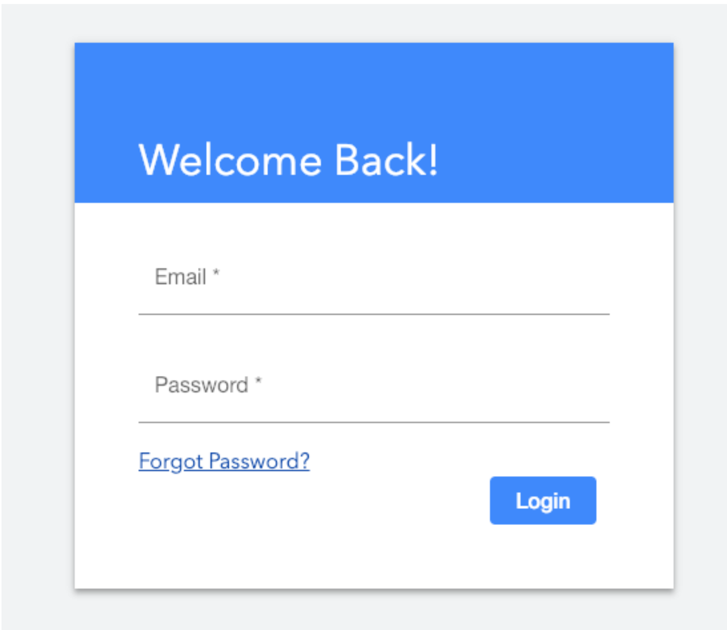
TAXI ACCOUNT PORTAL DOCUMENTATION

Version 2.2

National Taxi Services

Login Page

The login page can be used to log in to the Taxi Account Portal if a user has an account with valid login credentials. User accounts can only be created by Primary Contacts and Users with management access. After an account has been created, the user will receive an email invitation that will allow them to set a password. Once the password has been set, the user will then be able to log in to the Taxi Account Portal.



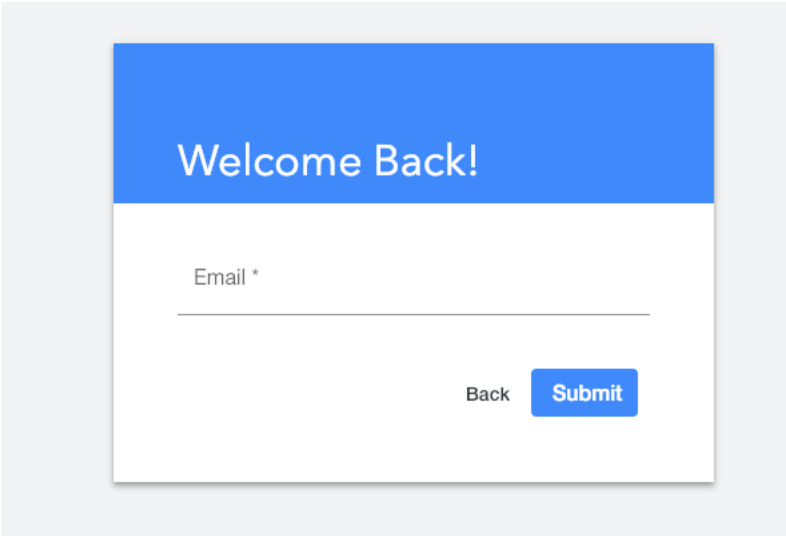
Login Page

Logging In

A user can log in to the Taxi Account Portal using a valid email and password.

Forgot Password

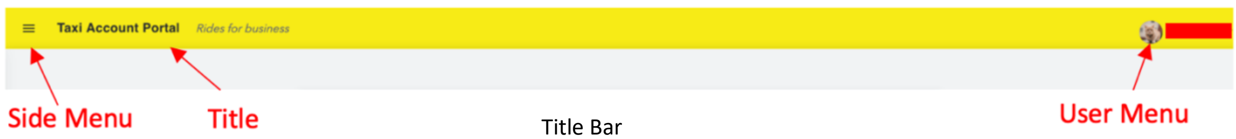
The password can be reset using the “Forgot Password?” link located below the “Password” input field. Once this link is clicked, the user will be prompted to enter their email. If there is an account associated with that email, the user will receive an email allowing them to reset their password.



Forgot Password

Title Bar

The title bar is a yellow bar located at the top of the page. It contains the “Side Menu”, “Title”, and “User Menu” options. A detailed description of each of these items can be found below.



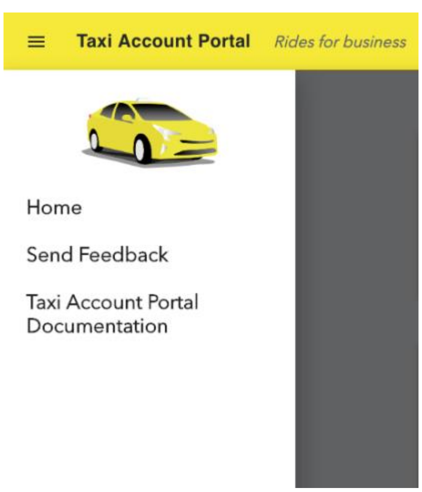
Title Bar

Title

The “Title” can be clicked to return to the “Accounts/Home” page from anywhere in the Taxi Account Portal.

Side Menu

Clicking the hamburger menu in the top-left corner will cause the “Side Menu” to slide into view. The “Side Menu” contains the following options: “Home”, “Send Feedback”, and “Taxi Account Portal Documentation”. A detailed description of each of these items can be found below.



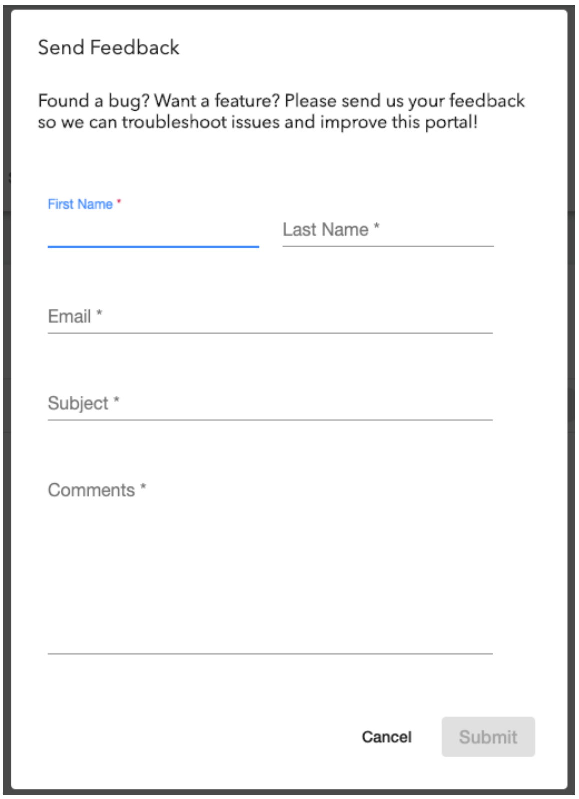
Side Menu

Home

The “Home” option can be clicked to return to the accounts/home page from anywhere in the Taxi Account Portal.

Send Feedback

The “Send Feedback” option can be clicked to open a pop-up form that the user can use to send feedback on the Taxi Account Portal to the developers.



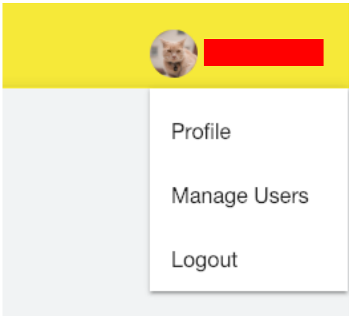
Send Feedback Pop-Up

Taxi Account Portal Documentation

The “Taxi Account Portal Documentation” option can be clicked to open the documentation on the Taxi Account Portal (this document). The PDF will open in a new tab.

User Menu

The “User Menu” option can be clicked to open a menu that displays the user options.



User menu

Profile

The “Profile” option will navigate the user to the “User Profile” page.

Manage Users

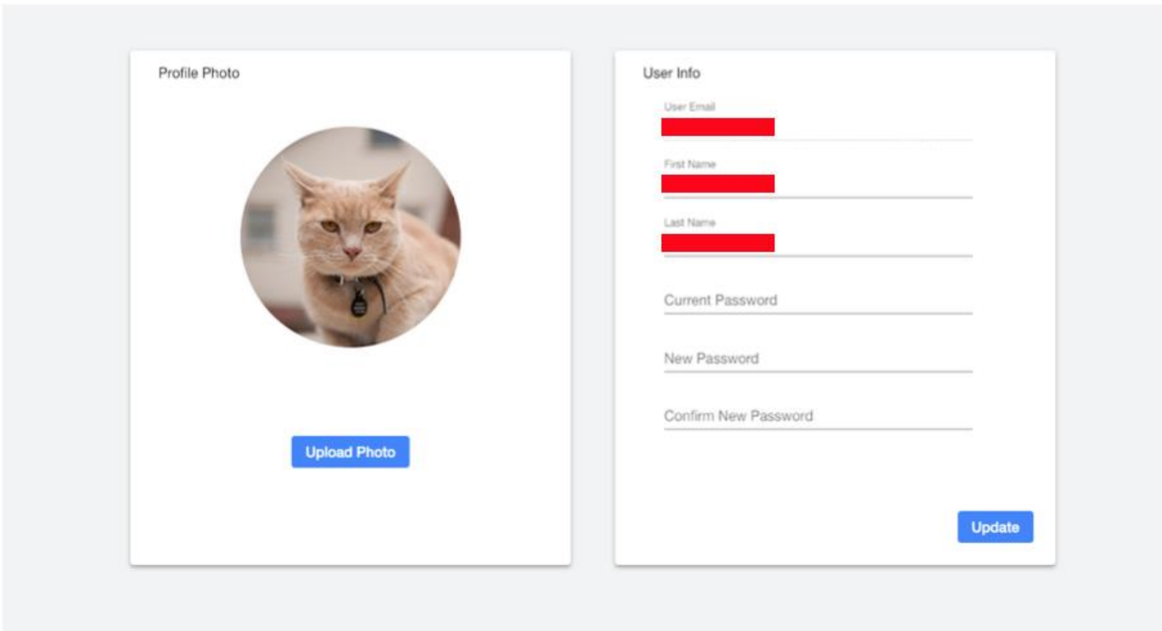
The “Manage Users” option will navigate the user to the “Manage Users” page

Logout

The “Logout” option can be clicked to log the user out. Once the user has been logged out, the user will be returned to the “Login Page”.

User Profile Page

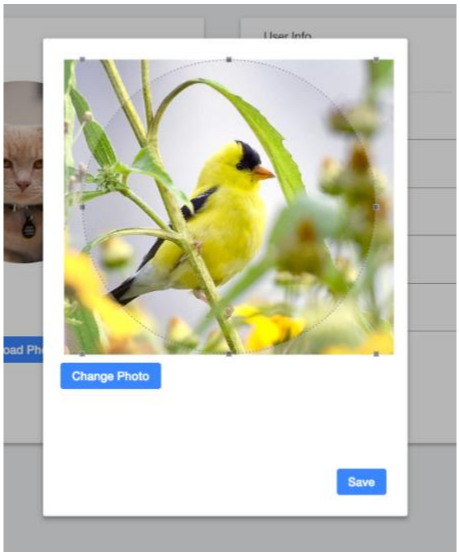
The “User Profile” page can be used to change the user’s profile photo and update the user’s information.



User Profile Page

Adding a new profile photo

The user can change their profile photo by clicking the “Upload Photo” button and selecting an image from the file selector pop-up. Once a photo has been selected, the user will be prompted to crop the image. Clicking the “Save” button will update the user’s profile photo.



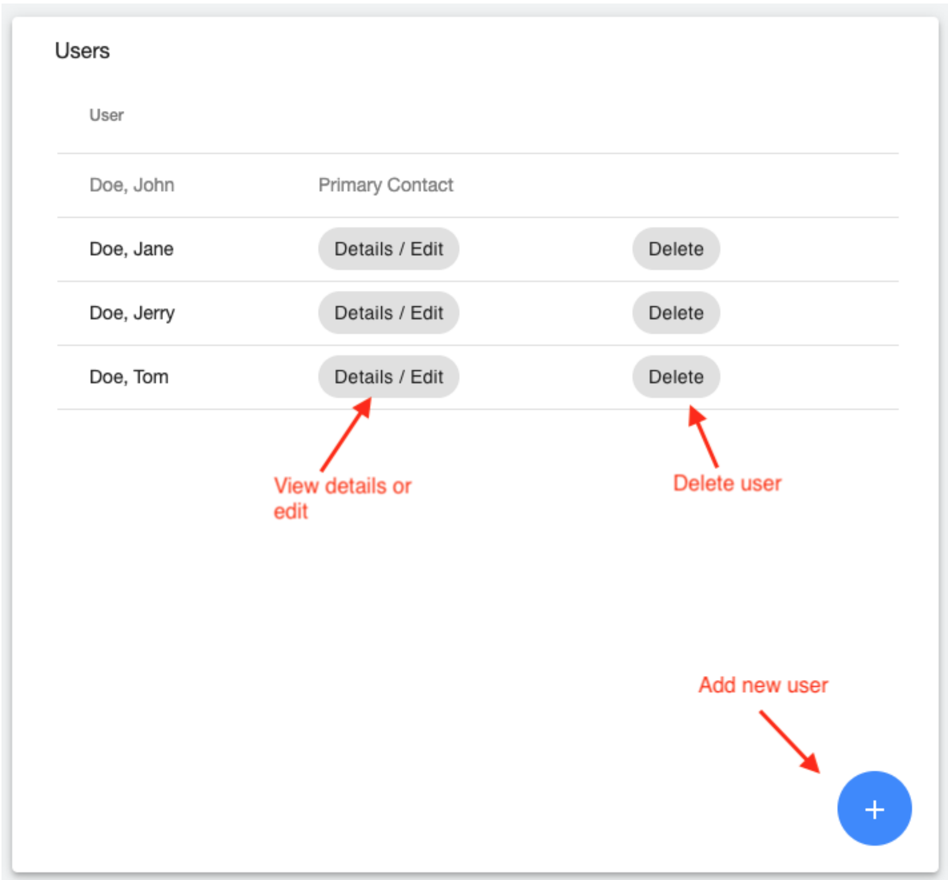
Cropping an image for the user photo

Updating user info

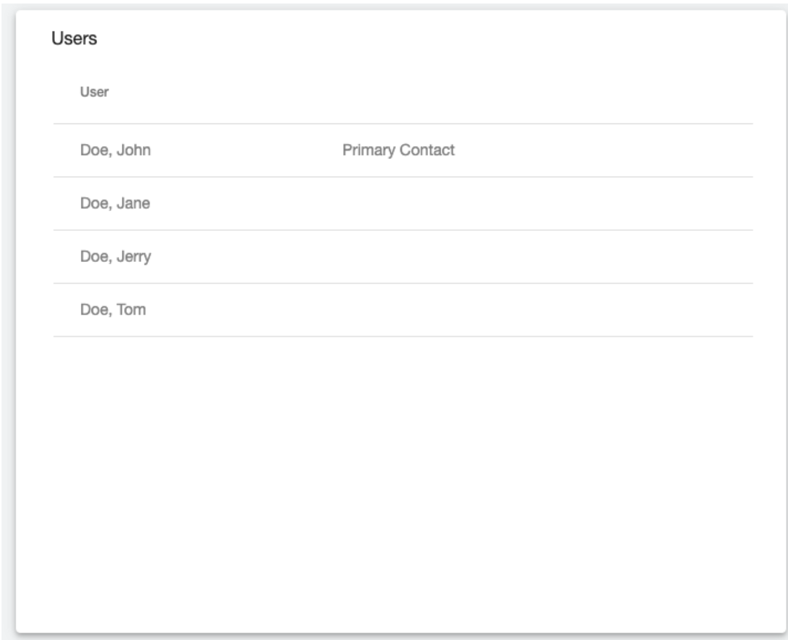
The user can update some information about themselves by entering the desired information into the input fields and clicking the “Update” button. The first name, last name, and password of the user can be changed using this page. In order to change the password, the user must enter their current password, the new password, and a confirmation of the new password.

Manage Users Page

The “Manage Users” page can be used by Primary Contacts and Users with management access to add new users, edit existing users, view details on the users, and delete existing users. Users that do not have management access will only be able to view the list of users.



Primary Contact and Users with management access view



Default user view

Users table

The “Users” table lists the users from every account the current user has access to. A user that the current user has the ability to edit and delete will have the options displayed next to the user’s name. If the current user does not have the ability to edit and delete the user, the user’s name will be grayed out and the role the user has will be displayed next to it. A detailed description of each type of user can be found below.

Types of Users

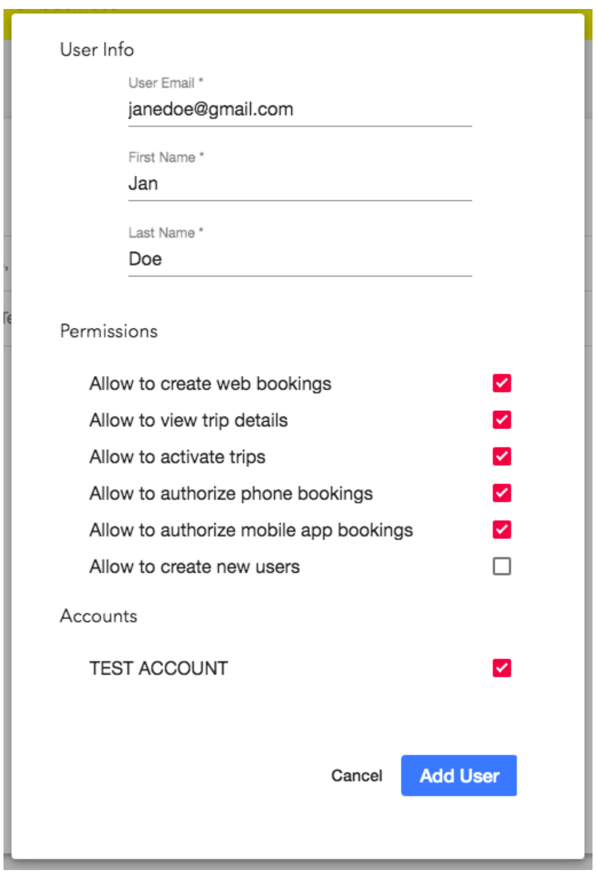
- *Primary Contact*
  A Primary Contact has the ability to add, edit, and delete Users, but not other Primary Contacts.
- *User with management access*
  This User has the ability to add, edit, and delete users, but not Primary Contacts. Both Primary Contacts and Users with management access are able to create these.
- *User*
  This user will only be able to view the “Manage Users” page and therefore cannot add, edit, or delete any user. Both Primary Contacts and Users with management access are able to create these.

Adding a new user

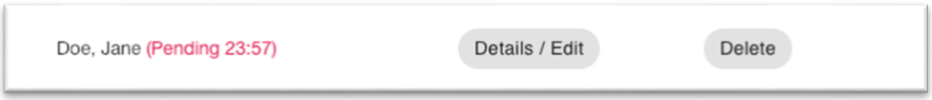
Clicking the “Add” button in the lower right-hand corner of the “Users” table will open a pop-up form that allows the current user to create a new user account. In order to create a new user, the following must be done: user information must be entered, at least one permission must be selected, and at least one account must be selected.

Once the “Add User” button has been selected, an email will be sent to the new user’s email that will allow them to complete the activation process. The new user will have 24 hours to activate their account. The “Users” table will update to display the new user and the amount of time they have left to activate their account (Pending HH::MM).

If a user’s invitation has expired (Expired :: Re-invite User), they will be unable to complete the activation process and will need to be invited again. This can be done by clicking “Re-invite User” next to the user’s name. A new email will be automatically sent to the user and they will have 24 hours to complete activation. The amount of time they have left to activate their account (Pending HH::MM) will be displayed next to their name.



Adding new User



User with a pending invitation

User with an expired invitation

Editing a user

Clicking the “Details / Edit” button next to a user’s name will open a pop-up form that allows the current user to edit the selected user. Editing an existing user is similar to creating a new user. The only information that cannot be changed is the user’s email.

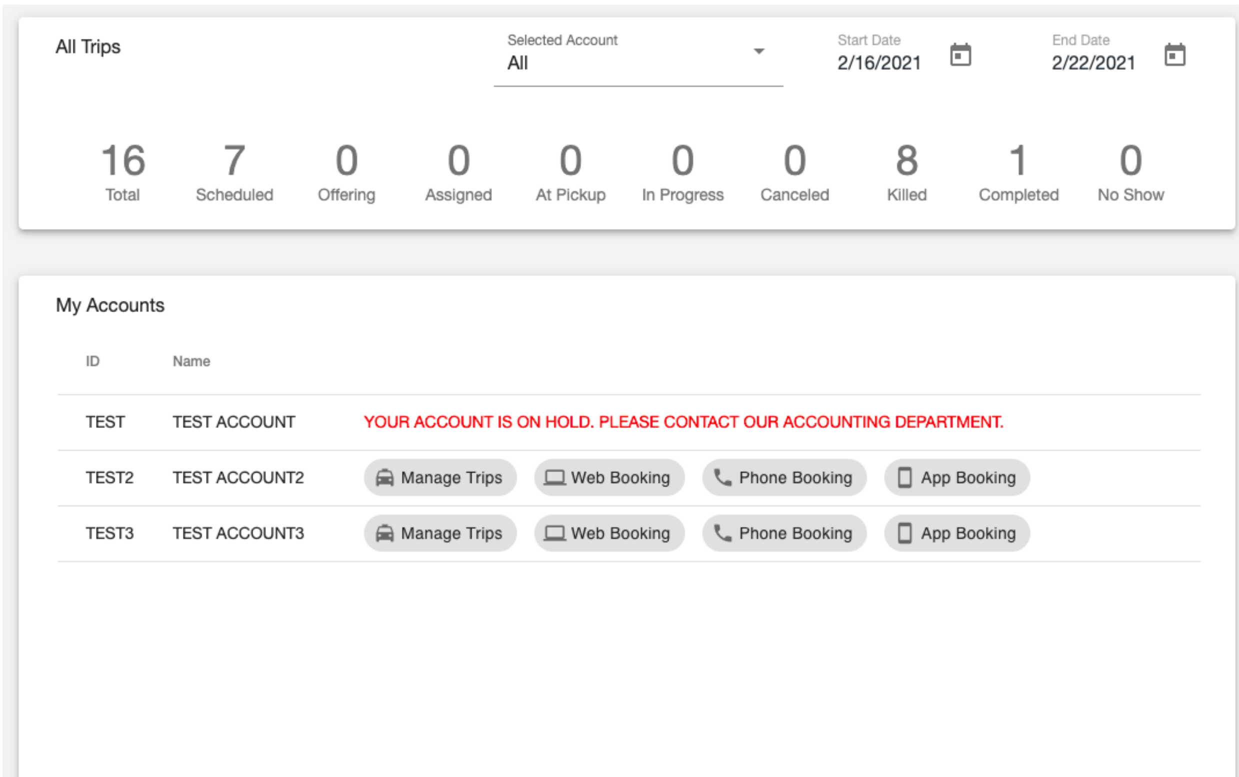
Deleting a user

Clicking the “Delete” button next to a user’s name will open a confirmation pop-up that allows the current user to delete the selected user. Deleting a user will completely remove the user’s account. They will no longer be able to log in to the Taxi Account Portal.

Deleting a user

Accounts/Home Page

The “Accounts” page also acts as the “Home” page for the user and will be the first page shown upon successful login. The “All Trips” and “My Accounts” sections are located on this page. A detailed description of these sections can be found below.



Accounts/Home Page

All Trips

The “All Trips” section contains statistics on all trips from the “Start Date” to the “End Date”. By default, the “Start Date” is the current date, and the “End Date” includes seven days into the future. The date ranges can be changed using the “Start Date” and “End Date” date pickers. The trip statistics will refresh once a new “Start Date” or “End Date” has been selected. There is about a 15-minute delay between the statistics displayed and real time.

By default, the trips statistics displayed are for all accounts, the “Selected Account” dropdown can be used to show statistics for a specific account by selecting the account name.

(See *Status* on page 16 for a description of the trip statuses shown in the statistics)

My Accounts

The “My Accounts” section contains a list of all the accounts the user has access to. The available options for each account are displayed next to the account name as buttons. If an account is on hold, an error message is displayed instead. A detailed description of each of these items can be found below.

Account Options

Options for each account are given as buttons next to the account name. There are four possible options for each account. The options that are shown are dependent on the user’s assigned permissions.

Account Options

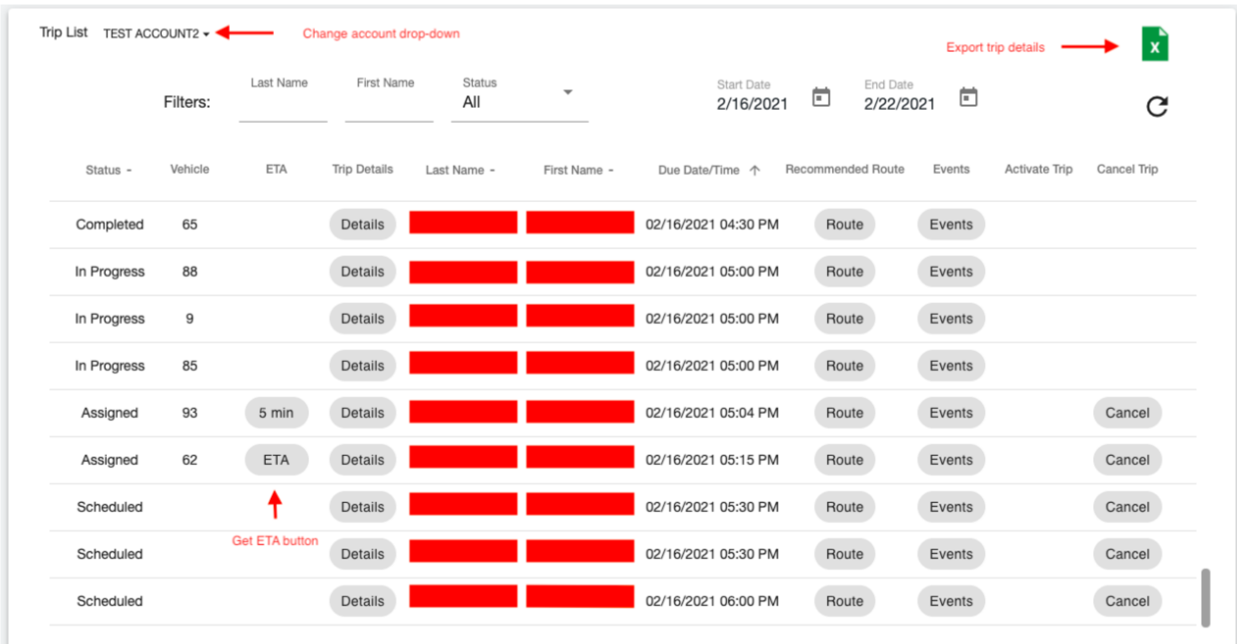
- *Manage Trips*
  Clicking the “Manage Trips” option will redirect to the “Manage Trips” page.
- *Web Booking*
  Clicking the “Web Booking” option will open the external “Web Reservations” site in a new tab. The user should be automatically logged in.
- *Phone Booking*
  Clicking the “Phone Booking” option will redirect to the “Phone Booking Authorization” page.
- *App Booking*
  Clicking the “App Booking” option will redirect to the “Mobile App Booking Authorization” page.

Holds

If an account is on hold, an error message will be displayed instead of the account options. This account cannot be interacted with until the issue causing the account to be on hold is resolved.

Manage Trips Page

The “Manage Trips” page displays a list of trips for the selected account. Filters can be applied to the list. The current account can be changed using the drop-down menu in the upper-left corner.



Manage Trips Page

Trip List table

The “Trip List” table displays information about each trip as well as options available for the trip. The list can be sorted by “Status”, “First Name”, “Last Name”, or “Due Date/Time” by clicking the sort controls next to each of these options. The list is currently sorted by the option with ↑ or ↓ next to it. The upward arrow means the list is currently sorted in ascending order and the downward arrow means the list is currently sorted in descending order. By default, the trips are sorted by “Due Date/Time” in ascending order.

Status

The following is a list of all possible trip statuses and their meanings:

- Scheduled – the trip has not been assigned to a vehicle
- Offering – the trip is being offered to available drivers
- Assigned – the trip has been assigned to a vehicle

- At Pickup – the driver is on-site
- In Progress – the passenger has been picked up by the driver
- Canceled – the trip was canceled by a human
- Killed – the trip was canceled by the system
- Completed – the trip has been completed
- No Show – the passenger was not at the pickup location

Filters

Filters can be used to display only the desired data. The following filters are available:

- Last Name
- First Name
- Status
- Start & End Date
    - By default, the "Start Date" is the current date, and the "End Date" includes seven days into the future

Export trip details

The details for each trip displayed in the "Trip List" can be exported as a spreadsheet (XLSX) file by clicking the XLSX download icon in the top-right corner. The file will automatically download after it has been created. The file can be opened and viewed using spreadsheet software such as Microsoft Excel.

Activate

The "Activate" option is shown only for "will call" trips. These are trips where a day is set, but not a time. Once the customer calls in, the trip can be activated by clicking the "Activate" option.

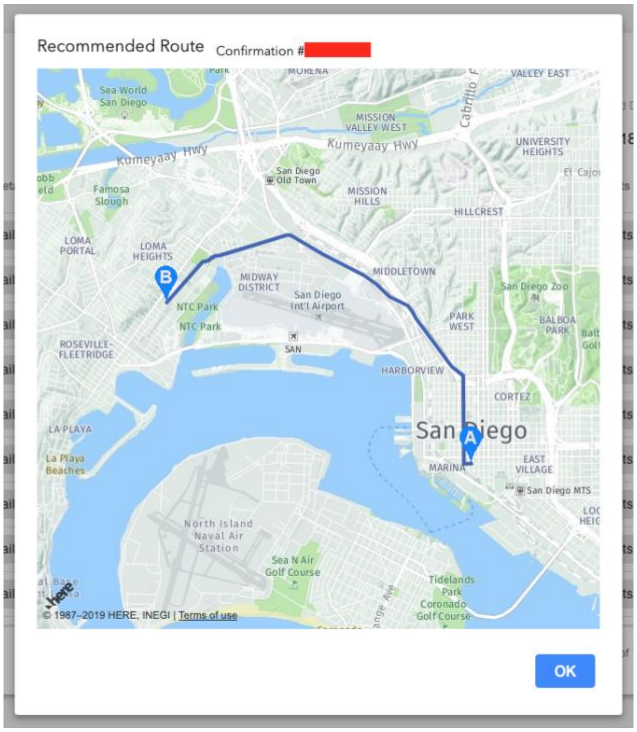
Cancel

The "Cancel" option is shown only for trips that have the ability to be cancelled. Clicking the "Cancel" option will cancel the trip. A confirmation email will be sent to both the user who created the trip and the user who cancelled the trip (if applicable).

Recommended Route

The “Recommended Route” option can be used to view the recommended route for a particular trip. An “Update” button is shown for trips that are “Active” and for trips that are “Scheduled” (if the trip is no longer pending).

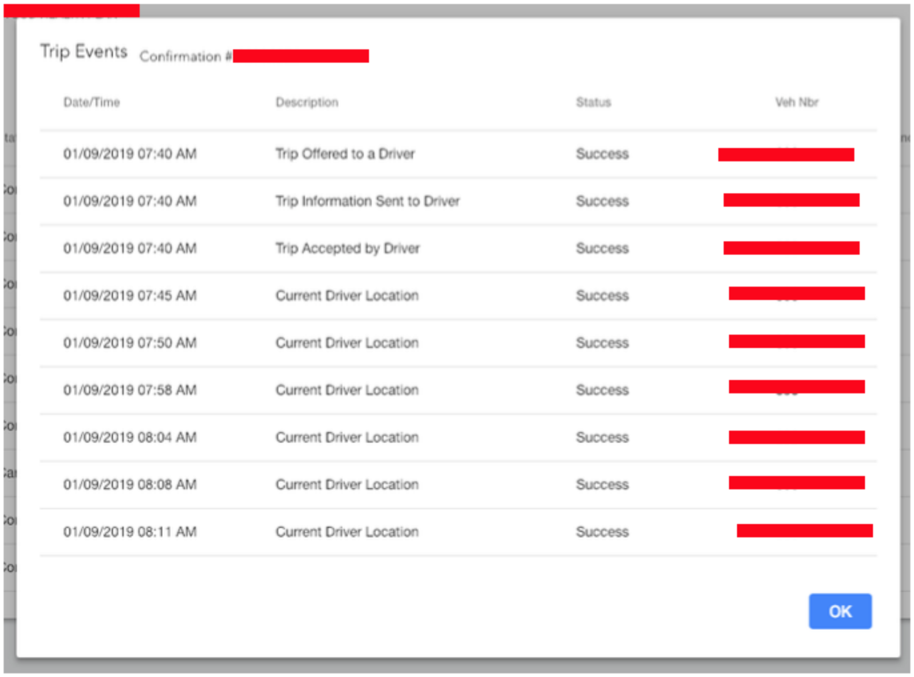
The “Update” button is used to refresh the recommended route for the purpose of updating the location of the cab.



Recommended Route Pop-Up

Events

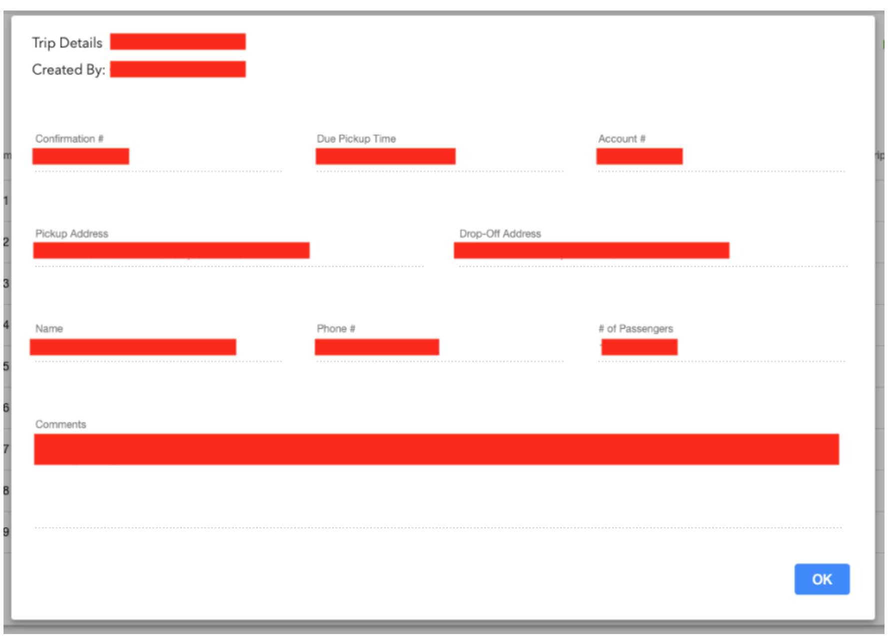
Clicking the “Trip Events” option opens a pop-up with a list of all the events for the selected trip.



Events Pop-Up

Details

Clicking the “Details” option opens a pop-up that displays the details for the selected trip.



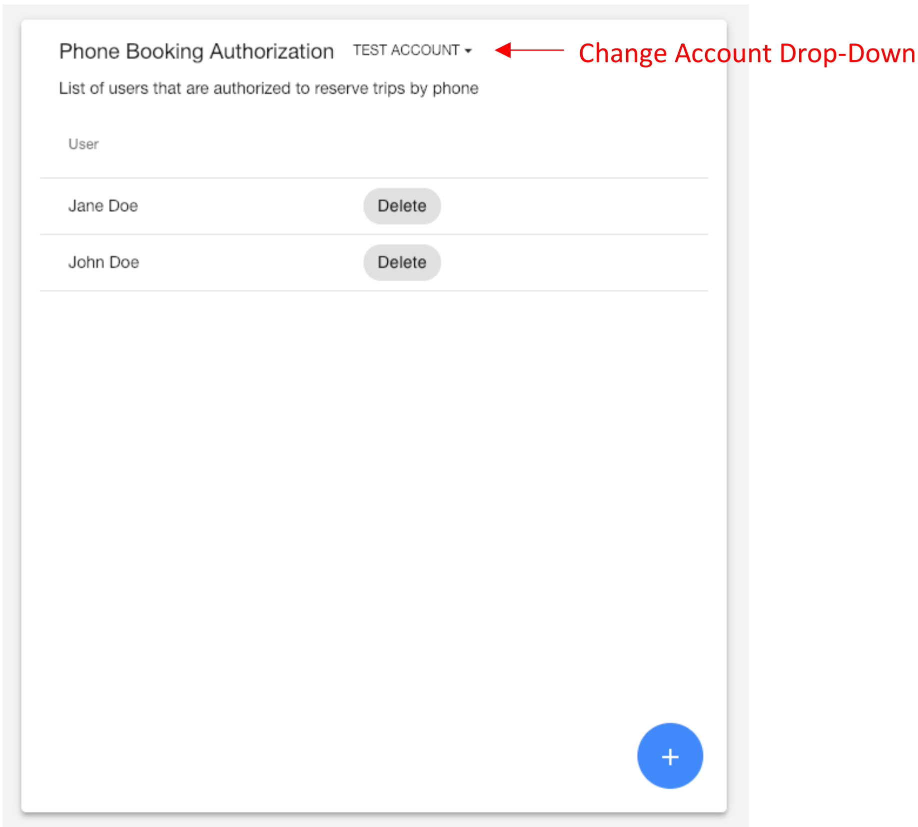
Details Pop-Up

ETA

Clicking the “ETA” option will display the estimated time in minutes for the cab to arrive at the destination. This time can be updated by clicking the option again.

Phone Booking Authorization Page

The “Phone Booking Authorization” page can be used to add or remove users that are authorized to reserve trips by phone for the selected account. The current account can be changed using the drop-down menu in the upper-left.



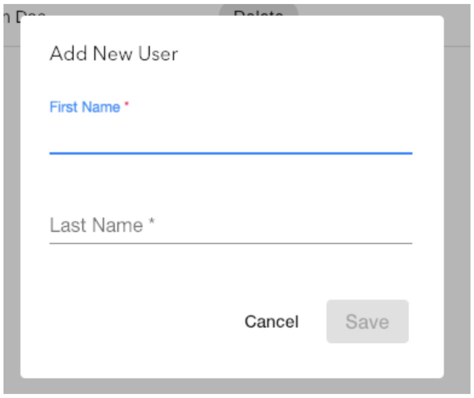
Phone Booking Authorization Page

Phone Booking Authorization table

The “Phone Booking Authorization” table displays the name of the user and the “Delete” option next to the user’s name.

Adding a new user

Clicking the “Add” button in the lower right-hand corner of the “Phone Booking Authorization” table will open a pop-up form that allows the current user to add a new user. In order to add a new user, a first and last name must be entered.



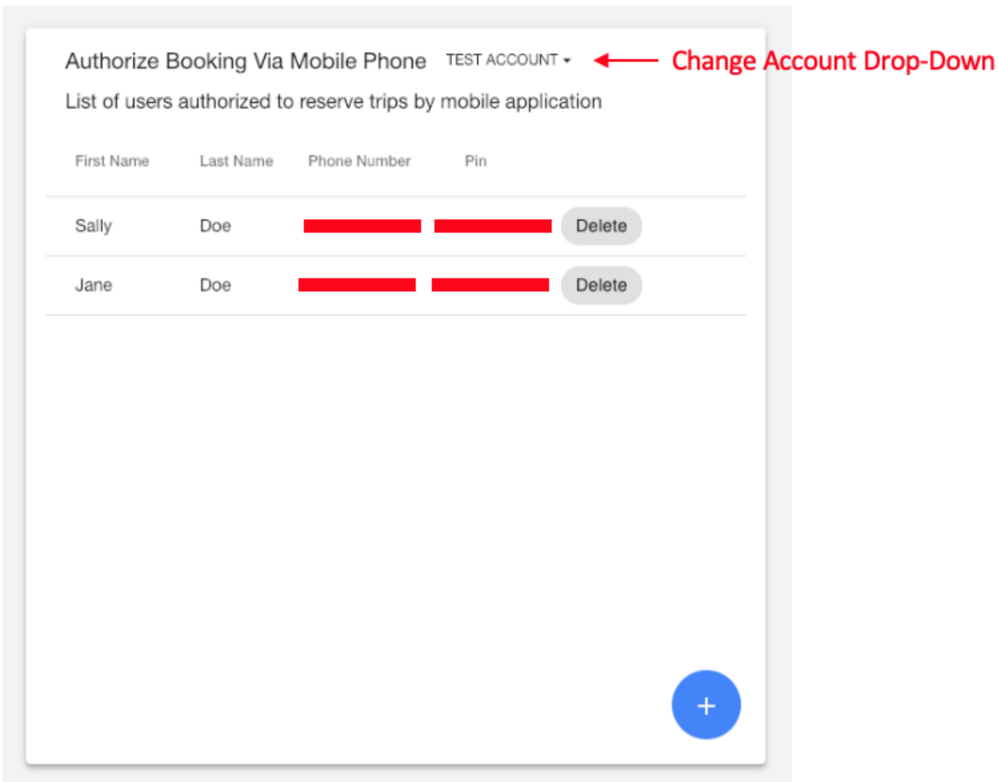
Adding a new user

Deleting a user

Clicking the "Delete" button next to a user's name will open a confirmation pop-up that allows the current user to delete the selected user. Deleting a user will remove the user from the list of users that are authorized to reserve trips by phone.

Mobile App Booking Authorization Page

The “Mobile App Booking Authorization” page can be used to add or remove users that are authorized to reserve trips by mobile application for the selected account. The current account can be changed using the drop-down menu at the top.



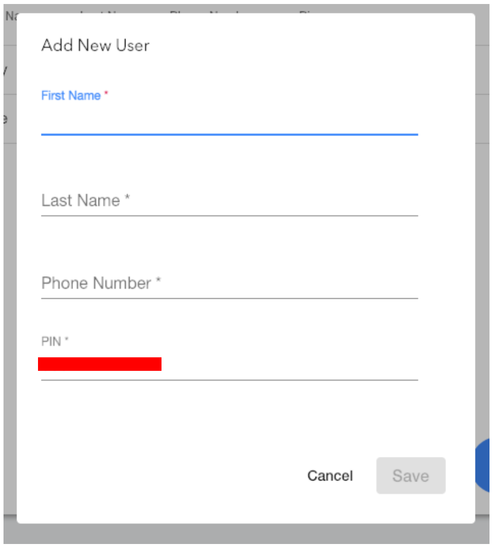
Mobile App Booking Authorization Page

User table

The “Phone Booking Authorization” table displays the first and last name, phone number, and pin of the user and the “Delete” option next to the user’s name.

Adding a new user

Clicking the “Add” button in the lower right-hand corner of the “Mobile App Booking Authorization” table will open a pop-up form that allows the current user to add a new user. In order to add a new user, a first name. last name, and phone number must be entered. A pin will be automatically generated when the pop-up opens.



Adding a new user