

# PHONEBOOK




































Type to search

15 FILTERS

IMPORT FROM XLSX

EXPORT TO EXCEL

EDIT PROFILE

Name	Code	Email	Phone	Type	Category	Country	Label	Action
Adam DOD		adam@leon.so			Client		Active	 
Adam		adam@leon.so			Client			 
Adam	Client	adam@leon.so	+44 1234567890		Client			 
Adam ABC					Client		Active	 
Adam Bob					Client			 
Adam Bob					Client		Active	 
Adam Carter	Client				Client			 
Adam Chen	<div>New Code</div>	adam@leon.so			Client			 
Adam Clark	Client				Client		Active	 
Adam Clark					Client			 
Adam Jones					Client			 
Adam Jones					Client			 

New Contact


Import From XLSX

Export To Excel

Edit Profile





New Phonebook main view

To make flight preparations quick and easy you can use this section and add contact data to Leon.

Hover the mouse over  icon and select 'New Phonebook'.

**Filtering options** are located at the top of the 'New Phonebook' view.

The **list of contacts** displays the following information:


- **Name** - name of contact
- **Code** - code of contact
- **Email** - email, to which all the emails are sent
- **Phone** - work phone number
- **Type** - type of contact:
  -  - indicates person
  -  - indicates company
- **Category** - indicates whether the contact is or isn't a Crew, Client, or PAX. Client can be indicated by selecting the 'Client' checkbox in the contact profile
- **Country** - a country where the contact is based
- **Action:**
  -  - clicking on a bin icon allows deleting a contact
  -  - accessing the changes history of a contact

## Filters

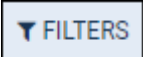
The filtering options are located at the top of the page.


There are the following **filtering options** available:

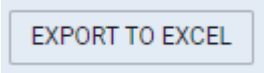
- Type to search



 - allows filtering by contact name and the contact code

- 

 - the following options are available:
  - Show** - allows displaying animals or deactivated contacts only
  - Labels** - allows filtering by labels assigned to the contacts. It is possible to filter by multiple labels (filtering based on 'or' method)
  - Category** - filtering by the category of the contact: Client, Crew, PAX and User
  - Type** - filtering by the type of the contact: Company, Person, Animal
- 


 - allows importing PAX data from Excel
- 

 - allows exporting Phonebook data to Excel

Resetting the filters can be done by deleting already selected options.

## Edit labels

By clicking 



 you can open a pop-up window, where it is possible to add or delete labels available in the contacts' profiles. If you delete a label, it will be removed from all the contacts.

## New Contact




Adding new Company



Adding new Person

In order to add a new contact press 



 button.

A pop-up window will appear where the type of contact can be selected between:

- Company**
- Person**

Depending on the selection, each of the types contains different tabs where the details can be

inserted.

In order to **edit** the existing contact, simply click on the contact and the editing pop-up window will display.

The contact details in the editing window are the same as in the 'New contact' window.

The formats for inserting dates recognized by Leon are dd.mm.yyyy, dd-mm-yyyy, dd/mm/yyyy

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## Operator base

This feature only applies to operators that have more than one base. For the operators with **one base only** this functionality will not apply.

Bases can be defined in [General Settings](#) section.

Once the bases are added, it is possible to assign one to a Client.

A screenshot of a web interface showing a dropdown menu labeled 'Operator base'. The dropdown is open, and the selected option is 'LTN'. There are small icons for clearing the selection and toggling the dropdown.

If the base is **assigned to a Client**, the trip requested by this particular Client will automatically be assigned to the Client's base.

It is also possible to assign or change the original base, including the base initially assigned to a Client, **without having to assign a specific user**.

If you select a particular base in the operator selection dropdown (top-right corner of Leon), the Requests/Quotes list will only display the requests assigned to this particular base.

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## Handling Requests per Client

It is possible to assign a **default handling agent to a Client** in Leon.

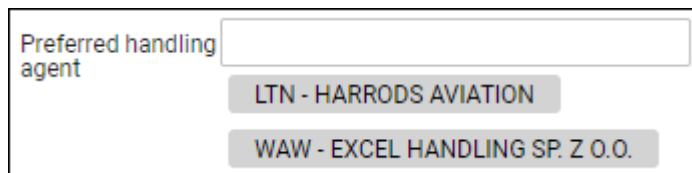
**In order to assign a Handling Agent to a Client**, you need to select the Agent(s) in the 'Preferred handling agent' box.

Handling agent can be searched by using:

- Airport ICAO/IATA/Custom code
- Handler Name
- Combination of 'Airport code - Handler name'

It is possible to assign multiple Handling Agents at different Airports to one Client.

Once the Handler is assigned, it will appear as a tag below the 'Preferred handling agent' selection box:



Preferred handling agent

LTN - HARRODS AVIATION

WAW - EXCEL HANDLING SP. Z O.O.

**Only one Handler per airport can be assigned to a Client. Assigning second Handling Agent will replace already assigned Handler.**

Once the Handler is assigned, it will auto-populate in the OPS checklist when the trip is booked.


Handler assigned to the Client has **higher priority** than the Handling Agent selected as **preferred in the Airport Directory**. This means that the Handler assigned to the Client will overwrite the preferred Handler from 'AD' upon booking the trip from Sales.

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## Exclusion zones

**Exclusion zones** are the countries over which the aircraft should not be flying.

The exclusion zones can be indicated in the **Client profile** - 'Exclusion zones' box as per below. Simply start to insert the country name and select it from the dropdown list.



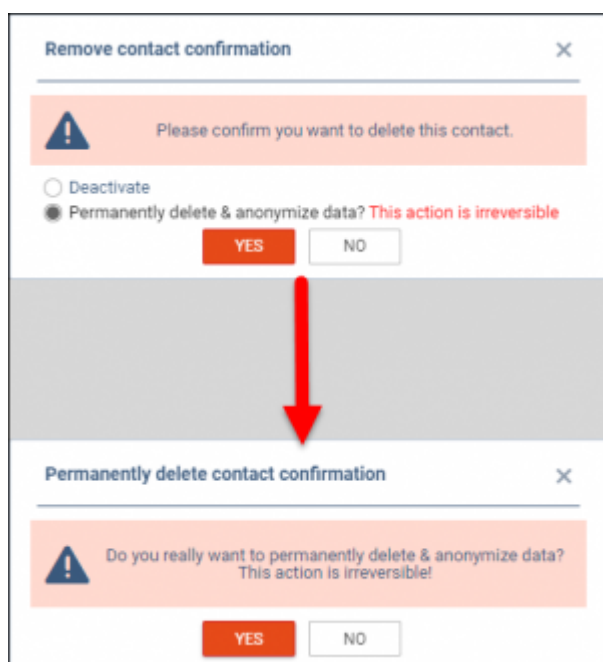
Exclusion zones

Belarus Ukraine

Once the exclusion zones are selected, the **flight time calculations in the 'Requests/Quotes' section** ('Calculate Flight Time' option) will take these zones into consideration.

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## Permanently delete & anonymize data



Remove contact confirmation

Please confirm you want to delete this contact.

☐ Deactivate

☒ Permanently delete & anonymize data? This action is irreversible

YES NO

Permanently delete contact confirmation

Do you really want to permanently delete & anonymize data? This action is irreversible!

YES NO

## Permanently delete and anonymize data actions

This functionality is created as part of the process of adhering to the **Regulation (EU) 2016/679** of the European Parliament and of the Council of 27 April 2016 (General Data Protection Regulation).

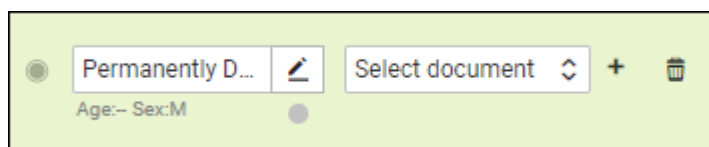
It is possible to **permanently** anonymize and delete PAX from Leon.

### The process is as follows:

1. Click on the bin icon located in the 'Action' column on the list of contacts
2. Select the 'Permanently delete & anonymize data' option and click 'YES'
3. In the 'Permanently delete contact confirmation' window, confirm the anonymization of the user by clicking on YES
4. Contact is deleted

**Once the PAX has been deleted** the following areas will be affected:

- PAX Profile will be permanently deleted from the New Phonebook
- If PAX was added to any flight, instead of PAX name, there will be a 'Permanently Deleted' information instead of a Name. Also when hovering the mouse over PAX Number in the OPS view, Leon will display 'Permanently deleted' in the tooltip



- Deleted PAX will show as 'Permanently deleted' in the reports that show Flights to which this PAX was added, for example, Custom Flights List Report

Date ADEP [Plan][UTC]	Flight number	Aircraft	STD [UTC]	ADEP ICAO [Plan]	STA [UTC]	ADES ICAO [Plan]	PAX Names
24/07/2022	ABCDE	A-BCDE	08:40	EPWA	09:30	EPGD	Permanently Deleted

**Anonymizing a PAX is permanent and irreversible. Once the PAX data has been deleted it cannot be reverted.**

## Edit Contact

In order to **edit** the contact simply click on the contact name in the list of contacts.

Depending on the type of contact, a different set of details will be available.

When it comes to the **Company** type client, the following tabs are available: **Basic, Details, Sharing, Persons, Misc, Files, Flights**

When it comes to the **Person** type client, the following sections are available: **Basic, Details, Characteristics, Sharing, Persons, Misc, Files, Flights**

The sections are explained below.

# History of contact changes

## BASIC



'Basic' tab display



Company 'Basic' tab

**Basic** tab contains some basic information as well as the documents and, VISA and Vaccinations details.

As for the generic information, these are:

- **Name and Surname**
- **Gender**
- **Place and date of birth**
- **Account** - Client name to which contact is assigned
- **Email addresses:**
  - Invoices and credit notes are sent to the billing e-mail if provided, otherwise to the default e-mail for invoices in operator settings.
  - Flight notifications are sent to addresses with a 'Notifications' descriptions. If no such address is specified, work addresses will be used.
  - All other system e-mails are sent to the work e-mails.

It is very similar when it comes to the **Basic** tab in the **Company** contact, apart from the **documents, Visas and Vaccinations subsection** which is not there.

In the **documents subsection** the following details can be inserted:



'Documents' tab

- **PASSPORTS** - clicking on the 'NEW PASSPORT' button will allow inserting the PAX passport details as well as uploading the passport scans and marking the passport as a default passport (will be automatically used on the flight to which the contact is assigned as a PAX). Additionally, it is possible to have the **deleted** passports displayed by switching the 'Deleted Passport' option from 'Hide' to '**Show**' - in this case, the deleted passport will appear with the 'Deleted' label in the 'Default' column
- **VISAS** - clicking on the 'NEW VISA' button will allow adding new visa details and connecting it to the specific passport
- **NATIONAL IDS** - section where the National ID details can be inserted
- **VACCINATIONS** - section where the vaccination details can be inserted. The diseases can be selected from the dropdown list

Access to this section can be allowed in the 'Privileges' by selecting DENY/VIEW/EDIT on the 'New phonebook - Documents' place.

## DETAILS

'Details' tab

The 'Details' tab contains very detailed information about the Person/Company, some of which include contact details such as Address/Addresses, Phone numbers, important remarks and labels (these display when assigning PAX on the flights).

Some of the more important details are:

- \* **Language** - an indication of the language that the contact speaks. This could be important when contacting the Client, especially if sales emails and documents are to be sent (can be customized in a specific language in the [Documents Manager](#) and the [EMAIL TEMPLATES](#))
- **Salutation** - salutation selected here can be used in email and documents templates by default
- **Operator base** - more information in the 'New Contact' subsection
- **Client** - checkbox indicating in the contact is a Client or not
- **Preferred handling agent** - more information in the 'New Contact' subsection
- **Exclusion zones** - more information in the 'New Contact' subsection
- **Customer Commission** - this subsection consists of 2 fields: 'Price' and 'Currency'. This allows defining the Client's default commission, which will automatically fill in the 3rd Party Commission field in subcharter and cost-based quotes, subject to this Client being a requester

## CHARACTERISTICS

'Characteristics' tab

Section **PAX Characteristics** contains important information about the PAX preferences such as likes, dislikes, favorite dishes, and drinks as well as other notes.

Access to this section can be allowed by privileges by selecting DENY/VIEW/EDIT on the 'New phonebook - Characteristics' place.

Any information populated in this section can be populated on the PAX and Crew Tripsheet.

## SHARING

'SHARING' tab

**SHARING** tab allows selecting the data that are to be shared with a buyer in the 'OPS&CREW' tab in the edit request section.

Currently, the following data can be selected:

- **Handling**
- **Crew**
- **Overflight Permits**
- **Slots**

The details are selected per Client and will apply to all the trips requested by the Client.

Once the details are selected and saved, the 'Trip data sharing status' will switch to 'SHARED' in the 'OPS&CREW' tab.

'Sharing' settings in the 'OPS&CREW' tab



Additionally, it is possible to **select the trip data directly in the 'OPS&CREW' tab** by clicking on the 'EDIT SETTINGS' button.

Apart from the trip data, it is also possible to apply the settings to the future buyer quote by selecting the relevant checkbox.

Once the sharing details are saved, the **Trip data sharing status** will change from 'NOT SHARED' to 'SHARED'.

## PERSONS

Name	Work email	Work phone
Thomas Delta	tom@leonsoftware.com	+35914203270
Martina Adams		796220726
John Graham		
Andrew Davidson		
John Smith	john@leonsoftware.com	+12345
John Graham	john@leonsoftware.com	

'Persons' tab

**Persons** tab displays the list of contacts assigned to the specific account (Company/Person indicated in the 'Account' field in the tab 'Basic').

The tab contains the following information:

- **Name**
- **Work email**
- **Work phone**

This list of persons will be available when assigning the PAX from the contact list when the trip is requested by the specific Account.

## MISC

This tab allows selecting extra settings that apply to the specific client.

Currently, the 'Receive mvt messages' option is available.

This setting allows selecting the client for MVT messages, subject to the 'Client' checkbox being marked in the 'MVT Messages' settings.

## FILES

In this tab, the files can be attached to the PAX profile.

The files can be uploaded/saved in various formats including pdf, txt, doc, docx, xls, xlsx, jpg, png, zip, rar, mp3, wav.

Maximum single file size is 10MB.

## FLIGHTS

Edit contact

BASICDOCUMENTSCHARACTERISTICSHARINGPERSONSMESSAGESFILESFLIGHTS

Flight list as passenger

Date	Aircraft	Route	Flight time	Customer
2023-09-05	Ch-020N	11:00 EPNAG - LPAJA 14:00	02:00	Jonathan Cox
2023-09-17	M-0000	12:00 EPNAG - BZBA 13:20	01:20	N/A
2024-12-04	Ch-020N	09:00 LPAJA - EPNAG 11:20	02:20	Martin Adams
2024-06-06	B-0001	12:00 EPNAG - EPNAG 14:00	02:00	N/A
2024-06-15	B-0001	09:00 LPAJA - LPAJA 08:30	01:30	Thomas Delta

Flight list as buyer

Date	Aircraft	Route	Flight time	Customer
2023-06-05	B-0001	12:10 EPNAG - EPNAG 13:30	02:20	Thomas Delta
2023-04-12	Ch-020N	09:00 EPNAG - EPNAG 07:00	01:00	Thomas Delta
2023-03-23	Ch-020N	09:00 LPAJA - EPNAG 10:10	02:10	Thomas Delta
2023-02-09	A-0000	10:00 LPAJA - EPNAG 11:40	01:40	Artemis
2023-02-07	A-0000	09:00 EPNAG - LPAJA 1:00	04:00	Artemis

CANCEL

OK

'FLIGHTS' tab in 'New Phonebook'

In the 'Flights' tab, it is possible to preview contact flights, both as a buyer of a trip as well as the passenger.

In order for the flights to **appear in this tab**, the following **conditions** have to be met:

- flights have to be booked ('Options' are not included)
- ferry flights do not appear on the list ('Flights as a buyer' list)
- deleted flights do not appear on the list ('Flights as a buyer' list)

The list takes into account flights from 'Requests/Quotes' as well as from the 'OPS' section (if 'Requests/Quotes' isn't used).

The flights are listed from the most recent one in descending order.

This tab is available in contact details if the 'New Phonebook - Flights' privilege is set to 'VIEW' for a group of privileges.

## INVOICES

Edit contact

BASICDETAILSCHARACTERISTICSHARINGPERSONSMESSAGESFILESFLIGHTSINVOICES

Invoices

Number	Type	Issue date	Del. date	Amount	Currency	Download
123	Invoice	2023-11-01	2023-11-01	€1000	EUR	
1234	Invoice	2024-06-18	2024-06-18	€1000	EUR	

CANCEL

OK

'INVOICES' tab

The 'INVOICES' tab presents the list of the invoices issued to a person, if the person was the Client of the Trip.

The list includes Pro-forma invoice, Invoice, Credit Note, and Recharge invoice.

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