

Catering follow up and headcount tracker

Blank manual record | Keep one sheet per action and retain completed action history. Record missing facts as To confirm. Keep this completed sheet private; use references to the original conversation instead of copying private contact or financial details.

Customer or event reference and event date

Quote reference and revision | Current quote status

Current approved plan and guest count | Approval evidence reference

Requested change or unanswered question

Customer agreed decision or contact date | Source of that agreement

Next action | Responsible person | Due date and business time zone

Action status | Actual contact date | Observed outcome and evidence reference

Manual status: Open, Done or Cancelled. Reopen before editing a closed action. Done describes the action only. Record a new review action if the reply changes the booking; quote approval remains separate.

For a headcount change, review the scope and price, issue any required revision and obtain its approval before replacing the kitchen plan. Retain the older version. Fresh acknowledgment and checks belong to the new approved version.

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A headcount reply changes the next action

Fictional worked example | Practice Community lunch | Event November 16, 2026 | America/Edmonton. All names, dates, references, actions and decisions are invented. This is separate from the Northwood and Cedar Room examples.

2026 date	Observed record	Office action	Current approved plan
Nov 2	F1 revision 1 approved for 40 guests.	Keep the recorded approval and plan reference.	F1 revision 1 40 guests
Nov 6	Headcount check-in agreed for November 9.	Office records one guest-count task due November 9.	F1 revision 1 40 guests
Nov 9	Customer requests 50. Revised scope and price are not approved.	Record the reply and complete the contact action. Add review due November 10.	F1 revision 1 40 guests
Nov 10	F2 revision 2 for 50 guests awaits approval.	Keep F1 current while reviewing F2 with the customer.	F1 revision 1 40 guests
Nov 11	Customer explicitly approves F2 scope and price; approval is recorded.	Issue F2 with fresh acknowledgment and checks. Retain F1 history.	F2 revision 2 50 guests

Next open action

Office to obtain acknowledgment of F2 revision 2 and review outstanding operational details. Due November 12 is an invented operator-chosen date for this exercise.

Venue access, complete service arrangements and dietary requests still require operator review. No payment, packing completion, dispatch or delivery is established.

PRACTICE F1 and PRACTICE F2 are illustrative manual quote references. Closing a follow-up does not approve a quote. Only November 11 changes the current approved plan to 50 guests.

Keep your quote and next follow up together

Create a private staff task in CaterScale, choose its due date and responsible person, and record the outcome. Staff tasks do not send emails or automatic reminders. These files do not import or create records.

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