'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'.

Below subsections explain each setting in details.

Default notes

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'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 involce recipement email 10 this field and all involces / credit soles will be used on this address	man@pmail.com
Default Lifting address?	TE Aviation St
Default billing address2	
Default billing postal code	ALS BRF
Default billing city	Chy
Default billing country	United Kingdom (OBR)

'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

All average strength	n zonoci	
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UNITE CARD IN CONC.	*	
CACHURON DOING		

'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).

Currency list



'Currency list'

Currency list will define which currencies should be available in the requests made on the own fleet and subcharters, also when setting up the invoice or Fees the list will be visible.

In case of no currency is defined all will be available to be used.

Quote Request Statuses

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PR 1996													
PR 8744					I	06.49	96.25	2790					
		• 5404					06.25	2766					

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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 - Rejected - and save the updated settings.

Country VAT



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

Aire	wit #400	К	0 Pric	a 140		DHR ©	NAT.				
ADEP	ADES	тва	Departure 17		Arrival 17		Meck Time	right Time		PAR	Party
PRO	1000		29 May 2021	08.25	29 May 2021	01.40	0125	00.47	282	0	8
run.	180		29 May 3021	10:00	29 May 3021	11:00	81.68	49.55	165	1	
URO .	ware.		29 May 3021	11:29	29 May 2021	1210	10.50	40.12	185		10

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:

C 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	~	12 Feb 2022	10:00	12 Feb 2022	13:30	04:30	03:56	1375	2		

• 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	✓	12 Feb 2022	TBA	12 Feb 2022	TBA	04:30	03:56	1375	2		

Minimal price margin

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Minimum price margin warning

Quote settings —	
Require departure and arrival times to be set regardless of TBA setting	
Minimal price margin	5

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 recalculating the price of the request if the itinerary elements are changed within the sales section.

Quote settings	
Automatically update quote on schedule change	

There are two possible scenarios:

- **Option ticked** any changes within the quoted itinerary automatically recalculate the pricelist elements and the final price
- Option unticked manual recalculation is required using the 'RECALCULATE' button

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.

C 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:

Aircr	aft B-AR	TI	≎ Prie	ce 🔨	79600	EUF	₹≎ V	AT	%							
ADEP	ADES	TBA	Departure L1	-	Arrival LT		Block Time	Flight Time	GCD[NM]	PAX	Ferry	+			S	
LSGG	EGGW		06 Jul 2022	09:45	06 Jul 2022	10:30	01:45	01:30	423	8		+	ŵ	- ð		
EGGW	KJFK		06 Jul 2022	11:00	06 Jul 2022	15:00	09:00	08:45	2995	8						
KJFK	LSGG		06 Jul 2022	12:29	07 Jul 2022	04:44	10:15	10:00	3356	0	~					
Aircr	aft B-AR	ТІ	≎ Prie	ce 🔨	80600	EUF	₹≎ V	AT	%							
Aircr	aft B-ART ADES	TI TBA	≎ Prie Departure LT		80600 Arrival LT	EUF	R O V Block Time	AT Flight Time	% GCD[NM]	PAX	Ferry	+			ß	
						EUF	Block	Flight		PAX 8	Ferry	+			ය ▲	
ADEP	ADES	ТВА	Departure L1	-	Arrival LT 06 Jul 2022		Block Time	Flight Time	GCD[NM]		-	+				

• 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:

Aircr	aft B-AR1	ГІ	≎ Pric	e 🔨	80600	EUR	¢ v	AT	%					
ADEP	ADES	TBA	Departure LT		Arrival LT		Block Time	Flight Time	GCD[NM]	PAX	Ferry	+	ø	
EPWA	EGGW		06 Jul 2022	09:45	06 Jul 2022	10:30	01:45	01:25	788	8			A	
EGGW	KJFK		06 Jul 2022	11:55	06 Jul 2022	15:55	09:00	08:45	2995	8			A	
KJFK	LSGG		07 Jul 2022	17:00	08 Jul 2022	09:15	10:15	10:00	3356	0			A	
Aircr	aft B-ART	ΓΙ	≎ Pric	e 🔨	80600	EUF	• v	AT	%					
Schedule in the OPS module has been modified.														
ADEP	ADES	TBA	Departure LT		Arrival LT		Block Time	Flight Time	GCD[NM]	PAX	Ferry	+	g	
EPWA	EGGW		06 Jul 2022	09:45	06 Jul 2022	10:30	01:45	01:25	788	8			A	
EGGW	KJFK		06 Jul 2022	11:55	06 Jul 2022	15:55	09:00	08:45	2995	8			A	
KJFK	LSGG		07 Jul 2022	17:00	08 Jul 2022	09:15	10:15	10:00	3356	0			A	

Optional Trip Settings

1	Optional trip settings	
	Create non confirmed trip when contract is sent	
	Default due time for optional trips [hth:mm]	48:10

'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 docur	ment: Charler Agreement	×
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'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).

Create non confirmed trip when contract is sent	Optional trip settings	
	optional trip octango	

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.

Send docum	rent: Charler Agreement 🛛 🕹										
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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:

Default due time for optional trips [48:10] [hhh:mm]	Coptional trip settings	
		48:10

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

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9/12

- Invoices & Credit notes
Set invoices due date 10 days after issue date 🗸
Include taxes in trip price on invoices 🗹
Default recharge invoice item tax rate 5

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)	0			🖄 DOWNLOAD
Invoice No.	INV12	3456		Company name	AirHeaven	
Invoice Date	10 Sep	2021		Address	London Rd, L13 W14 London, U.K.	
Issue Date	10 Sep	2021		Address		
Due Date	17 Sep	2021		Country	GBR	
Currency	EUR		\$	EU VAT#		

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 %	5 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	Gros	S		+
Wi-Fi		1200.00	USD	5	%	1260.00	USD	
RESET ITEMS					т	otal 1260.00	USD	

Subcharter settings

The below settings apply to the subcharter quotes

Select handling agents on subcharters automatically

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Operator price	23000	8.4.0	Margin	0	¢.	Thirdparty	2500	6M D
BADE MED	ADD ADDITES							
Registration	8-8028	•	ACT(9#	P900		PEX capacity	12	
Operator	ARC .	•	Contact email	savegeo: con		Phone-number	+64 8706 1280	
Operator ICHO	ARC		Manufacture year	2018	-	Two of Net up obment	3021	\$
OPT			40			Fight attendant		
Cren phone								
Carroellation gointy	Operator Denositation	Police						
Pictures	EDT PICTURES							
A								
25 Am 1000 EPW	IA - UPMIN 12:40							
Fight No.	ABC1204		Handing (IPWR)	NELCOME EXECUTIVE	2	Handling (LFIIM) 5	-0P9	:

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	

Sales Checklist items

This section allows selecting the default 'Sales Checklist Items' settings that will apply to the subcharter quotes.

Subcharter settings		
Sales Checklist Items		
Z PAX List	Catering (Trip)	Invoices (Trip)
Payments (Trip)	Luggage requested	Flight briefing (Trip)
Ground Transport (Trip)	Contract signed (Trip)	Ground Transport Invoice (Trip)
CATERING AND GROUND TRANSPORT	□ CHECK TRAVEL RIGHTS	Catering
Flight Brief		

Any changes to the settings will only apply to the subcharter quotes added after the update.

Phonebook settings

Video Tutorial		 1

Type (Company @ Pe	rson	
BASIC	DOCUMENTS	CHARACTERISTIC	SHARING
Title			
100.1710			
Operator bas		-	
abels		This Sold	is required
Account		- I	
Other account	N		

Account required warning

Phonebook settings	1
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



Permanent link: https://wiki.leonsoftware.com/leon/sales-module-tab-in-general-settings?rev=1678703843

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