

'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



'Default notes'

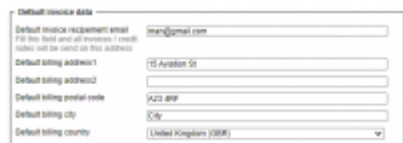
Default notes subsection allows inserting:

- 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).

Currency list

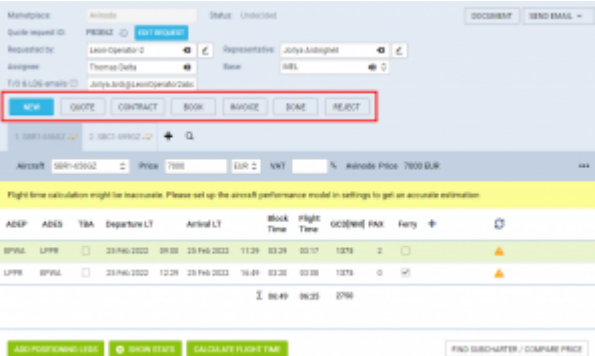


'Currency list'

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.

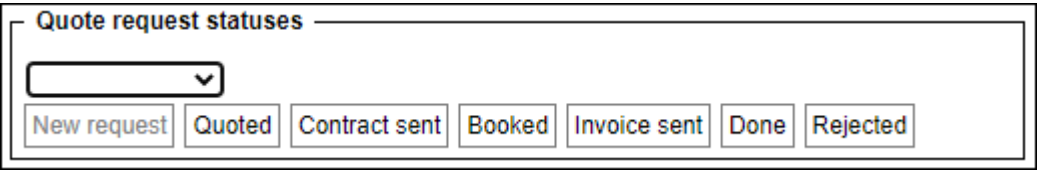
Quote Request Statuses



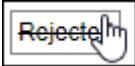
Statuses selected in the settings

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.



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

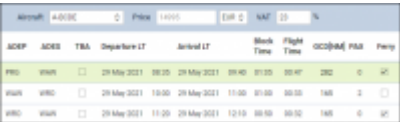
To remove the status from the list simply click on the status icon -  - and save the updated settings.

Country VAT



Country VAT

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



ACRYP	ACRER	TBA	Departure LT	Arrival LT	Block Time	Flight Time	ACCRATE	PAID	Party
PRG	WUH	<input type="checkbox"/>	29 May 2021 09:00	29 May 2021 09:40	01:00	00:40	20%	0	45
WUH	WUH	<input type="checkbox"/>	29 May 2021 10:00	29 May 2021 11:00	01:00	00:00	10%	0	0
PRG	WUH	<input type="checkbox"/>	29 May 2021 11:00	29 May 2021 12:10	00:50	00:00	10%	0	45

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 add taxes to the quote

Automatically add taxes to the quote ☒

This option will allow adding/removing automated calculation of passenger taxes on the quote.

If the option is **ticked** the passenger taxes will be automatically calculated in the quote.

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.

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]

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 document: Charter Agreement

Quote 1 A-BCE

Legs 18 DEC MEL - NAR 18 DEC NAR - WRO 18 DEC WRO - POZ

Document template Charter Agreement (REV) Email template CA English

To client@airheaven.com BCC

FROM Thomas Della

REPLY TO sales@leonsoft.com

SUBJECT Contract 8-BCE 18 DEC NAR-WRO

Dear Airheaven,

Please find the AGREEMENT attached.

If you have any questions, please let us know.

Best regards,

Thomas Della

ATTACHMENTS

UPLOAD FILES

You can drag & drop files in this section.

Charter Agreement

Back to Dispatch Quotes

Create non-confirmed trip in ops module

SEND BUSINESS EMAIL

SEND

'Create non-confirmed trip in OPS module' option

Leonsoftware Wiki - <https://wiki.leonsoftware.com/>

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.

Send document: Charter Agreement

Client: 1_A219 (AG202)

Legs:

☐ ES_JSL LPPH - BISSR

☐ ES_JSL BISSR - LPPH

☐ ET_JSL LPPH - BISSR

☐ ET_JSL BISSR - LPPH

Email: BOD.BISSR

Document template: Charter Agreement (RFQ)Email template: CA English

Selected quotes have warnings

TO: sales@airheaven.com

FROM: Thomas Delta

REPLY TO: thomas@man.com

SUBJECT: Contract 2022 3_JSL LTH OPS LTH

Paragraph

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

☐ Back to Requests/Quotes

☐ Create non confirmed trip in ops module

OKSENDING EMAIL

OK

RF Date: 08 Jun 2023 09:22

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:

Optional trip settings

Default due time for optional trips [hhh:mm]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**
- **Include fees in Invoice/Proforma**

Invoices & Credit notes

Set invoices due date10 daysafter issue date

Include taxes in trip price on invoices

Default recharge invoice item tax rate5

Include fees in Invoice/Proforma

Include fees only on proforma invoice?

Aircraft fees included on Invoice

Aircraft Parking Fee

PAX Block Fee

Add fee

Airport fees included on Invoice

Catering Fee

Arrival PAX Fee

Add fee

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:

Leonsoftware Wiki - <https://wiki.leonsoftware.com/>

EMAIL

INVOICE

+

Template

Quote Invoice (REV1)

DOWNLOAD

Invoice No.

INV123456

Company name

AirHeaven

Invoice Date

10 Sep 2021

Address

London Rd, L13 W14
London, U.K.

Issue Date

10 Sep 2021

Country

GBR

Due Date

17 Sep 2021

EU VAT#

Currency

EUR

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	
<input type="text" value="Wi-Fi"/>	<input type="text" value="1200.00"/>	USD <div><input type="text" value="5"/></div> %	<input type="text" value="1260.00"/>	USD
<input type="button" value="RESET ITEMS"/>				Total 1260.00 USD

Include fees in Invoice/Proforma

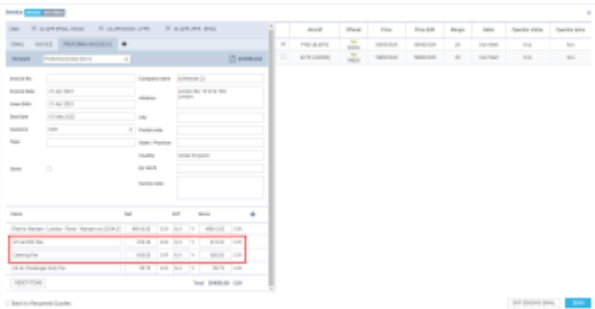
In the **Include fees in Invoice/Proforma** section it is possible to select the default elements of the 'Aircraft/Airport Fees' that will show on the Invoice/Proforma Invoice.

Include fees in Invoice/Proforma

Include fees only on proforma invoice ☒

Aircraft fees included on Invoice

Airport fees included on Invoice



'Include fees in Invoice/Proforma' example

If the element of the fees exists in the quotation pricelist, it will also be added to the Invoice/Proforma Invoice, as per the screenshot.

Selecting the **Include fees only on proforma invoice** checkbox will make the selected items to only display on the Proforma Invoice in the Sales panel.

Subcharter settings

The below settings apply to the subcharter quotes

Select handling agents on subcharters automatically

Operator price23000EURMargin0%Therapeutic commission1500EUR

BASICMESSAGESADVERTISEMENTS

RegistrationA-8008AC TypePRODPAX capacity12

OperatorABCContact emailADMIN@ABC.COMPhone number+44 8750 1230

Operator ICAOABCManufacture year2018Year of Retirement2021

CPTFlight attendant

Clear phone

Cancellation policyOperator Cancellation Policy

Pictures

EDIT PICTURES

main

sub

29 Jan 10:00 EPM - LPM 12:40

Flight noABC1234

Handling (PAX)WELCOME EXECUTIVEHandling (CPT)S-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☒

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

☒ PAX List

☐ Payments (Trip)

☒ Ground Transport (Trip)

☐ CATERING AND GROUND TRANSPORT

☒ Flight Brief

☒ Catering (Trip)

☐ Luggage requested

☐ Contract signed (Trip)

☐ CHECK TRAVEL RIGHTS

☒ Invoices (Trip)

☒ Flight briefing (Trip)

☐ Ground Transport Invoice (Trip)

☐ Catering

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

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Phonebook settings

[Video Tutorial](#)

New contact

Type ☐ Company ☒ Person

BASICDOCUMENTSCHARACTERISTICSHARING

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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Permanent link:
<https://wiki.leonsoftware.com/leon/sales-module-tab-in-general-settings?rev=1688803228>

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