



Project Document Tracker

and Filing System Template | Joy of PM AI Solutions

FREE RESOURCE

The Problem This Solves

Someone asks for the proposal you sent three months ago, and you spend 15 minutes digging through email, Google Drive, Slack, and your desktop before finding it in a folder called 'misc_final_v2.' Multiply that by every document in your business, and you are losing hours every week to information retrieval.

This template gives you a simple, repeatable system for organizing and finding every important business document in under 2 minutes.

How to Use This Template

1. Make a copy of the Document Tracker table in Google Sheets, Excel, or any spreadsheet tool
2. Spend 30 to 60 minutes doing an initial inventory of your most important documents (start with the last 90 days)
3. Going forward, log every new document as you create or receive it (this takes 30 seconds per document)
4. When you need to find something, search or filter the tracker instead of digging through folders

Part 1: Document Tracker Table

Create a spreadsheet with these columns. Example entries shown below:

Document Name	Client/Project	Category	Location	Status
Q1 Sales Report	Internal Ops	Financial	Drive > Finance > 2026	Final
Website Proposal	Acme Co	Proposal	Drive > Clients > Acme	Sent
AI Accelerator SOW	Beta LLC	Contract	Drive > Clients > Beta	Signed
Meeting Notes Feb 10	Internal Ops	Meeting Notes	Drive > Meetings > 2026-02	Final
Invoice #1042	Acme Co	Invoice	Stripe + Drive > Acme	Paid

Column Definitions

Document Name: Clear, descriptive. Format: [Type] - [Subject] - [Date]

Client/Project: Which project or client. Use 'Internal Operations' for internal items.

Category: Proposal, Contract, Invoice, Financial Report, Meeting Notes, Project Plan, Status Report, Marketing, Legal, Template, Other

Date Created / Last Updated: YYYY-MM-DD format for easy sorting

Location: Full path: 'Google Drive > Clients > Acme > Proposals'

Owner: Who is responsible for this document

Status: Draft, In Review, Final, Signed, Paid, or Archived

Notes: Who it was shared with, related documents, action items

Your Document Tracker (Fillable)

Document Name	Client/Project	Category	Location	Status

Part 2: Folder Structure Template

Use this structure in Google Drive, Dropbox, or OneDrive:

```
Business Name/  
Clients/  
[Client Name]/  
Proposals/ | Contracts/ | Invoices/  
Deliverables/ | Communications/ | Meeting Notes/  
Internal Operations/  
Finance/ (by year) | Legal/ | Marketing/ | SOPs/  
Projects/  
[Project Name]/  
Planning/ | Deliverables/ | Meeting Notes/ | Status Reports/  
Meetings/  
[Year] > [Month]/  
Templates/  
Proposals/ | Reports/ | Invoices/ | Meeting Agendas/
```

5 Rules for This System

Rule 1: Every document gets a home within 24 hours. Do not let files pile up in Downloads or Desktop.

Rule 2: Use consistent naming. Format: [Type] - [Subject] - [YYYY-MM-DD]

Rule 3: One document, one location. No copies in multiple folders. Use the tracker to reference.

Rule 4: Update the tracker when you update the document. Takes 10 seconds, saves 10 minutes.

Rule 5: Archive quarterly. Move completed projects to an Archive subfolder every 3 months.

Quick-Find Cheat Sheet

I Need...	Go To...
A document from a specific client	Clients > [Client Name] > [Category]
Meeting notes from a specific date	Meetings > [Year] > [Month]
A template to start something new	Templates > [Type]
A financial document	Internal Operations > Finance > [Year]
Something but I cannot remember where	Search the Document Tracker spreadsheet

Want to Find Any Document in 8 Seconds?

This filing system gets you from chaos to organized. But what if you could ask a question like 'What did we agree on pricing with Acme?' and get the answer instantly, with citations, pulled from across all of your documents? That is what **PM Document Intelligence** does. 96.4% citation accuracy. Under 8 seconds.

Learn more: joyofpm.com | Schedule a free assessment: joyofpm.com/#contact