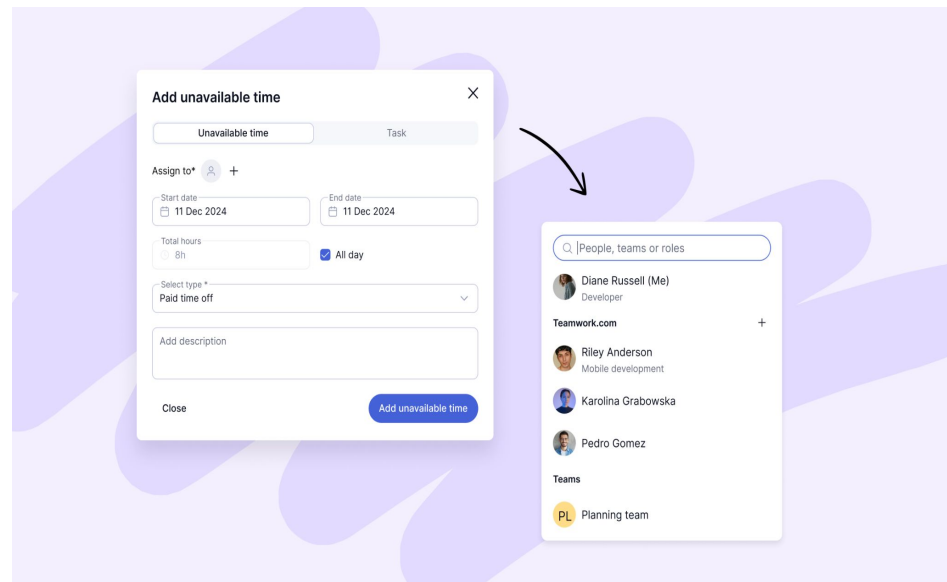
Status: ☒ Live ☐ Coming Soon

Unavailable Time

Managing unavailable time across your organization is now simpler and more intuitive than ever.

Why you'll love it:

- A refreshed UX means it's faster and easier to schedule unavailable time, with fewer clicks and a more intuitive flow
- Apply unavailable time at scale across your whole company or just to selected teams



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Status:  Live  Coming Soon

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Make projects profitable

Quotes

Easily create and edit quotes/estimates for client work

Why you'll love it:

- Lots of flexibility and configuration options
- Build time and materials or fixed fee quotes
- Optional discounts and tax applications
- Freedom to create the exact line items you need for each quote; time, services, expenses etc.
- **Coming soon:** Use templates to create Quotes and convert accepted quotes to Projects/Tasks and more

Home / Clients / Ninja Co. / Quotes

Ninja Co. | Profile People Teams **Quotes NEW** Projects

← Edit quote ⓘ Changes are saved automatically Export to PDF ⌵

Quote no.* QTE-002 Issue date 23 May 2024 Valid until 30 May 2024 Pricing Time & materials Amounts are Exclusive of 23% tax Status **DRAFT** Edit details

Notes (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!

DESCRIPTION	WHO ⓘ	QUANTITY	RATE	AMOUNT (EXCL. TAX)
Discovery & planning	Anyone	10.00	\$100.00	\$1000.00 ⓘ
Design	Alex Bailey	20.00	\$120.00	\$2400.00 ⓘ
Development	Riley Anderson	30.00	\$150.00	\$4500.00 ⓘ
Testing & launch	Cameron Sullivan	10.00	\$80.00	\$800.00 ⓘ
Post-launch support	Anyone	5.00	\$70.00	\$350.00 ⓘ

+ Add line item

Subtotal	\$8,650	Hide breakdown
- Discount	-\$1,000	
Subtotal excl. tax	\$7,650.00	
+ Tax (23%)	+\$1,759.50	
Quote total	\$9,409.50	

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Status:



Live



Coming Soon

NetSuite Integration

Easily sync time logs from Teamwork.com to NetSuite in real time, eliminating manual data entry and ensuring accurate invoicing.

Why you'll love it:

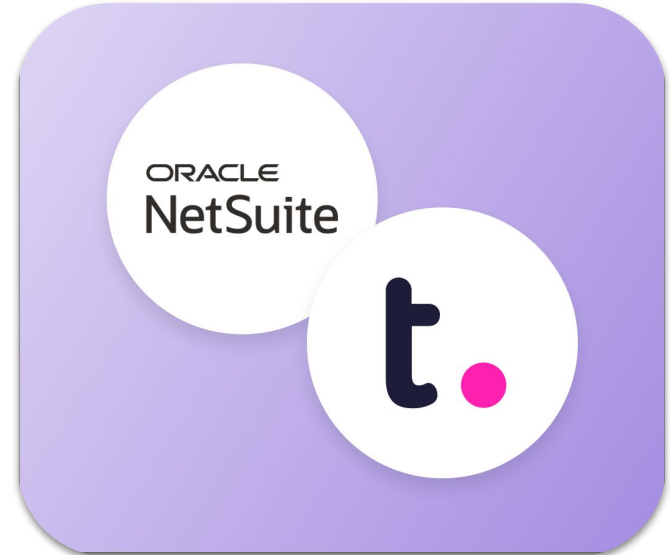
- No more exporting/importing time logs manually
- Syncs instantly when time logs are created and updated
- Ensures financial teams have up-to-date project data
- For teams that need seamless project-to-finance workflows

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Status: ☒ Live ☐ Coming Soon



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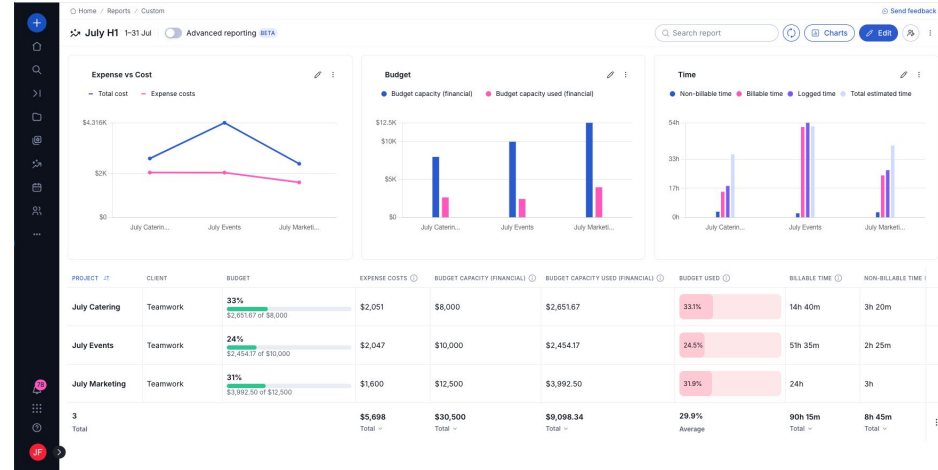
Track performance

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)



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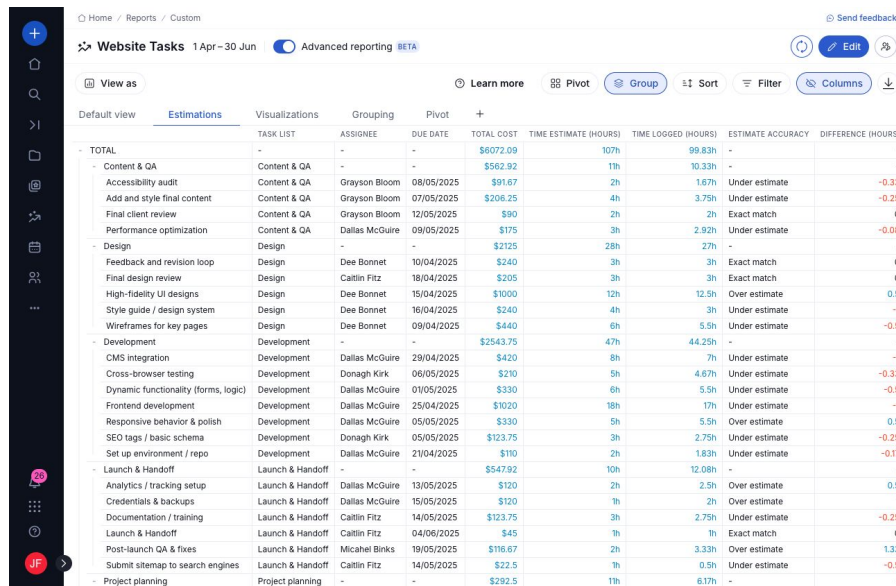
Status: ● Live ○ Coming Soon

Advanced Reporting

Gain deeper insights thanks to custom expressions and flexible options, helping you manage how your data is displayed.

Why you'll love it:

- Create custom calculations using expressions to generate new data points
- Build pivot tables or group your data in the way that best highlights the information you want to showcase
- Choose from custom aggregation methods to tailor how your data is totalled



Default view	Estimations	Visualizations	Grouping	Pivot	+	Learn more	Pivot	Group	Sort	Filter	Columns	Send feedback
Task List	Assignee	Due Date	Total Cost	Time Estimate (Hours)	Time Logged (Hours)	Estimate Accuracy	Difference (Hours)					
TOTAL	-	-	\$6072.09	107h	99.83h	-	-					
Content & QA	Content & QA	-	\$562.92	11h	10.33h	-	-					
Accessibility audit	Content & QA	Grayson Bloom	\$91.67	2h	1.67h	Under estimate	-0.33					
Add and style final content	Content & QA	Grayson Bloom	\$206.25	4h	3.75h	Under estimate	-0.25					
Final client review	Content & QA	Grayson Bloom	\$90	2h	2h	Exact match	0					
Performance optimization	Content & QA	Dallas McGuire	\$175	3h	2.92h	Under estimate	-0.08					
Design	Design	-	\$2125	28h	27h	-	-					
Feedback and revision loop	Design	Dee Bonnet	\$240	3h	3h	Exact match	0					
Final design review	Design	Caitlin Fitz	\$205	3h	3h	Exact match	0					
High-fidelity UI designs	Design	Dee Bonnet	\$1000	12h	12.5h	Over estimate	0.5					
Style guide / design system	Design	Dee Bonnet	\$240	4h	3h	Under estimate	-1					
Wireframes for key pages	Design	Dee Bonnet	\$440	6h	5.5h	Under estimate	-0.5					
Development	Development	-	\$2543.75	47h	44.25h	-	-					
CMS integration	Development	Dallas McGuire	\$420	8h	7h	Under estimate	-1					
Cross-browser testing	Development	Donagh Kirk	\$210	5h	4.67h	Under estimate	-0.33					
Dynamic functionality (forms, logic)	Development	Dallas McGuire	\$330	6h	5.5h	Under estimate	-0.5					
Frontend development	Development	Dallas McGuire	\$1020	18h	17h	Under estimate	-1					
Responsive behavior & polish	Development	Dallas McGuire	\$330	5h	5.5h	Over estimate	0.5					
SEO tags / basic schema	Development	Donagh Kirk	\$123.75	3h	2.75h	Under estimate	-0.25					
Set up environment / repo	Development	Dallas McGuire	\$110	2h	1.83h	Under estimate	-0.17					
Launch & Handoff	Launch & Handoff	-	\$547.92	10h	12.08h	-	-					
Analytics / tracking setup	Launch & Handoff	Dallas McGuire	\$120	2h	2.5h	Over estimate	0.5					
Credentials & backups	Launch & Handoff	Dallas McGuire	\$120	1h	2h	Over estimate	1					
Documentation / training	Launch & Handoff	Caitlin Fitz	\$123.75	3h	2.75h	Under estimate	-0.25					
Launch & Handoff	Launch & Handoff	Caitlin Fitz	\$45	1h	1h	Exact match	0					
Post-launch QA & fixes	Launch & Handoff	Michael Blinks	\$116.67	2h	3.33h	Over estimate	1.33					
Submit sitemap to search engines	Launch & Handoff	Caitlin Fitz	\$22.5	1h	0.5h	Under estimate	-0.5					
Project planning	Project planning	-	\$292.5	11h	6.17h	-	-					

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Scale

Status:  Live  Coming Soon

Advanced Formulas

Create tailored calculations using a wide range of functions, fields, and operators—unlocking a whole new level of reporting precision.

Why you'll love it:

- Access deeper insights from your reports without needing to export to spreadsheets
- Build powerful formulas using a broad range of functions, fields, and logical operators.
- Get inspired with built-in examples that show exactly how to apply formulas to your data

Add custom field

[Send feedback](#) ✕

f(x) ROUND

Rounds a number to a certain number of decimal places according to standard rules.

Syntax

f(x) ROUND (value , places)

Examples

Profit margin

f(x) ROUND (((\$ Revenue - \$ Cost) / \$ Revenue) * 100,2)

[+ Use](#)

Functions ^

f(x) AND

f(x) AVERAGE

f(x) COUNT

f(x) DAY

f(x) EXACT

f(x) IF

f(x) OR

f(x) ROUND

f(x) MAX

f(x) MEDIAN

[How to start?](#)

Field title *

Profit margin

Field type *

☒ Formula

▼

Formula **BETA** [Clear](#)

f(x) ROUND (((\$ Revenue - \$ Cost) / \$ Revenue) * 100,2)

☒ All correct

Example output: **40** [👁](#)

▼ Advanced options

The formula will be available only in Reports [Learn more about formulas](#)

Cancel

Save field

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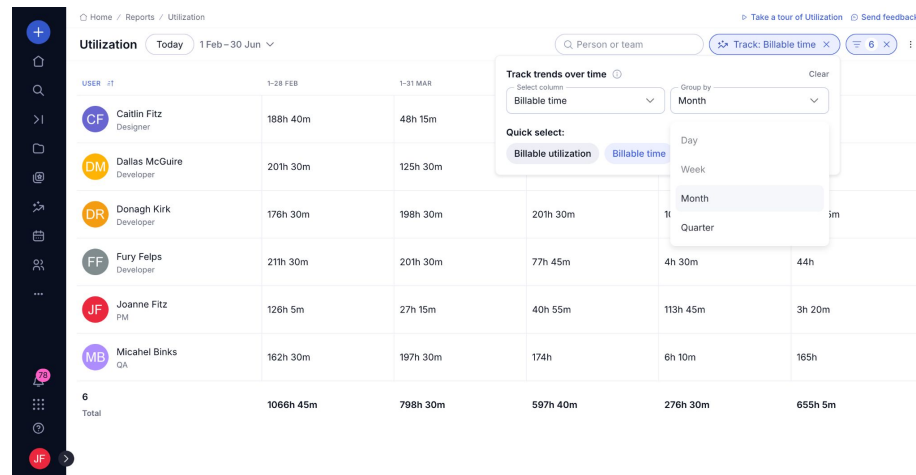
Status: ☒ Live ☐ Coming Soon

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 a specific metric like Total Utilization or Billable Time to track changes over time
- Uncover trends directly in Teamwork.com without exporting to Excel



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Status:  Live  Coming Soon



Q3+

**Coming
Soon**

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Q3+ 2025

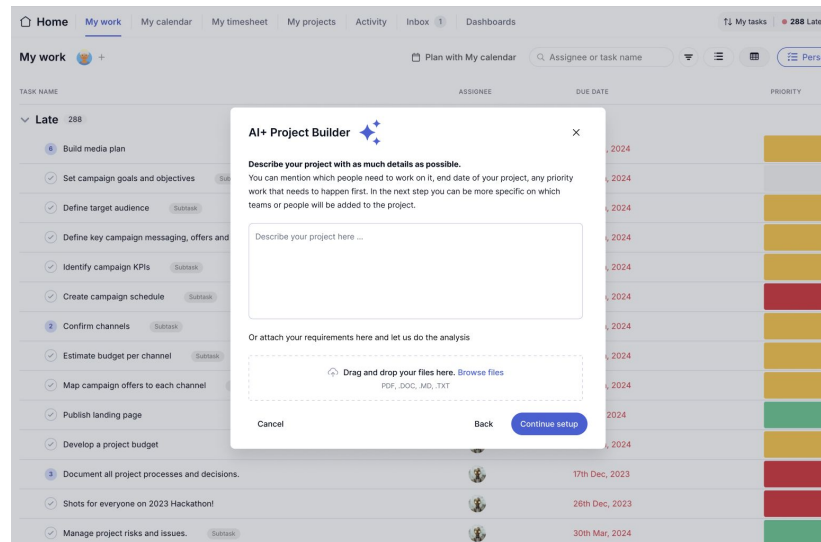
TeamworkAI

AI Project Builder

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
- TeamworkAI puts together the project structure, including tasks and task lists
- Stay in control by reviewing and editing any details as needed



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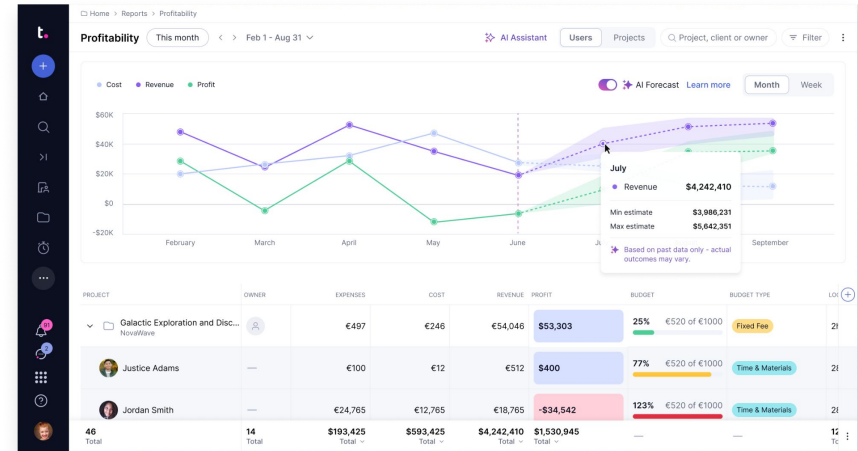
Status:  Live  Coming Soon

AI Forecasting

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:

- Whether you're aiming to grow or stay on track, AI Forecasting helps you anticipate what's ahead
- 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



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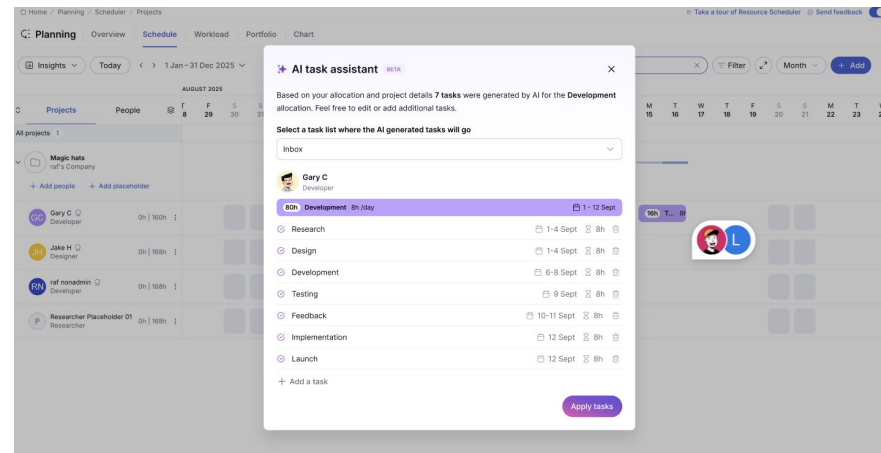
Status: ○ Live ● Coming Soon

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 Workload Planner



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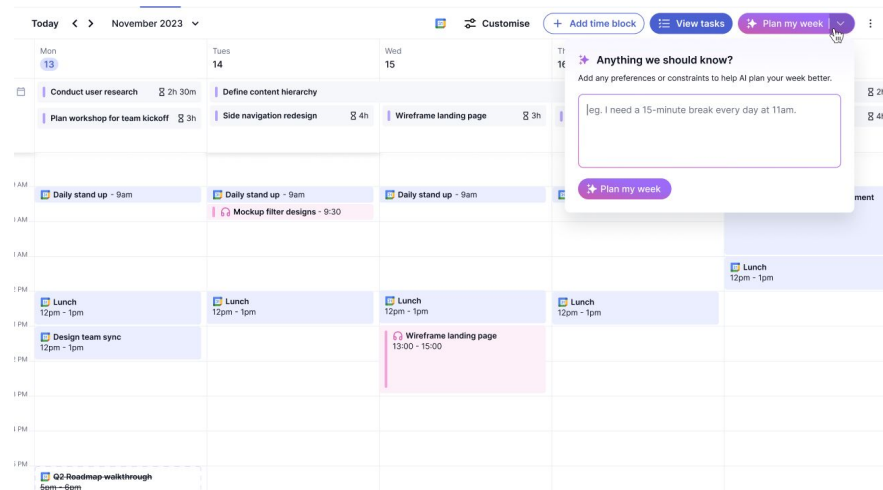
Status:  Live  Coming Soon

AI Calendar

Automatically convert assigned tasks into calendar time blocks, creating a complete weekly plan based on task priority, start date, due date, and estimated time.

Why you'll love it:

- Transforms scattered task lists into organized, actionable daily schedules
- Adapts to changing priorities and commitments
- Works around existing calendar meetings



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Status: ☐ Live ☒ Coming Soon

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Q3+ 2025

Manage client work

New Table View Experience

An improved Table View experience for My Work and Projects Task Table View.

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 us to group by task attributes outside of Date and Task List

TASK NAME	ASSIGNEE	DUE DATE	PRIORITY	ESTIMATED TIME	LOGGED TIME	TAGS
▼ Late 6 Tasks						
Sketch filters	[Avatar]	10 Sept	Low	1h 30m	20m	In progress UX, Test
Design homepage layout and features	[Avatar]	9 Sept	Medium	30m	10m	Approval needed, Label Label
Define User Personas	[Avatar]	6 Sept	High	10m	0m	Meeting booked, Sales
Conduct UX Audit	[Avatar]	10 Sept	High	15m	5m	Design, QA
Revise, streamline, and simplify overall site navigation	[Avatar]	4 Aug	Medium	1h 20m	1h	Project management
Prep presentation	[Avatar]	14 Sept	High	25m	15m	Retained, Backlog
▼ Today 7 Tasks						
Choose Typography	[Avatar]	1 Oct	Low	1h	1h	Lightspeed
Plan Content Strategy	[Avatar]	1 Oct	Medium	15m	10m	Documentation, Files, Test
Design Homepage	[Avatar]	1 Oct	High	15m	15m	Design, QA
Optimize Mobile Layout	[Avatar]	1 Oct	High	30m	20m	Design team, Proofing
Create Style Guide	[Avatar]	1 Oct	High	10m	10m	Needs info, Backlog
Write New Copy	[Avatar]	1 Oct	Medium	45m	1h	UI review needed
Review dev tasks	[Avatar]	1 Oct	Medium	1h	1h 30m	High impact

Deliver

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Scale

Status: ○ Live ● Coming Soon

Salesforce Sync + Mapping

A seamless, real-time data sync between Salesforce and Teamwork.com — ensuring consistent project visibility and field mapping support.

Why you'll love it:

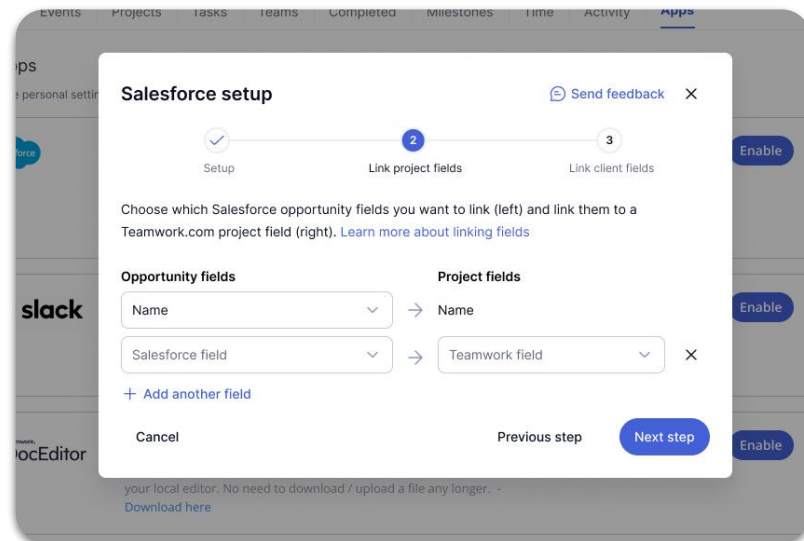
- Reduce manual work with an automated data sync between Salesforce and Teamwork.com
- Ensure accurate, real-time project visibility across systems
- Eliminate silos with swift, consistent updates

Deliver

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Scale

Status:  Live  Coming Soon



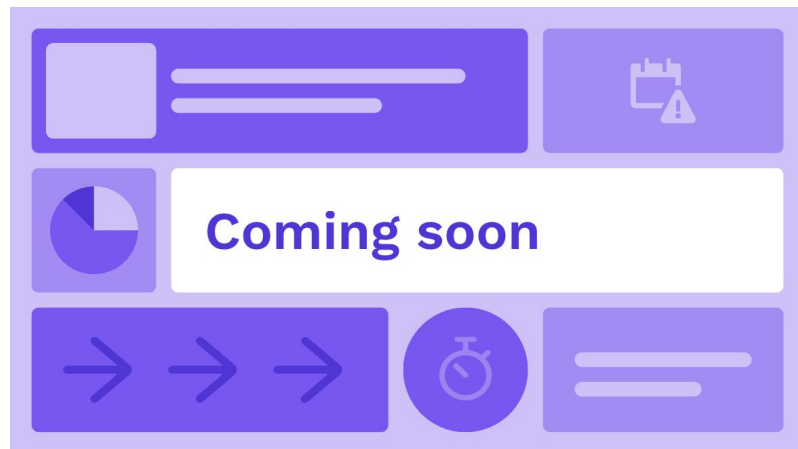
New Gantt Chart

Introducing a new and improved Gantt to plan smarter, visualise task better & deliver projects faster!

Why you'll love it:

- Faster & smother interactions with instant responsive drag & drop.
- Client-ready exports with polished PDFs
- Enhanced clarity with improved task visibility, milestone tracking & custom colour coding.
- The gantt you have been waiting for to make better informed decisions

Status: ☐ Live ☒ Coming Soon



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Q3+ 2025

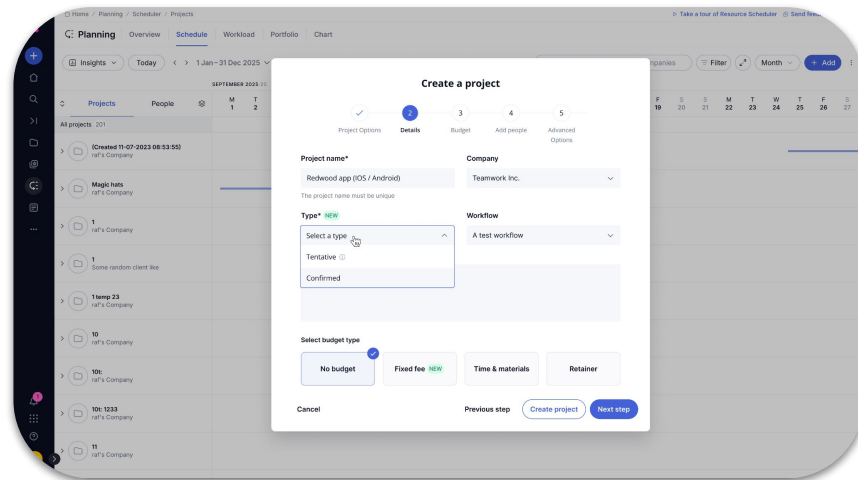
Plan resources

Tentative Projects

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

Why you'll love it:

- Lets you hold capacity for likely work, helping you forecast with confidence before a deal is closed
- Easily convert a tentative project into a confirmed one with all of your planning carried across
- Keeps tentative work visible only to the right people without cluttering your team's view



Deliver

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Status:



Live



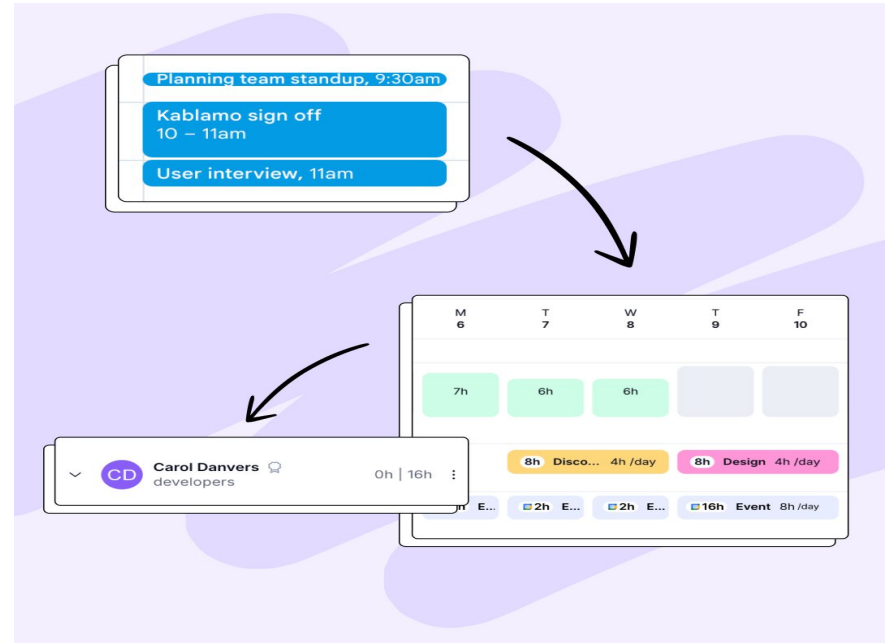
Coming Soon

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



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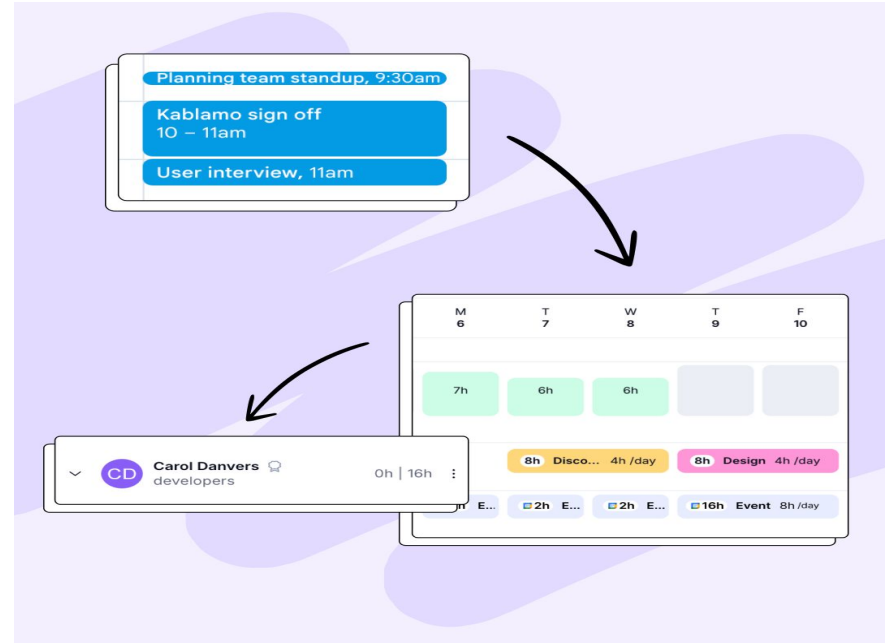
Status: ☐ Live ☒ Coming Soon

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

Scale

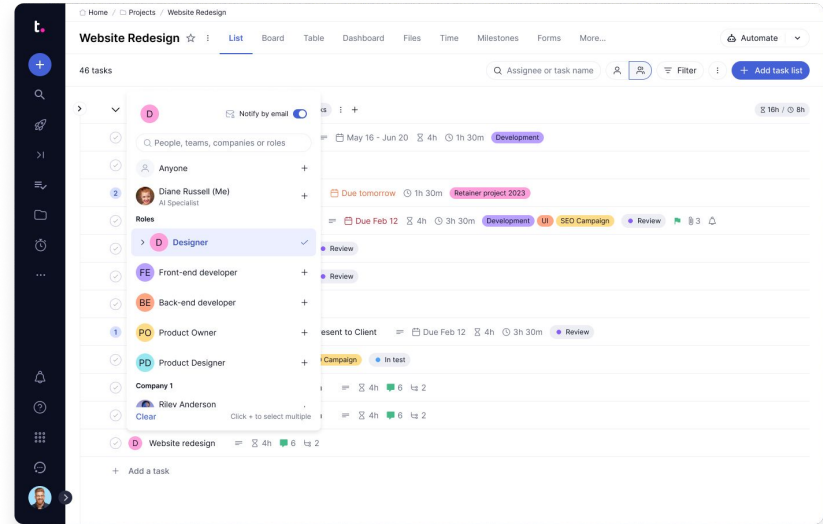
Status: ☐ Live ☒ Coming Soon

Assigning Tasks to Roles

Plan out your client work by Role in Projects or Tasks to make the transfer of work to named resources smoother than ever!

Why you'll love it:

- Flexible project planning based on Role before needing to know exactly 'who' will complete the work
- Plan repeatable work in Templates based on Roles to save time down the line
- Quickly find the best resource to complete the work based on their Role



Deliver

Grow

Scale

Status: ○ Live ● Coming Soon

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Q3+ 2025

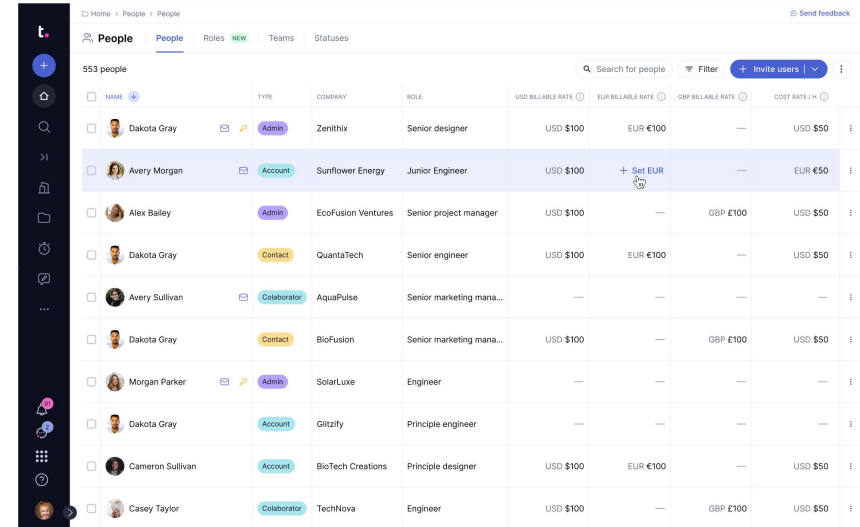
Make projects profitable

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. A user named Avery Morgan is highlighted, showing a '+ Set EUR' button next to the 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

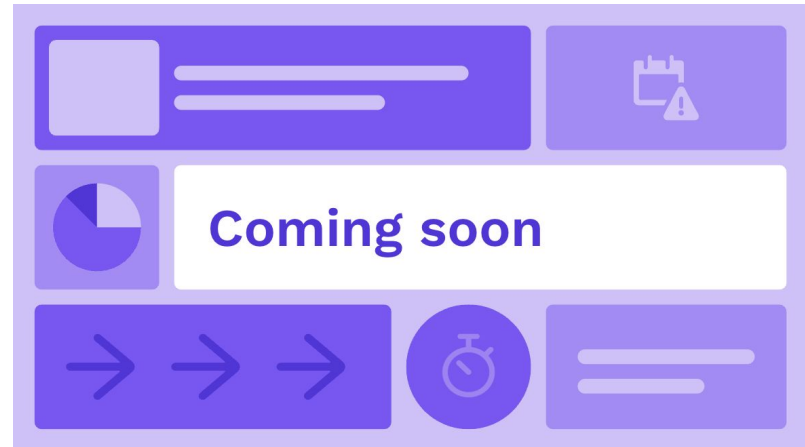
Status: ☐ Live ☒ Coming Soon

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

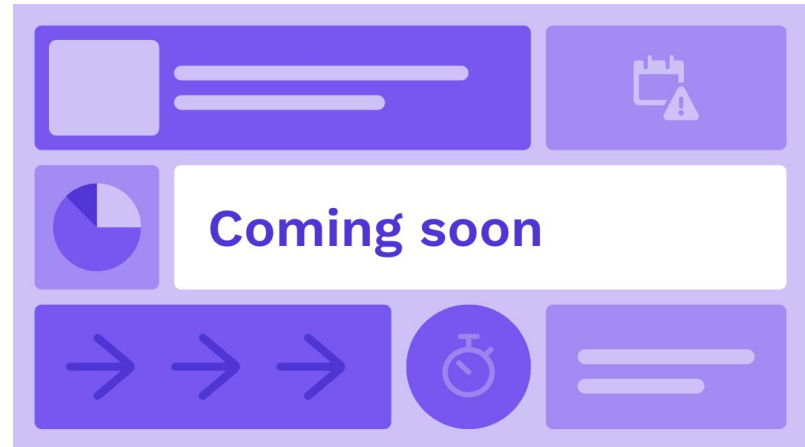
Status: ☐ Live ☒ Coming Soon

Time Approvals V2

More effectively and efficiently review, manage & approve your peoples' 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



Deliver

Grow

Scale





Status: ☐ Live ☒ Coming Soon



Track Ticket Time in Teamwork.com

Time logging in Teamwork Desk is getting a major upgrade. Quickly see when time is billable and move time entries to Teamwork.com for a complete and accurate view of all time spent on client communication.

Why you'll love it:

- Enhanced UX in Desk
- Time logs are Teamwork.com-specific, not product-specific
- Log time on behalf of others
- Automatic time logging to Projects based on ticket, linked task, or client

Time ⌚ 6h			
<input type="checkbox"/>	WHO	BILLABLE	TIME
Project A ⌚ 1h 30m			
		💰	1h 30m
		💰	2h 30m
		—	30m
		—	30m
<button>Log time</button>			


Log time [Send feedback](#)  

Log time to

Ticket only
Log time spent on this ticket only

Linked task
Log time to a linked task on this ticket

A project ✓
Log time on a project in Teamwork.com

Date
28 Jul 2023  +

Project*
Select project

Task
Select task

Hrs spent* 1 **Mins spent*** 0 ☒ Mark as billable

2h 1h 45m 30m 15m

Description
<https://digitalcrew.staging.teamwork.com/desk/tickets/87041738>
Fixing incorrect link redirections within the website's footer to ensure users are directed to the intended pages.

Cancel Save & log another Log time

Pro

Premium

Enterprise

Status:  Live  Coming Soon

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Q3+ 2025

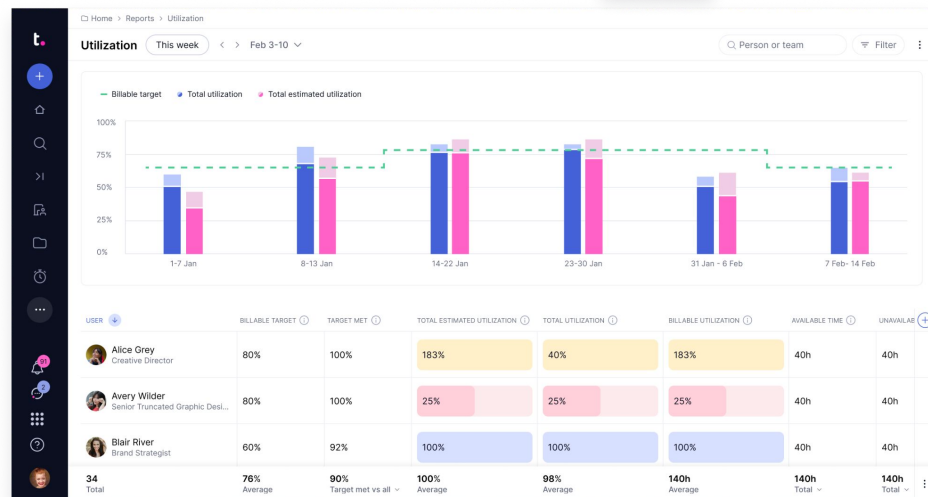
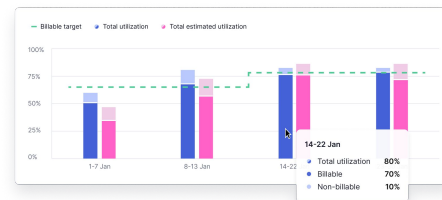
Track performance

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 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

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
- Use AND/OR logic to group filters and create powerful, flexible rule sets that match your reporting needs
- Instantly surface insights without needing to open a spreadsheet

The screenshot displays the 'Custom report builder' interface. On the left, there's a sidebar with fields for 'Report name*' (Revenue per teams), 'Type' (Project), 'Date and filters' (Dec 2023), 'Columns*' (Revenue, Team), and 'Permissions' (Admins). The main area shows a 'Preview' section with the title 'Revenue per teams'. A modal window titled 'Filters' is open, showing a filter rule: 'Where Project Is Completed' with a date range '31 Jul 2025'. Below this, there's an 'OR' condition with 'Start date Is after 31 Jul 2025' and 'Budget Is between 5,000,000 - 10,000,000'. The bottom of the modal shows a 'Tags' filter set to 'Retainer' and 'EMEA'. The background shows a table with columns for Product Innovation, Prototyping, etc., Revenue, and Engineering, with a total of 12 rows and a total revenue of \$956,203.00.

Product Innovation, Prototyping,...	Revenue	Engineering
12	\$956,203.00	6
Total	Total	Total

Deliver

Grow

Scale

Status: ○ Live ● Coming Soon

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And more

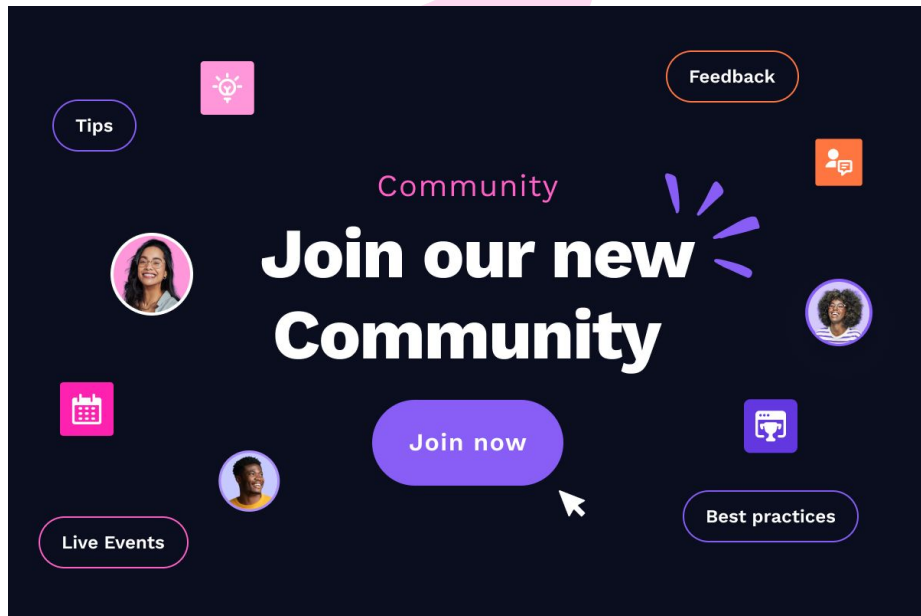
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Get in touch with us!

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- Share your experiences and learn from others
- Access product updates, exclusive content, events, tips, and best practices
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grouping important content by
key area:

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- Client management
- Profitability
- Time tracking
- Agile

Upcoming Webinars

 **Live Webinar**

August 5
8:00am PT / 11:00am ET / 4:00pm GMT+1

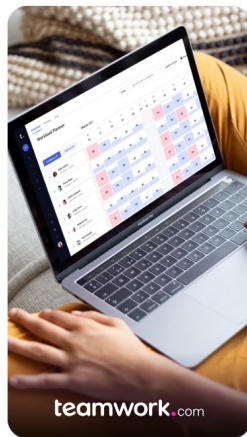
5 Tips + Tricks: Resource Management



Jennifer Delahooke
Customer Success Manager



Helen Chen
Customer Education Manager



 **Live Webinar**

August 6
8:00am PT / 11:00am ET / 4:00pm GMT+1

Mastering Financials in Teamwork.com




Andrew Parks
Customer Solutions Manager



Renee Demaree
Customer Success Manager





Upcoming Webinars

 **Live Webinar**


August 12
8:00am PT / 11:00am ET / 4:00pm GMT+1

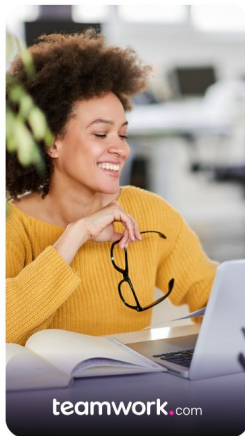
Set up Teamwork.com for success




Andrew Parks
Customer Solutions Manager

Helen Chen
Customer Education Manager







 **Live Webinar**


August 14
8:00am PT / 11:00am ET / 4:00pm GMT+1

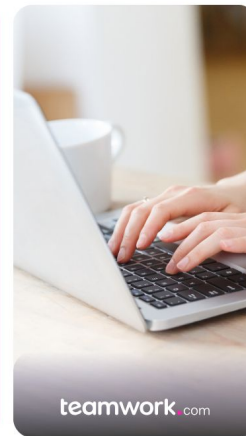
Simplify daily work with Teamwork.com



Andrew Parks
Customer Solutions Manager

Helen Chen
Customer Education Manager





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Q & A

Thank You!

