

Clarivore Manager User Guide

This is the manager-facing operating manual for Clarivore. It is organized by manager task type so you can quickly find what to do, where to do it, and what "good" looks like.

Guide metadata

- Product area: Manager dashboard, webpage editor, viewer validation, tablet pages
- Audience: Restaurant managers, owners, operations leads
- Scope: Day-to-day operation, monthly compliance confirmation, menu maintenance, analytics interpretation, escalation

How to use this guide

1. Start with [Task map](#) to understand daily/weekly/monthly responsibility.
2. Jump to the section matching your current task.
3. Use the embedded annotated screenshots and callout mappings while you execute.
4. Use troubleshooting and escalation templates when expected outcomes do not occur.

Task map



This map is the reference hierarchy for all manager tasks in this guide:

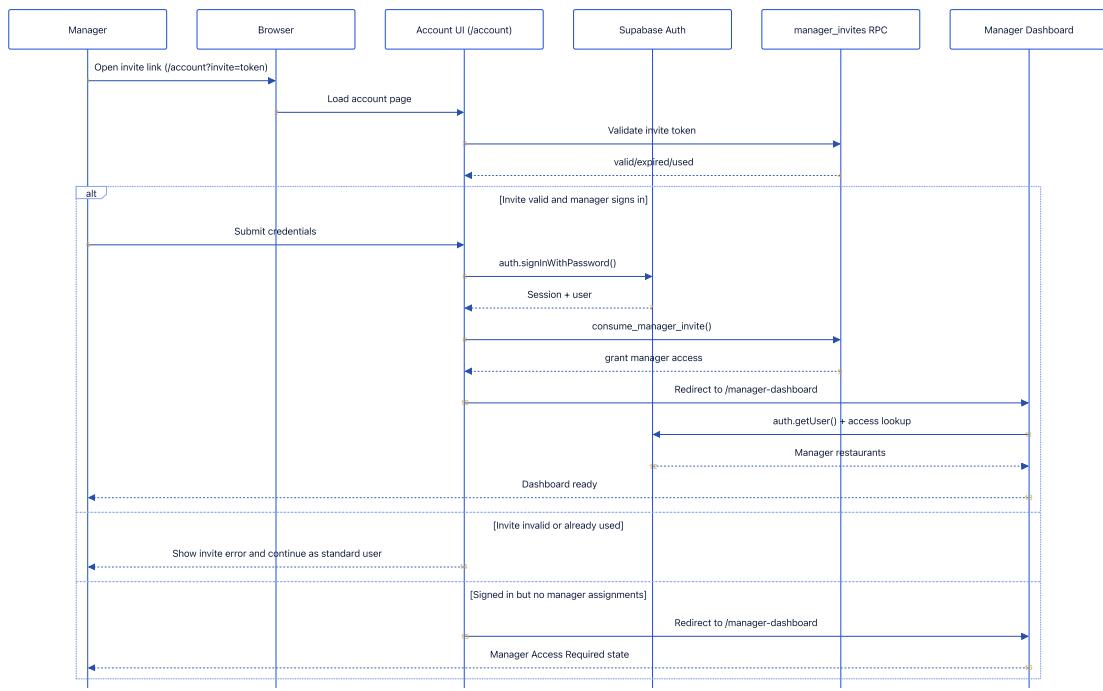
1. Daily operations: communication, request triage, due-date checks, analytics monitoring.
2. Weekly governance: change quality review, brand drift review, viewer spot checks.
3. Monthly governance: two-step confirmation completion and remediation planning.

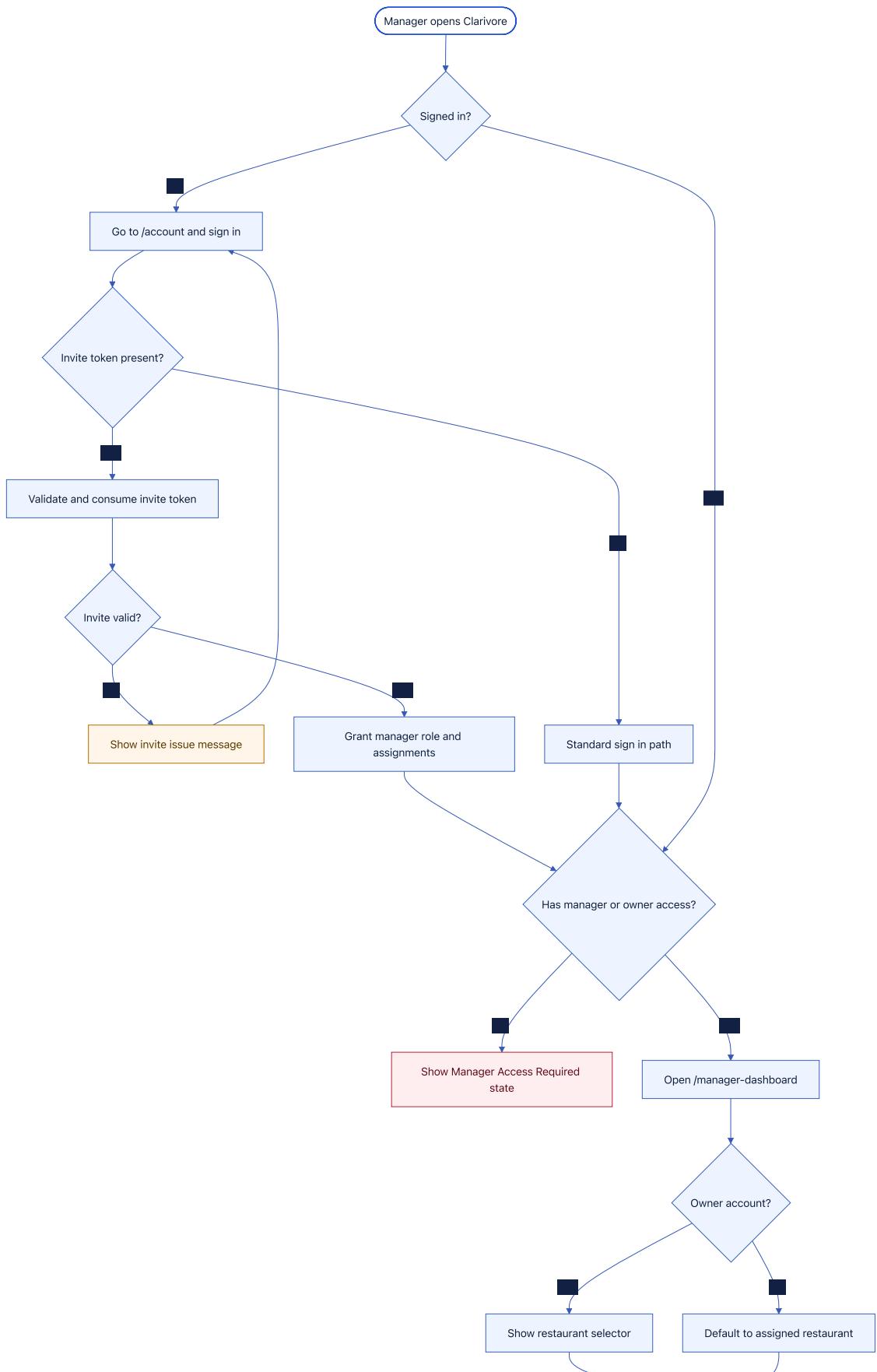
Task type 1: Access, onboarding, and navigation

1.1 Objective

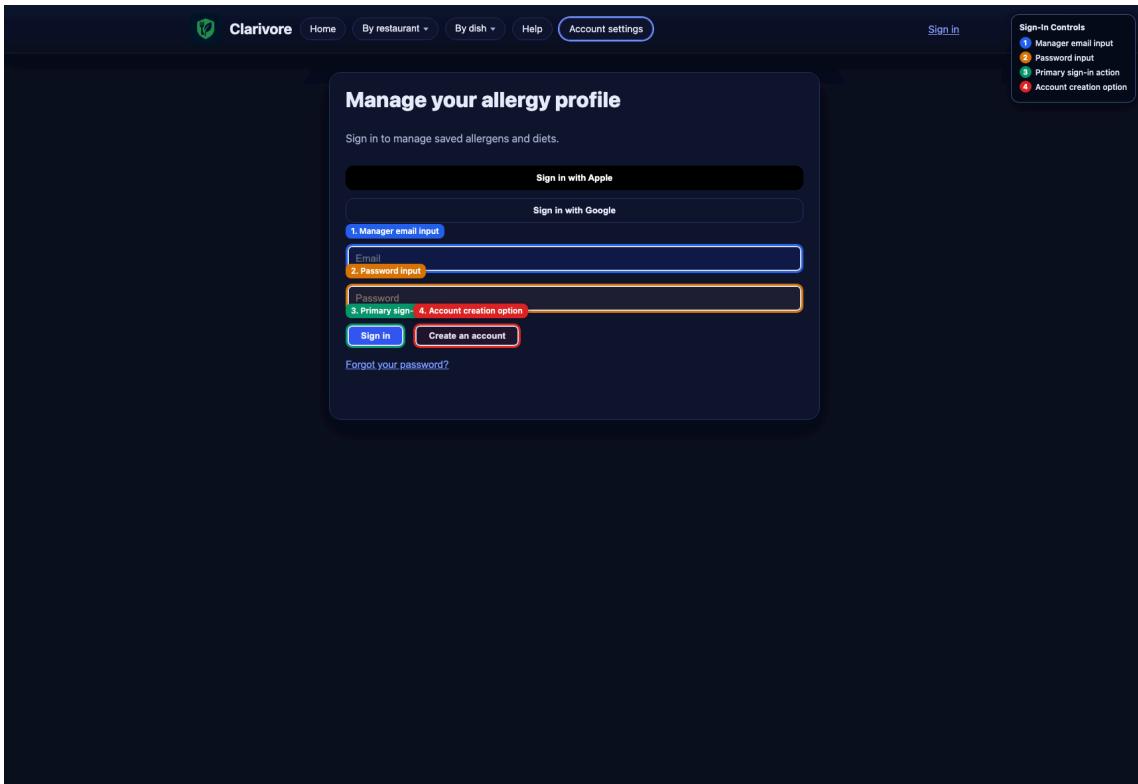
Access manager tooling in an authorized state and verify that navigation is routing to the correct manager surfaces.

1.2 Flow diagrams





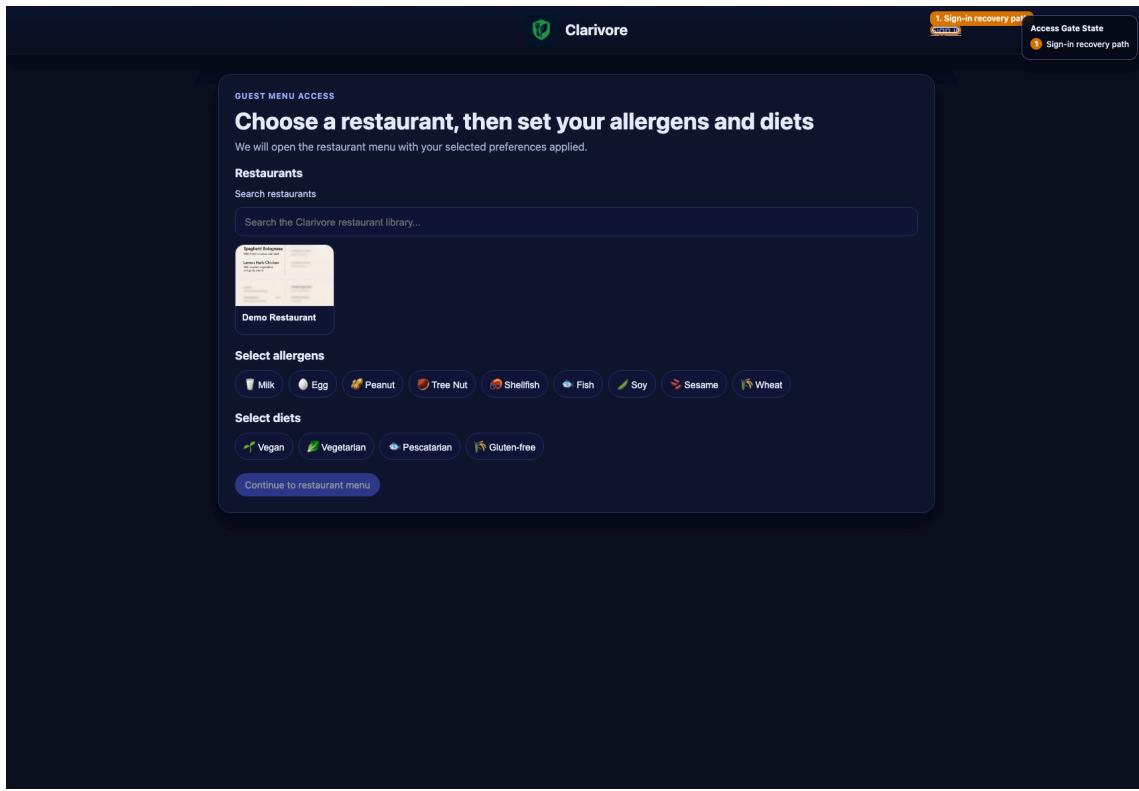
1.3 Sign-in screen reference



Callout mapping:

1. Manager email input.
2. Password input.
3. Primary sign-in action.
4. Account creation path.

1.4 Unauthorized manager-dashboard state reference



Callout mapping:

1. Authentication-required state.
2. Recovery path to sign-in.

1.5 Mobile reference (signin and dashboard shell)



Clarivore

Home

By restaurant ▾

By dish ▾

Help

Account settings

Sign in

Manage your allergy profile

Sign in to manage saved allergens and diets.

Sign in with Apple

Sign in with Google

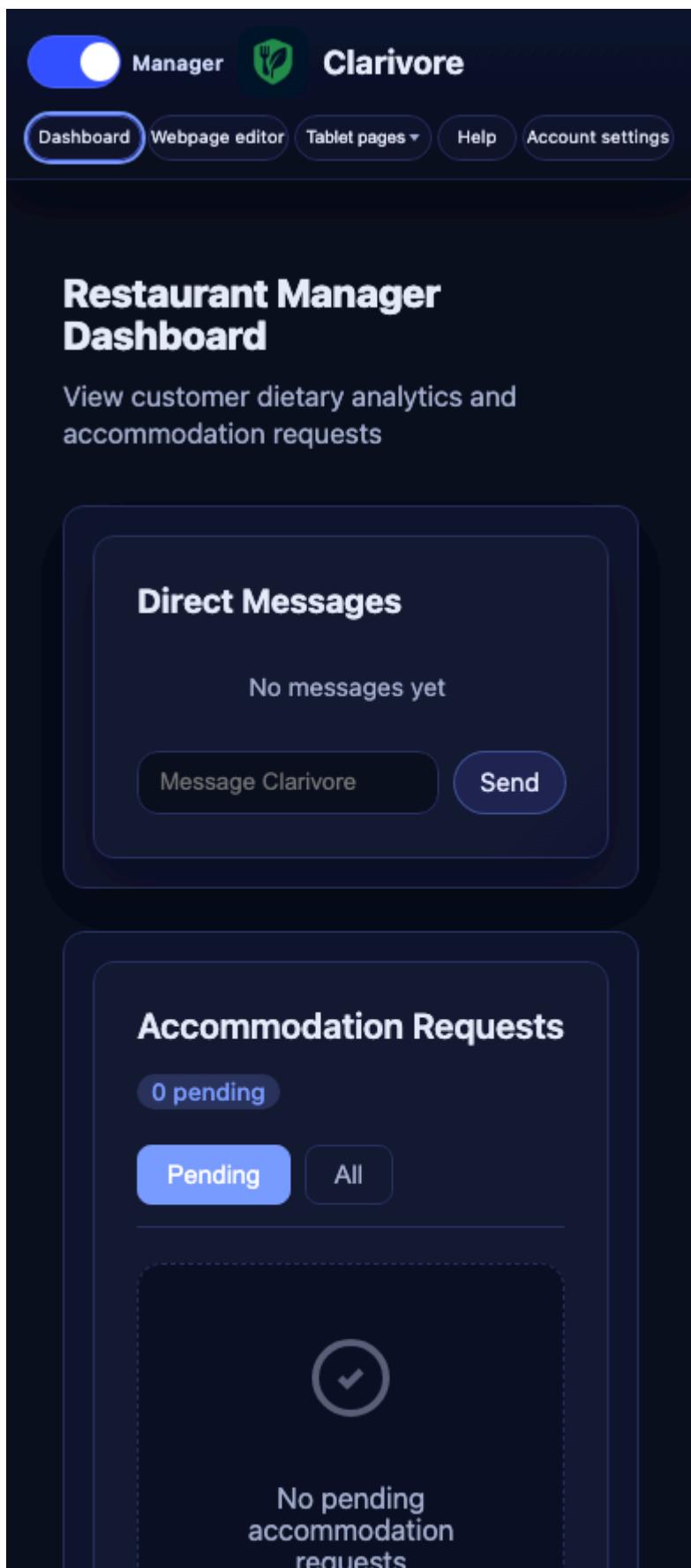
Email

Password

Sign in

Create an account

[Forgot your password?](#)



The image shows a mobile application interface for a restaurant manager. At the top, there is a navigation bar with a blue toggle switch labeled "Manager", a green circular icon with a fork and knife, and the brand name "Clarivore". Below the navigation bar are five buttons: "Dashboard" (highlighted in blue), "Webpage editor", "Tablet pages ▾", "Help", and "Account settings".

The main content area features a section titled "Restaurant Manager Dashboard" with the subtitle "View customer dietary analytics and accommodation requests".

Below this, there are two main sections:

- Direct Messages**: A box containing the message "No messages yet" and two buttons: "Message Clarivore" and "Send".
- Accommodation Requests**: A box showing "0 pending" requests. It includes two filter buttons: "Pending" (highlighted in blue) and "All". Below these buttons is a dashed box containing a checkmark icon and the text "No pending accommodation requests".

Menu Confirmation

NEXT CONFIRMATION DUE

Due in 25 days

Last confirmed: Feb 20, 2026

Confirm information is up-to-date

Recent changes

Review the latest edits to your menu.

Matt Davis Feb 23, 2026, 2:35 PM

banana bread

- Added overlay
- Ingredient row removed: vanilla extract
- Ingredient row removed: baking powder

[Review rows](#)

banana bread

- Ingredient row added: coconut oil
- Ingredient row

Show details

Show

[View full changelog](#)

Viewing 10 items

Brand items in use

Search brand items...



KIND Blueberry Vanilla Cashew

Ingredients: dairy-free dark chocolate chips, extra-firm tofu

2 dishes More options

Menu Interest Heatmap

Click on a dish to see detailed analytics

Categorize interest by:

Total views Total loves
Total orders Total requests
Proportion of views safe/accommodable

Low  High

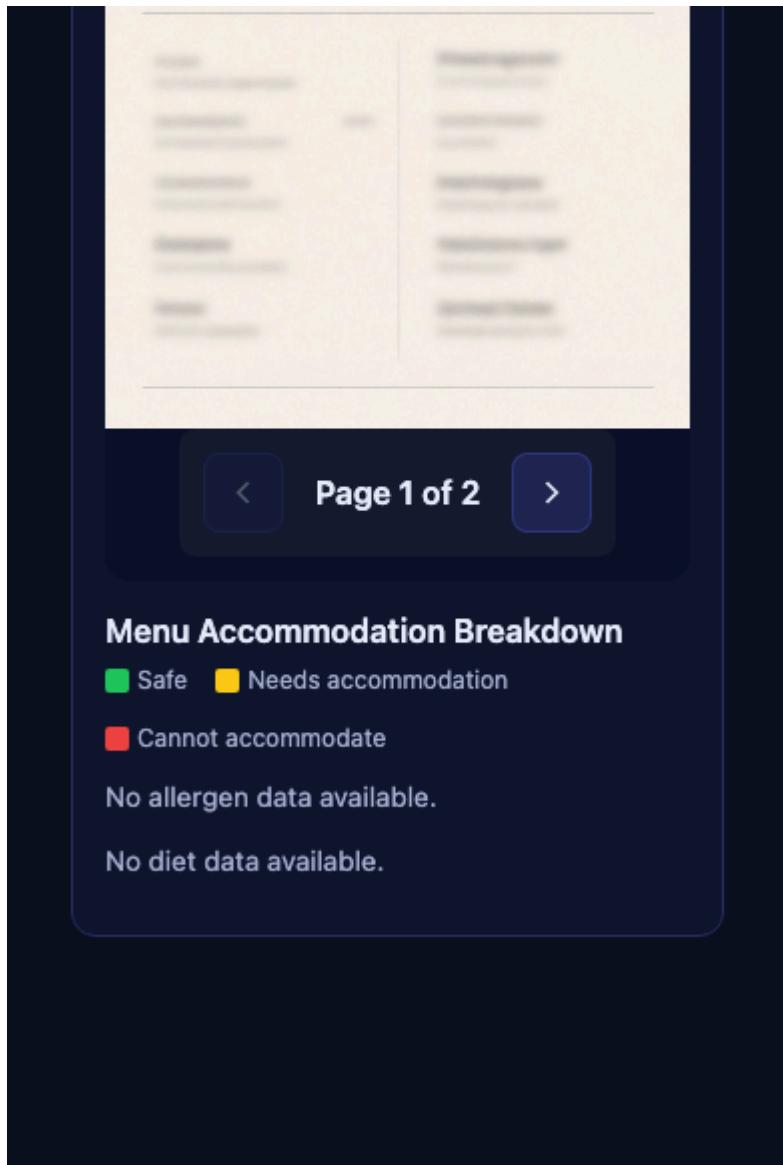
RESTAURANT



Grilled Tofu
With vegetables and potatoes

Spaghetti Bolognese
With tomato sauce and basil

Lemon Herb Chicken
With roasted vegetables and garlic sauce



1.6 Access checklist

1. Open `/account?mode=signin`.
2. Sign in with manager credentials.
3. Open `/manager-dashboard`.
4. Confirm `Restaurant Manager Dashboard` heading appears.
5. Confirm manager sections render (direct messages, requests, confirmation, changes/brands, analytics).
6. If owner: confirm restaurant selector appears and can switch restaurants.

1.7 Common access outcomes

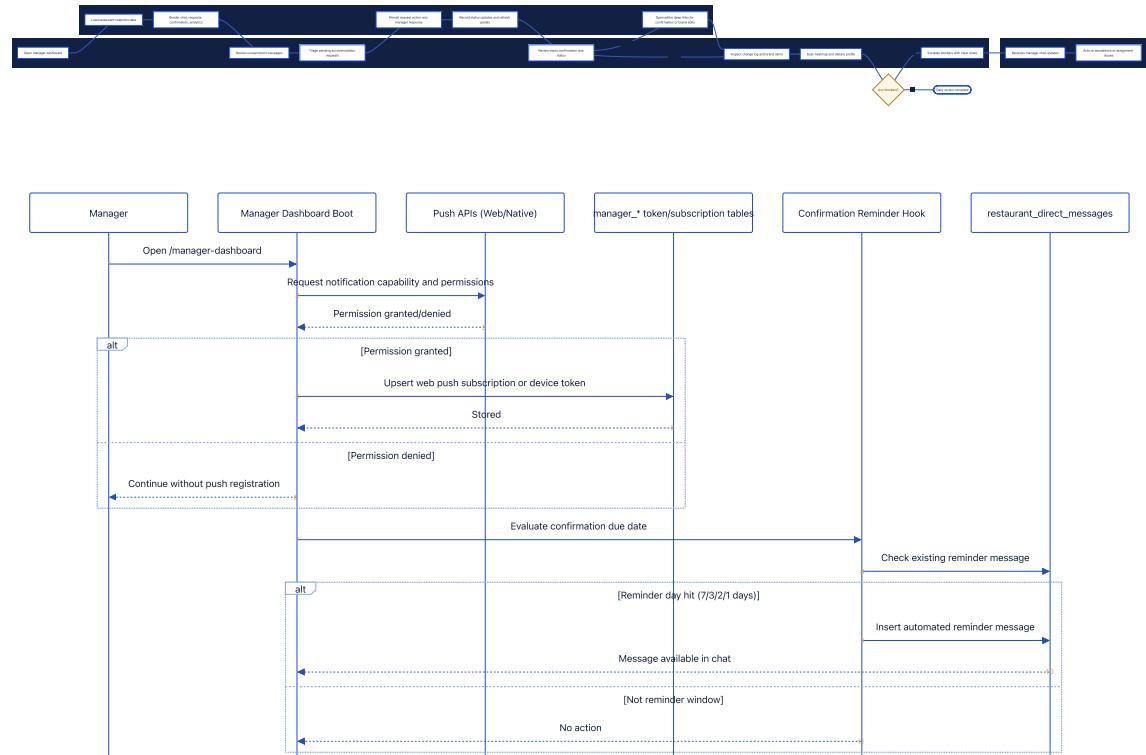
- Signed in but no manager assignment: `Manager Access Required` state appears.
- Signed out: auth-required messaging appears.
- Valid manager assignment: full dashboard content appears.

Task type 2: Run the manager dashboard command center

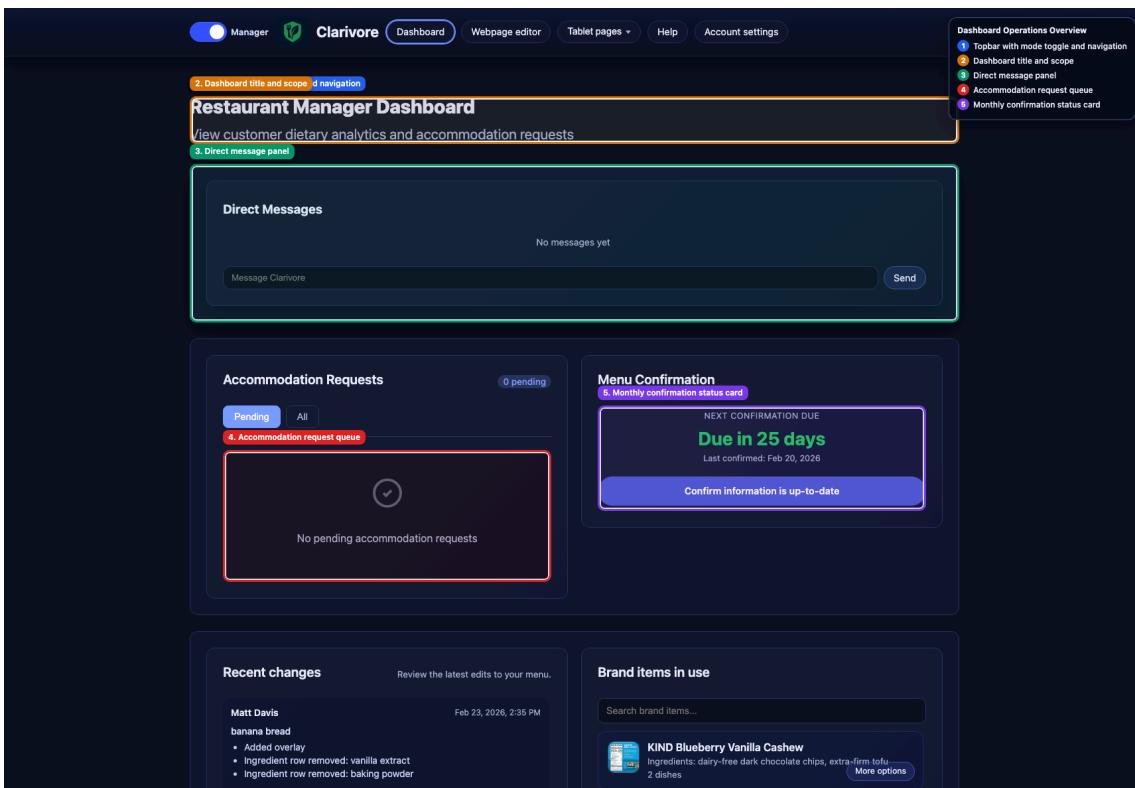
2.1 Objective

Use dashboard panels as the primary daily control center for communication, triage, compliance, change review, and analytics.

2.2 Flow diagrams



2.3 Dashboard overview reference

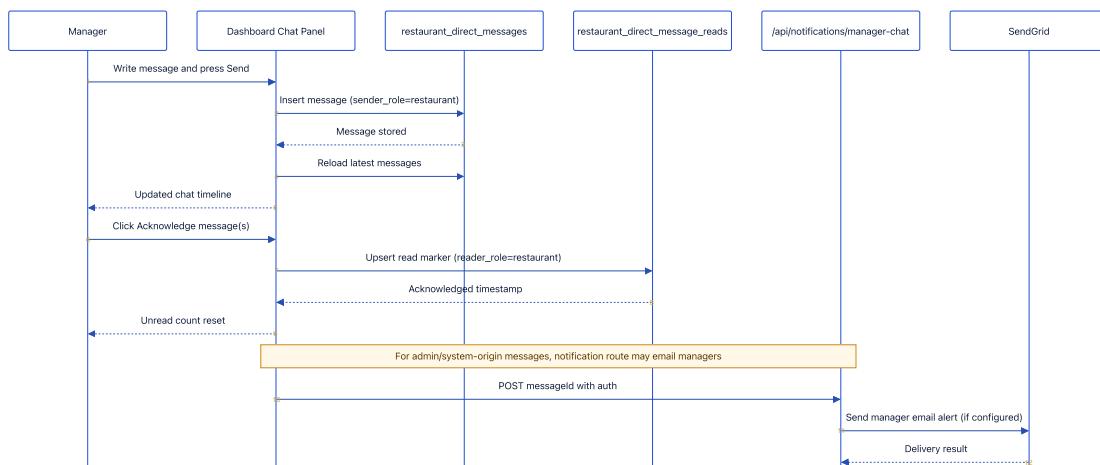


Callout mapping:

1. Topbar with mode toggle and navigation.
2. Dashboard title and scope.
3. Direct message panel.
4. Accommodation request queue.
5. Monthly confirmation status card.

2.4 Direct message workflow

Flow diagram



Execution steps

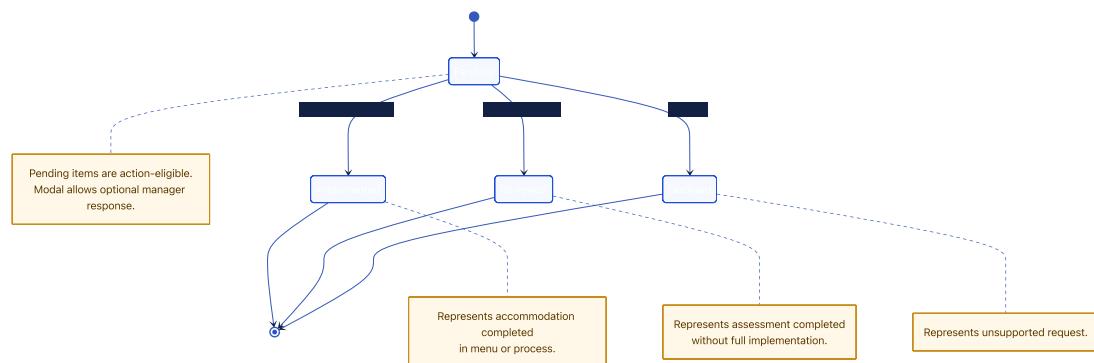
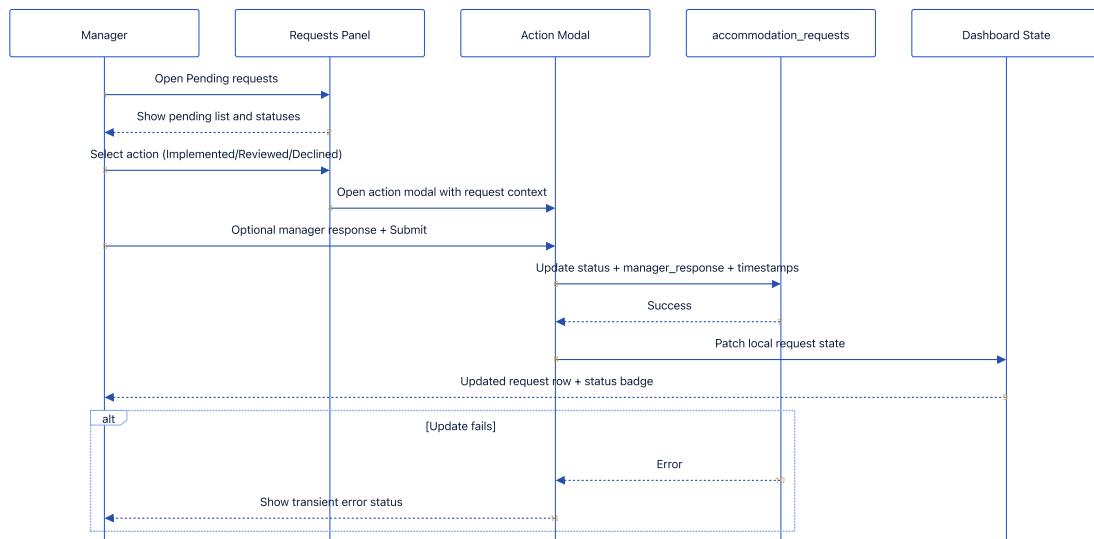
1. Open Direct Messages in dashboard top section.
2. Review unread items and required action context.
3. Reply with structured update: Issue → Impact → Action taken → Ask from admin .
4. Use Acknowledge after you have processed the message.
5. Confirm unread state drops and timeline shows your response.

Quality standard

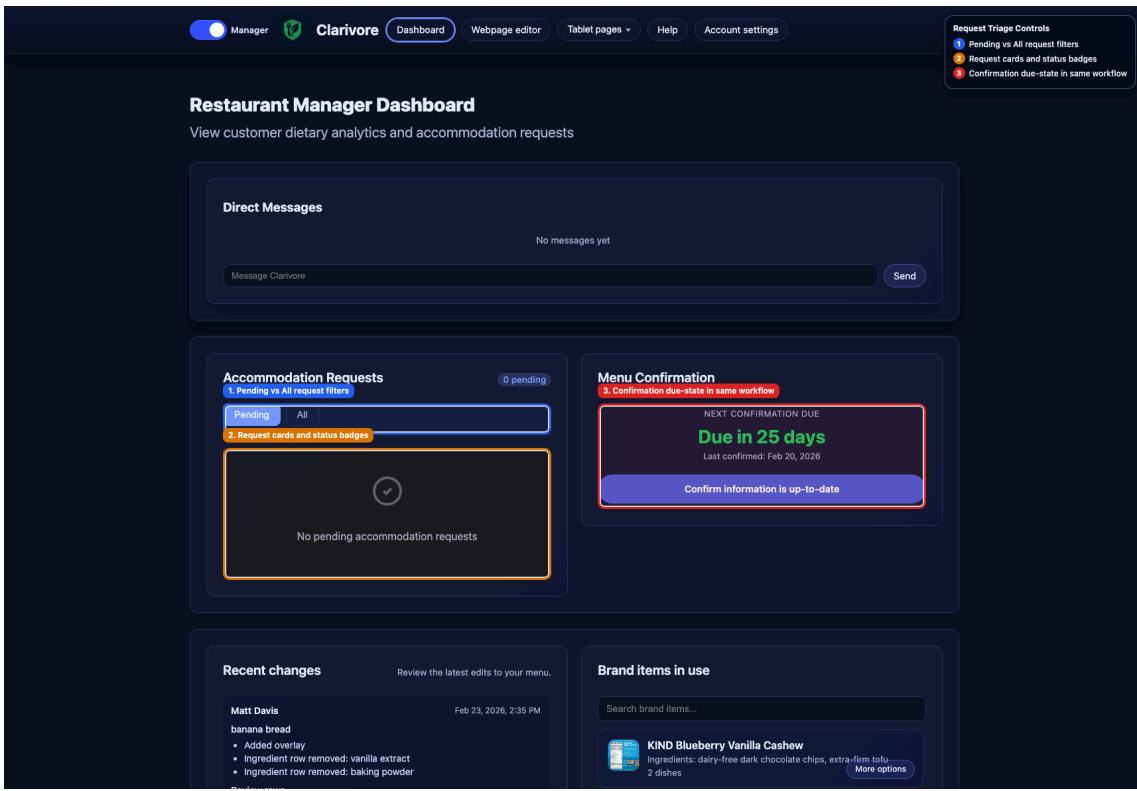
- Good: actionable details with timestamp, dish/menu scope, and required support.
- Poor: vague requests with no operational context.

2.5 Accommodation request triage

Flow diagrams



Panel reference



Callout mapping:

1. Pending vs All filters.
2. Request cards and status badges.
3. Implement/Review/Decline actions.
4. Confirmation due-state context alongside triage.

Decision rules

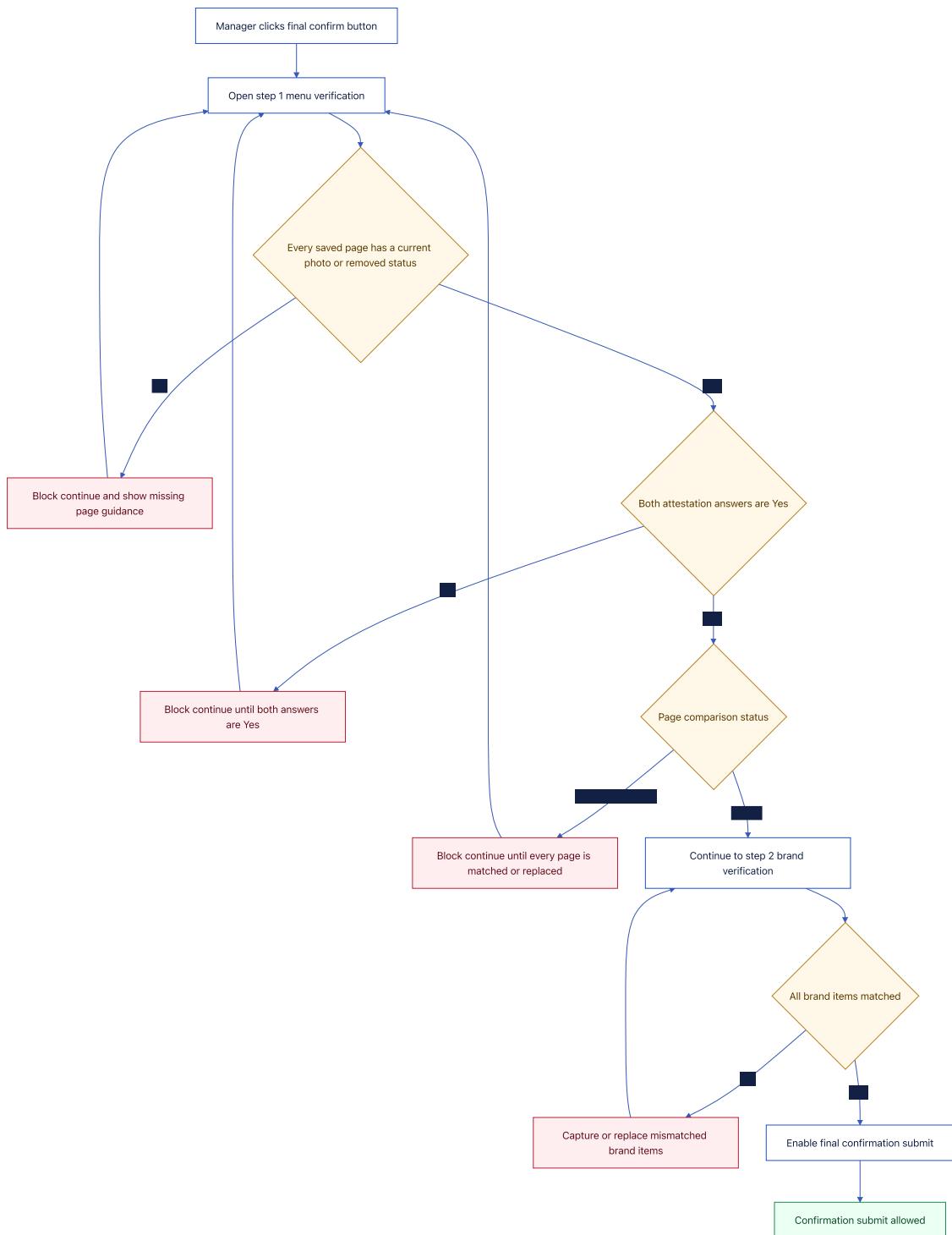
- implemented : use when accommodation is now materially available.
- reviewed : use when assessed but not yet implemented.
- declined : use when request cannot be supported.

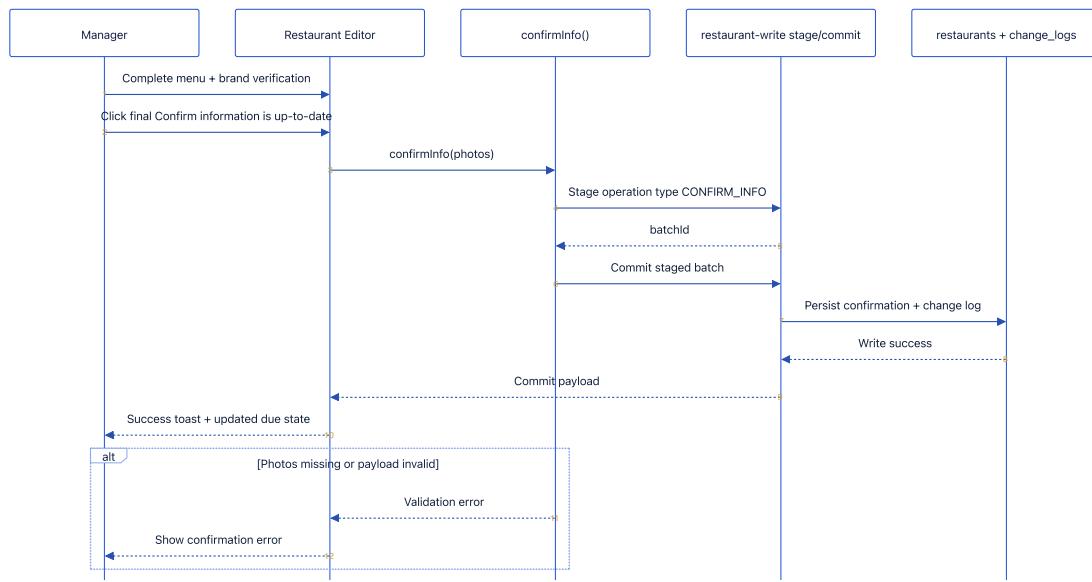
Execution steps

1. Start with Pending .
2. Open each request card and verify dish and need context.
3. Apply the correct action (Mark Implemented , Mark Reviewed , or Decline).
4. Add manager response text when rationale is not obvious.
5. Validate state transitions in All tab for audit continuity.

2.6 Monthly confirmation from dashboard

Flow diagrams





Dashboard interpretation

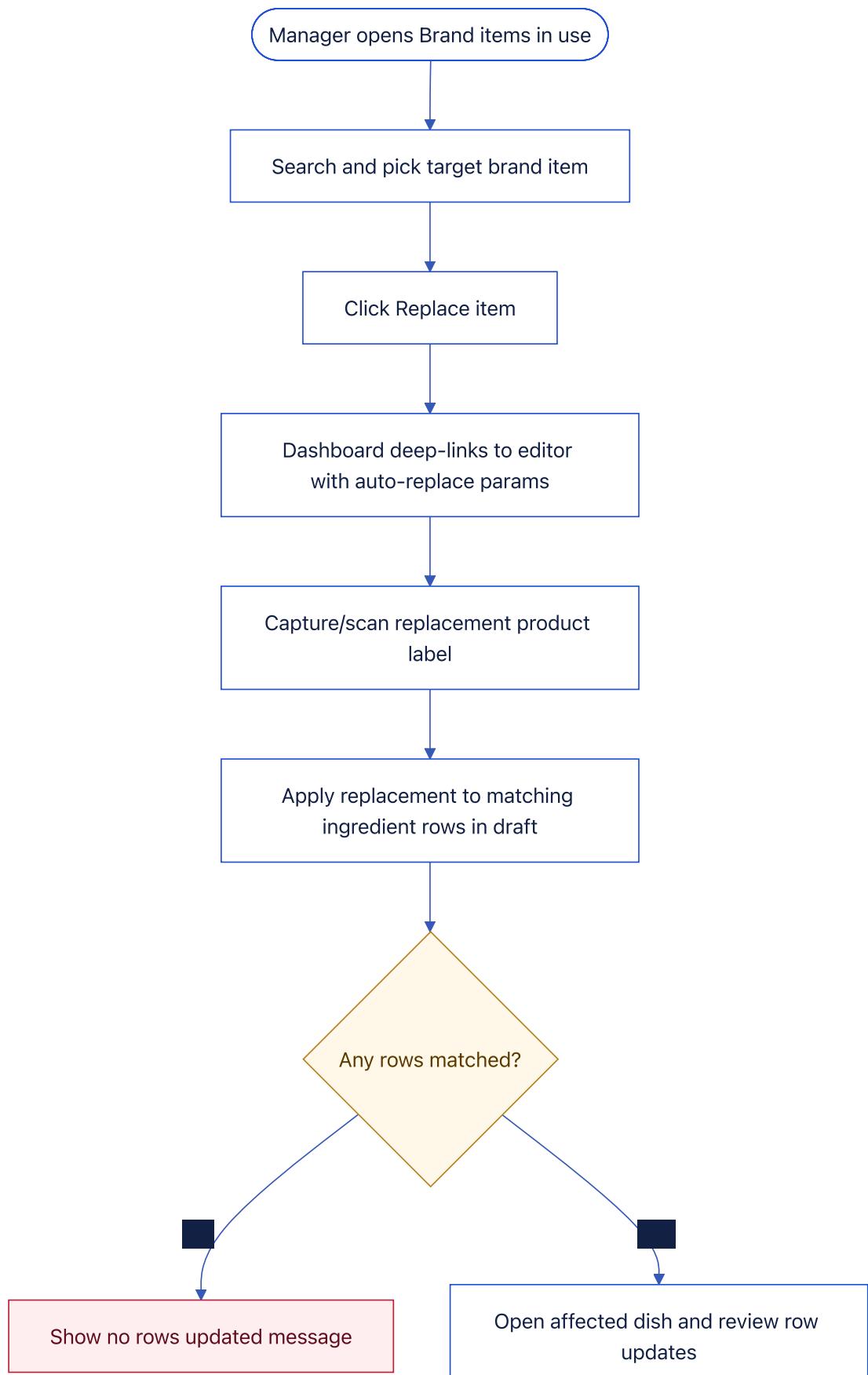
- Due in N days : normal if $N > 7$, watchlist if $N \leq 7$.
- Due today : immediate task.
- X days overdue : highest urgency.

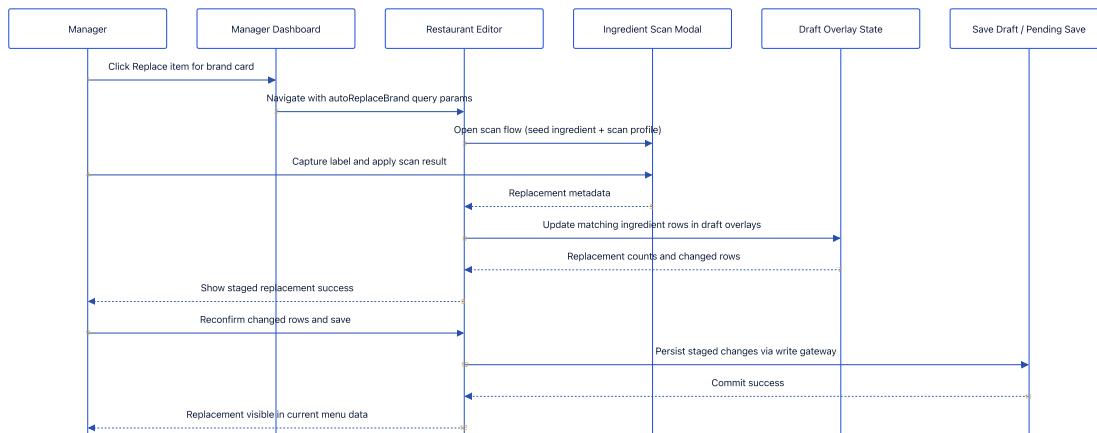
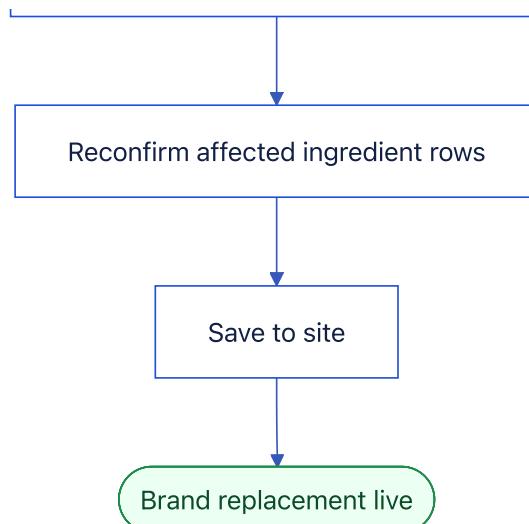
Execution steps

1. Review the `Menu Confirmation` card each day.
2. If due/overdue or verification incomplete, click `Confirm information is up-to-date` .
3. Complete the editor-based confirmation sequence (detailed in task type 3.7).

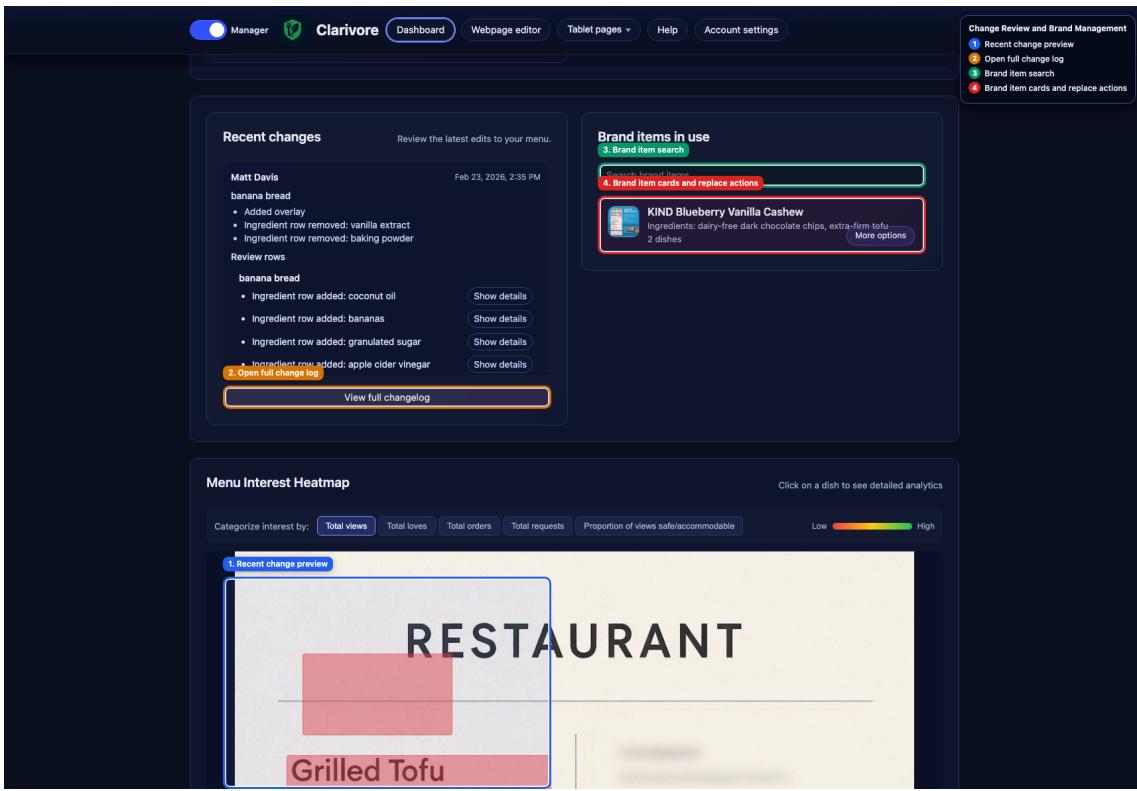
2.7 Review recent changes and brand items

Flow diagrams





Panel reference



Callout mapping:

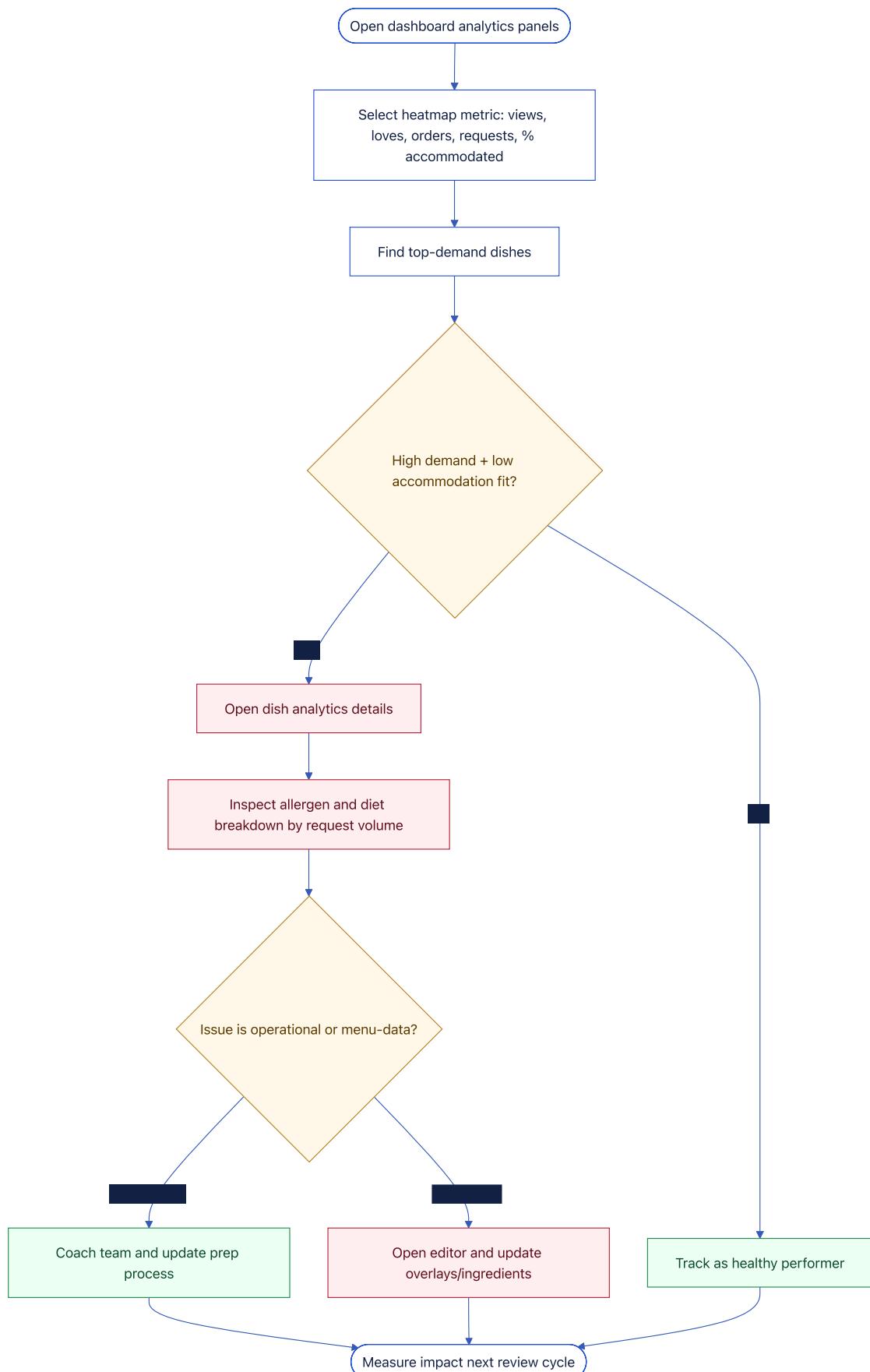
1. Recent changes preview list.
2. Open full changelog action.
3. Brand item search.
4. Brand cards with dish links and replace workflow.

Execution steps

1. Scan Recent changes for unexpected edits.
2. Use View full changelog when an edit needs full historical context.
3. In Brand items in use, search for target item by name/ingredient/dish.
4. Expand More options for full brand context.
5. Use Open to jump to dish editor context, or Replace item for replacement flow.

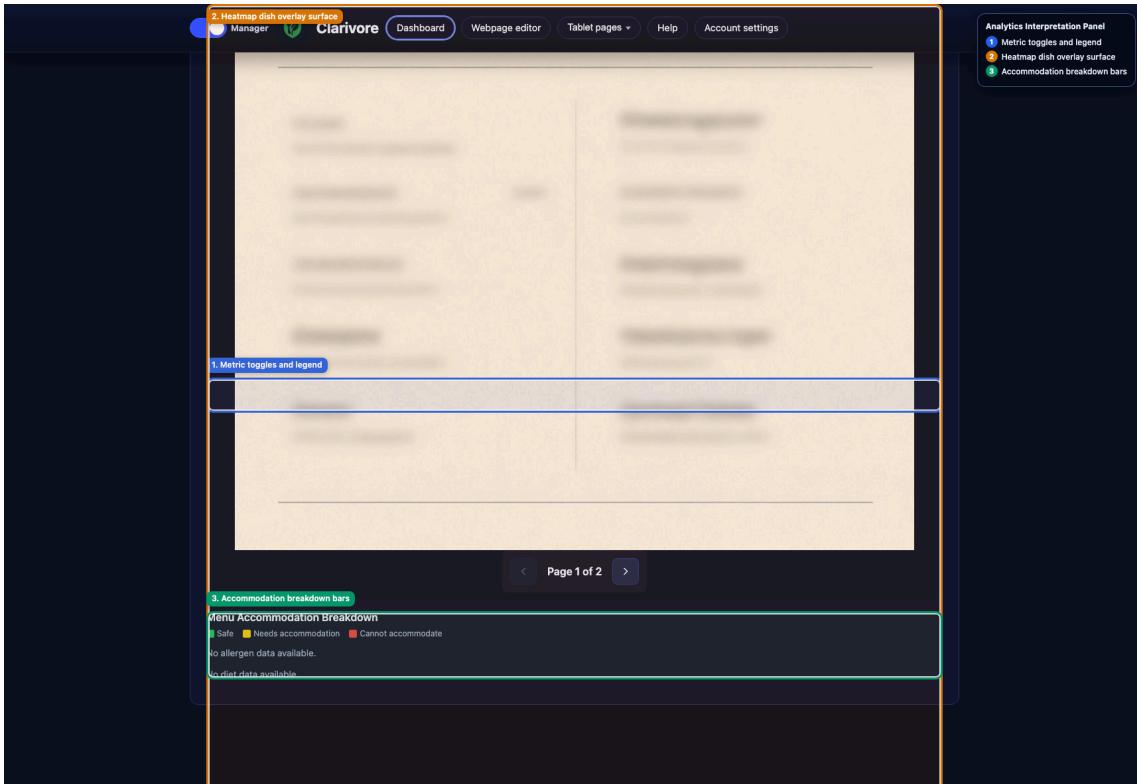
2.8 Interpret analytics and prioritize actions

Flow diagrams





Panel reference



Callout mapping:

1. Metric toggles and legend controls.
2. Dish-level heatmap surface.
3. Accommodation breakdown bars.
4. User allergen/diet distribution panel.

Metric meaning

- Total views : discovery demand.
- Total loves : preference signal.
- Total orders : conversion signal.
- Total requests : accommodation friction.
- % accommodated : compatibility fit signal.

Interpretation playbook

1. Start with `views` and `orders` to identify high-impact dishes.
2. Switch to `requests` and `% accommodated` to identify friction hotspots.
3. Cross-check hotspots with user profile panel to estimate customer impact.

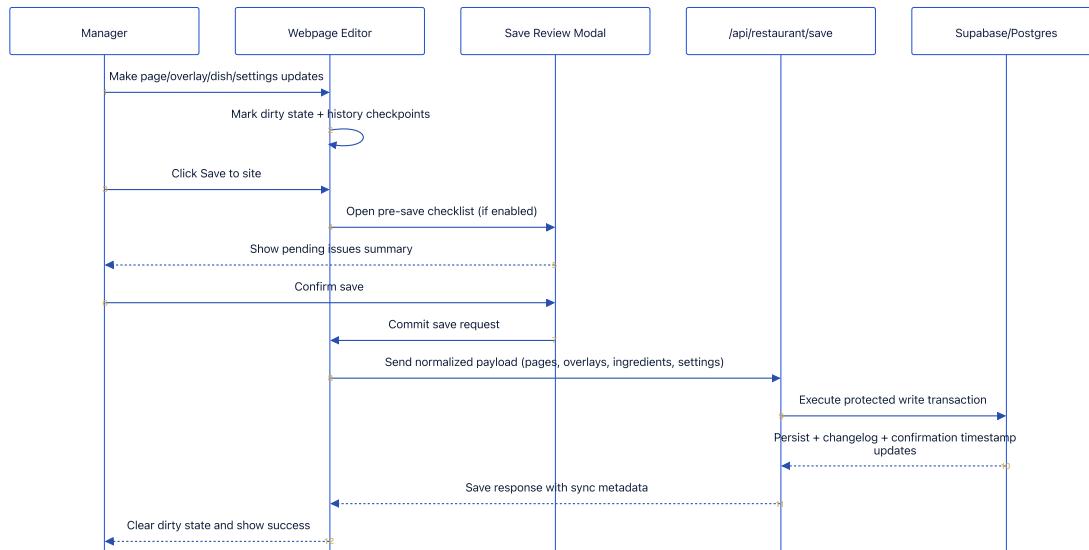
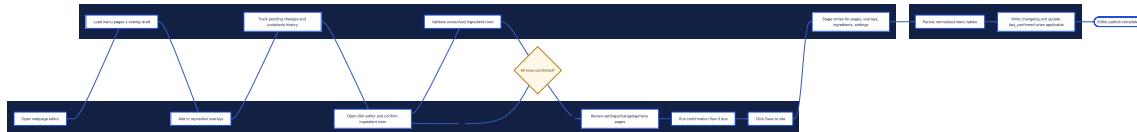
4. Create remediation tasks in editor for high-demand, low-fit dishes.

Task type 3: Edit and publish the menu safely

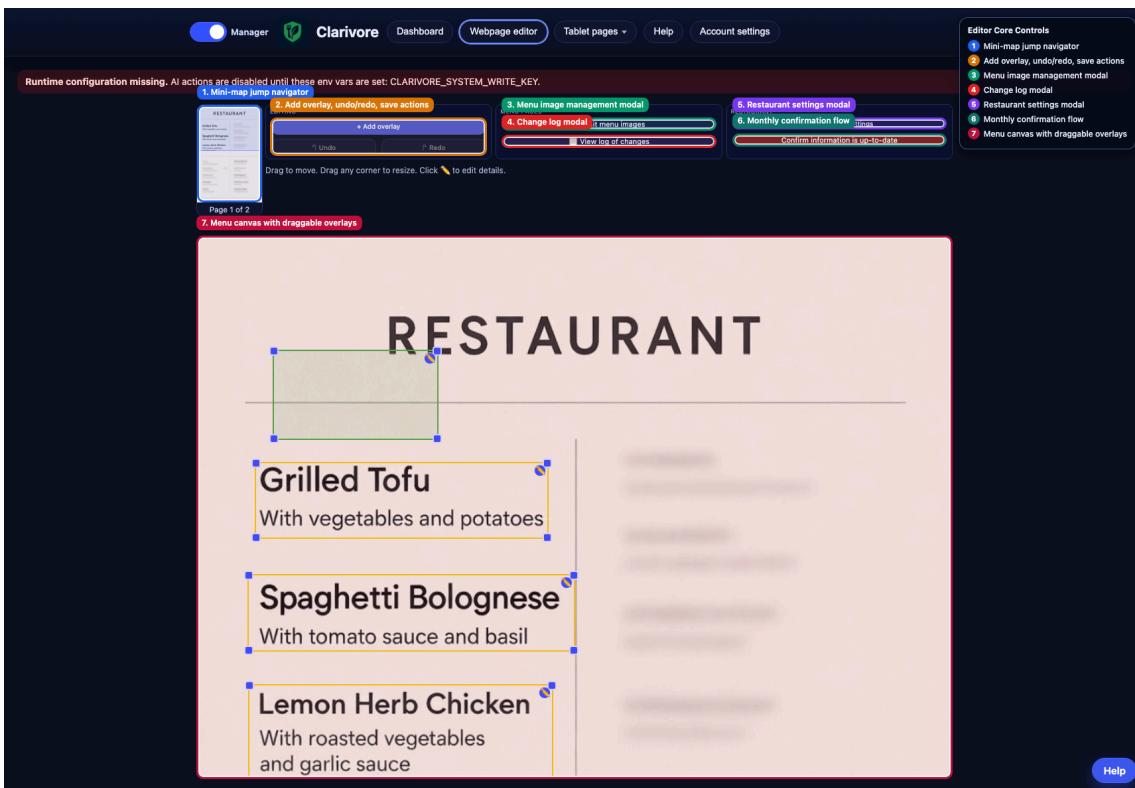
3.1 Objective

Use webpage editor tools to maintain menu pages, overlays, dish data, settings, and monthly confirmations with safe publish behavior.

3.2 Flow diagrams



3.3 Editor core controls reference



Callout mapping:

1. Minimap jump navigator.
2. Add overlay, undo/redo, and save actions.
3. Menu image management modal entry.
4. Changelog modal entry.
5. Restaurant settings entry.
6. Monthly confirmation entry.
7. Menu canvas with draggable overlays.

3.4 Core editor operations

Add or modify overlay boxes

1. Use + Add overlay to create a new dish box.
2. Drag overlay to reposition.
3. Drag corners to resize.
4. Click Edit badge to open dish editor.

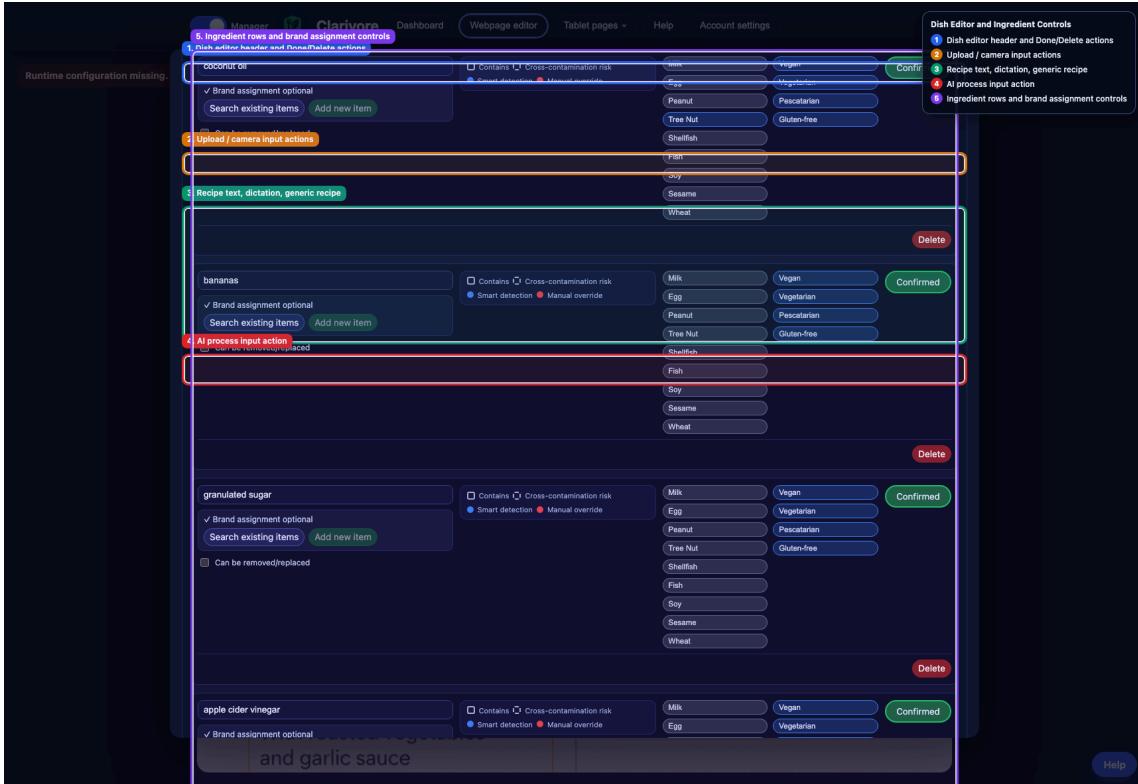
Undo and redo

1. Use Undo to step backward through local history.
2. Use Redo to reapply reverted changes.
3. Confirm final state before save.

Save behavior

1. Save to site publishes staged changes.
2. Save can be blocked when ingredient confirmations are unresolved.
3. Use confirmation guide controls to resolve outstanding rows before save.

3.5 Dish editor and ingredient management



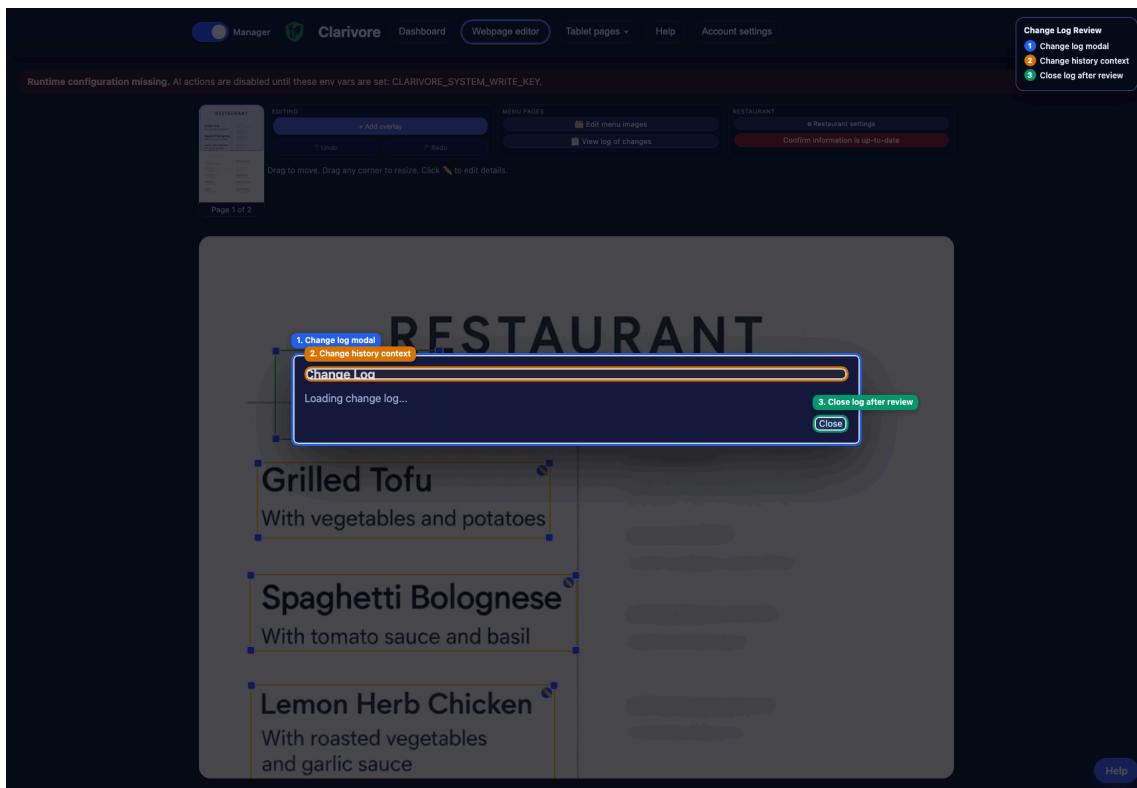
Callout mapping:

1. Dish header with Done and Delete actions.
2. Upload/camera controls for recipe evidence.
3. Recipe text and dictation input area.
4. AI process Input action.
5. Ingredient rows with brand assignment and confirmation controls.

Execution steps:

1. Open overlay dish editor.
2. Set accurate dish name.
3. Add photo evidence and/or recipe text.
4. Run Process Input .
5. Verify each ingredient row and assign/confirm brand items.
6. Resolve warnings and confirm all required rows.
7. Click Done .

3.6 Changelog review inside editor



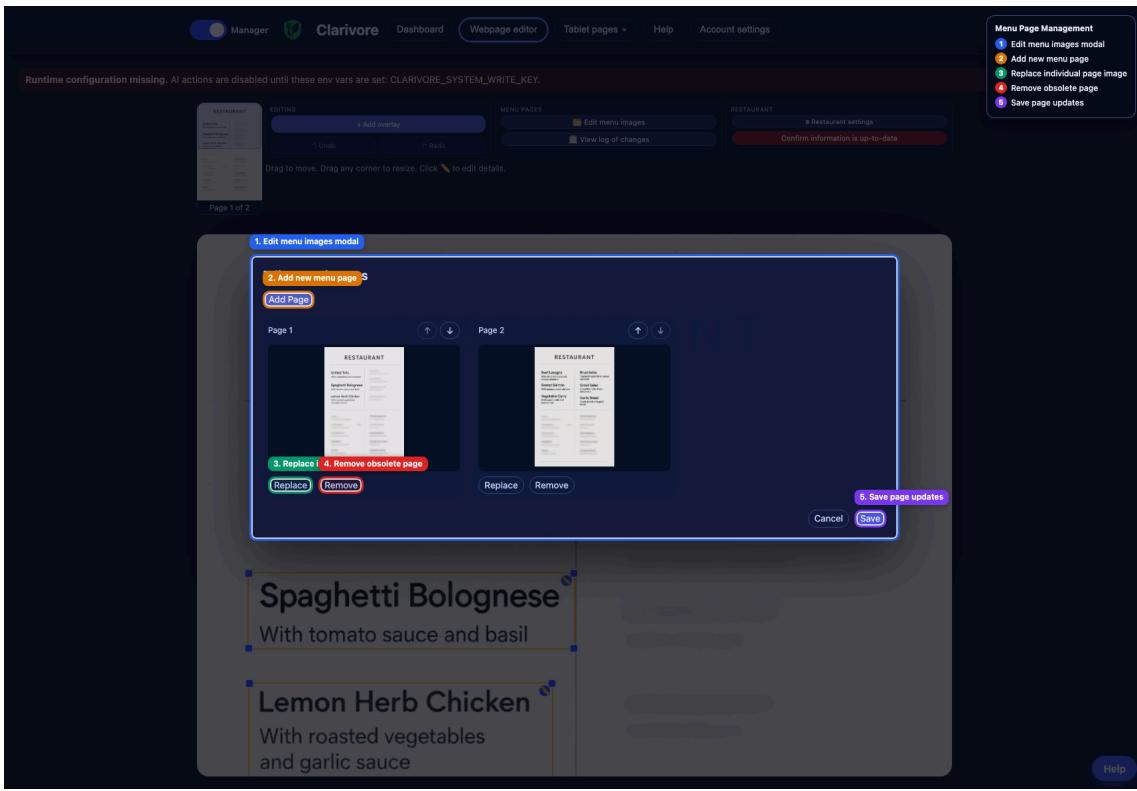
Callout mapping:

1. Changelog modal container.
2. Change history context.
3. Close control.

Execution steps:

1. Open View log of changes .
2. Review entries for unintended edits before publishing.
3. Close modal and continue editing or save.

3.7 Menu page management



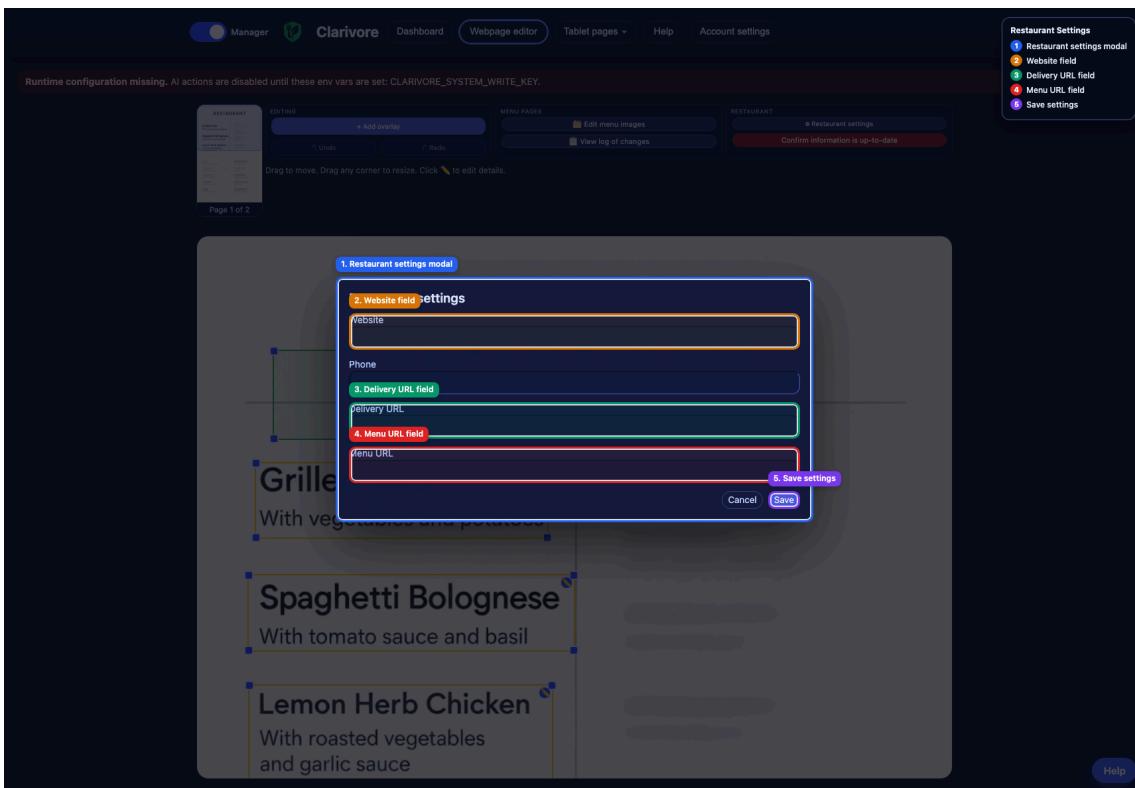
Callout mapping:

1. Menu image modal container.
2. Add page action.
3. Replace page action.
4. Remove page action.
5. Save page updates action.

Execution steps:

1. Open `Edit menu images`.
2. Add missing pages, replace stale scans, remove obsolete pages.
3. Save modal changes.
4. Return to editor and validate overlays still align with page content.

3.8 Restaurant settings management



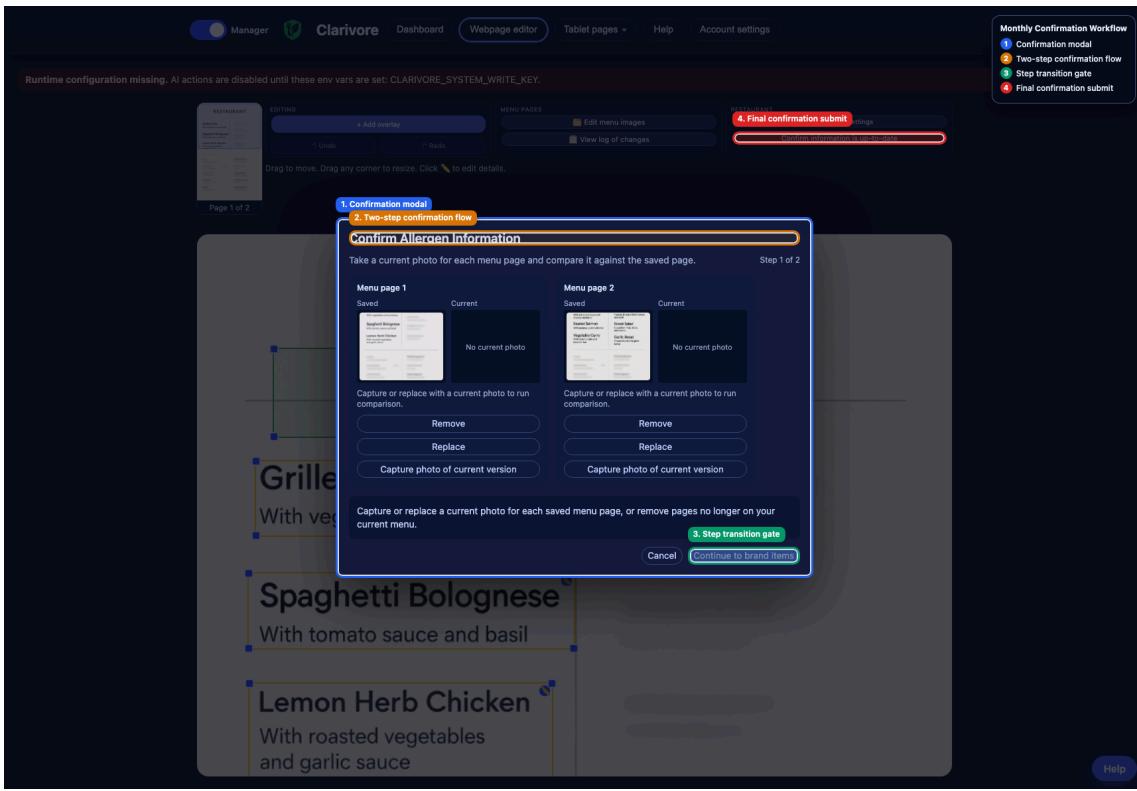
Callout mapping:

1. Restaurant settings modal container.
2. Website field.
3. Delivery URL field.
4. Menu URL field.
5. Save settings action.

Execution steps:

1. Open Restaurant settings .
2. Update URLs and metadata fields.
3. Save settings.
4. Perform full Save to site if prompted by pending changes.

3.9 Monthly confirmation in editor



Callout mapping:

1. Confirmation modal container.
2. Step 1 menu/allergen confirmation context.
3. Continue gate to brand review.
4. Final confirmation submit action.

Execution steps:

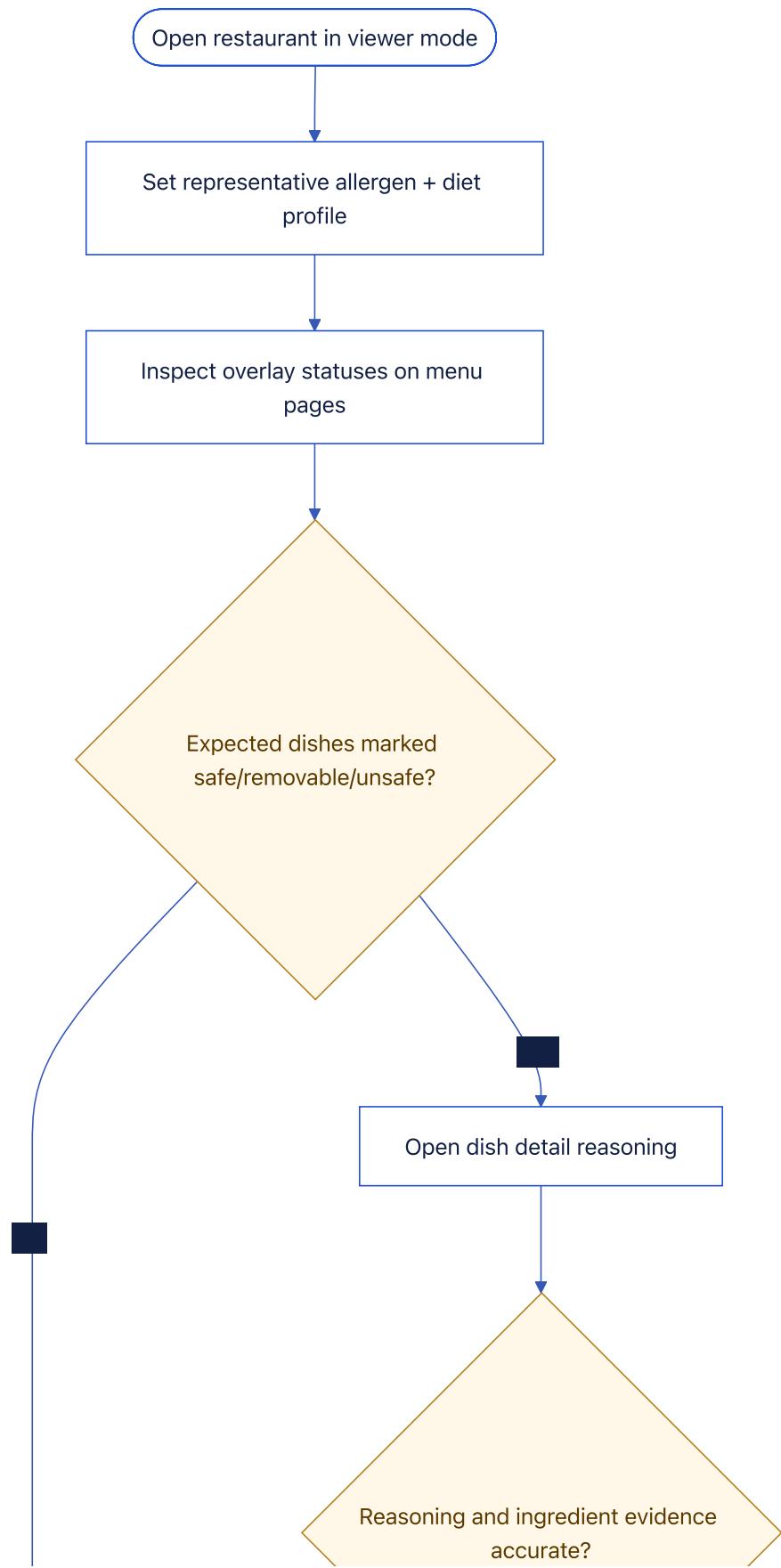
1. Confirm all menu pages are current and attestations are complete.
2. Continue to brand verification.
3. Resolve brand mismatches.
4. Submit final confirmation.
5. Verify due-state updates back in dashboard.

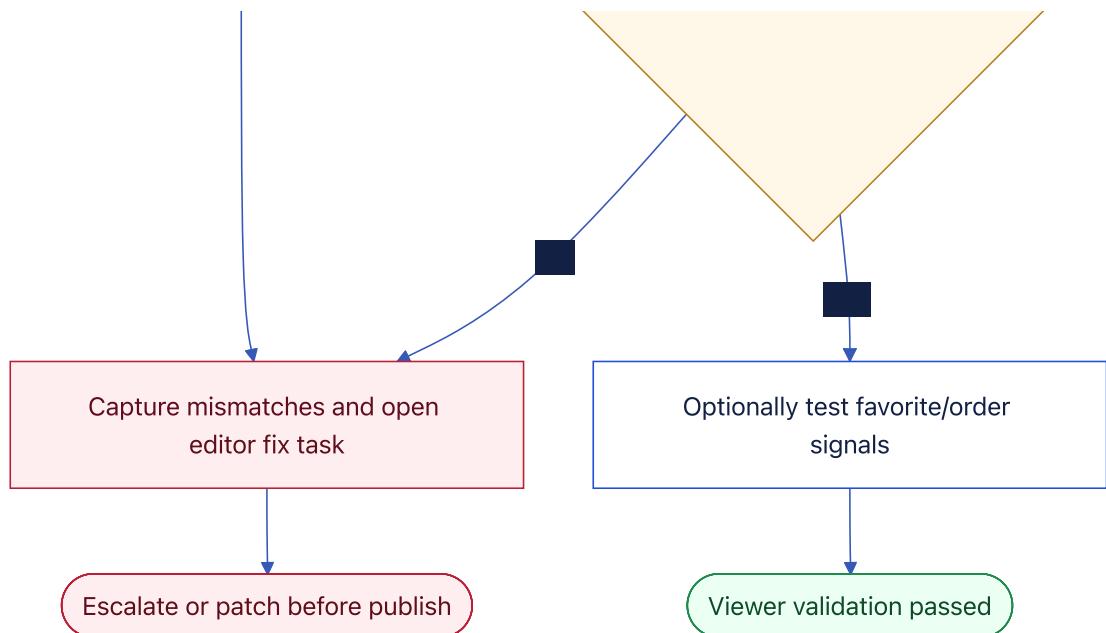
Task type 4: Validate diner experience (manager perspective)

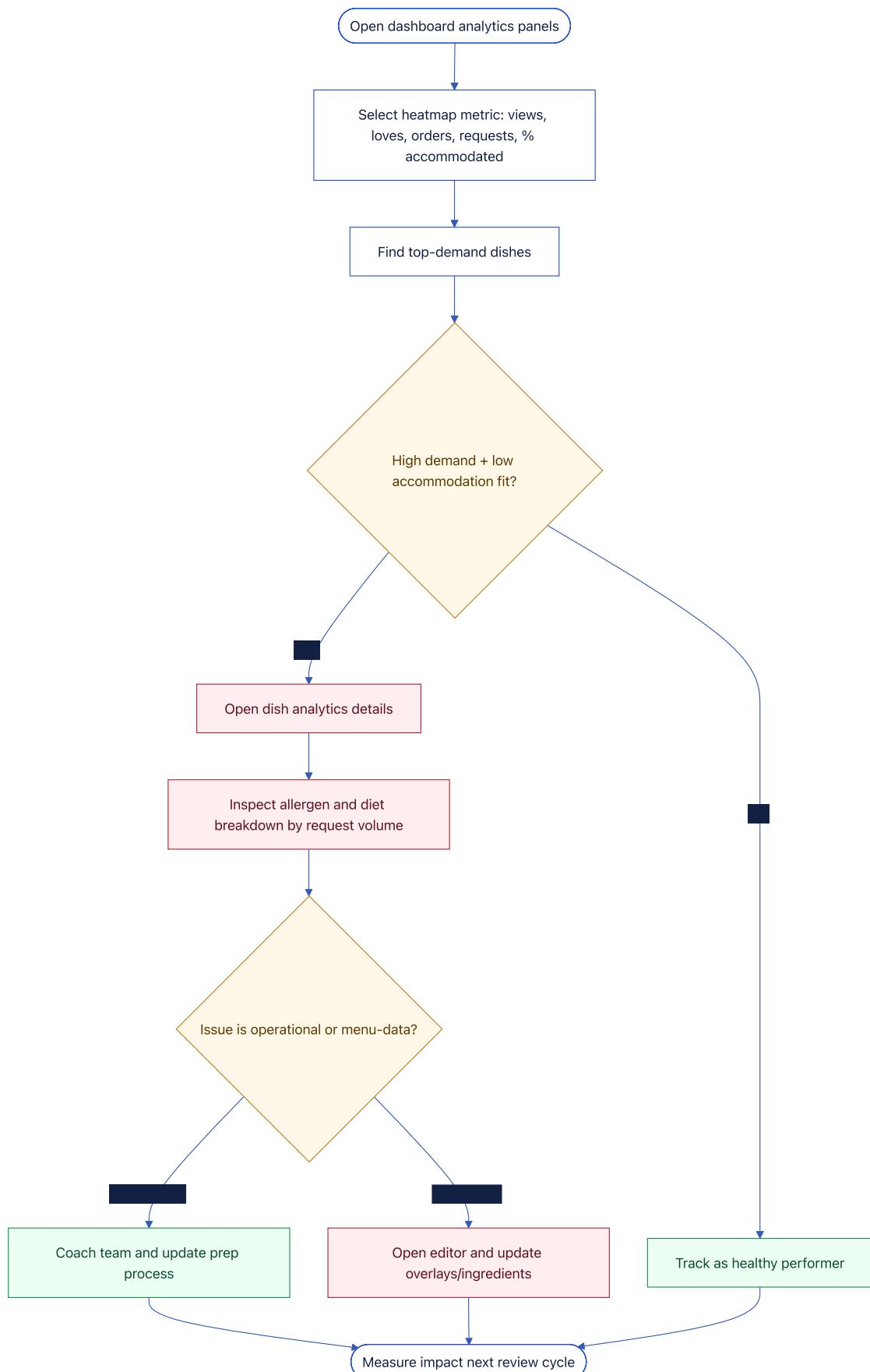
4.1 Objective

Confirm that published overlays and compatibility statuses produce the expected diner-facing experience.

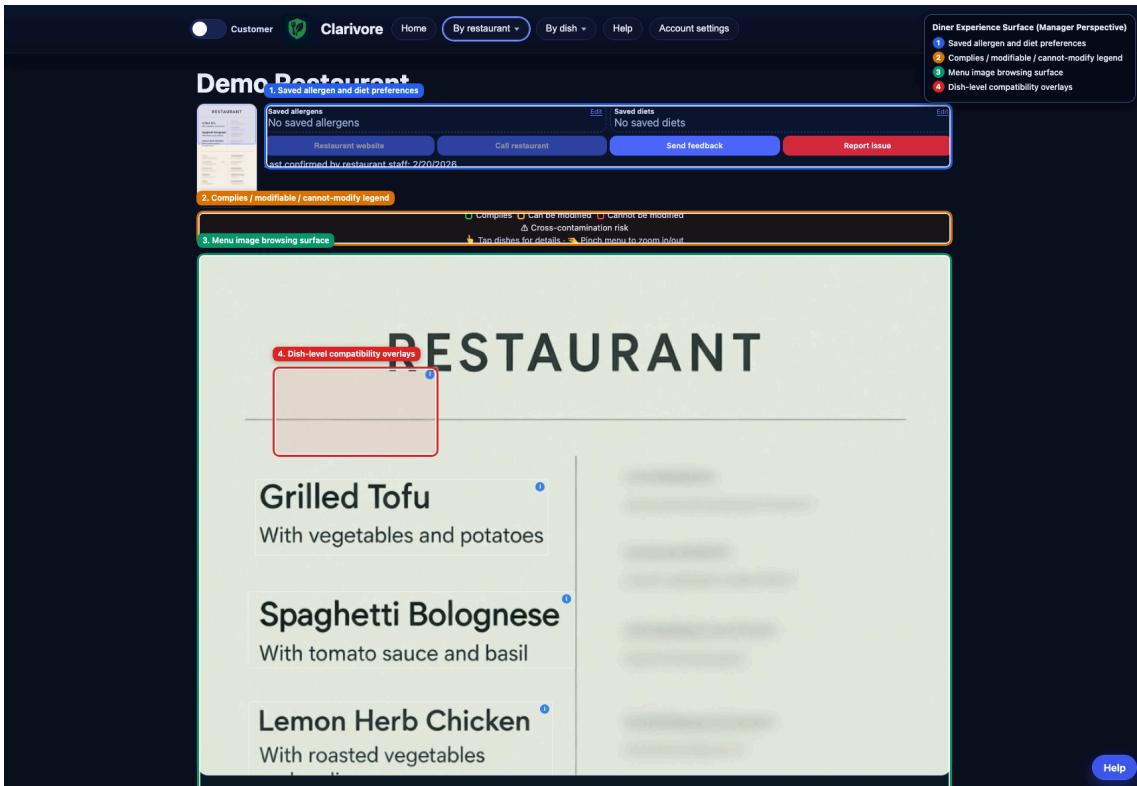
4.2 Flow diagrams







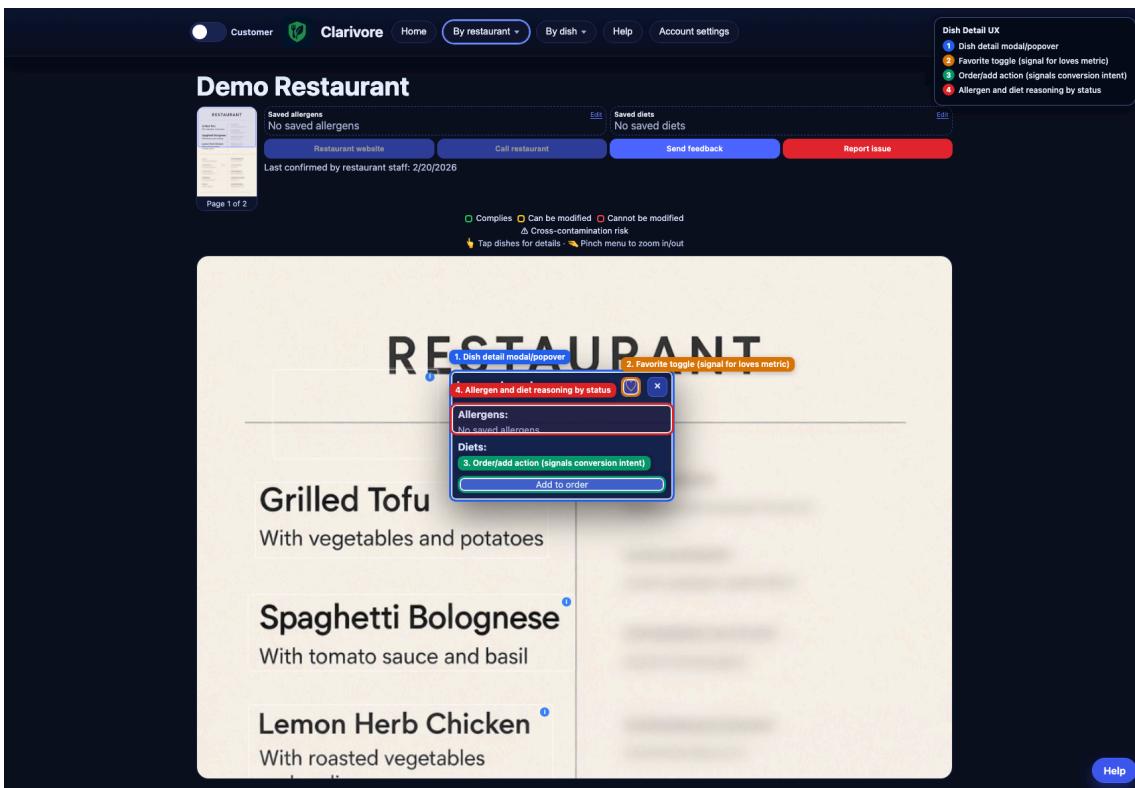
4.3 Viewer reference



Callout mapping:

1. Saved allergen and diet preference controls.
2. Status legend (`complies` , `modifiable` , `cannot modify`).
3. Menu browsing surface.
4. Dish overlay hotspots.

4.4 Dish detail reference



Callout mapping:

1. Dish detail popover/modal.
2. Favorite toggle (loves signal).
3. Order/add action (orders signal).
4. Allergen and diet reasoning sections.

4.5 Validation procedure

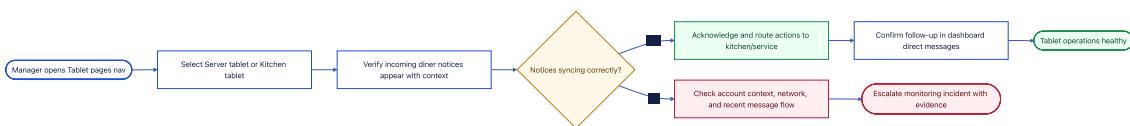
1. Open viewer mode for the target restaurant.
2. Apply representative allergen and diet profile.
3. Confirm overlay statuses align with known dish constraints.
4. Open dish details and verify reasoning text is consistent with ingredient data.
5. If mismatch exists, return to editor and correct data before republishing.

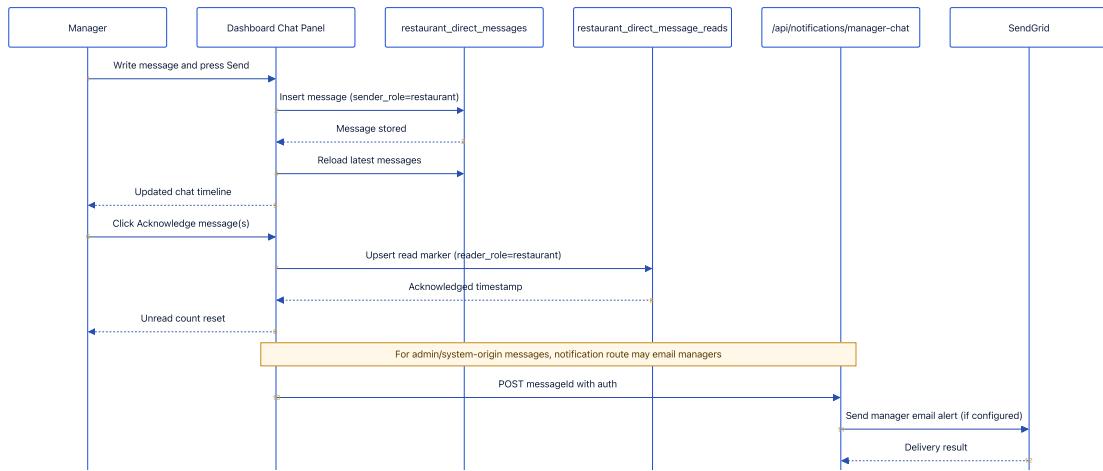
Task type 5: Tablet pages operations

5.1 Objective

Use `Tablet pages` navigation as an operational monitor for service and kitchen workflows.

5.2 Flow diagrams



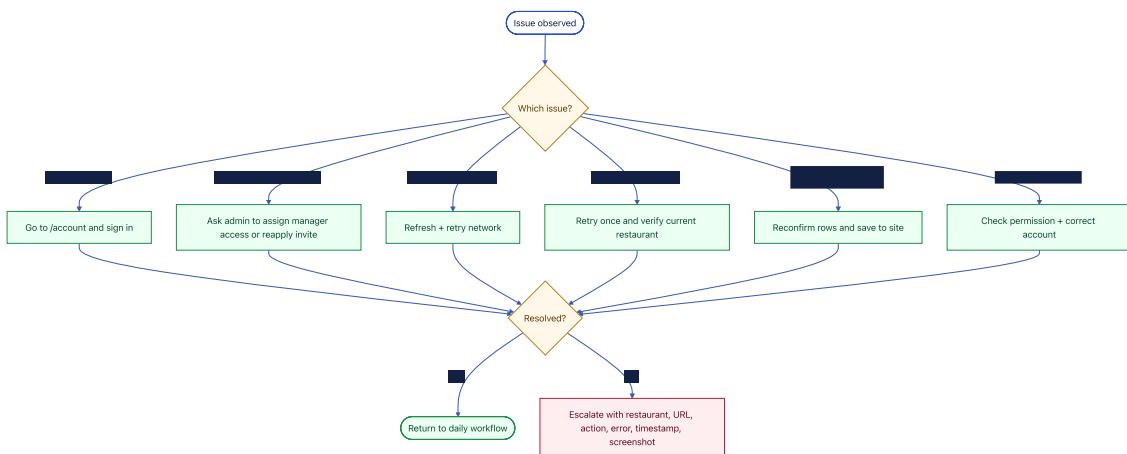


5.3 Execution procedure

1. In topbar, open Tablet pages .
2. Select Server tablet or Kitchen tablet .
3. Verify diner notices and operational signals are appearing.
4. Route required actions to kitchen/service teams.
5. Confirm related follow-up in manager direct messages.

Task type 6: Troubleshoot and escalate

6.1 Flow diagram



6.2 Symptom-to-action matrix

Symptom	Likely cause	Immediate action
Sign in required	No active session	Sign in at /account?mode=signin
Manager access required	Missing manager assignment	Request assignment/reapply invite

Dashboard section not loading	Runtime fetch failure	Refresh and retry
Request action failed	Write or context mismatch	Retry once and verify restaurant context
Replacement appears not applied	Change staged but unsaved	Reconfirm rows and click Save to site
Confirmation cannot submit	Missing attestations or unresolved brand/page checks	Complete all gating requirements
Notifications missing	Browser permission or account mismatch	Verify notification permission and active manager session

6.3 Escalation payload template

Include all of the following in escalation:

1. Restaurant name.
2. Full URL.
3. Action attempted.
4. Error text.
5. Timestamp and timezone.
6. Annotated screenshot or short recording.

Task type 7: Cadence and governance

7.1 Daily checklist

1. Read and respond to direct messages.
2. Clear pending accommodation queue or assign owners.
3. Check confirmation due-state and route work before risk window.
4. Review heatmap and dietary profile for new friction patterns.
5. Escalate blockers with evidence.

7.2 Weekly checklist

1. Audit changelog for risky edits.
2. Review brand-item drift and run replacements where needed.
3. Perform viewer validation spot checks on high-volume dishes.
4. Confirm request-status hygiene in All history.

7.3 Monthly checklist

1. Complete confirmation flow before due date.
2. Review repeated request hotspots and plan remediation.
3. Verify unresolved escalations are closed.
4. Validate top-demand dishes for compatibility accuracy.

Feature inventory by manager task

Dashboard operations

- Mode toggle and manager navigation.

- Direct message inbox, send, acknowledge.
- Accommodation queue with status transitions.
- Confirmation due-state panel and editor deep-link.
- Recent changes preview and full changelog access.
- Brand item discovery, dish deep-links, replace-item flow.
- Heatmap analytics and user profile interpretation panels.

Editor operations

- Minimap navigation and page viewport sync.
- Overlay create/move/resize/select.
- Dish editor with recipe input, process action, ingredient confirmations.
- Undo/redo and staged change handling.
- Menu page add/replace/remove workflow.
- Restaurant settings modal.
- Save-to-site publish action.
- Confirmation workflow entry and submission.

Experience validation operations

- Viewer mode preference controls.
- Overlay status legend interpretation.
- Dish compatibility validation from manager perspective.

Governance operations

- Tablet page monitoring.
- Notifications and reminder checks.
- Troubleshooting and escalation standards.

Rebuild commands

- Regenerate diagrams: `npm run docs:flows:build`
- Regenerate screenshots: `npm run docs:flows:capture`
- Lint manager docs: `npm run docs:lint`
- Export PDF: `npm run docs:manager:pdf`