ClearSkai TECHNOLOGIES

INTERNAL TRACKING · DOCUMENTS PAGE

Document Packet Tracker

Master document page for tracking which ClearSkai forms were sent, completed, signed, and stored in the client folder. Use this as the front page for the full document library.

SL-IT-01 · Version 6.0 · Issued November 20, 2026

Document	
Document ID	SL-IT-01
Version	6.0
Issued	November 20, 2026
Library folder	Internal Tracking
Replaces	ClearSkai_Document_Packet_Tracker_v5-2.pdf
Classification	Sales document library · client form

Prepared for

CLIENT NAME & COMPANY

PROJECT / BUILD NAME

CLIENT EMAIL

Get back to building where it matters most.

DOCUMENTS PAGE

Client Document Packet Tracker

Use this as the master folder checklist. It helps the sales team, build team, and client know exactly which documents are complete and which are still missing.

CLIENT / COMPANY

PROJECT / BUILD NAME

CLIENT CONTACT

CLEARSKAI REP

CLIENT EMAIL

PACKET STATUS

Sales + Close Documents

Document	Sent?	Completed?	Signed?	Stored?

Document	Sent?	Completed?	Signed?	Stored?

TRACKER

Onboarding, Build Approval & Handoff

Track the remaining project documents from intake through ownership transfer.

Onboarding Documents

Document	Sent?	Completed?	Signed?	Stored?

Approval + Handoff Documents

Document	Sent?	Completed?	Signed?	Stored?

Document	Sent?	Completed?	Signed?	Stored?

CONFIRMATION

Missing Items, Follow-Up & Packet Confirmation

Use before kickoff, before launch, and again at final handoff.

MISSING DOCUMENTS / MISSING SIGNATURES

FOLLOW-UP NOTES / WHO OWNS NEXT STEP

Storage Reminder

Save final signed copies in the client folder. For legal and operational consistency, avoid relying on text messages or verbal approval when a signed form is available.

Signatures

CLEARSKAI REP

SIGNATURE / TYPED NAME

PRINTED NAME / TITLE

DATE

PROJECT MANAGER

SIGNATURE / TYPED NAME

PRINTED NAME / TITLE

DATE