Clarivore Manager Runbook and User Guide

This document is the operational reference for restaurant managers using Clarivore.

Scope and Audience

Use this guide if you are responsible for:

- Monitoring and responding to direct manager/admin communication
- Triage of accommodation requests
- Monthly menu confirmation workflow completion
- Brand item updates and replacement actions
- Ongoing analytics review and escalation of blockers

This guide is written as a runbook: each section includes entry conditions, exact actions, expected outcomes, and failure handling.

Navigation Map

- Access and onboarding flow
- Daily manager workflow
- Direct messages and communication flow
- Accommodation request triage and lifecycle
- Monthly confirmation flow
- Brand replacement flow
- Notification and reminder behavior
- Troubleshooting and escalation

Core Concepts

- `Manager mode` : editor-capable context (`/manager-dashboard`)
- `Customer mode` : consumer browsing context (`/home`)
- `Pending request` : unresolved accommodation request
- `Implemented` : request addressed with a concrete menu/process change
- `Reviewed` : request assessed but not fully implemented
- `Declined` : request cannot be supported
- `Confirmation due` : monthly confirmation SLA countdown based on `last_confirmed`

Quick Start

1. Open `/account` and sign in.
2. If invited, use your invite link (for example `/account?invite=<token>`).
3. Confirm you land on `/manager-dashboard` .
4. If you have manager access, use the topbar mode toggle:
5. `Manager` mode opens `/manager-dashboard` .
6. `Customer` mode opens `/home` .

Flow 1: Access and Onboarding

Objective

Authenticate the user, apply any invite access, and load an authorized dashboard context.
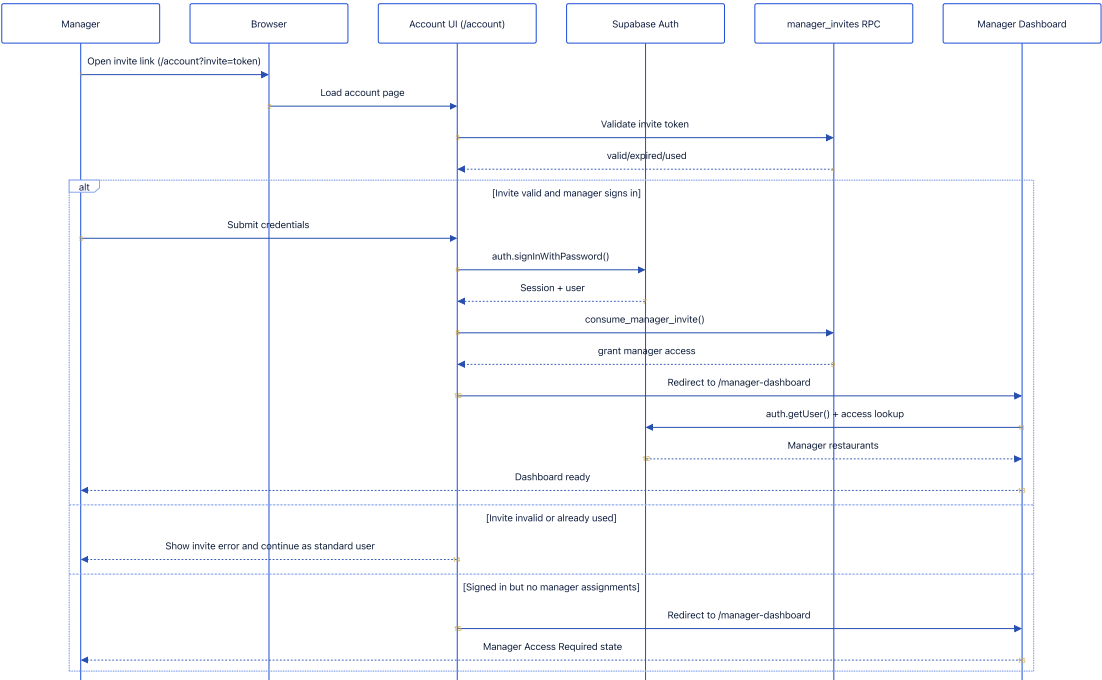
Entry Conditions

- User opens Clarivore without guaranteed manager session.
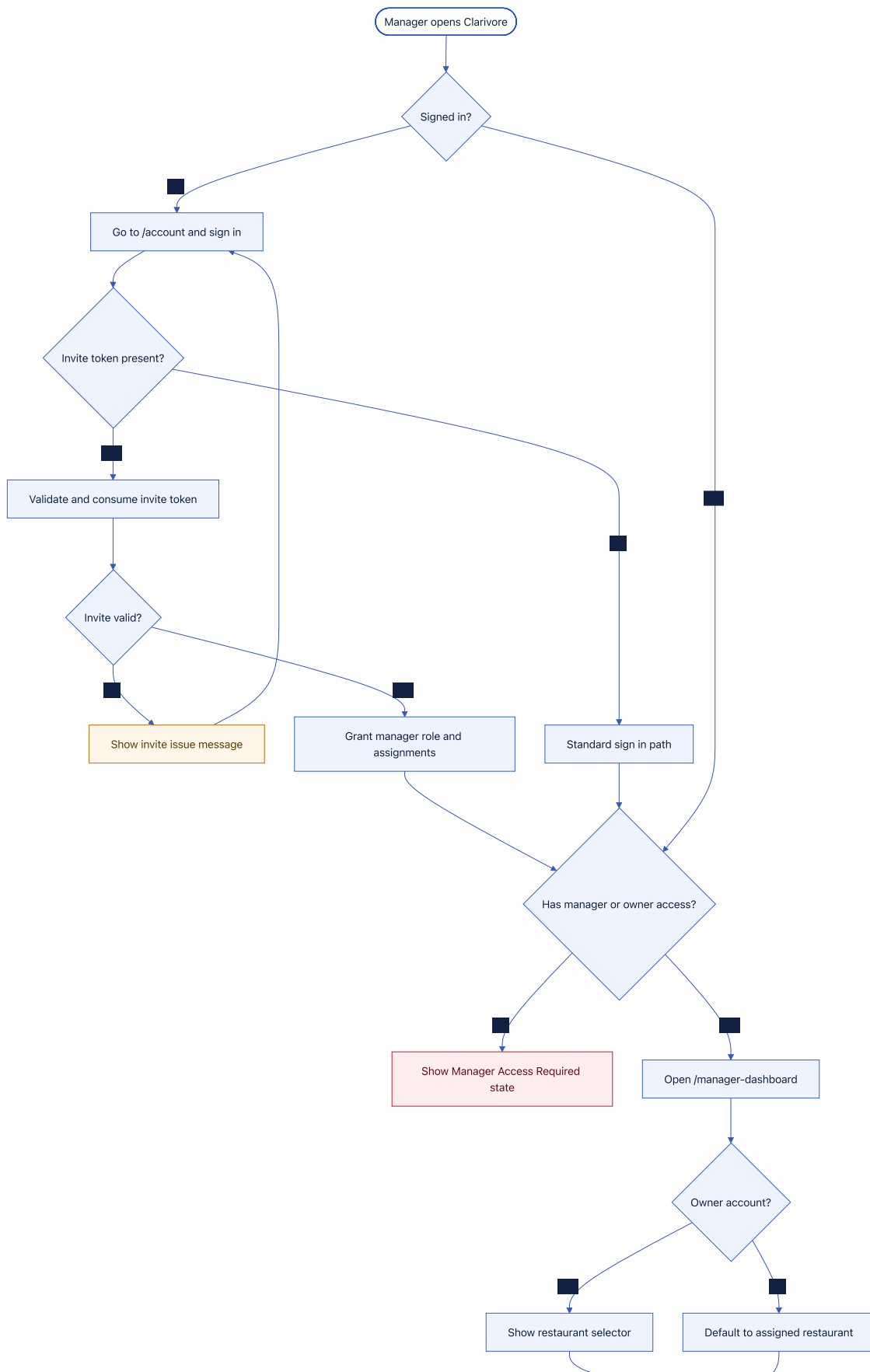- Invite token may or may not be present.
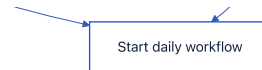
Exit Conditions

- Manager dashboard loads with restaurant access, or
- explicit access-state guidance is displayed.
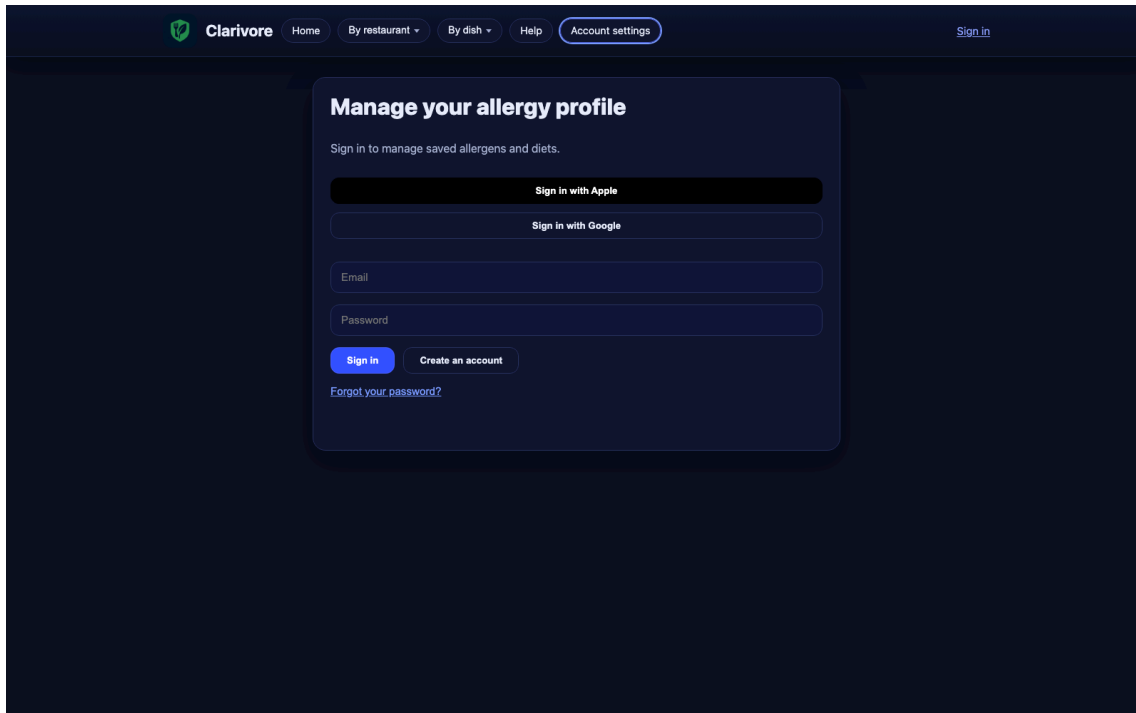
Access Sequence Diagram


Access Decision Diagram

```
                    ┌──────────────────────┐
                    │ Manager opens        │
                    │ Clarivore            │
                    └──────────┬───────────┘
                               │
                               ▼
                          ◇ Signed in? ◇
                         /              \
                        /                \
            ┌──────────────────────┐      \
            │ Go to /account and   │       \
            │ sign in              │        \
            └──────────┬───────────┘         \
                       │                       \
                       ▼                        \
                ◇ Invite token present? ◇        \
                /                \                 \
               /                  \                 \
    ┌──────────────────────┐       \                 \
    │ Validate and consume │        \                 \
    │ invite token         │         \                 \
    └──────────┬───────────┘          \                 \
               │                        \                 \
               ▼                         \                 \
          ◇ Invite valid? ◇               \                 \
          /            \                    \                 \
         /              \                    \                 \
┌──────────────────┐  ┌──────────────────┐  ┌──────────────────┐
│ Show invite      │  │ Grant manager    │  │ Standard sign in │
│ issue message    │  │ role and         │  │ path             │
│                  │  │ assignments      │  │                  │
└──────────────────┘  └────────┬─────────┘  └────────┬─────────┘
                               │                      │
                               └──────────┬───────────┘
                                          ▼
                          ◇ Has manager or owner access? ◇
                          /                            \
                         /                              \
            ┌──────────────────────┐        ┌──────────────────────┐
            │ Show Manager Access  │        │ Open /manager-       │
            │ Required state       │        │ dashboard            │
            └──────────────────────┘        └──────────┬───────────┘
                                                        │
                                                        ▼
                                               ◇ Owner account? ◇
                                               /              \
                                              /                \
                                 ┌──────────────────┐  ┌──────────────────────┐
                                 │ Show restaurant  │  │ Default to assigned  │
                                 │ selector         │  │ restaurant           │
                                 └──────────────────┘  └──────────────────────┘
```

Start daily workflow

Baseline UI Screenshots

Desktop sign-in:

Desktop unauthorized dashboard state:
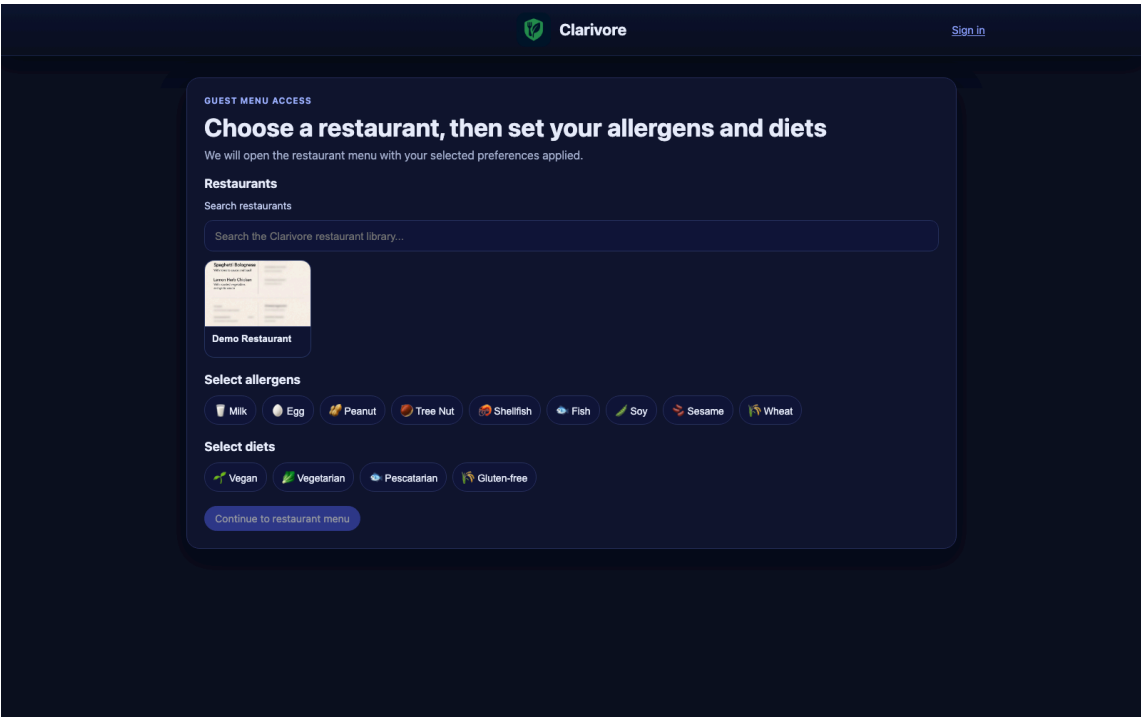
Mobile sign-in:

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?

Mobile unauthorized dashboard state:

GUEST MENU ACCESS

Choose a restaurant, then set your allergens and diets

We will open the restaurant menu with your selected preferences applied.

Restaurants

Search restaurants

Search the Clarivore restaurant library...

Spaghetti Bolognese
With tomato sauce and basil

Lemon Herb Chicken
With roasted vegetables
and garlic sauce

Demo Restaurant

Select allergens

🥛 Milk   🥚 Egg   🥜 Peanut

🌰 Tree Nut   🦐 Shellfish   🐟 Fish

🫛 Soy   🌶 Sesame   🌾 Wheat
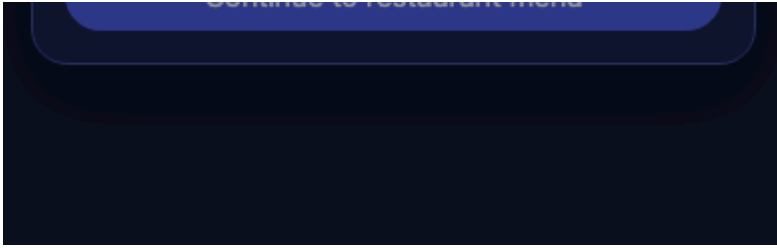
Select diets

🌱 Vegan   🍃 Vegetarian

🐟 Pescatarian   🌾 Gluten-free

Continue to restaurant menu

Operational Notes

- Owners are treated as manager-capable and can access all restaurants.
- Non-owner managers must have assignment rows for one or more restaurants.
- If assignment is missing, dashboard correctly shows `Manager Access Required`.

Failure Handling

- Invalid/used/expired invite: proceed with standard account path and request new invite.
- Signed in but no manager access: escalate assignment request to admin.

Flow 2: Daily Manager Workflow

Objective

Run the full daily dashboard loop in a consistent sequence so communication, requests, and confirmation status do not drift.

Entry Conditions

- Manager dashboard loads successfully.

Exit Conditions

- Messages acknowledged or responded to
- pending requests triaged
- confirmation status reviewed
- blockers escalated

Daily Swimlane Diagram

Daily Execution Checklist

1. Open `/manager-dashboard`.
2. Validate selected restaurant (owners should verify selector value).
3. Open `Direct Messages`.
4. Acknowledge unread admin/system messages.
5. Triage requests in `Accommodation Requests`.
6. Check due/overdue state in `Menu Confirmation`.
7. Review `Recent changes` and `Brand items in use`.
8. Review heatmap and dietary profile for trend shifts.
9. Escalate blockers with specific evidence.

Recommended Cadence

- Minimum: once per day
- High-volume restaurants: start/end of shift
- Near due date (<= 7 days): include confirmation readiness check every day

Flow 3: Direct Messages (Manager/Admin Communication)

Objective

Maintain an auditable, low-latency communication thread with admin/operations.

Message Sequence Diagram
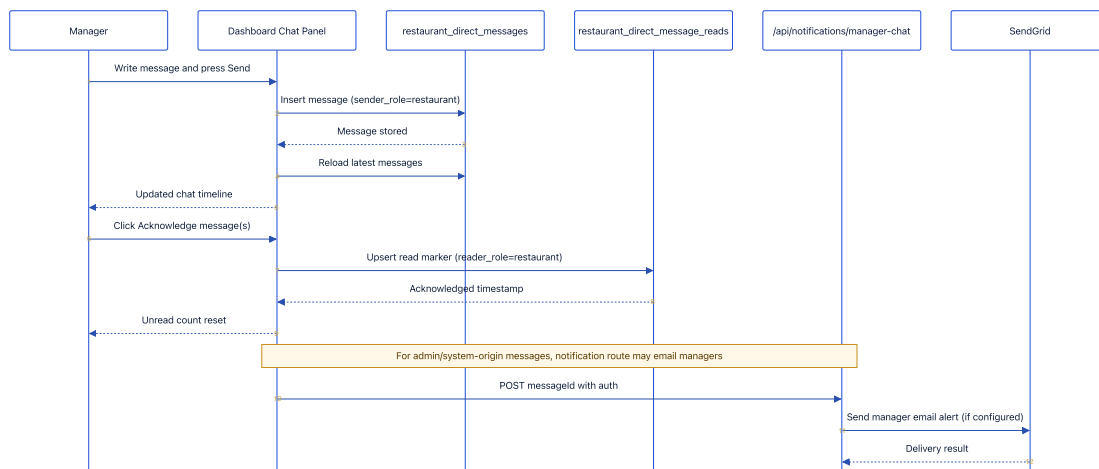
Panel Behavior Reference

- `Send` : inserts a `restaurant` sender-role message for current restaurant context.
- `Acknowledge message(s)` : writes read marker and clears unread count.
- Timeline shows sender + timestamp and acknowledgment markers.
- Chat list auto-scrolls to latest message after reload.

Communication SOP

1. For action-required admin messages, acknowledge only after review.
2. Reply with concise update format:
3. `Issue` -> `Impact` -> `Action Taken` -> `Need from Admin` .
4. Keep one thread per restaurant context to avoid cross-store confusion.

Quality Standard

Good message:

- "Menu page 2 changed at 14:10, gluten-free pasta ingredient replaced, reconfirming rows now, need confirmation on allergen mapping for X brand."

Weak message:

- "Need help please."

Flow 4: Accommodation Request Triage

Objective

Process every pending accommodation request with explicit status and response context.

Triage Sequence Diagram
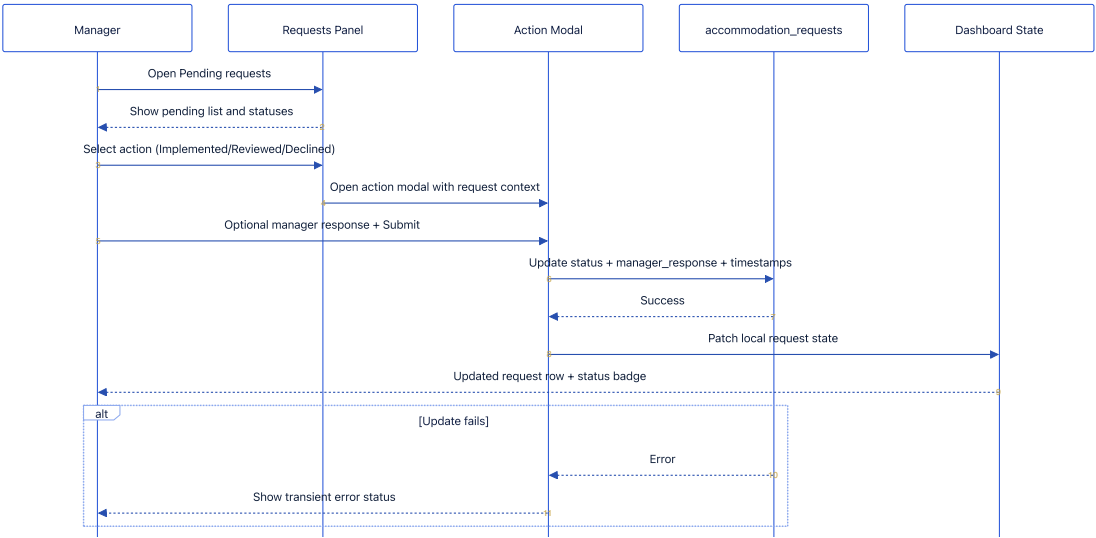
Request Lifecycle Diagram
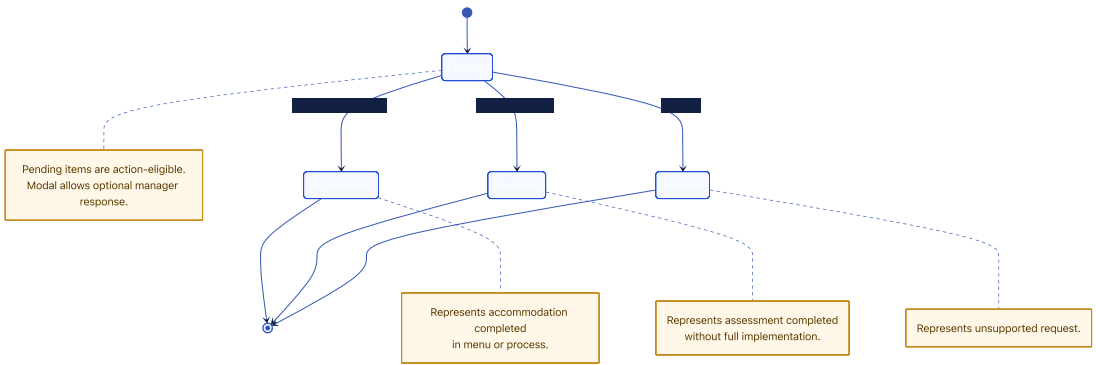
Request Panel Reference

- Tabs:
- `Pending` : unresolved only
- `All` : complete historical list
- Request card details include:
- dish name
- date
- allergen and diet needs
- current status

- manager response (if present)

Status Decision Rules

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

Triage SOP

1. Work from `Pending` tab.
2. Open request action modal for one of three actions.
3. Add optional response text to preserve rationale.
4. Submit and verify status badge update.
5. Spot-check in `All` tab for audit trail completeness.

Error Handling

If update fails:

1. Retry once.
2. Verify selected restaurant has not changed.
3. Capture request id/dish/status target and escalate if repeated.

Flow 5: Monthly Confirmation

Objective

Confirm menu and brand information is current before due date to avoid suspension risk.

Confirmation Gating Diagram

```
                    ┌─────────────────────────────────┐
                    │ Manager clicks final confirm button │
                    └─────────────────────────────────┘
                                    │
                                    ▼
                    ┌─────────────────────────────────┐
              ┌────▶│    Open step 1 menu verification    │◀────┐
              │     └─────────────────────────────────┘     │
              │                     │                        │
              │                     ▼                        │
              │              ╱──────────────╲                │
              │            ╱  Every saved page ╲             │
              │          ╱   has a current      ╲            │
              │         ╲  photo or removed     ╱            │
              │          ╲    status          ╱              │
              │           ╲────────────────╱                 │
              │          ■                    ■               │
              │       ┌──────────────────┐      ╲            │
              │       │ Block continue and │       ╲──────╲   │
              │       │ show missing page  │              ╲  │
              │       │     guidance       │          ╱──────────────╲
              │       └──────────────────┘        ╱  Both attestation ╲
              │                               ╱    answers are Yes      ╲
              │          ■                     ╲                       ╱
              │   ┌──────────────────────┐       ╲──────────────────╱
              │   │ Block continue until   │              ■
              │   │ both answers are Yes   │              ▼
              │   └──────────────────────┘        ╱──────────────╲
              │                                 ╱ Page comparison  ╲
              │                                 ╲     status       ╱
              │                                  ╲──────────────╱
              │                            ▬▬▬▬▬▬         ■
              │                    ┌──────────────────────┐  ┌──────────────────────┐
              └────────────────────│ Block continue until   │  │  Continue to step 2   │
                                   │ every page is matched  │  │  brand verification    │◀──┐
                                   │    or replaced         │  └──────────────────────┘   │
                                   └──────────────────────┘            │                  │
                                                                       ▼                  │
                                                               ╱──────────────╲           │
                                                             ╱  All brand items ╲         │
                                                             ╲    matched       ╱         │
                                                              ╲──────────────╱            │
                                                            ■                  ■          │
                                                  ┌──────────────────────┐  ┌──────────────────────┐
                                                  │ Capture or replace     │  │ Enable final           │
                                                  │ mismatched brand items │  │ confirmation submit    │
                                                  └──────────────────────┘  └──────────────────────┘
                                                                                      │
                                                                                      ▼
                                                                            ┌──────────────────────┐
                                                                            │ Confirmation submit   │
                                                                            │      allowed          │
                                                                            └──────────────────────┘
```
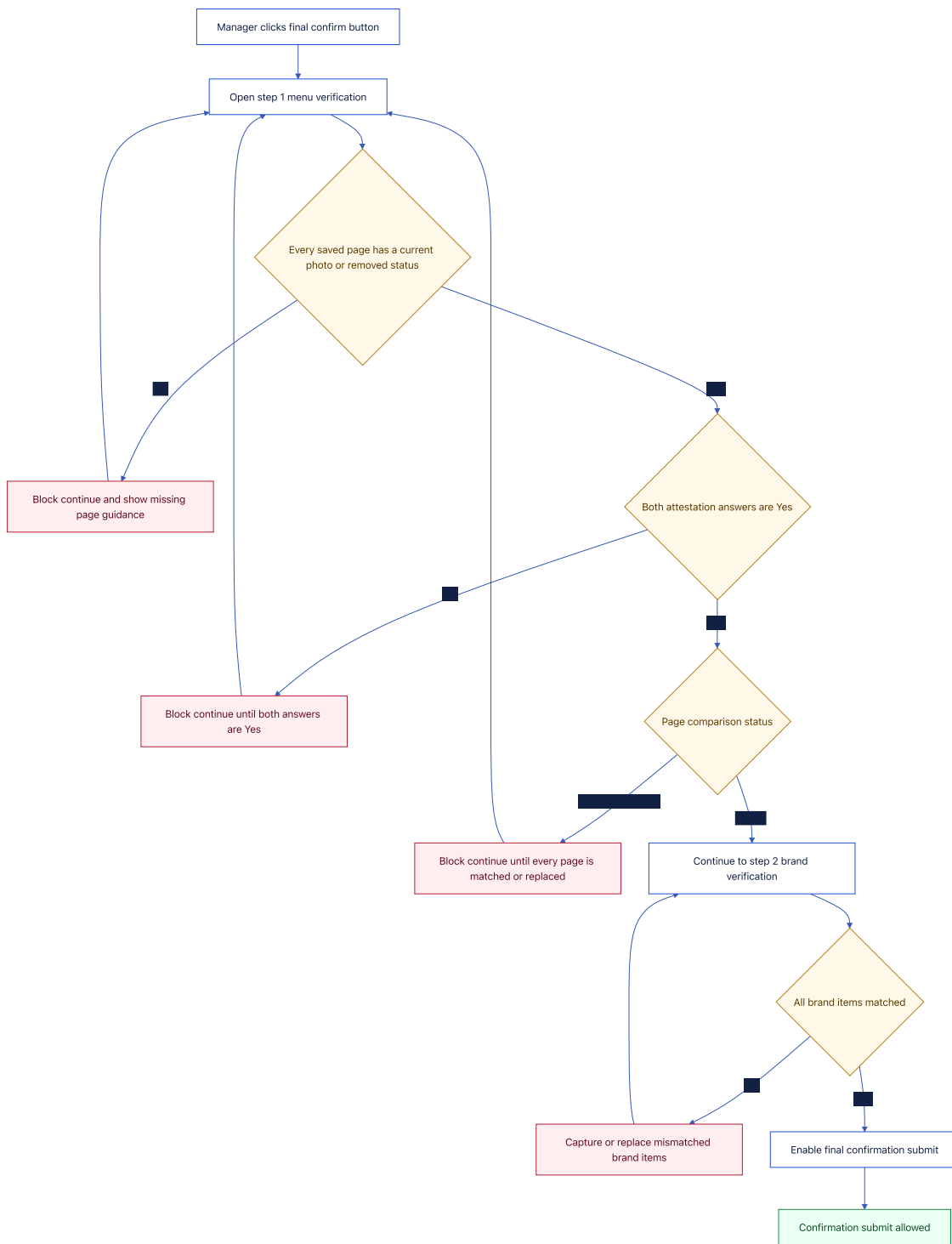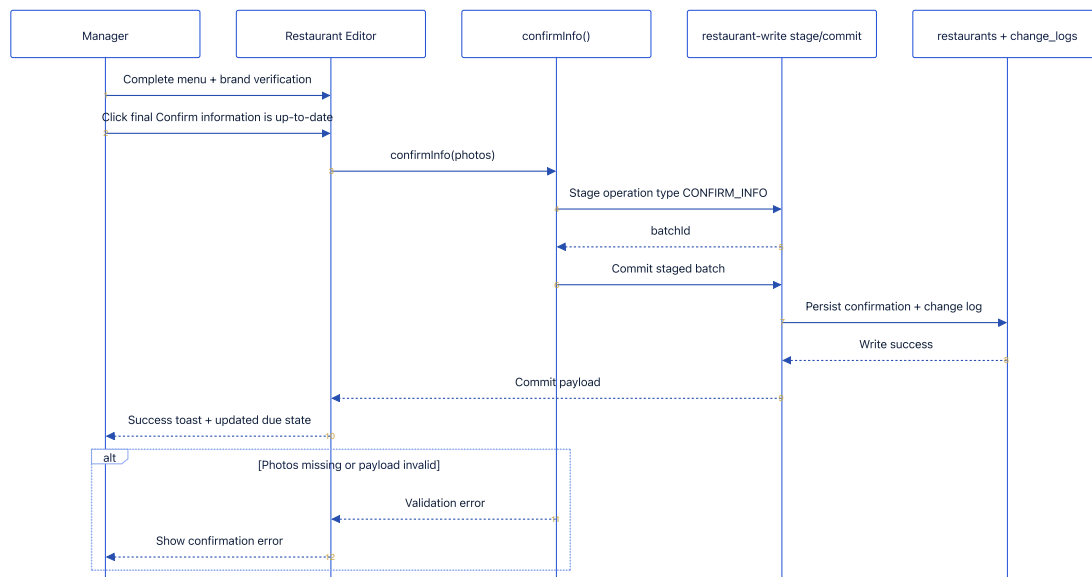
Confirmation Commit Sequence

Due-State Interpretation

- `Due in N days` : healthy if N > 7, caution if N <= 7
- `Due today` : treat as immediate action item
- `X days overdue` : highest priority

Step 1: Menu Verification

1. Provide a current image or replacement for each saved menu page.
2. Mark pages removed when no longer current.
3. Set both attestations to `Yes` .
4. Wait for comparison outcomes to resolve.
5. Continue only when all pages are matched/replaced and no comparison is pending.

Step 2: Brand Verification

1. Review each brand card.
2. Replace/capture for mismatched items.
3. Confirm final action only when all brand items are matched.

Final Submit Outcome

- Confirmation event is written through write gateway flow.
- Due state updates based on new `last_confirmed` timestamp.
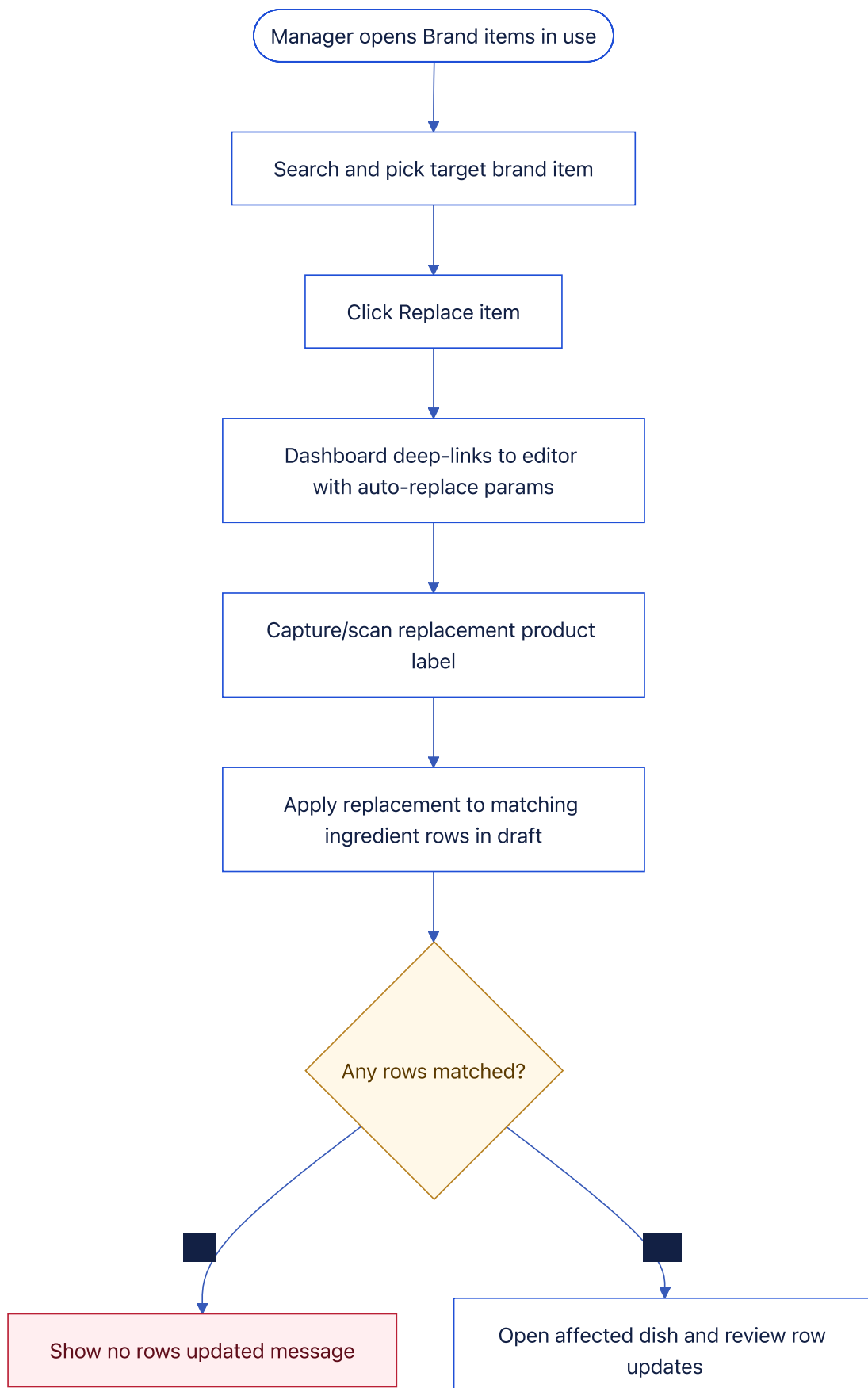
Common Blocks

- Missing page photos
- Attestations unanswered or answered `No`
- Comparison still pending
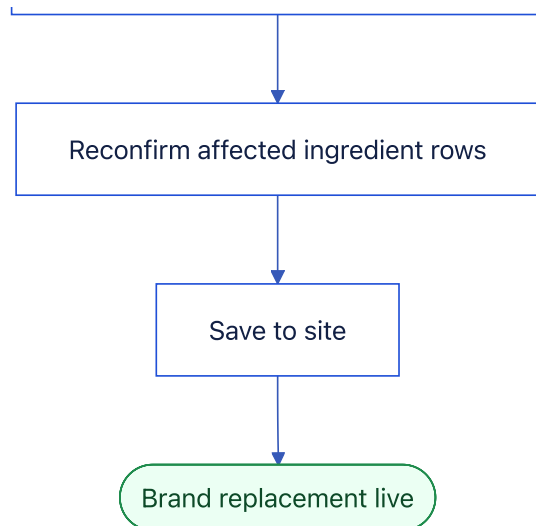- Brand mismatch unresolved

Flow 6: Brand Replacement Workflow

Objective

Replace a product/brand across affected ingredient rows safely before publishing.

Brand Replacement Process Diagram

```
                    ╭─────────────────────────────────╮
                    │  Manager opens Brand items in use │
                    ╰─────────────────────────────────╯
                                    │
                                    ▼
                    ┌─────────────────────────────────┐
                    │   Search and pick target brand item │
                    └─────────────────────────────────┘
                                    │
                                    ▼
                        ┌───────────────────────┐
                        │    Click Replace item   │
                        └───────────────────────┘
                                    │
                                    ▼
                    ┌─────────────────────────────────┐
                    │     Dashboard deep-links to editor │
                    │        with auto-replace params    │
                    └─────────────────────────────────┘
                                    │
                                    ▼
                    ┌─────────────────────────────────┐
                    │    Capture/scan replacement product │
                    │              label                 │
                    └─────────────────────────────────┘
                                    │
                                    ▼
                    ┌─────────────────────────────────┐
                    │    Apply replacement to matching   │
                    │       ingredient rows in draft     │
                    └─────────────────────────────────┘
                                    │
                                    ▼
                              ◇───────────◇
                             ╱             ╲
                            ╱  Any rows      ╲
                            ╲   matched?     ╱
                             ╲             ╱
                              ◇───────────◇
                          ╱                   ╲
                         ▼                     ▼
                        ■                       ■
                        │                       │
                        ▼                       ▼
          ┌───────────────────────┐  ┌─────────────────────────────┐
          │ Show no rows updated   │  │  Open affected dish and review row │
          │       message          │  │            updates             │
          └───────────────────────┘  └─────────────────────────────┘
```

```
                    ┌─────────────────────────────────────┐
                    │                                     │
                    ▼                                     │
        ┌─────────────────────────────────┐
        │  Reconfirm affected ingredient rows  │
        └─────────────────────────────────┘
                    │
                    ▼
            ┌─────────────────┐
            │   Save to site   │
            └─────────────────┘
                    │
                    ▼
            ╭─────────────────────╮
            │  Brand replacement live  │
            ╰─────────────────────╯
```

Brand Replacement Sequence Diagram
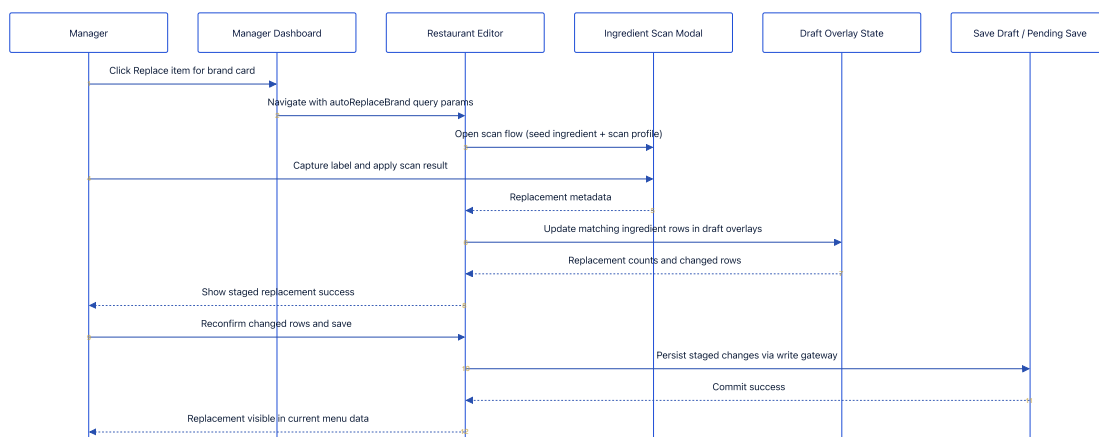
Execution SOP

1. In `Brand items in use`, locate target brand card.
2. Click `Replace item`.
3. System deep-links to editor with replacement context.
4. Capture/scan replacement label.
5. Review staged row updates in editor.
6. Reconfirm all affected ingredient rows.
7. Save to site.

Critical Guardrail

Replacement actions are staged in draft overlays and are not live until saved.

Validation Checklist Before Save

- Target rows updated count is non-zero
- No unresolved ingredient confirmation flags
- Dish context matches intended restaurant/menu

Analytics Interpretation Guidance

Menu Interest Heatmap Metrics

- `Total views` : top funnel demand
- `Total loves` : user preference intent
- `Total orders` : conversion signal
- `Total requests` : accommodation friction indicator
- `% accommodated` : compatibility/fit ratio

Operator Usage Pattern

1. Start with `views` and `orders` to find high-impact dishes.
2. Switch to `requests` and `% accommodated` to detect friction hotspots.
3. Open dish analytics for candidates with high demand and low accommodation fit.
4. Prioritize adjustments that reduce repeated request burden.

User Dietary Profile Section

- Shows aggregate allergen/diet distribution among interacting users.
- Use to rank accommodation investment by expected user impact.

Notifications and Reminder Behavior

Delivery Sequence Diagram
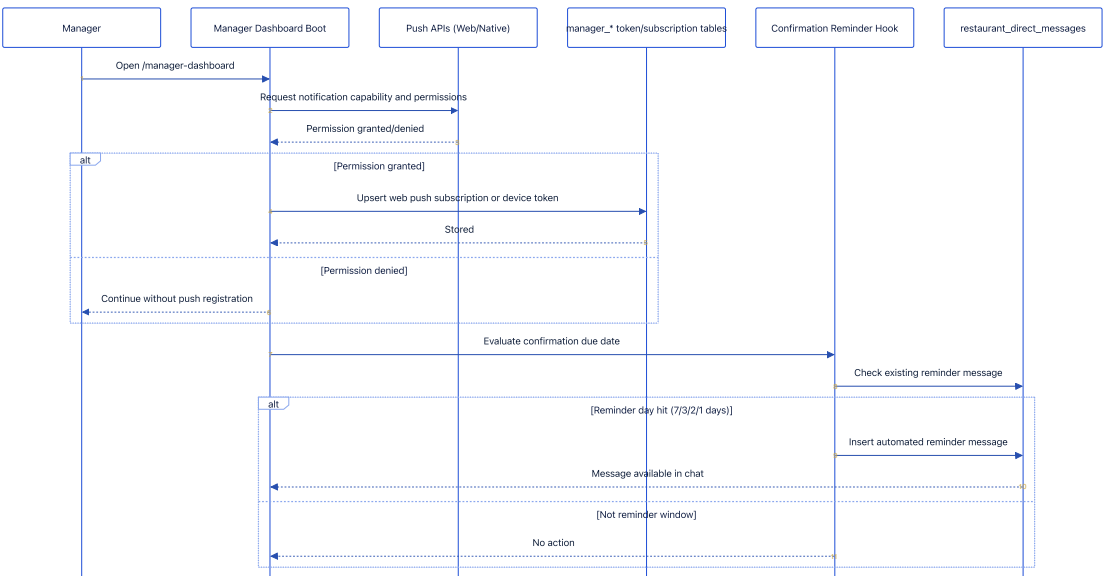
Behavior Summary

- Manager dashboard boot attempts web/native notification registration.
- Web push permission is user-interaction-gated.
- Reminder messages are eligible at 7, 3, 2, and 1 days before due date.
- Duplicate reminder prevention is built into reminder checks.

Practical Expectations

- Notifications can be partially available depending on permission and env configuration.

- In-app chat remains primary source of truth for reminder visibility.

Troubleshooting and Escalation

Troubleshooting Routing Diagram
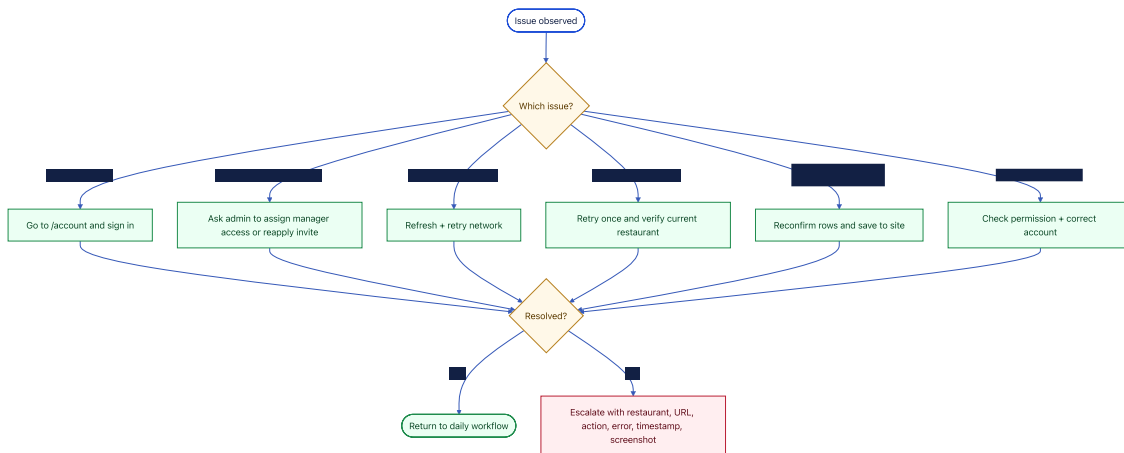
Symptom-to-Action Matrix

Symptom	Likely Cause	Immediate Action
`Sign in Required`	No active session	Sign in at `/account`
`Manager Access Required`	No manager assignment	Request assignment or reapply invite
Dashboard load error	Data fetch/runtime failure	Refresh, retry network, capture timestamp
Request update fails	Write/update issue	Retry once, confirm restaurant, escalate with request details
Brand replacement appears missing	Draft staged but unsaved	Reconfirm rows and save to site
No notifications	Permission/config mismatch	Check permissions, account, and test chat refresh

Escalation Template

When escalating to admin, include:

- Restaurant name
- Full page URL
- Action attempted
- Error text shown
- Approximate timestamp
- Screenshot or screen recording if available

Weekly and Monthly Governance Checklist

Weekly

1. Pending requests <= operational target.
2. Unread direct messages at zero by close.
3. Top demand dishes reviewed for accommodation gaps.
4. Brand item list reviewed for stale/replaced products.

Monthly

1. Confirmation completed before due date.
2. Changelog reviewed for risky edits.
3. Escalation backlog cleared.
4. Recurring friction dishes prioritized for remediation.

Diagram Source and Rebuild

Diagram assets for this guide are generated from Mermaid sources under:

- `docs/manager-flows/src/*.mmd`

Rebuild commands:

- `npm run docs:flows:render`
- `npm run docs:flows:optimize`
- `npm run docs:flows:build`

Optional screenshot capture command:

- `npm run docs:flows:capture`

Optional PDF export:

- `npm run docs:manager:pdf`