

Client Taxi Record (Edit Taxi Record) Screen

Created in November 2024

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Business Purpose:

The **Client Management – Edit Taxi Record** page allows the user to update an existing Taxi Record to keep information current and precise. This page provides a complete workflow for capturing and managing all taxi-related records for clients.

How to:

1. To edit an existing taxi record, from the Client Management – Taxi Record (list) page, click the edit  action button to open the Edit Taxi Record page.

Edit Taxi Record

Modify information of taxi record

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Workflow

📍 Current Status	👤 Updated By	🕒 Updated On
Record in Progress	MIC CI Intake, Mgr	14 Nov 2024 11:04:15 AM

📄 Update workflow to

Submitted for Approval

Creator Details

Created By	Created On
CI Intake, Mgr	14 Nov 2024 11:04:15 AM

Date & Time Details

* Date	* Time
2024-11-05	11:03 am

Taxi Details

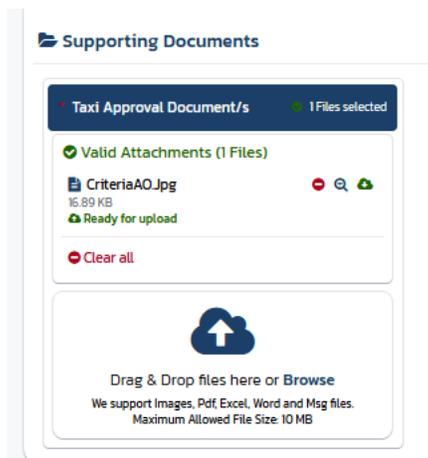
* Fare Reference No (Trip No.)	* Company Name	* No. of Taxi Needed
4444	ABC	44

Location Details

* Pick-up

John St

2. In the **Edit Taxi Record page**, users can update these fields: Date, Time, Fare Reference No (Trip No.), Company Name, No. of Taxi Needed, Pick-up, Drop-off, and Supporting Documents.
3. To add a new attachment, you can drag and drop the file or click **Browse** and select a file then click **Open**. A valid file will be attached successfully.



4. **“Delete”**  - When clicked, this button will delete the file.
5. **“Download”**  - When clicked, a file downloads to the local device.
6. **“Save”**  - When clicked, this button will update the Taxi record.
7. **“Submitted for Approval”**  - After creating a taxi record, user can submit for approval to ensure compliance and accuracy. When this button is clicked, the taxi record status will be *“Submitted for Approval”*.
8. **“Approved & Closed”** and **“Declined & Closed”**   - After submitting for approval, Approvers can review records and can either approve or decline. When these buttons are clicked, the taxi record status will be changed to either *“Approved & Closed”* or *“Declined & Closed”*.

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9. **“Rollback”**  - When clicked, the status of taxi records will revert to its original status *“Record in Progress”* if needed, to allow for users the flexibility for error correction.
 10. **“Back”**  - When clicked, this button will go back to the “Client Management Taxi List” page.
 11. **Help”**  - When clicked, this button will open a PDF document with instructions and explanations on how to use the “Client Management - Edit Taxi Record” page in a new browser tab, allowing the user to print and/or save the PDF.

Important Notes:

1. Only **MGR** role has access to **Rollback**  button.
2. **MGR, SUP** and **Shift Leader** roles have access to **Approved & Closed** and **Declined & Closed**   buttons.
3. **Read-Only mode** – After approving or declining the taxi record, it now becomes read-only and non-editable to all users, ensuring the integrity and finality of the record.