

# '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'

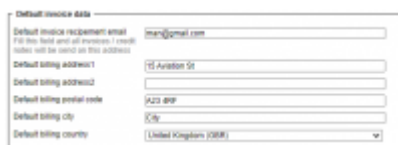
**Default notes** subsection allows inserting:

- 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

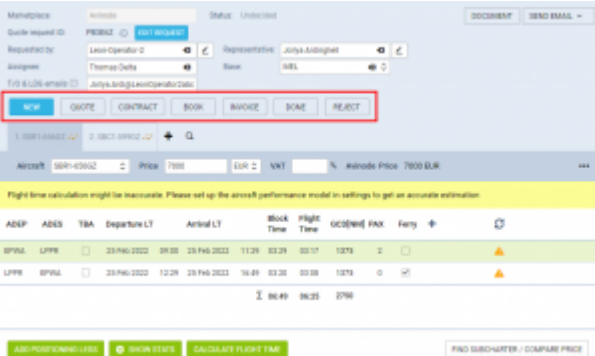


'Currency list'

**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.

Quote request statuses

New request

Quoted

Contract sent

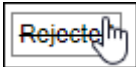
Booked

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

Calculate VAT proportionally domestic to international

☒

Include ferry flights

☐

France (FRA)

10

✖

Poland (POL)

9

✖

Add country and VAT rate

Country VAT

In **Country VAT** it is possible to select the following options:

- **Calculate VAT proportionally domestic to international** - explained below and connected directly to the selected rates for countries
- **Include ferry flights** - option to include ferry flights in the VAT calculations. By default, Leon calculates VAT on the passenger flights only
- **Rates** - setting up the default VAT rate for specific countries

## Rates

Aircraft	ABCDE	Price	14995	EUR	VAT	23	%
ADEP	ADES	TBA	Departure LT	Arrival LT	Block Time	Flight Time	GCS(NM) PAX Ferry
PRG	WAW	<input type="checkbox"/>	29 May 2021 06:35	29 May 2021 09:40	01:05	00:47	282 0 <input checked="" type="checkbox"/>
WAW	WRO	<input type="checkbox"/>	29 May 2021 10:00	29 May 2021 11:00	01:00	00:33	165 2 <input type="checkbox"/>
WRO	WAW	<input type="checkbox"/>	29 May 2021 11:20	29 May 2021 12:10	00:50	00:32	165 0 <input checked="" type="checkbox"/>

Example of default VAT rate application

In order to select the VAT rates list simply select the country and insert the rate for this country. If more country rates need to be inserted, click on the 'Add country and VAT rate' button and insert the details for the next country.

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 by default unless the 'Include ferry flights' is selected

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.

## Calculate VAT proportionally domestic to international

The **Calculate VAT proportionally domestic to international** option allows to calculate the VAT rate on both domestic and international flights proportionally to the flight time within the country.

If this setting is applied, the VAT rates are calculated separately for each country and added to give the **final VAT rate**, as per below:

**A.** VAT rate for the country

**B.** Flight time for the domestic flight

**C.** Total flight time within the trip, subject to the 'Include ferry flights' setting

The **formula is as follows**:

$$A \times B / C = \text{Country VAT rate}$$

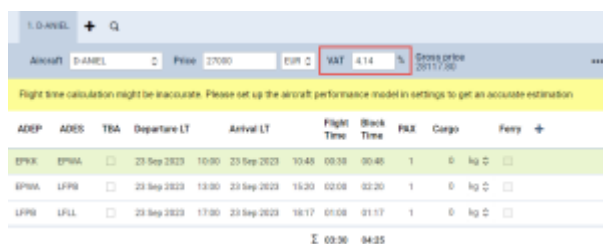
VAT rates are not calculated for the **International flights**.

### EXAMPLE

In this example, the trip consists of three flights of which two are domestic - Poland and France - and one is international.

**Total flight time** for all 3 flights is 03:30.

**VAT rates** are 9% for Poland and 10% for France.



The screenshot shows a flight quote interface. At the top, there's a summary bar with 'Aircraft: D-AMBL', 'Price: 27080', 'EUR', and a highlighted 'VAT: 4.14' box. Below this is a table of flight segments. The first two segments are domestic flights (LFPB to EPWA and LFPB to LFPB) with VAT rates of 9% and 10% respectively. The third segment is an international flight (LFPB to LPL) with a VAT rate of 0%. The total flight time is 03:30.

ADP	ADP	TBA	Departure LT	Arrival LT	Flight Time	Block Time	PR	Cargo	Ferry
EPWA	EPWA		23 Sep 2023 10:00	23 Sep 2023 10:45	00:45	00:45	1	0	kg
LFPB	LFPB		23 Sep 2023 13:00	23 Sep 2023 15:20	02:20	02:20	1	0	kg
LFPB	LPL		23 Sep 2023 17:00	23 Sep 2023 18:17	01:17	01:17	1	0	kg
					Σ 03:30	04:25			

Example of proportional VAT calculations

The **calculations of VAT rate are as follows**:

- **Leg 1** - Domestic in Poland - Flight time is 00:30 - **Calculation:**  $9\% \times 00:30 / 03:30 = 1.28\%$
- **Leg 2** - International flight - **Calculation:** VAT = **0%**
- **Leg 3** - Domestic in France - Flight time is 01:00 - **Calculation:**  $10\% \times 01:00 / 03:30 = 2.86\%$

Based on the above 3 legs calculations, **VAT rate calculated for this trip is 4.14%:**

- $1.28\% + 2.86\% = 4.14\%$

## 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

Send document: Flight Quotation

Quote ID: 1-43214-8235

Document template: a Flight Quotation (PDF)

Email template: Individual details

Send document to:

At least one of the quotes is below defined margin

Check the following warnings: check when below defined margin

TITLE:

FROM:

ASAP TO:

SUBJECT:

Use Merkle system

Please find attached your Flight Quotation from Leonsoft

Use Projects

Use Teams

ATTACHMENTS

PDF File

You can attach up to 10 files in the system

or a Flight Quotation

Back to Requests/Quotes

SEND DOCUMENT

Minimum price margin warning

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

**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:

Last  
update:  
2023/10/18  
21:10

leon:sales-module-tab-in-general-settings <https://wiki.leonsoftware.com/leon/sales-module-tab-in-general-settings?rev=1697663402>

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"/>	

## Recalculate mode

The **Recalculate mode** contains two setting options that recalculate elements of the booked quote accordingly when the trip is amended by the OPS.

Quote settings

Recalculate mode

☐ Update units but keep prices

☒ Update units and prices

Label	Unit	Cost	Quantity	Total
Extra Fee		0.00	1.00	0.00
Post/Reply Fee	18.75	20.00	0.00	0000.00
Extra Reply Fee	30.00	20.00	0.00	0.00
Services	1	40.00	0.00	0000.00
Landmark Fee			0.00	0000.00
<a href="#">Request Charges</a>				

↓

Label	Unit	Cost	Quantity	Total
Extra Fee		0.00	1.00	0.00
Post/Reply Fee	18.75	20.00	0.00	0000.00
Extra Reply Fee	30.00	20.00	0.00	0.00
Services	1	40.00	0.00	0000.00
Landmark Fee			0.00	0000.00
<a href="#">Request Charges</a>				
Principles Contact Fee	1	40.00	0.00	0.00

'Update units and prices' recalculation



## Update units and prices

This recalculation mode will:

- revert the units to the default units based on the default calculations, as long as the units are calculated automatically
- reinstate the removed elements of the pricelist, as long as the elements are the default within the selected pricelist
- keep the elements added manually in the quote

In the **example** on the right the following happened upon the update:

- manually added element called 'Extra Fee' remained in the quote
- removed 'Portuguese Carbon Tax' was reinstated
- units in 'Services' were recalculated from 2 to 1

## Update units but keep the prices

---

## Cost & margin total price update mode

**Cost & margin total price update mode** settings apply to the requests based on the 'Cost&Margin' method of quoting. It allows selecting which part of the quote should be adjusted upon changing the Total Price.

**Quote settings**

Cost & margin total price update mode

☒ Select manually  
☐ Update margin  
☐ Update cost

**Cost & margin total price update mode** contains 3 options:

- **Selected manually** - user decides which part should be recalculated when the total price is changed
- **Update margin** - the margin is recalculated when the total price is changed
- **Update cost** - margin remains unchanged but the 'Extra Fee'/'Discount' element of the pricelist is added to the quote with the relevant value

## EXAMPLE

Pricing: 

ABOX W/ DEFAULT

ABOX FIXED

RECALCULATE

SELECT QUOTE

Label	Unit	Cost	Currency	Total
Port Flight Fee	05.15	x 2000	EUR	10500.00
Ferry Flight Fee	00.20	x 1800	EUR	360.00
Services	1	x 4500	EUR	4500.00
Landing Fee			EUR	9000.00

Add new fee

Cost

EUR24033.33

Margin

20 %

Price without commission

EUR31915.00

Third party commission

604.12

Total price

EUR32519.12

Original request

The original request is presented in the screenshot on the right-hand side:

- Total Price is €33876.59
- Margin is 20%

For the clarity of selection, the **Select manually** mode is set in the Sales Module settings

1. The Total Price is changed to €35000.00

Once the Total price is amended, Leon will ask which part of the quote should be adjusted.

Third party commission

Total price

Update: 

Cost

Margin

35000

Pricing: 

ABOX W/ DEFAULT

ABOX FIXED

RECALCULATE

SELECT QUOTE

Label	Unit	Cost	Currency	Total
Port Flight Fee	05.15	x 2000	EUR	10500.00
Ferry Flight Fee	00.20	x 1800	EUR	360.00
Services	1	x 4500	EUR	4500.00
Landing Fee			EUR	9000.00

Add new fee

Cost

EUR24033.33

Margin

20.00 %

Price without commission

EUR31915.00

Third party commission

604.12

Total price

EUR32519.12

Margin-based recalculation of the quote

Pricing: 

ABOX W/ DEFAULT

ABOX FIXED

RECALCULATE

SELECT QUOTE

Label	Unit	Cost	Currency	Total
Service Fee			EUR	696.73
Port Flight Fee	05.15	x 2000	EUR	10500.00
Ferry Flight Fee	00.20	x 1800	EUR	360.00
Services	1	x 4500	EUR	4500.00
Landing Fee			EUR	9000.00

Add new fee

Cost

EUR25032.06

Margin

20 %

Price without commission

EUR31915.00

Third party commission

604.12

Total price

EUR32519.12

Cost-based recalculation of the quote

In the case of the 'Update margin/cost' settings selected in the Sales module settings, recalculation will happen automatically.

2. Margin-based update of the quote

If the **Margin** option is selected:

- Elements and the cost remain unchanged
- Since the Total price is increased from €33876.59 to €35000.00, the Margin value is recalculated from 20% to 22.82% based on the cost and the new Total price

### 3. Cost-based update of the quote

If the **Cost** option is selected:

- Margin remains unchanged at 20%
- Since the Total price is increased from €33876.59 to €35000.00, the **'Extra Fee'** element is added to the pricelist with the relevant amount calculated based on the new Total Price and unchanged margin

## Optional Trip Settings

**Optional Trip Settings** sub-section contains the following options:

Optional trip settings

Create non confirmed trip when contract is sent

☒

Default due time for optional trips [hhh:mm]

48:10

Send document: Charter Agreement

Quote

1 A-RCE

Legal

☐ 18 DEC MEL - RUS

☒ 18 DEC RUS - VRO

☐ 18 DEC RND - POZ

Document template

Charter Agreement (RUS)

Email template

Ck English

TO

client@leonsoftware.com

BCC

FROM

Thomas Delta

REPLY TO

leon@leonsoftware.com

SUBJECT

Contract 8-BCC 18 DEC RUS-VRO

Dear Mr/Ms/Ms,

Please find the AGREEMENT attached.

If you have any questions, please let us know.

Best regards,

Thomas Delta

ATTACHMENTS

UPLOAD FILES

Uploading & drop files in this section.

8/ Charter Agreement

Back to Diagnostic/Quotes

☒ Create non confirmed trip in ops module

SEND DOCUMENT EMAIL

SEND

'Create non-confirmed trip in OPS module' option

### Create non-confirmed trip when contact is sent

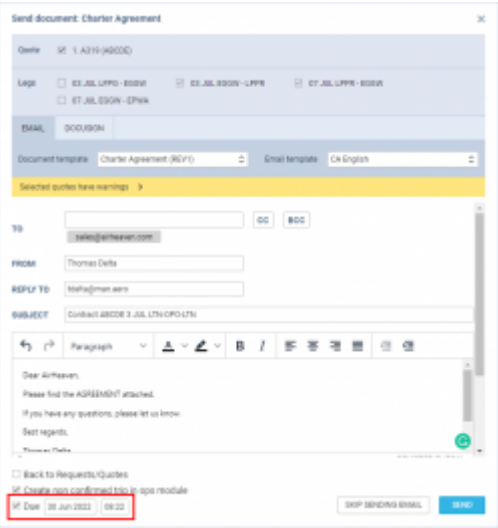
The **'Create non-confirmed trip when contact is sent'** checkbox allows activating the **'Create non-confirmed trip in OPS module'** checkbox in the 'Send document: Charter Agreement' pop-up window ('CONTRACT' status button in the RFQ).

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

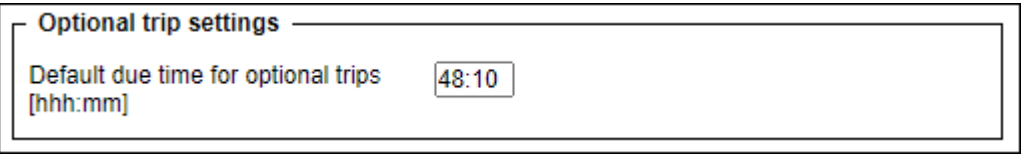
Default due time for optional trips [hhh:mm]

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**
- **Include fees in Invoice/Proforma**

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

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:

EMAILINVOICE+

TemplateQuote Invoice (REV1)

DOWNLOAD

Invoice No.INV123456

Invoice Date10 Sep 2021

Issue Date10 Sep 2021

Due Date17 Sep 2021

CurrencyEUR

Company nameAirHeaven

AddressLondon Rd, L13 W14  
London, U.K.

CountryGBR

EU VAT#

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

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## 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

## 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

Aircraft Parking Fee

✖

PAX Block Fee

✖

Add fee

Airport fees included on Invoice

Catering Fee

✖

Arrival PAX Fee

✖

Add fee

Invoice	Invoice No.	Invoice Date	Invoice To	Invoice From	Invoice Status	Invoice Total
1	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
2	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
3	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
4	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
5	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
6	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
7	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
8	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
9	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
10	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
11	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
12	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
13	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
14	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
15	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
16	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
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96	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
97	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
98	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
99	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00
100	123456789	2024-05-10	ABC COMPANY	DEF COMPANY	Open	1000.00

'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 price: 23000 EUR Margin: 6 % Third party commission: 1500 EUR

REGISTRATION

AC Type: PROO PAX capacity: 12

Operator: ABC Contact email: admin@abc.com Phone number: +998 8796 1230

Operator ICAO: ABC Manufacture year: 2018 Year of last maintenance: 2021

CPT: 80 Flight attendant: 1

Chen phone:

Cancellation policy: Operator Cancellation Policy

Pictures: 

EDIT PICTURES

inside

outside

28 Jan 10:00 EPW - LPMK 12:40

Flight No: ABC1234

Handling (EPW): NSUCONS EXECUTIVE

Handling (LPMK): 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.

## 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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