

'Sales Module' in 'General settings'

Sales Module tab is available in Admin Panel > General Settings section.

This section is directly connected to the quotation process performed in the 'Requests/Quotes'.

There are the following subsections available in the 'Sales Module' section:

- **Default notes**
- **Default invoice data**
- **Exclusion zones**
- **Quote Request Statuses**
- **Country VAT**
- **Quote Settings**
- **Optional Trip Settings**
- **Invoices & Credit notes**
- **Subcharter settings**
- **Phonebook settings**
- **Customer portal**

Default notes



'Default notes'

Default notes subsection allows inserting:

- Default Legal Note
- Default Cancellation Policy

Once the notes are added in this subsection, they will appear in the quote edit > Notes tab in the 'LEGAL NOTE' and the 'CANCELLATION POLICY' fields respectively.

Additionally, the notes can be included in the sales documents, if applied in the Documents Manager for specific document.

Default invoice data



'Default invoices settings'

Default invoice data contains two sets of settings:

- **Default invoice recipient email** - this can be used when, rather than sending an invoice email to the Client, the email is sent to the internal department (e.g. Accountancy) for checks, and then the internal department sends it to the Client. If the default email is set in this section, it will automatically populate as a **TO** email when selecting the **INVOICE** option on the quote editing page.
- **Default address** - default address comprises 5 address lines that can be used on the invoice as the Invoice address. By default, Leon takes the address from the 'Manage account' settings, however, if the address for invoices is different, then it can be inserted here and used on the document/email

Exclusion zones



'Exclusion zones'

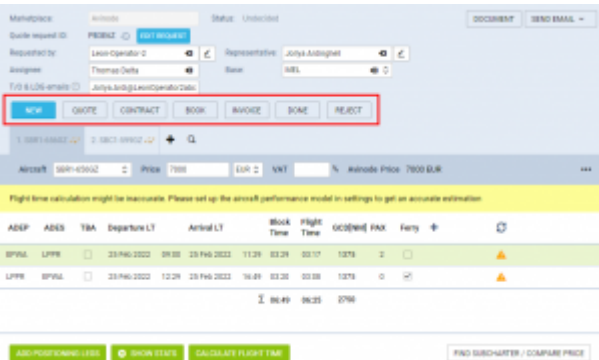
Exclusion zones are countries over which the aircraft should not be flying.

Once the exclusion zones are selected, the flight time calculations that apply to Aviapages and ReouteFinder in Request/Quotes panel > Edit quote ('Calculate Flight Time' option) will take these zones into consideration and omit the selected countries.

Exclusion zones indicated in this section will apply per operator.

There are 2 additional options available in the 'Fleet' section (per aircraft) and the Client profile (per Client).

Quote Request Statuses



Statuses selected in the settings

Quote Request Statuses setting allows selecting the default request statuses.

All the statuses are available in the dropdown and once selected, they appear in the list below the

dropdown.

Quote request statuses

New request

Quoted

Contract sent

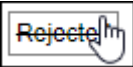
Booked

Invoice sent

Done

Rejected

Upon saving, the statuses will update in the request edit section (as per screen on the right).

To remove the status from the list simply click on the status icon -  - and save the updated settings.

Country VAT

Country VAT

Country (ISO)

25

Parent (ISO)

25

United Kingdom (GB)

0

Find country and add new

Country VAT

In **Country VAT** it is possible to select the default VAT rate for a specific country

ACDEP	ACDES	TBA	Departure LT	Arrival LT	Block Time	Flight Time	Occupied	PRG	Prng
PRG	WNR		29 May 2021 09:00	29 May 2021 09:40	01:00	00:40	280	0	40
WNR	WNR		29 May 2021 10:00	29 May 2021 11:00	01:00	00:00	160	2	
WNR	WNR		29 May 2021 11:00	29 May 2021 12:10	00:50	00:00	160	0	40

Example of default VAT rate application

Once the list of rates is created, it then applies the default rate to the request in the 'Requests/Quotes' section based on the following criteria:

- it has to be a domestic flight and within the listed country
- it has to be a passenger flight

The default VAT rate will be presented in the **VAT** box in the quote/edit section, as per the screenshot on the right.

The default VAT rates also apply to the requests coming from Avinode.

Quote Settings

Require departure and arrival times to be set regardless of TBA setting

Require departure and arrival times to be set regardless of TBA setting option applies to the way the scheduled times are displayed in the itinerary when editing the quote:

Quote settings

Require departure and arrival times to be set regardless of TBA setting ☒

- **Ticked** - Departure and Arrival times appear and despite the 'TBA' checkbox being ticked

ADEP	ADES	TBA	Departure LT	Arrival LT	Block Time	Flight Time	GCD[NM]	PAX	Ferry	+
EPWA	LPPR	<input checked="" type="checkbox"/>	12 Feb 2022 10:00	12 Feb 2022 13:30	04:30	03:56	1375	2	<input type="checkbox"/>	

- **Unticked** - Departure and Arrival times do not appear and only the 'TBA' label is displayed

ADEP	ADES	TBA	Departure LT	Arrival LT	Block Time	Flight Time	GCD[NM]	PAX	Ferry	+
EPWA	LPPR	<input checked="" type="checkbox"/>	12 Feb 2022 TBA	12 Feb 2022 TBA	04:30	03:56	1375	2	<input type="checkbox"/>	

Minimal price margin



Minimum price margin warning

Quote settings

Require departure and arrival times to be set regardless of TBA setting ☒

Minimal price margin

This setting allows defining the minimum margin required applicable to the 'Cost & Margin' method of quoting.

If a quote margin falls below the value specified in this section, Leon will display warning information upon clicking on the 'QUOTE' status (screen on the right).

Automatically update quote on schedule change

Automatically update quote on schedule change allows setting up and automated update of itinerary and recalculation of the price of the request if the itinerary is changed within the sales section by using the 'EDIT REQUEST' option.

Quote settings

Automatically update quote on schedule change ☒

Update quote based on trip change

Update quote based on trip change allows selecting an option of auto-update the quote upon schedule changes from the OPS part.

Quote settings

Update quote based on trip change ☐ Update schedule but keep the price
☒ Update schedule and recalculate the price
☐ User takes a decision
☐ Ignore

'Update quote based on trip change' contains the following recalculation options:

- **Update schedule but keep the price** - schedule updated without recalculating the price
- **Update schedule and recalculate the price** - schedule updated and the price recalculated based on the new schedule
- **User takes a decision** - User will manually decide which option to select in Sales upon the update in OPS
- **Ignore** - updates in OPS are ignored

Below, there are two examples of the applied settings:

- **Update schedule and recalculate the price** - schedule updates automatically and the price is recalculated based on the updates itinerary, as soon as the changes are saved in the OPS section:

Aircraft	B-ARTI	Price	79600	EUR	VAT	%							
ADEP	ADES	TBA	Departure LT		Arrival LT		Block Time	Flight Time	GCD[NM]	PAX	Ferry	+	
LSGG	EGGW	<input type="checkbox"/>	06 Jul 2022	09:45	06 Jul 2022	10:30	01:45	01:30	423	8	<input type="checkbox"/>	+	
EGGW	KJFK	<input type="checkbox"/>	06 Jul 2022	11:00	06 Jul 2022	15:00	09:00	08:45	2995	8	<input type="checkbox"/>		
KJFK	LSGG	<input type="checkbox"/>	06 Jul 2022	12:29	07 Jul 2022	04:44	10:15	10:00	3356	0	<input checked="" type="checkbox"/>		
Aircraft	B-ARTI	Price	80600	EUR	VAT	%							
ADEP	ADES	TBA	Departure LT		Arrival LT		Block Time	Flight Time	GCD[NM]	PAX	Ferry	+	
EPWA	EGGW	<input type="checkbox"/>	06 Jul 2022	09:45	06 Jul 2022	10:30	01:45	01:25	788	8	<input type="checkbox"/>		
EGGW	KJFK	<input type="checkbox"/>	06 Jul 2022	11:55	06 Jul 2022	15:55	09:00	08:45	2995	8	<input type="checkbox"/>		
KJFK	LSGG	<input type="checkbox"/>	07 Jul 2022	17:00	08 Jul 2022	09:15	10:15	10:00	3356	0	<input checked="" type="checkbox"/>		

- **User takes a decision** - changes in OPS do not apply automatically in Sales. Information appears in the Sales itinerary as soon as the changes are saved in the OPS section. Action required based on the action buttons:

Aircraft

B-ARTI

Price

80600

EUR

VAT

%

...

ADEP	ADES	TBA	Departure LT		Arrival LT		Block Time	Flight Time	GCD[NM]	PAX	Ferry	+	
EPWA	EGGW	<input type="checkbox"/>	06 Jul 2022	09:45	06 Jul 2022	10:30	01:45	01:25	788	8	<input type="checkbox"/>		
EGGW	KJFK	<input type="checkbox"/>	06 Jul 2022	11:55	06 Jul 2022	15:55	09:00	08:45	2995	8	<input type="checkbox"/>		
KJFK	LSGG	<input type="checkbox"/>	07 Jul 2022	17:00	08 Jul 2022	09:15	10:15	10:00	3356	0	<input checked="" type="checkbox"/>		

Aircraft

B-ARTI

Price

80600

EUR

VAT

%

...

Schedule in the OPS module has been modified.

UPDATE SCHEDULE & RECALCULATE PRICE

UPDATE SCHEDULE

IGNORE

ADEP	ADES	TBA	Departure LT		Arrival LT		Block Time	Flight Time	GCD[NM]	PAX	Ferry	+	
EPWA	EGGW	<input type="checkbox"/>	06 Jul 2022	09:45	06 Jul 2022	10:30	01:45	01:25	788	8	<input type="checkbox"/>		
EGGW	KJFK	<input type="checkbox"/>	06 Jul 2022	11:55	06 Jul 2022	15:55	09:00	08:45	2995	8	<input type="checkbox"/>		
KJFK	LSGG	<input type="checkbox"/>	07 Jul 2022	17:00	08 Jul 2022	09:15	10:15	10:00	3356	0	<input checked="" type="checkbox"/>		

Optional Trip Settings

Optional trip settings

Create non confirmed trip when contract is sent☒

Default due time for optional trips [hhh:mm]

'Optional Settings' option

Optional Trip Settings sub-section contains the following options:

- **Create non-confirmed trip when contact is sent**
- **Default due time for optional trips [hhh:mm]**

Send document: Charter Agreement

Quote ☒ 1 A-BCE

Legs ☐ 18 DEC MEL - NAR ☒ 18 DEC NAR - VNO ☐ 18 DEC VNO - PCD

Document template Email template

TO

FROM

REPLY TO

SUBJECT

TEST

BOOKING OPTION

Dear AirHeaven,
Please find the AGREEMENT attached.
If you have any questions, please let us know.
Best regards,
Thomas Delta

ATTACHMENTS

UPLOAD FILES

You can drag & drop files in this section.

☒ Charter Agreement

☐ Back to Deposits/Quotes

☒ Create non-confirmed trip in ops module

SEND SENDING EMAIL

SEND

'Create non-confirmed trip in OPS module' option

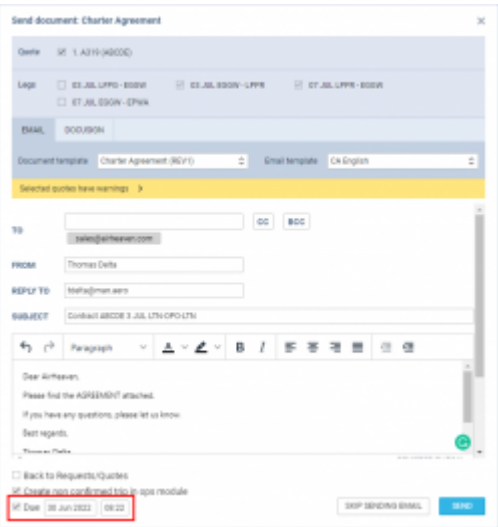
Create non-confirmed trip when contact is sent

The '**Create non-confirmed trip when contact is sent**' checkbox allows activating the '**Create non-confirmed trip in OPS module**' checkbox in the 'Send document: Charter Agreement' pop-up window ('CONTRACT' status button in the RFQ).

Optional trip settings

Create non confirmed trip when contract is sent☒

Selecting the '**Create non-confirmed trip in OPS module**' and sending the contract to the Client will create a non-confirmed trip (Option) in the OPS section without having to initially go through the 'OPTION' status button. This checkbox is the equivalent of the 'OPTION' status button in the RFQ.



Indication of a due date when creating a non-confirmed trip

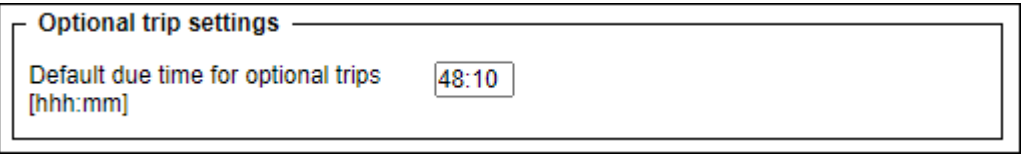
Default due time for optional trips [hhh:mm]

The **Default due time for optional trips [hhh:mm]** allows setting the due time and date for when the non-confirmed trip should be automatically cancelled if the response is not received from the buyer.

The format of the default due date is set to **hhh:mm**. This allows calculating the correct due time and date based on the time when the non-confirmed trip is being created.

EXAMPLE

The due time is set to 48:10, as per the below screenshot:



When creating the non-confirmed trip (either via the 'OPTION' or the 'CONTRACT' status) on the 28th of June at 08:12LT, the due date will automatically be set to the 30th of June at 08:22LT (as per the screenshot on the right).

Invoices & Credit notes

This subsection consists of 3 settings:

- **Due date for invoices**
- **Include taxes in trip price for invoices**
- **Default recharge invoice item tax rate**

Invoices & Credit notes

Set invoices due date days

Include taxes in trip price on invoices ☒

Default recharge invoice item tax rate

Due date for invoices

In this section, you can set up a **default 'Due date'** for the Quote Invoice.

The setting consists of **2 fields**:

1. Input with the number of days
2. Dropdown with the following options:
 - **after issue date** - number of days after the invoice issue date
 - **after invoice date** - number of days after the invoice date
 - **before flight** - number of days before the first flight within the request

As you can see in the example below, the Invoice due date was set to 7 days after the invoice date:

EMAIL	INVOICE	+
Template	Quote Invoice (REV1)	
DOWNLOAD		
Invoice No.	<input type="text" value="INV123456"/>	Company name <input type="text" value="AirHeaven"/>
Invoice Date	<input type="text" value="10 Sep 2021"/>	Address <input type="text" value="London Rd, L13 W14 London, U.K."/>
Issue Date	<input type="text" value="10 Sep 2021"/>	
Due Date	<input type="text" value="17 Sep 2021"/>	Country <input type="text" value="GBR"/>
Currency	<input type="text" value="EUR"/>	EU VAT# <input type="text"/>

By default, the 'Due date' is set to 10 days after the issue date. This setting also applies to 'Credit Notes'

Include taxes in trip price for invoices

Include taxes in trip price for invoices setting allows deciding whether the tax should be displayed as a separate item on the Invoice section of the request.

It works as follow:

- **Ticked** - tax is included in the total price in the Invoice section

Items	Net	VAT	Gross	+
Fee for London - New York on 12-02-2022	112137.00	EUR N/A %	112137.00	EUR
RESET ITEMS				Total 112137.00 EUR

- **Unticked** - the default setting, tax is presented as a separate item in the Invoice section

Items	Net	VAT	Gross	+
Fee for London - New York on 12-02-2022	110836.29	EUR N/A %	110836.29	EUR
UK Air Passenger Duty Tax	1300.71	EUR N/A %	1300.71	EUR
RESET ITEMS				Total 112137.00 EUR

Default recharge invoice item tax rate

Default recharge invoice item tax rate allows setting up a default VAT rate for the items listed on the Recharge Invoice.

The rate will automatically apply and can be presented both in an email and the Invoice document.

Items	Net	VAT	Gross	+
Wi-Fi	1200.00	USD 5 %	1260.00	USD
RESET ITEMS				Total 1260.00 USD

Subcharter settings

Operator price: 2300 EUR Margin: 6 % Throttle capacity: 1500 EUR

BASIC

MESSAGES

ADVERTISING

Registration: 0-8028 AC Type: PROD PAX capacity: 12

Operator: ABC Contact email: sales@abc.com Phone number: +44 1753 1280

Operator ICAO: ABC Manufacture year: 2018 Year of refurbishment: 2021

CPT: Flight attendant: Flight attendant

Crew phone: Operator Cancellation Policy:

Pictures:

EDIT PICTURES

inside

outside

28 Jan 10:00 (PM) - LPM 12:40

Flight no: ABC1234

Handling (PHN): HULCONS EXECUTIVE

Handling (PHN): 9-OPS

Default handler assigned

'Select handling agents on subcharters automatically' setting allows deciding if the preferred

handling agents should apply automatically to the subcharter requests for quotes:

- **Checkbox ticked** - default setting. preferred handler automatically assigned to the request on a subcharter
- **Checkbox unticked** - preferred handler not assigned to the request on a subcharter

Subcharter settings
Select handling agents on subcharters automatically ☒

Phonebook settings

[Video Tutorial](#)

New contact

Type ☐ Company ☒ Person

BASIC DOCUMENTS CHARACTERISTIC SHARING

Title

Job title

Operator base

Labels

Account

Other accounts

This field is required

Account required warning

Phonebook settings
Is account required ☒

Is account required setting allows making the 'Account' field as required while creating a new contact ('Person') in the 'New Phonebook'.

If the checkbox is ticked, the 'Account' has to be selected, otherwise, Leon will issue a warning and will not allow saving a new contact

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