Requests/Quotes

On the main page of the **Requests/Quotes** panel you can see the list of **Quotes** downloaded from **Avinode** as well as those created in Leon.

Quotes unread/unedited are displayed in **bold** to all users until it is read/edited by the particular user of the operator.

L-M1U2MS	**New request**	FlyHigh Ltd.	**D-LEON (G450)**	**28 Mar 2019 EPWA - EGGW 0 PAX**

When a new quote is added, Leon shows a message 1 NEW REQUEST, 0 UPDATED REQUESTS - click it and the new quote will appear on the screen.

The main page displays several columns:



Requests/Quotes - the view on the list of quotes

- **ID** - quote request ID.
- **Status** - showing the status of the quote: New request, Quoted, Booked, Option, Brief sent, Contract sent, Rejected, or Closed.
- **Requester** - requesting client's name or a company. If the Requester is an account ('Is account' checkbox ticked in the Requester profile) it will be indicated by '(Account)' next to the Requester name in the selection dropdown
- **Aircraft** - requested aircraft registration & type.
- **Aircraft offered** - displayed the aircraft registrations for which the quotes were sent to the Client
- **Aircraft sold** - displays the registration of the booked aircraft (status BOOK)
- **Checklist** - displays the overall status of the Sales checklist on the booked trip. Hovering the mouse over the dot will display the detailed statuses of each element of the checklist. Only the elements that apply to trip are displayed
- **Itinerary** - requested itinerary. If there are requests with the same itinerary details, the colour bar will appear on the left-hand side. Hovering the mouse over the bar will display the following information: 'We use colours to mark RFQs having the same dates, routing, and PAX number. Colours allow finding same requests very quickly.'

L-882JMR	New request	A-BCDE (A319)	24 Jun 2021 EPWA - EGLL 1 PAX	23 Sept, 18:20 Leon
L-KXP2AQ	**New request**	**B-ARTI (F900)**	**24 Jun 2021 EPWA - EGLL 1 PAX**	**23 Sept, 18:17 Leon**

- **Created** - informs when the request has been created. Switched off by default, can be switched on in the '...' filter
- **Updated** - day, month & exact time (LT) of updating the quote as well as the source (Avinode or Leon).

- **Assignee** - first person who is editing unread RFQ and designated to work with the quote. Underneath the person's name, Leon displays the Base to which the quote is assigned in the quote edit section
- **Quote** - list of possible aircraft quotes with prices - the lowest price is always on top
- **Booking ratio** - the percentage of booked quotes from the last 90 days. Right next to the percentage value Leon shows in brackets the number of booked quotes and after the slash, the number of all quotes **per a requester**
- **Broker revenue** - the sum of prices (in operator's currency) from the booked quotes - from the last 90 days
- **Avinode price** - column presenting the price from Avinode initial request
- **Messages** - Leon displays all comments added in the quote's edition - unread 1 and read 1
- **Action** - hover the mouse over and there are **3 icons** available: **Trash icon** to delete the quote, **Clone icon** to copy the quote, and **Envelope icon** to mark the quote as 'Read' or 'Unread'

In the top-right corner there is a ••• icon including **filtering** options:

- **Columns** - here you can choose which columns are to be displayed in the list of requests
- **Preferred airport code** - you can switch between ICAO and IATA codes for the whole 'Requests/Quotes' panel

Use **3** available fields on top of the page to filter the list of quotes:

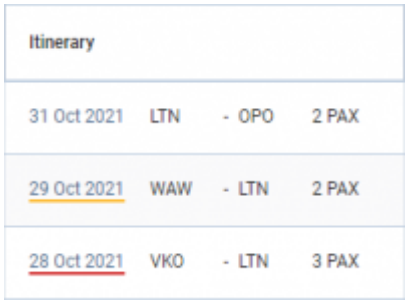
- **Type to search** - you can type any part of the ID or Requester to find the quote. Additionally, you can search by the **Airport code** or **Routing**
- **Status** - Leon shows 'all' quotes by default - click to open the drop-down box and select the status to narrow down the list of quotes.
- **Show** - you can filter by the following:
  - **All** - displaying either all requests
  - **With unread messages** - displaying only the requests with unread messages
  - **Empty leg requests** - displaying only requests for empty legs coming from Avinode
  - **Owner requests** - displaying trips requested by the owner in the Owner App ('Owner' label in the 'Requester' column)
  - **Sold only** - displays only booked requests (status BOOK)
  - **Updated in OPS** - displays the quotes with the changes applied in the OPS section but not updated in the 'Requests/Quotes'
- **Show also archived** - checkbox that allows displaying archived requests. The request is considered as 'Archived' if the status is set to either 'Rejected' or 'Done' or if the itinerary is scheduled before 'NOW'. 'Archived' requests are indicated on the list of requests by the grey bar on the left-hand side and the 'Archived' label underneath the status in the 'Status' column. The Requests list is checked every **6 hours**



'Filter' option

- **FILTER** - allows filtering by:
  - **Assignees** - sales person(s) assigned to quotes
  - **Tags** - tag(s) assigned to quotes





Timeframe indicators in main RQ view

In the **Itinerary** column Leon indicates the timeframe to the start of a flight by underlining the specific leg as per below:

- 28 Oct 2021 - less than 24h left to the scheduled requested flight
- 29 Oct 2021 - less than 72h left to the scheduled flight
- 31 Oct 2021 - more than 72h left to the scheduled flight

The abovementioned indications only apply to the **new requests**.

It is also possible to **sort the requests** by:

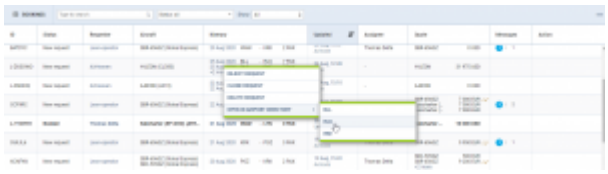
- Updated - sorting based on the date and time of the update of the request
- Itinerary - sorting based on the date and time of departure of the first leg of the itinerary. This does not include the legs that already took off. Only includes the legs from 'now' minus 24h. It does not update the requests list and the green update button is not available
- Created - sorting based on when the quote was created, from the most recent to the oldest or the other way round

There are additional options available directly from the Requests/Quotes view. In order to access the options menu, click with the right button of the mouse.

The available options are:

- **REJECT REQUEST** - allows to quickly reject a request
- **CLONE REQUEST** - option to clone specific requests. Option briefly described below
- **DELETE REQUEST** - option to delete request. Option briefly described below
- **ASSIGN TO** - option to assign the request to a person and base
- **OPEN IN AIRPORT DIRECTORY** - allows opening airport information
- **SEND MESSAGE** - allows sending a reminder message. Option briefly described below
- **SHOW STATISTICS** - displays statistics of quoted and booked routings. Option described below

Open in Airport Directory

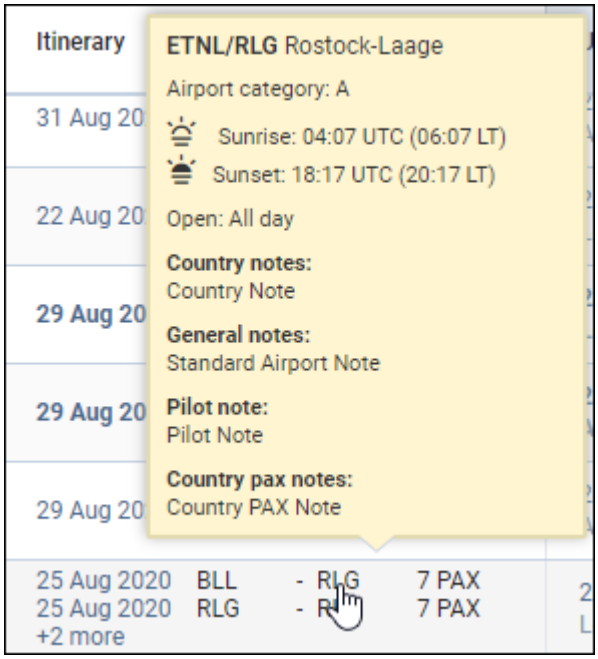


Option to preview airport in Request-Quotes

It is possible to preview selected airport details from the 'Request/Quotes' list.

Simply click with the right click of the mouse on the selected itinerary details and Leon will open a pop-up menu where one of the options is **'OPEN IN AIRPORT DIRECTORY'**. Hovering the mouse over this option allows selecting and previewing an airport from the Itinerary in the Airport Directory (upon clicking on the selected Airport code).

Hovering the mouse over the airport code, displays **the airport details and airport notes**.

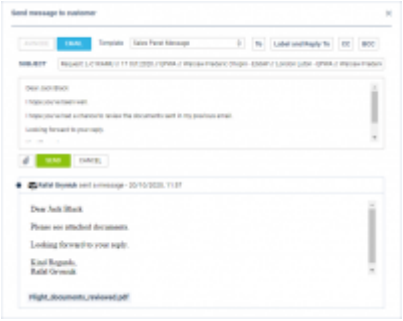


It is also possible to **open the specific request in the new tab by:**

1. clicking on it with the middle scroll button of the mouse, or
2. holding the left 'Ctrl' key and clicking on the left button of the mouse (or a pad)

By clicking any part of the quote Leon gets displayed the **quote edition** page.

Send Message to Customer



Send Message to Customer option

It is possible to send a message to the Client directly from the 'Requests/Quotes' list.

In order to do that, click with the right-click of a mouse on the request of choice and select **SEND MESSAGE TO CUSTOMER** option from the pop-up menu.

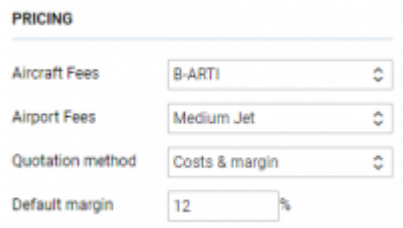
'SEND MESSAGE TO CUSTOMER' window will open where you can:

- select email template from available 'Sales Messages' templates
- attach documents

If the quote comes from **Avinode**, the 'AVINODE' button will be active which will allow sending messages directly to the Avinode chat.

History of correspondence will display below the current message.

New Quote



'Pricing subsection in 'Fleet' settings

It is possible to quote trips based on 2 different methods:

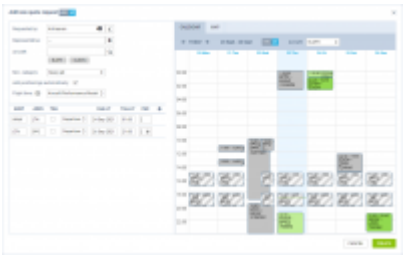
- **Price based**
- **Costs & margin**

The **default method** of quoting can be selected in the 'Settings' > 'Fleet' section in the 'Sales' tab 'Pricing' subsection.

There, you can also select the 'Default margin' and assign default pricelists (fees).

Additionally, you need to remember to insert the 'Cost' values in the 'Aircraft Fees'. The 'Airport fees' are considered as costs.

Price Based



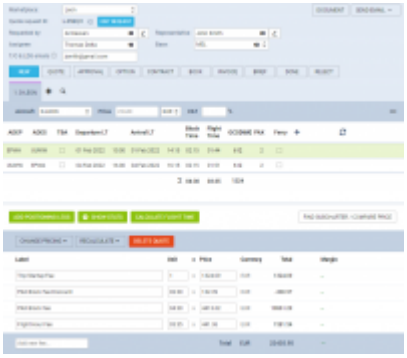
New request pop-up window

To **add a new quote** you need to perform the following steps:

1. Click on **NEW QUOTE** option in the 'Requests/Quotes' screen

2. Fill in the information in the **'Add new quote request'** window:

- **'UTC/LT'** - option allowing to select whether the quote is to be added in UTC or LT:
  - option is always set to LT by default
  - times in the Schedule section are not recalculated upon changing the timezone
- **'Requested by'** - name of the Client requesting the trip. The Clients in this window are divided into 2 groups: 'ACCOUNT' ('Account' flag marked in the Client profile) and 'OTHER'
- **'Representative'** - option to select the representative assigned to the requester
- **'Min. category'** - a category of the aircraft on which the trip is requested, e.g. Heavy jet, Midsize jet, Piston, etc. This will allow searching for the subcharter flights in Avinode if needed. If the aircraft registration is selected, Leon will automatically select the lowest aircraft category
- **'Aircraft'** - selecting aircraft on which the request should be performed. Only operator aircraft available in the dropdown list
- **'Add positionings automatically:'** - ticking the checkbox will automatically add the positioning legs
- **'Schedule section'** - ADEP, ADES, option to select 'Departure'/'Arrival' date and time (in LT) and the number of PAX



New request editing window

. 'GCD(NM)' will be calculated automatically. Leon will display the itinerary in the Calendar view as well as on the map (Tab 'MAP'). If the aircraft is selected, the 'CALENDAR' tab will also display the positioning legs. You can also select **'TBA' checkbox** which will allow inserting the schedule without having to indicate 'Departure'/'Arrival Time'. In this case, the itinerary will display on the Calendar underneath the flight date.

There is also an additional option in General Settings > Sales Module - if a checkbox **Require**

departure and arrival times to be set regardless of TBA setting is marked, times will have to be added, despite TBA marked.

- **'Flight time'** - select the flight time calculation method. Methods are explained further down in this section. Once the method is selected, it will be remembered by the system when the next request is created

3. Press 'CREATE' to add the request

4. Request editing section will open, where:

- if 'Add positionings automatically:' checkbox has been ticked, the positioning legs should be added automatically and should be marked as 'Ferry'
- the schedule timeframes should be built based on the aircraft performance and the minimum ground time required (Positioning flights)
- the quote should be added and calculated based on the 'Fees' assigned in the aircraft settings > 'SALES' tab. If there are no fees assigned to the requested aircraft, then no quote will be created automatically. If there is an 'AIRPORT CHARGES' integration in place, there is a possibility to automatically recalculate airport fees based on 'AIRPORT CHARGES' (more information in the 'AIRPORT CHARGES' subsection



Request without assigned aircraft

It is possible to add a request **without selecting the aircraft**.

In this case, the editing window would suggest creating a quote ('CREATE A QUOTE' button) or finding subcharter in Avinode ('FIND SUBCHARER/COMPARE PRICE' button).

If we choose to create a quote, the standard edition window will appear with the schedule that we inserted initially but with no aircraft selected and no times calculated.

The request with no aircraft assigned will present on the list of requests as per below:

L-TXZI5J	New request	Annika Annika Abraham	- (-)	12 Sep 2020	WAW	- AMS	2 PAX	11 Sep, 12:27 Leon	Thomas Delta

Please make sure that the API key provided by Avinode has the privileges to create the trip in Avinode. Without this privilege, the functionality will not work. You can confirm by contacting Avinode TechSupport at techsupport@avinode.com

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Costs and margin

This quotation method allows quoting based on the cost and increasing the quoted amount by a

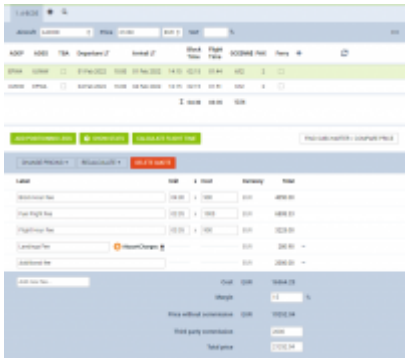
specified margin.

In order to quote using the 'Costs & margin' method first, you need to:

- Insert the costs in the 'Cost' column in a selected 'Aircraft fees'
- Assign 'Costs & margin' as the default method in the 'Settings' > 'Fleet' section, 'SALES' tab
- Select the default margin per aircraft in the 'Settings' > 'Fleet' section, 'SALES' tab

Quoting based on this method is very similar to the 'Price based' method.

Within the quote breakdown, you will see the 'Cost' column where the default cost value from the pricelist is populated.


Quote based on 'Costs & margin'

The **Discount** and **Additional Fee** elements **do not apply to** 'Costs and margin' quoting method.

Values in both 'Unit' and 'Cost' columns can be manually overwritten.

The major difference is that in the **summary** section, there are 5 elements:

- **Cost** - this is the sum of the total costs
- **Margin** - default margin used to calculate the price. Can be manually overwritten
- **Price without commission** - amount for the Client without third party commission. Calculated in a way that required margin is achieved:
  - **Price = Cost /(100% - Margin%)**
- **Third Party Commission** - the amount of commission paid to the third party, e.g. a broker
- **Total price** - the price that is a sum of 'Price without commission' and the 'Third Party Commission'
- **Gross price** - not editable and appears only if **VAT value** is inserted. Hovering the mouse over the 'Gross price' amount will display VAT value in the tooltip

Additionally, hovering the mouse over each of the calculated amounts will display a tooltip with the cost/price calculated per hour of:

- **Flight time** and,
- **Block time**

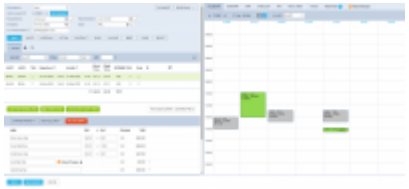


'Price' value can be edited and overwritten. In this case, when inserting the price and clicking outside the 'Price' input, Leon will round the price in accordance with the setting in the 'Fees' section. Additionally, Leon will recalculate the 'Margin' value.

The **sales documents** will still present the total price from the 'Price' box above the itinerary.

In case if the default method changed from 'Costs & margin' to 'Price based' in the 'Fleet' settings, and you wish to recalculate the existing quote based on the updated method, simply select 'DELETE QUOTE' and then 'ADD QUOTE' options. Leon will requote based on the new default method.

Managing the RFQ



Requests/Quotes - the quote edition page

The main page of the **RFQ - Request For Quote** page is divided into **2** sections, which show all details in a transparent way:

1. RFQ details with options of adding & managing the quote.
2. Displaying the quote in Calendar, managing the Checklist, PAX and other options.

Details of the Request

The top-left part of the page shows details, such as:

- **Marketplace** - Avinode, HelloJet, Victor or Leon.
- **Quote request ID** - ID of the quote generated by Marketplace. Additionally, two icons are available:
  - **Show changes history** - displays the history of changes within the quote
  - **EDIT REQUEST** - option to edit the initially requested schedule and apply changes so that they reflect in the main Requests/Quotes view
- **Requested by** - client or company name.
- **Representative** - client's representative (defined in Leon or imported from Marketplace).
- **Assignee** - a person who is designated to work the quote.
- **T/O & LDG emails** - client representative's email address to which Leon should send MVT emails (or client's if Representative is not selected). Can be deleted or overridden by manual

entry.

Adding a new client/representative



Adding a new client (company or person)

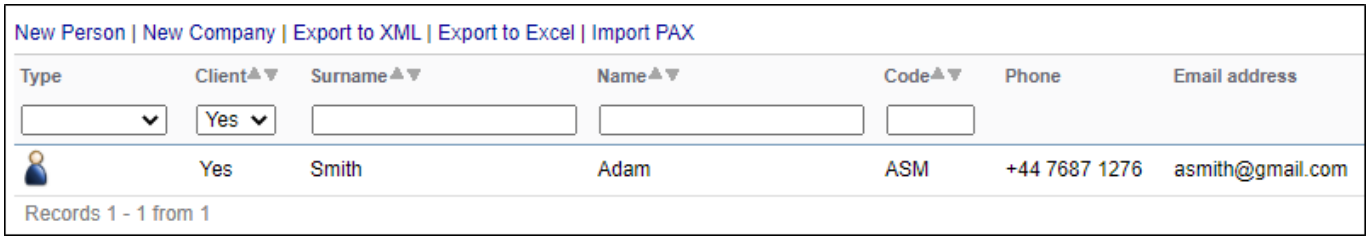
It is now possible to **add a new client** (a company or a person) straight from the **REQUESTS/QUOTES** panel, as well as adding a client's representative.

When creating a new quote, click a **+** icon right next to the 'Requested by' field.



Leon will show slightly different windows if a new client is a **company** and a different one if a new client is a **person** (see screenshot on the right).

Once a new client has been added it will be stored in Leon for future usage and its profile is also created in the Phonebook





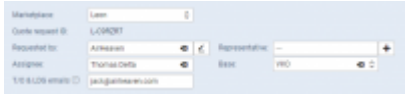
Editing requester or representative

It is also possible to **edit a Requester or Representative** by clicking on  icon located next to Requester/Representative box.



The changes applied in the 'Edit requester/representative' pop-up window will apply instantaneously.

Operator bases

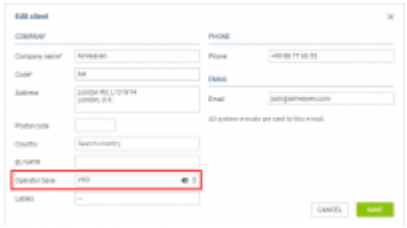


RQ assigned to a base

It is possible to assign requests to bases.

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.



Assigning Operator base to a Client

Once the bases are added, it is possible to assign one to a user, Client or directly to the request.

Operator bases can be assigned as follow:

- **Client/Client Representative** - by editing Client/Client Representative in RQ details section
- **User** - bu editing a user in Settings > Users section

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

Once this request is edited by a **user with base assigned** then this request will get assigned to the user base automatically.

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**.



Requests filtered by one Operator base

The 'Requests/Quotes' list includes all the requests including the ones without bases assigned.

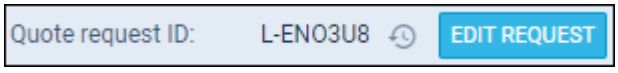
If you select a particular base in the operator selection dropdown (top-right corner of Leon), the Requests/Quotes list will only display the requests assigned to this particular base. See the screenshot on the right.

Change of assignee or a Client does not automatically change the base assigned to the request.

'EDIT REQUEST' option

It is possible to edit the originally requested schedule and reflect it in the main 'Requests/Quotes' view.

EDIT REQUEST button is available by the quote number in the quote details section:





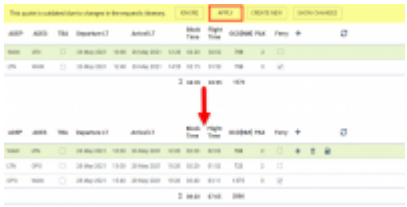
'EDIT REQUEST' pop-up window

Clicking on the 'EDIT REQUEST' button will open the 'Edit quote request' pop-up window (quote editing part presented on the right). This window is identical to the 'Add new quote request' window.

In the 'Edit quote request' window, the initially requested schedule can be amended.

The changes can include:

- schedule - routing as well as the number of PAX
- aircraft - change of aircraft or additional aircraft
- option to include positioning legs



Updated schedule applied

After the changes are performed and applied ('UPDATE' button), the yellow strip will appear in the request edit section with the following options:

- **IGNORE** - does not apply any changes
- **APPLY** - the update will be accepted and reflected in the updated itinerary
- **CREATE NEW** - new itinerary on the same aircraft will be created within the same request (the second tab with the updated itinerary)
- **SHOW CHANGES** - displays the history of changes of the request

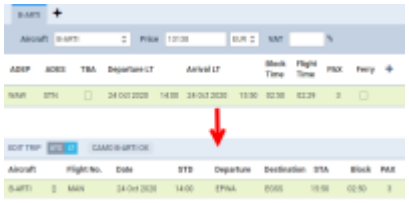
The screenshot on the right presents the usage of the **REGENERATE** button.

If **the changes are applied** to the schedule, the quotation will recalculate automatically.

Additionally, **the changes applied will reflect in the main 'Requests/Quotes' view:**

ID	Status	Aircraft	Itinerary	Quote
L-C4ZMA4	New request	A-BCDE (A319)	26 May 2021 WAW - LTN 2 PAX	A-BCDE 27 205 EUR
L-C4ZMA4	New request	A-BCDE (A319)	26 May 2021 WAW - LTN 2 PAX 28 May 2021 LTN - OPO 2 PAX	A-BCDE 45 305 EUR

Auto update of the booked trips



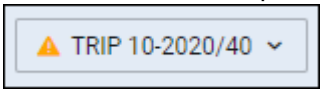
Auto update of the booked trips

It is possible to set up an **auto-update** of the booked trips. Once a quote's status has been set to 'BOOKED' if the quote's schedule has changed, Leon can either automatically update the trip in OPS, or the user can do it manually.

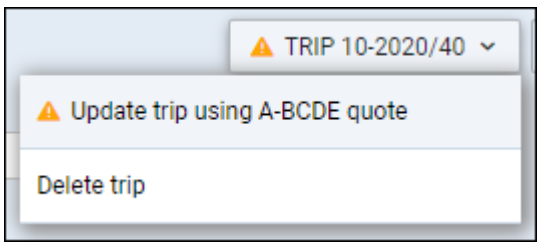
AUTO-UPDATE

To make it work, mark a checkbox **Auto-update booked trips in Requests/Quotes** in the General Settings panel. Once it's done, when changing a quote's schedule, Leon will automatically update the trip in the OPS panel (see example on the screenshot on the right).

MANUAL UPDATE

If an auto-update is switched off and the booked quote's schedule changes, Leon will show an orange warning triangle in the button 

Click it and select **Update trip using (aircraft reg number) quote** and Leon will update the trip's schedule in the OPS panel.

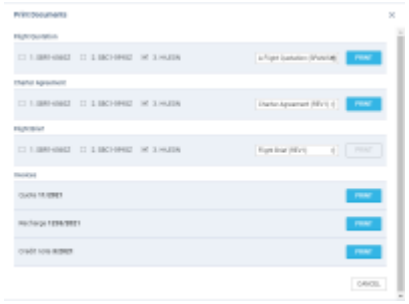


Statuses of the Quote

In this section, you can find available options for the quote status change. Changing statuses are correlated with actions, among which are: sending emails, documents, etc...

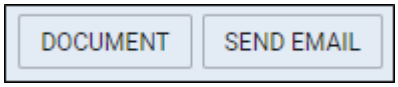
The statuses available in the request edit section can be **customized** in the 'Sales Module' in 'General settings' section:

1. NEW - highlighted when adding a new quote into Requests/Quotes or as a new quote from Avinode.
2. QUOTE - send a quote proposition details with Flight Quotation document - when dealing with Avinode quote, clicking SEND means accepting the quote. It is possible to send **the same message** for all quotes by marking a checkbox **Send same message to all quotes**.
3. OPTION - click to add the trip to the OPS page with the status 'Option'.
4. CONTRACT - shows a new window for Charter Agreement document sending. It is possible to **include the positioning FERRY flights** in the Charter Agreement document by selecting the FERRY flights in the CONTRACT message window. Flights with PAX cannot be de-selected
5. BOOK - click to add the trip to the OPS page with the status 'Confirmed'.
6. BRIEF - shows a window for Flight Brief document sending. It is possible to **send the Flight Brief document for selected flights** by selecting a specific flight in the BRIEF email window
7. INVOICE - an option to send an invoice to the client.
8. DONE - closing the transaction.
9. REJECT - reject the client's offer (the quote will show as 'rejected' on the client's side in Avinode). Should be used on a non-processed request (process of quoting has not started)
10. CANCEL - this status is very similar to the 'REJECT' status however can be used after the processing of the request has started and one of the parties decided to resign at one stage



Printing sales documents

Independent from the status change actions you can always print sales document or send it via email using options:

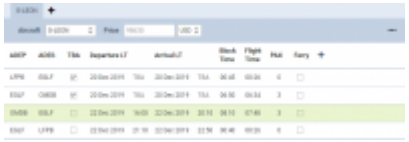


1. DOCUMENT - Flight Quotation, Charter Agreement, Flight Brief, and already created Invoices.
2. SEND EMAIL - for sending sales documents via email or sending custom emails.

When working with Avinode requests you can **accept or reject** selected quotes, instead of rejecting all quotes in the request you are managing. In other words, you can accept (click QUOTE and sending email means accepting the quote), or reject quotes (click REJECT) inside

Avinode request **independently**. You can also send to Avinode your own quote if only the aircraft assigned to it exists in Avinode. All quotes sent to Avinode can be also rejected if needed. For quotes sent to Avinode aircraft change is not available.

Itinerary details


Itinerary section

Right below request details & quoting options you can find **Trip details**: Aircraft registration, Price, ADEP, ADES, TBA checkbox, Departure time LT, Arrival time LT, Block Time, Flight Time, PAX number and Ferry flight indication.

By clicking the **+** icon you can add a new leg into the existing trip - you can do it also in-between existing flights.

It is possible to change the **Currency** and Leon will recalculate the price in the new currency. The new currency will also apply to the quote's fees (catering, hotel, flight plan, etc...).

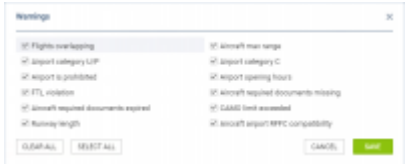
If there is a discontinuity in the itinerary, and the warning is marked in the 3-dot filter, it is indicated with 

If there is no **aircraft performance data** inserted in the 'Fleet' section, Leon will display the following information:

Flight time calculation might be inaccurate. Please set up the aircraft performance model in settings to get an accurate estimation

It is also possible to schedule a **Fuel Stop**. More information is in the subsection below.


Itinerary filtering options


Feasibility check 'Warnings' filter

In the top-right corner of the itinerary, there is a  icon where the following options are available:

- **Commercial** - selection whether the quote should be for a commercial flight or not by using the

switch
- **Show changes history** - access to the history of changes of the quote. More information in the section below
- **Delete** - option to delete the itinerary
- **Warnings** - selecting the types of warnings in the feasibility check window
- **Cautions** - selecting the types of cautions in the feasibility check window
- **Notices** - selecting the types of notices in the feasibility check window

With regards to filtering **Warnings, Cautions and Notices**, only the selected options will trigger the feasibility check icon.

Once the new filtering options have been selected you need to **refresh** the 'Feasibility Check' column in order to apply new settings.

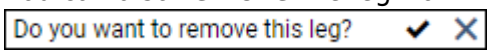
Only the selected options will trigger the feasibility check icon.

Items that are not selected in the filter will not appear in the feasibility check information window.

Selected elements of the feasibility check filter will be remembered per user.

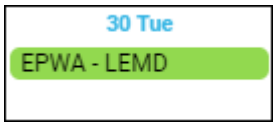
When sending documents to the client, Leon also shows red triangle (alerting feasibility check) next to the 'SEND' button - hover the mouse over the triangle to see the information.



You can also **remove** the leg from the itinerary by clicking on icon. Leon will display the 

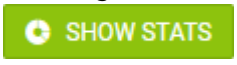
validator where you can perform the relevant action.

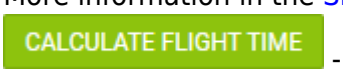
By clicking on the **TBA checkbox** Leon will allow you to save the quote/trip without specifying Arrival and Departure times. Such a trip will be displayed in the 'CALENDAR' tab as an “All day” operation (just underneath the date).

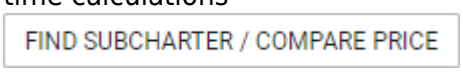


Below trip details you can find **4** options to:

1. 

- click to add a positioning flight (Leon will match last flight's ADES and next flight's ADEP in actual confirmed aircraft schedule).
2. 

- click to display statistics for the particular request based on past quotes. More information in the SHOW STATISTICS section
3. 

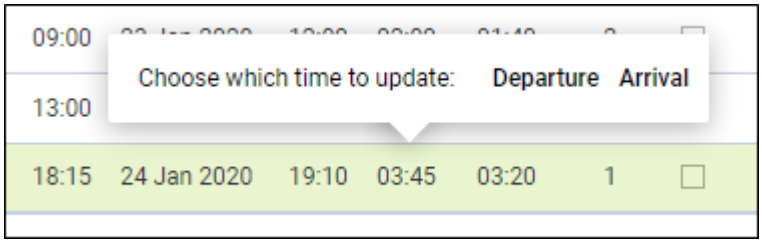
- click to display a pop-up window with the different options of flight time calculations
4. 

- click to perform the search in Avinode. Applies only to the Clients who have activated the integration with Avinode. In order to perform the search, Avinode needs to activate the privileges to create a trip in Avinode within the integration key provided

If you click on this icon Leon will display the **Feasibility check information** window which provides specific warning details as presented in the screenshot - all warnings, cautions and notices enabled in Leon, plus the information if on the day of the quote (departure day) no **minimum crew** (defined in the aircraft profile for cockpit & cabin) have been assigned with the **Duty on the aircraft** (registration or type - depending on Duties Setup configuration). Also, a caution **FTL close to limit for Cockpit/Cabin crew member: warning FDP length exceeded** will show up if defined in FTL Settings (by Leon Support Team) FDP threshold has been exceeded.

Modifying timeframes in schedule

1. When changing **Block time** of the flight, Leon will **NOT** change **Flight time** and will also show a tooltip with a question, whether it should be the departure or arrival time that should be updated. **Block time cannot be shorter than the flight time.**



2. When changing **Flight time** of the flight, Leon will change **Block time** automatically and will keep initial Taxi times. Leon will ask whether to change 'Departure' time or 'Arrival' time

3. When changing **STA**, Leon will change the **STD** by the block time value. The same scenario applies to the change of the **STD**. Leon will **NOT** require validation.

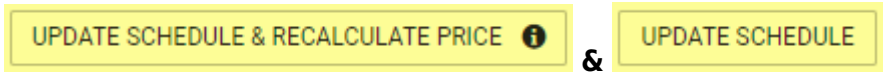
4. When changing **ADEP/ADES** Leon will automatically recalculate the **Block time** and the **Flight time** value based on the aircraft performance and will ask whether to change 'Departure' time or 'Arrival' time

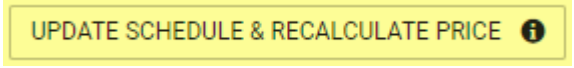
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Updating booked quote

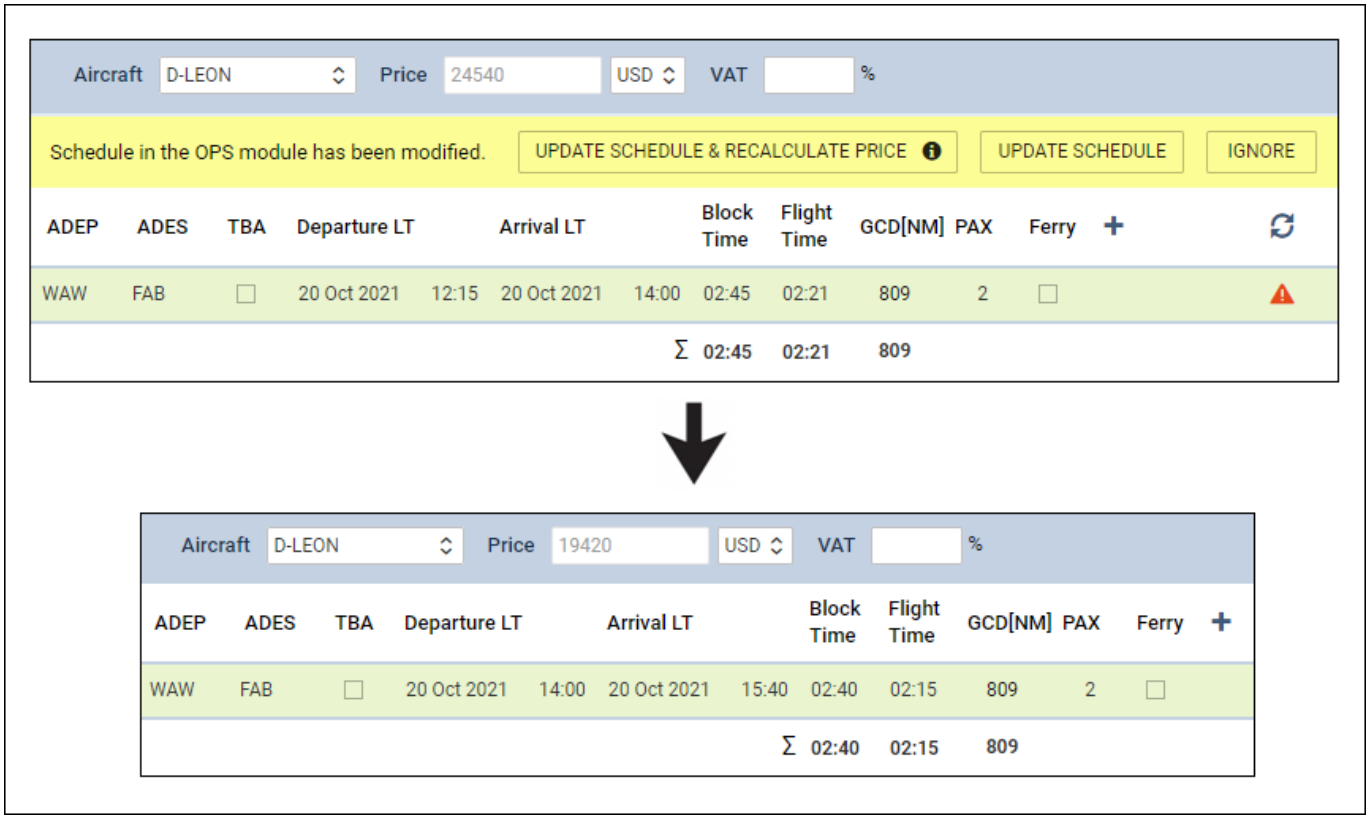
We have **improved** a functionality of updating quote's schedule after its modification in the OPS panel.

If the quote's schedule gets changed in the **OPS** panel, when editing it in the Sales panel, Leon will show now options such as:

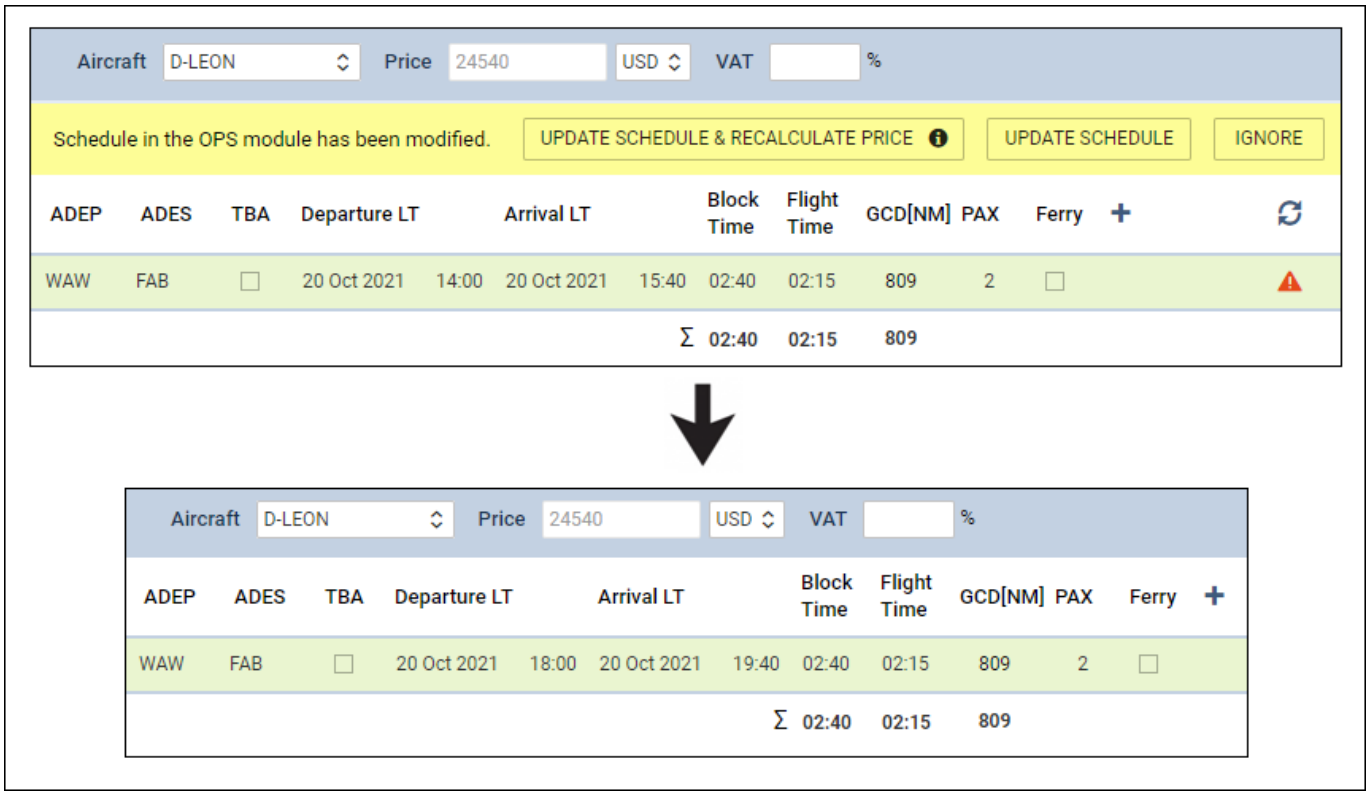


When selecting 

Leon will change the quote's schedule & will recalculate its **price** based on the changed details.

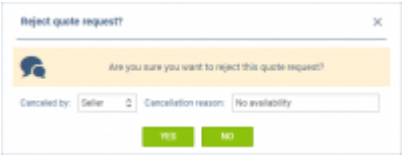


When selecting UPDATE SCHEDULE Leon will change only the quote's schedule and will leave the price unchanged.

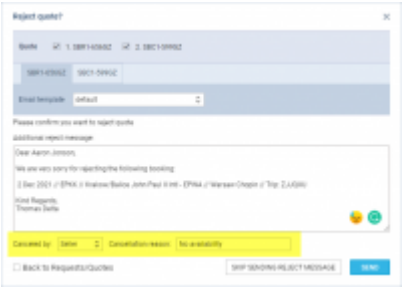


Changes will reflect in the main Requests/Quotes view.

Rejecting the quote



'Reject request' window when no quote present


'Reject request' window with quote added

Request can be **rejected** in three ways:

- from the pop-up menu in the main 'Requests/Quotes' page
- from the edit quote window using the 'REJECT' button
- from Avinode, if the request comes from Avinode. It can be rejected either by the buyer or the seller directly in Avinode

When rejecting the request, the pop-up window will appear. Depending on whether the request has a quote or it hasn't, the window will show in one of the two possible versions presented on the right-hand side.

It is also possible to select the party that is rejecting the request (**Canceled by**) as well as the reason for the rejection (**Reason**)

The following **rejection options** are available:

1. Canceled by **Seller** reasons:

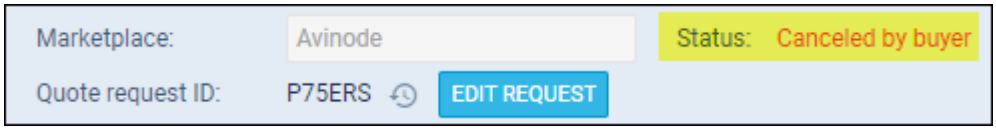
- No availability
- Inoperable Airport
- Aircraft performance
- Out of the Company Range
- Other

2. Canceled by **Buyer** reasons:

- Buyer reasons
- Force majeure
- Other

Quote **rejected in Leon** will appear in Avinode as **Declined**.

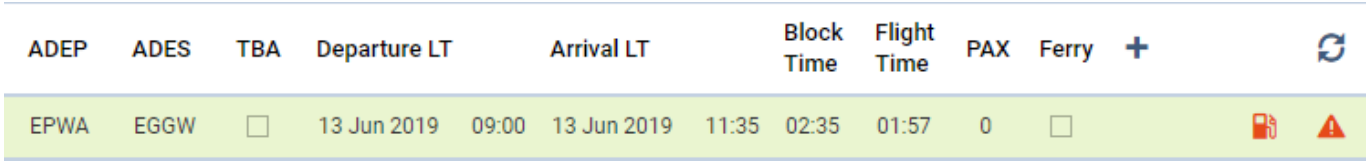
Quote **rejected in Avinode** will appear in Leon as **Rejected** with the relevant 'Status' in the edit request window ('Canceled by Seller/Buyer' as per below example):



Additionally, **columns** 'Canceled by' and 'Cancelation reason' as well as the **filter** 'Canceled by' were added to the **Report Wizard**, scope **Quote**.

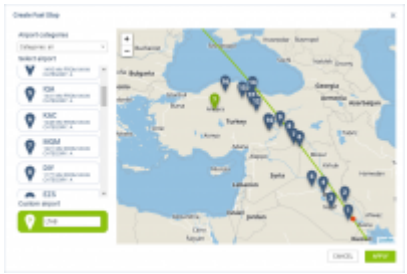
Fuel Stop

It is possible to add a **Fuel stop** to a flight in the itinerary section by clicking on a 'Fuel stop' icon.



Fuel stop is indicated by the following icons:

- - fuel stop required. This icon is displayed when the distance (in NM) between ADEP and ADES is greater than 'Max range with '0' PAX(NM)' or'Max range with max PAX(NM)' configured in the Performance section of an aircraft in the 'Settings' > 'Fleet' section in Leon
- - fuel stop optional. This icon is hidden and will be displayed if you hover the mouse over a flight in the itinerary


'Create Fuel Stop' window

To **add a Fuel stop** you have to:

1. Click on a 'Fuel stop' icon
2. In the 'Create Fuel Stop' window, you will see the list of airports. Airports are suggested based on a 50 NM radius along the route of the aircraft. The list displays up to 99 airports sorted by the proximity from the point on the routing. The option to filter the airports by category allows narrowing the list down to the airports with the required Airport Category. It is also possible to insert your own airport of refuelling in the **Custom Airport** field.
3. Select one of the airports from the list and click the 'APPLY' button
4. The 'Fuel stop' leg is added to the itinerary. The fuel stop airport is indicated by frame. The feasibility check can be performed by clicking on icon. The new schedule also includes aircraft rotation time. For example, route **EPWA-EGGW** after adding a 'Fuel stop' in **EDDH** would look as below:

ADEP	ADES	TBA	Departure LT		Arrival LT		Block Time	Flight Time	GCD[NM]	PAX	Ferry	+
EPWA	EDDK	☐	19 Nov 2020	10:00	19 Nov 2020	12:00	02:00	01:40	523	2	☐	
EDDK	EGGW	☐	19 Nov 2020	13:00	19 Nov 2020	13:20	01:20	01:06	288	2	☐	
						Σ	03:20	02:46	811			

Handling Requests per Client

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


Assigning a handler

In order to assign a Handling Agent to a Client, you need to:

- Edit the Client in the Sales module. An agent can also be assigned while adding a new Client in the Sales module
- Select the Agent(s) in the '**Preferred handling agent**' box. Handling agents can be searched by using:
  - Airport ICAO/IATA/Custom code
  - Handler Name
  - Combination of 'Airport code - Handler name'
- Once the Handler is assigned, it will appear as a tag below the 'Preferred handling agent' selection box
- Save changes

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

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





Preferred Handler assigned to the trip in OPS view

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.

Additionally, Handler **assigned to the Client is prioritised over the default Handler assigned to the Client Representative**.

If the Handler is changed in the OPS Checklist, updating the trip from the Sales panel will affect the Handler selection.

If the trip is added in the OPS section and the Client is assigned in the TRIP tab, the Client's preferred Handling Agent will be assigned to the trip.

Handling Agent can only be assigned to a Client in the Sales module. Handling Agent assigned to Client Representative is not taken into consideration.

Invoice



Adding an invoice in Sales panel

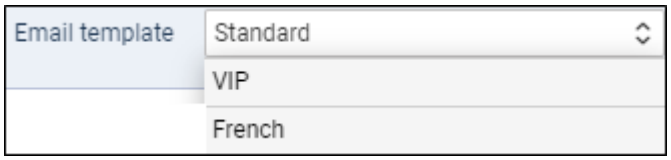


Leon default Invoice pdf template

Before using this option you need to set up in Documents Manager a new template **QUOTE INVOICE** - you can set up multiple different templates and re-arrange them the way you want (using HTML & CSS). You can also use Leon default template pdf.

Name	Type	Language	Published	Last modified
QUOTE INVOICE REGULAR	Quote Invoice	English	●	08-Nov-2019 09:10
QUOTE INVOICE VIP	Quote Invoice	English	●	08-Nov-2019 11:01

You can also configure EMAIL TEMPLATES for the Invoice in a section Settings > Email Templates - click **ADD TEMPLATE**, select **Quote Invoice** and set it up. You can define as many email templates for as necessary.



Once it's all set up, edit the Quote that has already been **BOOKED**, click the button **INVOICE** and Leon will show a pop-up window where you can select an appropriate Email and Invoice template. Then Invoice details & items should be defined with their Net price and VAT. Below the items list, Leon will show **Total price**.

Three fields with dates are available in the document:

- **Invoice Date** - date of invoicing
- **Issue Date** - date of issuing the Invoice
- **Due Date** - due date of the payment. If this field is left blank, Leon will assume 10 days in advance from the 'Invoice Date'

Click the **DOWNLOAD** icon to preview the template before sending it out.

RESET ITEMS function makes it easier to recalculate the amount on the 'Invoice'.

It is very useful when after sending the invoice to the Client, the amount of the quotation changes, be it due to a change in the number of items or the calculated price of the items.

In such a scenario, it is sufficient to go to the 'INVOICE' tab in the 'INVOICE' section, press RESET ITEMS button and Leon will update the amount on the invoice to the actual one.

IMPORTANT!!! Any extra items added to the Invoice will be removed after the reset.

If the quote is created for more than one aircraft, the Invoice pop-up will allow to switch between tails and define Invoice items accordingly.



In case you wish to upload your own template and send it to the client without creating it in Documents Manager, you can use 'Upload files' button in a tab 'EMAIL' of the Invoice pop-up window.

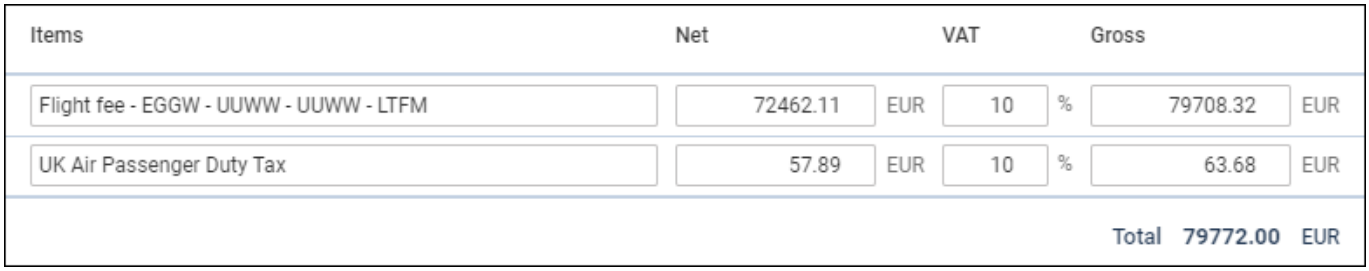
TAX

It is possible to set up a **default VAT rate per Country** in the **'Sales Module'** tab in the 'General Settings'. More information can be found here.

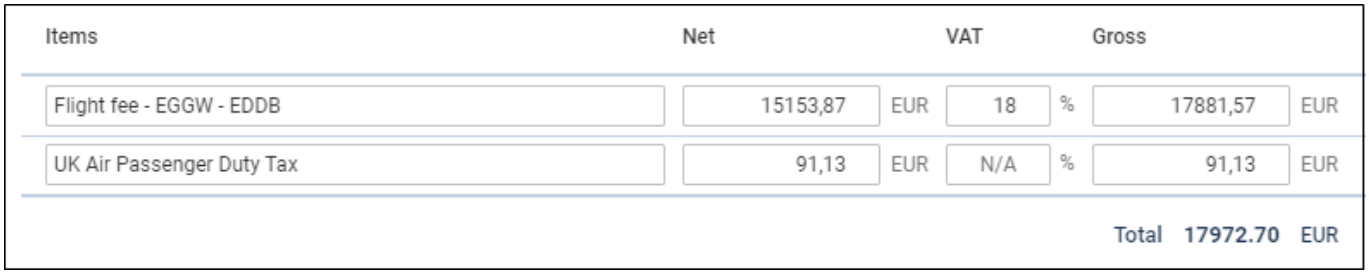
Apart from the above mentioned, the 'VAT rate' can be set up in the main Quotation view in the 'VAT' box:



This rate will automatically apply to the default items in the Invoice section, **including PAX taxes (UK, German, Swedish or Italian) and will increase the total amount by this rate.**



It is possible to **exclude the VAT rate** from the calculations in the Invoice by simply deleting it.



The VAT rate, gross amount, as well as taxes amounts, are included in the available data for Sales documents (including Suncharter) in 'Documents Manager'.

Once the invoice has been paid, you can edit the quote again and in the Invoice tab mark a checkbox **Paid** - then you can generate a report (in a scope 'Invoice') in a report Wizard panel and add a column 'Paid' to the report.

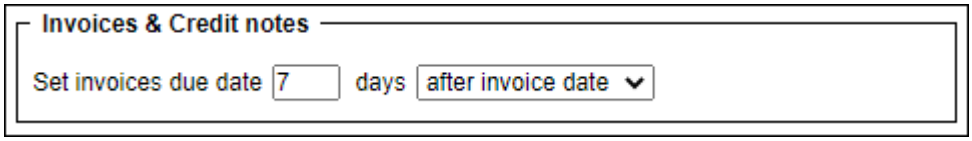
It is possible to **close** the Invoice (checkbox 'Close'). Once the Invoice is closed, only the user with the 'Can open invoice' setting in the Privileges > 'SETTINGS' tab will be able to preview and edit this page.

It is also possible to exclude TAX from showing on the Invoice by unmarking a checkbox **Include taxes in trip price on invoices** in a section General Settings > Sales Module.

'Invoices & Credit notes' settings

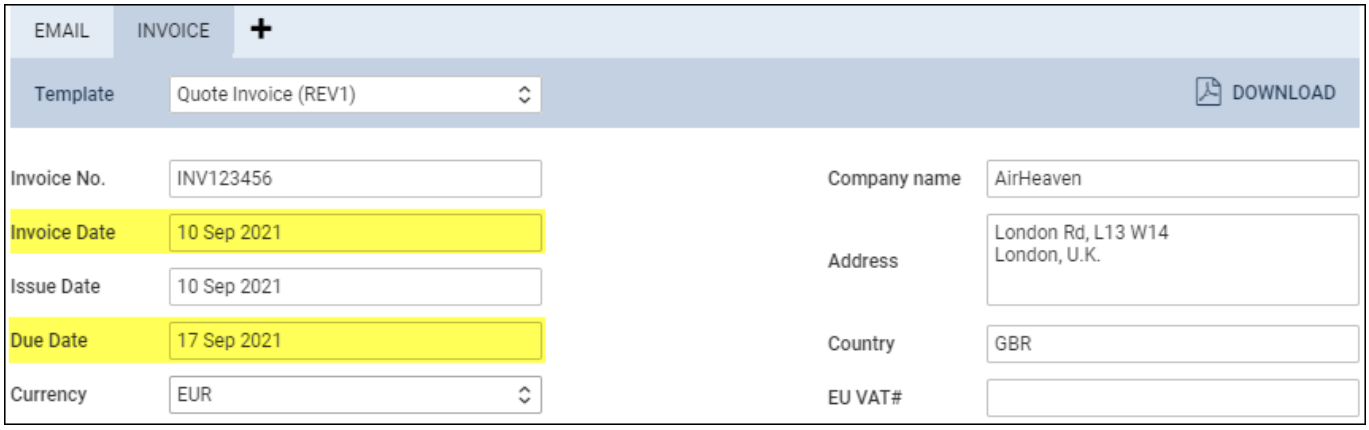
It is now possible to set up a **default 'Due date'** for the Quote Invoice in 'Settings' > 'General settings' > 'Sales Module' tab.

The setting consists of **2 fields**:



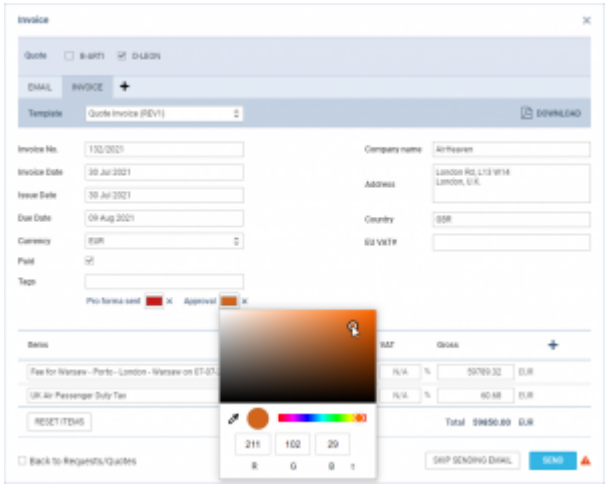
1. Input with the number of days
2. Dropdown with the following options:
    - **after issue date** - number of days after the invoice issue date
    - **after invoice date** - number of days after the invoice date
    - **before flight** - number of days before the first flight within the request

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



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

Tagging Invoice



'Tags' in Invoice

It is possible to **tag an Invoice**.

The option is available on the 'Invoice'/'Recharge invoice'/'Credit note'.

In order to **add a new tag** you need to:

1. Insert the new tag name in the 'Tags' box and press 'Enter'. A new tag will appear underneath the 'Tags' box
2. Click on the colour square and select the colour using the available palette
3. Sending / Saving without sending the Invoice will save the tag

Once the tag is saved, it will be available in the dropdown list in the 'Tags' box.



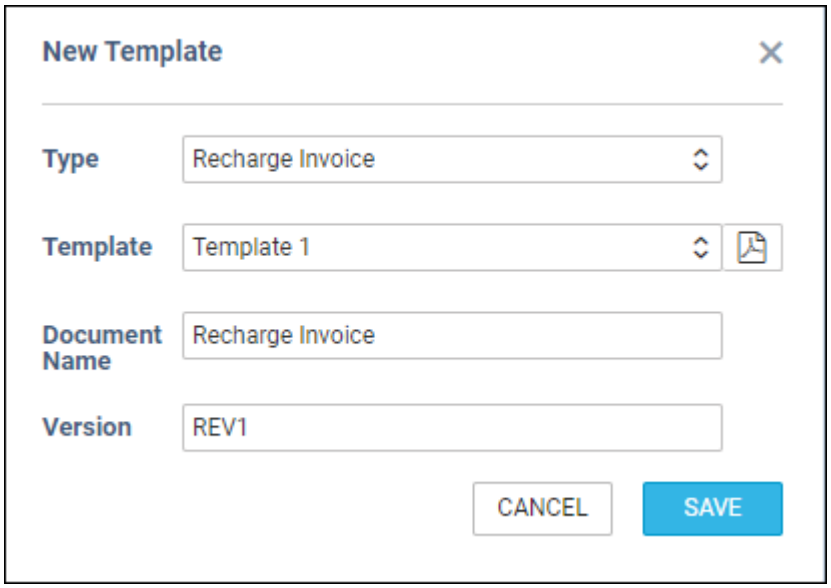
Tags added to the Invoice are available in the Report Wizard > Scope 'Invoices & Credit Notes', column 'Invoice Tags'.

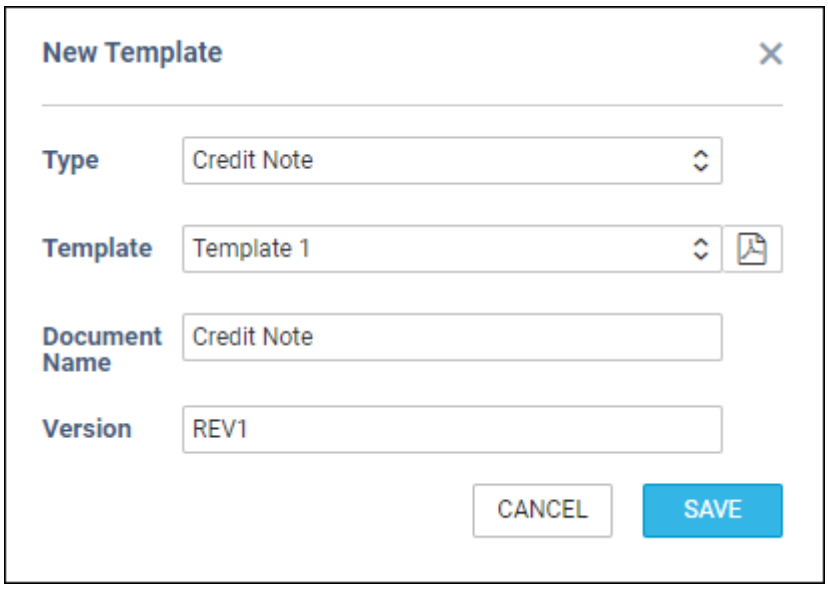
Recharge Invoice & Credit Note

We have added **2** new documents, which can be sent to a client from the **Invoice** section:

- **Recharge Invoice** - sent if there was an extra cost for a service not included in an initial trip cost, i.e. deicing or limo.
- **Credit Note** - sent to a client, if some part of the agreed cost should be returned to the client, due to i.e. cancellation of the flight by a client or if the cost of the trip turned out to be lower than the agreed cost and the difference must be returned to a client.

First step to issue these documents is adding it in Documents Manager. Here, click NEW TEMPLATE and select **Recharge Invoice** and/or **Credit Note**. Added documents need to be published (set filter to 'No' and click the white dot). You can define multiple templates of these documents.

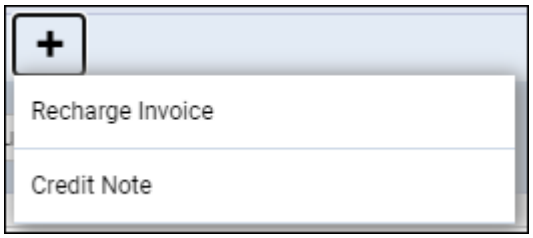






Sending 'Recharge Invoice' and 'Credit Note' documents from 'Requests/Quotes' panel

The second step is adding these documents in the 'Invoice' section of the quote's edition panel. Click a button **+** placed right next to the 'Invoice' button and select documents from the list.



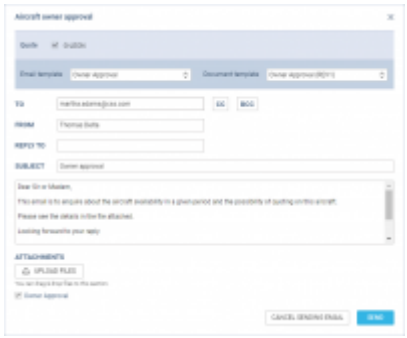
It is possible to add more than one 'Recharge Invoice' & 'Credit Note' document when sending Invoice documents to a client, however, each document needs to be sent out separately.

Owner approval

Owner approval is the functionality that allows sending gain the consent from the Aircraft owner to perform the trip on the aircraft at a given time.

In order to activate the functionality, you need to:

- go to 'Settings' > 'Fleet' section and edit the aircraft
- click on tab 'SALES', click on **'Requires owner approval'** and save changes. Make sure that the owners are also selected



Owner approval email

Once the option is activated, the **APPROVAL** button will appear amongst the status buttons.



Once the button is available, clicking on it will allow sending an email to the Owner along with the document.

Both, 'Owner approval' email template, as well as the default document, can be created in 'Settings' > 'Email templates' and 'Settings' > 'Document's manager' accordingly.

'To' email is fed from the Owner's email inserted in the profile.

Flight Brief



'Flight Brief' email

'Flight Brief' is the document that presents the summary of the trip.

When sending the Flight Brief document it is possible to **select the flights** that should be presented on the document.

This is quite useful when the trip consists of numerous flights spread across a number of days and separated by longer periods.

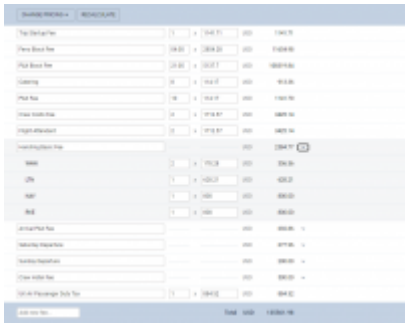
It allows sending the document to the client in stages, based on the itinerary, and include the flights nearest to each other.

As presented in the screenshot on the right, the trip consists of 5 flights between 28th May and 11th June. The functionality allows selecting the nearest flights (28th May) and sending these initially. The

remaining ones can be selected and sent closer to the planned departure date.

Ferry flights are not presented on the list.

Quote pricing



Aircraft & Airport fees in the quote

There are **2** ways of creating price valuation: manual entering price for an entire quote and using a detailed price list for an aircraft and airports.

You can manually enter the **Price** in the field next to **Aircraft**. This field is only editable when the detailed price list is not added.

Be advised that when the quote is imported from Avinode and an aircraft is configured in a section FEES, a detailed price list shows automatically and an original **Avinode** price is always displayed next to it and can not be changed.

Once you have added Request & Itinerary details and selected the aircraft, click 

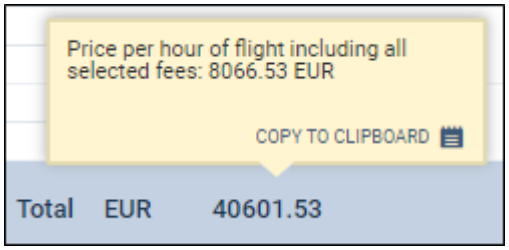
button in a section **Quote** and Leon will add the quote with Aircraft Fees & Airport Fees (previously defined in the section Fees).

In this section you can manage the price list:

1. Add a new item
2. Change the item's name
3. Change items quantity and their price.
4. Delete item.
5. Switch price lists to another aircraft price list (by using a button Recalculate).

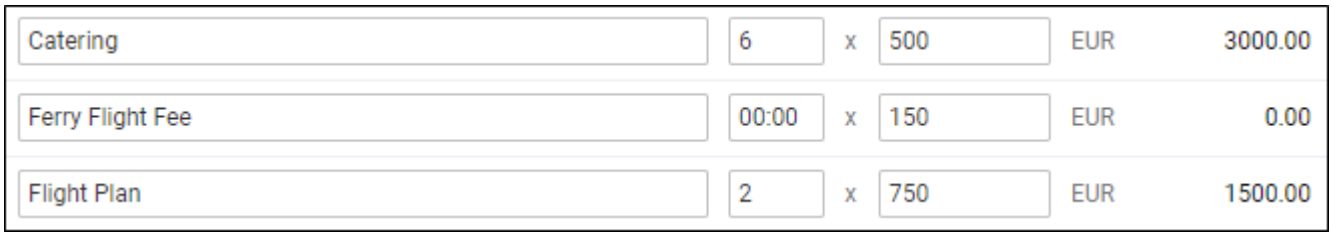
Each item is **editable**, which means you can change its name (for edited flight only - default name remains the same) and/or its price.

When you click on the arrow next to the price, Leon will show both airports. The default fee will show for ADEP only but you can still add fees to ADES manually. Another option is adding a **new fee** available in the drop-down box below the items. When changing fees manually, Leon shows **Total price** simultaneously changed at the same time. Hover the mouse over the Total price amount to see **the price per hour of the flight**.





If it comes to Aircraft Fees displayed below Airport Fees, you can also change their names and overwrite values.



There are **2 buttons** available to manage the quote:

- **RECALCULATE** - explained below
- **CHANGE PRICING** - should be used when you'd like to recalculate on a different 'Aircraft Fee' or 'Airport fee'

'RECALCULATE'

The **RECALCULATE** button now has 2 options available:

- **Itinerary**
- **Airport fees**

Itinerary

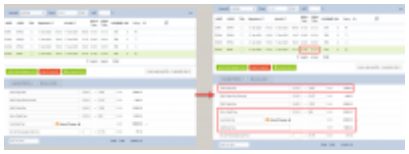
Itinerary option is used when the aircraft schedule is changed.

The way it works has not changed. Clicking on the 'Itinerary' button will recalculate the quotation based on the updated schedule.

It will also **update the Airport Fees** if they were changed in the 'Sales' > 'Fees' section,

This option **will not affect** manually inserted prices.

Example


Itinerary recalculation

Following changes applied in the 'Airport fees:

- 'Landing fee' at EP* changed from €1200 to €1500
- 'Additional fee' of €1000 added to EG*

Additionally, the original itinerary's flight time has been changed by 10 minutes and the 'De-icing' fee was added manually.

As you can see in the screenshot on the right, Leon recalculates based on the new itinerary but also includes the updated aircraft fees.

Airport fees

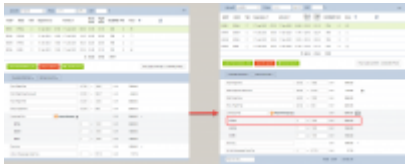
Airport fee option applies only to airport fees recalculation.

It should be used whenever there are changes to the 'Airport fees' in 'Sales' > 'Fees' which one would like to update within the quote.

It does not add or remove any elements from the quote unless there is a change in the itinerary (see above).

Manually added items of the quote should remain within the quote after the recalculation.

Example


Airport fees recalculation

Following changes applied in the 'Airport fees:

- 'Landing fee' at EP* changed from €1200 to €1500
- 'Additional fee' of €1000 added to EG*

Additionally, the 'De-icing' fee was added manually.

As you can see in the screenshot on the right, only the value of the 'Landing fee' at EPWA has changed.

Once you reviewed the RFQ you can:

1. SAVE - saves changes to the Quotation/Trip

2. SAVE & BACK - clicking on this one will save the changes and take you back to the List of quotations page
3. CANCEL - transfers to the List of quotations page without saving changes
4. SHOW IN OPS - clicking on it will open this trip in the OPS view.


Sending Flight Brief to the client

If you have created a quote for **2 different aircraft**, or downloaded a quote like that from Avinode, after clicking QUOTE Leon shows a pop-up window with 2 quotes - mark a checkbox which quotes you choose to be sent.

It is also possible to send the email with the details for more than one quotation by ticking more than one checkbox.

Leon will then generate the documents that include these 2 quotations based on the Sales Documents templates.



By clicking **SKIP SENDING QUOTE** you decide not to send an email, but still the status of the quote changes to 'Quoted' in the main quotes list.

Similarly works sending **CONTRACT** or a **BRIEF** - Leon shows a pop-up window where you can send an email with the Charter Agreement, or you can click **SKIP SENDING EMAIL** - that will change quote's status to 'Contract sent'.

If you tick the Back to Requests/Quotes checkbox and press any of the buttons in the 'Send email' window, Leon will revert to the list of Quotes. This setting will be saved so next time when you open an email window this checkbox will be already ticked.

Changing the price in 'Price' quoting mode

It is possible to amend the price in the 'Price' quoting mode.

There are **two possible scenarios** when the final price is updated:

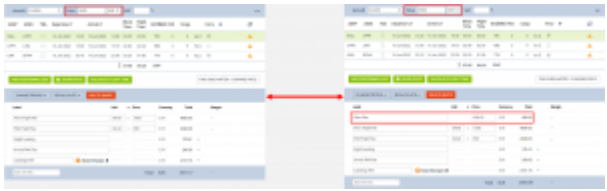
- **Price increased** - the value of the 'Extra Fee' element of the price list is added and recalculated automatically. If the original quote included both 'Extra Fee' and 'Discount' upon increasing the price these 2 elements are replaced by the new 'Extra Fee' element of the price list
- **Price reduced** - the value of the 'Discount' element of the price list is added and recalculated automatically. If the original quote included both 'Extra Fee' and 'Discount' upon reducing the price these 2 elements are replaced by the new 'Discount' element of the price list

If the price increase/reduction are within the 'Extra Fee'/'Discount' elements values respectively, Leon only recalculates the value of the elements' price rather than replacing them.

Examples

Below, there are examples presented for each of the scenarios.

Price increased

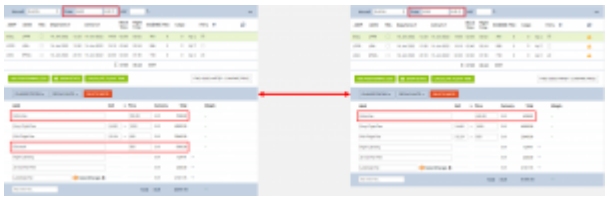


Price increased - Example 1

Example 1

In the screenshot on the right-hand side, the price is increased from €8600 to €9000.

The 'Extra Fee' element of the price list was added and recalculated based on the new Final Price.



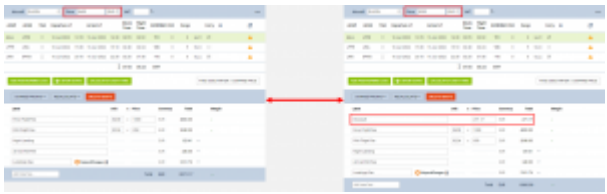
Price increased - Example 2

Example 2

In the screenshot on the right-hand side, the price is increased from €8600 to €9100.

Because the increase is higher (€600) than the value of the 'Discount' (€500), the 'Extra Fee' and the 'Discount' elements of the original price list are **replaced** by a single 'Extra Fee' element with the recalculated value.

Price reduced

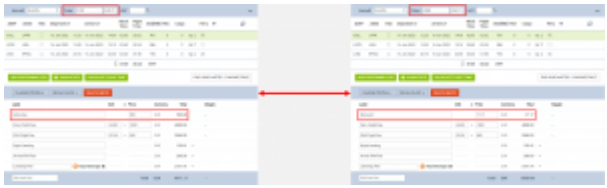


Price reduced - Example 1

Example 1

In the screenshot on the right-hand side, the price is reduced from €8600 to €8300.

The 'Discount' element of the price list was added and recalculated based on the new Final Price.



Price reduced - Example 2

Example 2

In the screenshot on the right-hand side, the price is reduced from €9100 to €8500.

Because the reduction is higher (€600) than the value of the 'Extra Fee' (€500), the 'Extra Fee' element of the original price list is **replaced** by a single 'Discount' element with the recalculated value.

The Margin

It is important to see the **Margin** between trip-related revenues and the cost - this way the operator knows whether to increase fees or cut the cost.

When creating an aircraft pricing in Leon, it is now possible to define the **Cost** for each fee of the aircraft.

In a section Sales > Fees, when creating aircraft fees (or editing existing fees), Leon shows a separate column **Cost**. Here you can insert a value of the cost. The currency of the cost is the same as the price's currency. Items with no cost added will show as No margin

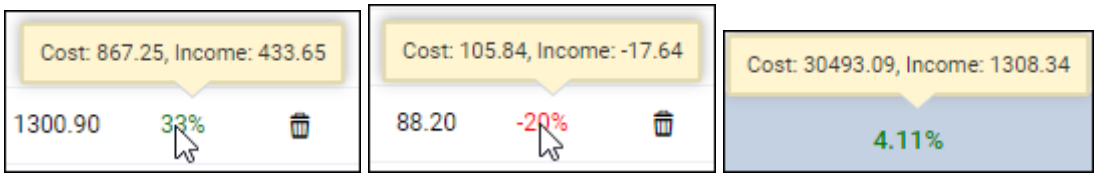


The margin of the quote in Leon sales panel

Label	Unit	Price	Cost	Unit
Trip Startup Fee	trip	1500	1200	EUR
Ferry Block Fee	ferry block hour	4000	3500	EUR
PAX Block Fee	PAX block time	4800	4500	EUR
Fuel Block Fee	block hour	1500	1350	EUR
Pax Leg Fee	PAX leg	200	150	EUR
Fuel Stop Fee	fuel stop	2200	1750	EUR

Once the cost values have been added, on the quote's edition page Leon will show a new column **Margin** with percentage values.

If the cost is **lower** than the price, Leon will show the margin value in green. If the cost is **higher** than the price, Leon will show it in red. Hover the mouse over the margin's value to view details. At the bottom of the page, Leon will show a total margin value.



CO2 Emission

More and more clients travelling by aeroplanes want to know how much **CO2** will be emitted during the flight they have bought. Meeting this request we have added an option to **show CO2 emission on sales documents**: Flight Quotation and Flight Brief.

In order to have CO2 on sales documents, follow the below steps.

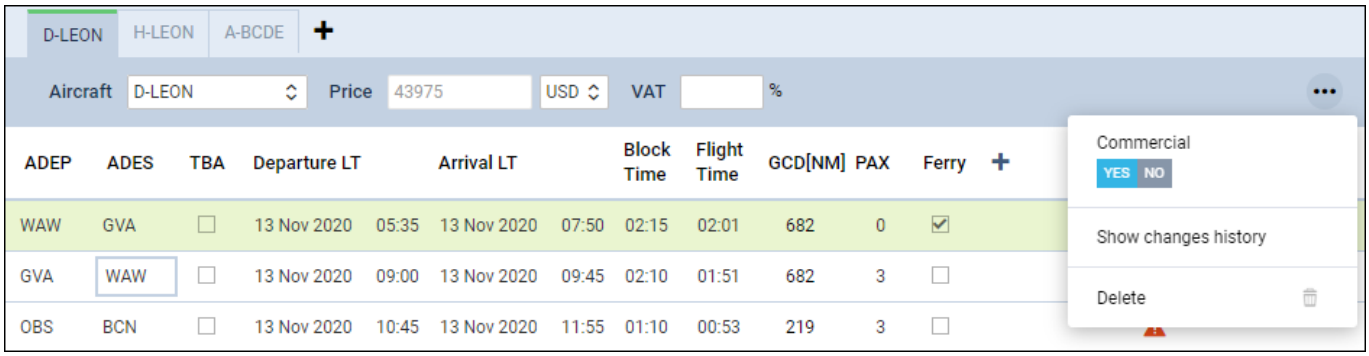
1. In the tab OPS of an aircraft profile (section Settings > Fleet) select **Fuel type** (JETA1 or AVGAS).
2. In the tab PERFORMANCE add **Average fuel consumption**.
3. In a section **Documents Manager** edit one of the sales documents and add CO2 on it by using an item 'CO2' from the Available Data filter.



To calculate CO2 emission Leon uses block time, average fuel usage and the factor: for JETA1 - 3.16 and for AVGAS - 3.10

Request changes history

It is now possible to access **Changes History** of the Quote in the quote's edition panel, under the 3-dot filter.





Changes history window

Clicking on the '**Show changes history**' option will generate a pop-up window with details regarding

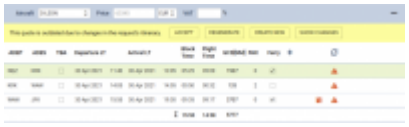
any quote changes such as:

- aircraft changes
- quotation status changes
- price changes
- trip schedule changes

In the changes history window, Leon shows a chronological list of all changes (the latest on top). The **colours indication** shows added data in green, changed data in yellow and removed data in red.

When you click on the changed detail, Leon highlights previous entrances of the same detail.

Changes requested via App

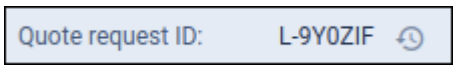

'Show Changes' option

Changes can also be requested in the Owner App.

If a change is requested and forwarded to Sales Panel, the yellow strip will appear in the request edit section with the following options:

- **IGNORE** - does not apply any changes
- **APPLY** - the update will be accepted and reflected in the updated itinerary
- **CREATE NEW** - new itinerary on the same aircraft will be created within the same request (the second tab with the updated itinerary)
- **SHOW CHANGES'** - displays the history of changes of the request

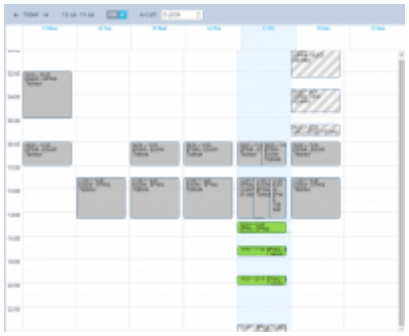
Additionally, next to the 'Quote request ID' the history icon will appear:



Additional options

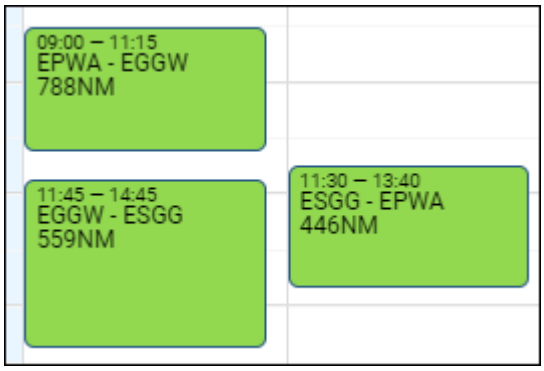
The right side of the page shows additional panels, which will allow seeing the quote in the Calendar, view the route on the Map, view & managing Sales checklist items and seeing OPS checklist items, managing PAX, add Notes or Comments.

CALENDAR

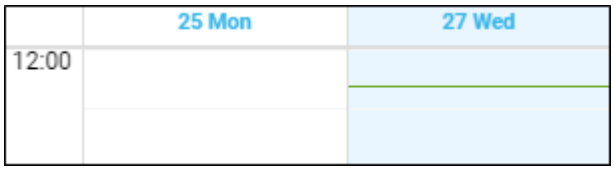


The view on quotation flights in Calendar

The quote itinerary/trip is imposed on actually confirmed schedule of the selected aircraft. The information displayed shows departure-arrival times & ADEP-ADES.



The current day is always displayed in light-blue and the thin, green line shows actual **UTC** time.



The view shows the 7-days period. Click ← or → buttons to move for another 7 days backwards or forward, or click TODAY to get back to the current day view. You can also switch between **UTC** & **LT**.

Aircraft selection dropdown allows you to view a different aircraft activity vs the aircraft used in the RFQ. If you choose a different aircraft in the 'CALENDAR' tab, the activity for this aircraft will be displayed in grey and the RFQ will be highlighted green. This is presented in the main screenshot of this section.

Switching the aircraft registration in the 'Itinerary' section will reset the aircraft registration in the 'CALENDAR' tab to the same one.

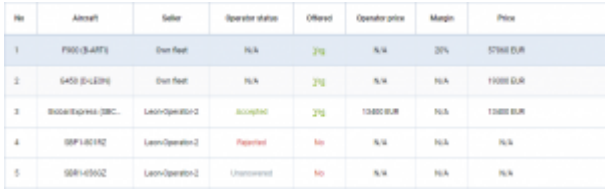
SUMMARY

The **'Summary'** tab displays the quick overview of all the quotes within one request.

The list is displayed in the same order as the order of the quotes.

The highlighted line corresponds to the quote that is currently previewed in the request edit section.

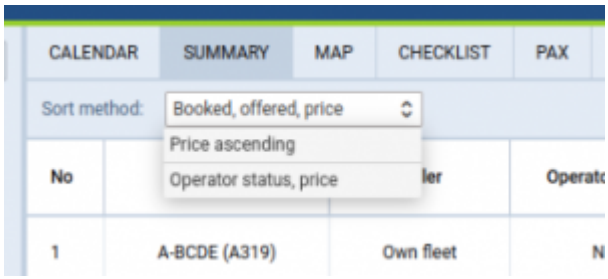
The tab contains the following columns:



'Summary' tab

- **No** - order number corresponding to the quote number
- **Aircraft** - Aircraft type and registration assigned to a specific quote
- **Seller** - Name of the airline selling the trip. It could be either the name of the subcharter company or 'Own fleet' label, in case of quoting on own aircraft
- **Operator status** - reply status received from Avinode (Accepted, Rejected, Unanswered). In case of own fleet or subcharter added within Leon, the status will always be set to 'N/A'
- **Offered** - displays the information whether the specific quote was included in an email sent to the Client using the 'QUOTE“ status. Set either to 'Yes' (if sent) or 'No'
- **Operator price** - applies to 'Operator price' for quoted by the subcharter operator
- **Margin** - this is either the subcharter operator margin or the margin indicated in the quote performed using the 'Cost & Margin' method
- **Price** - total quoted price

POSSIBILITY TO SORT QUOTES IN 3 DIFFERENT WAYS



Sorting option in 'Requests/Quotes'

It will be possible to sort the quotes in 6 different ways, using the field available in the Summary tab.

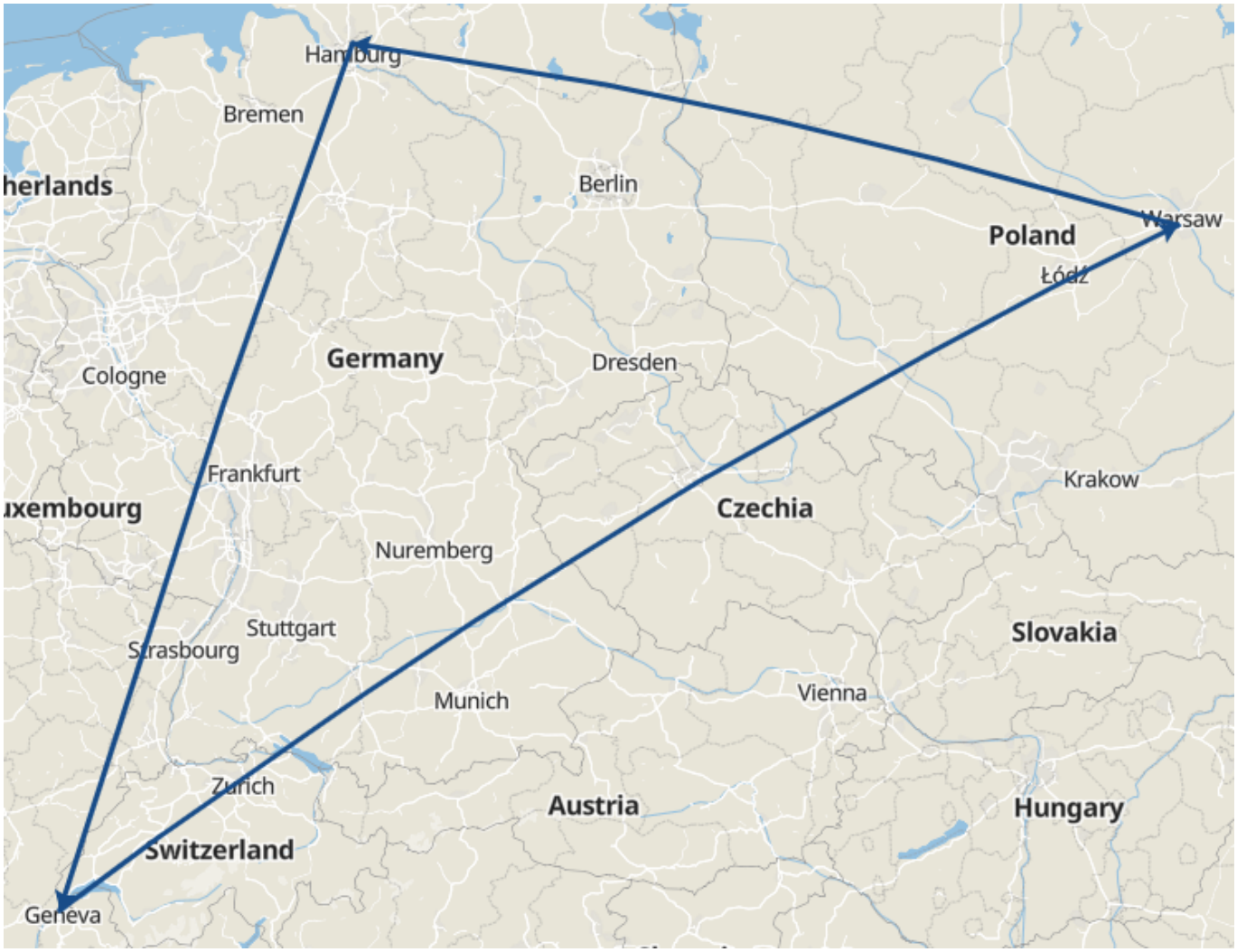
1. **Booked, offered, price** - this is the default way of sorting, in which the quotes will be sorted in the following way:
    1. Booked
    2. Offered, ordered by the ascending price
    3. The rest, ordered by the ascending price
2. **Booked, offered, operator price** - the sorting method works similarly to the 'Booked, offered, price' method but prioritises the subcharter Operator Price
3. **Price ascending** - the quotes will be ordered by the price, ascending
4. **Operator price ascending** - the sorting method works similarly to the 'Price ascending' method but prioritises the subcharter Operator Price
5. **Operator status, price** - in this case, the order is following (in each group sorting by ascending price):
    1. Own fleet
    2. Accepted
    3. Unanswered
    4. Rejected
6. **Operator status, operator price** - the sorting method works similarly to the 'Operator status,

price' method but prioritises the subcharter Operator Price

MAP

The **Map** shows the **route** of the trip. You can navigate with the map by clicking **+** or **-** in the top-left corner.

The selected flight shows the arrow in green. Ferry leg shows the arrow in the light blue.



CHECKLIST



Checklist section

Sales checklist on the trips/quotations added in the Requests/Quotes can be managed in the

Checklist section of Requests/Quotes only.

Sales checklist becomes available when the request is created, whether it is a regular fleet or subcharter.

It is possible to add extra items to the checklist by using the **'ADD ITEM'** button. It is also possible to delete the items by clicking on the **bin** icon.

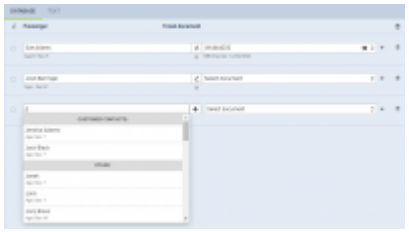
It is possible to service the Sales Checklist from the OPS view if the trip/quotation has been added in the Requests/Quotes.

OPS Checklist appears only once the trip is booked.

It is also not possible to service the OPS checklist in the Requests/Quotes. This can only be serviced in the OPS view.

Elements of the Sales Checklist can be set by default in the Flight editing section. Any changes to the Sales Checklist items will only apply to the newly added flights. If you wish to add or remove the Sales Checklist item, you can do it in the OPS view by using the ”+ADD ITEM“ button.

PAX



PAX section

In this tab, you can add passengers on a flight.

You can choose either the PAX you already have in your Phonebook and add them in the “DATABASE” section or add Passengers as a free text in the “TEXT” section.

In order to activate the PAX boxes in the “DATABASE' section, you need to insert the number of passengers in the route section of the quotation.

ADEP	ADES	Departure LT		Arrival LT		Block Time	Flight Time	PAX	Ferry	+
EPWR	EPWA	30 Mar 2019	09:00	30 Mar 2019	10:25	01:25	00:40	2	☐	+

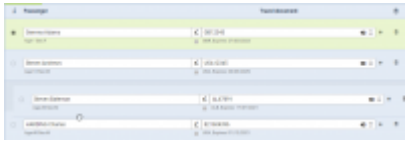
The PAX selection dropdown is divided into two sections:

- **CUSTOMER CONTACTS** - these are the passengers who belong to the company/Client requesting the trip
- **OTHER** - other passengers available in the phonebook

In this section, it is also possible to add new passengers to the Phonebook or edit existing passengers that are already in the database. The process is exactly the same as described here.

If the trip is added in the Requests/Quotes it is possible to add passengers or edit the data in the OPS section, tab PAX.

If a passenger has more than 1 passport you can select which one should be used as default (in PAX profile mark a checkbox 'Default'), but it is also possible to select a **different passport for departure & arrival** - when adding PAX, click **+** icon and select appropriate passport. This feature is for PAX selected from Leon database and not available when adding PAX from text.


Option to change order of PAX

It is possible to change the order of passengers by drag&dropping the name on the list.

Simply click on the name line you'd like to move, hold the left button of the mouse and move it up/down the PAX list.

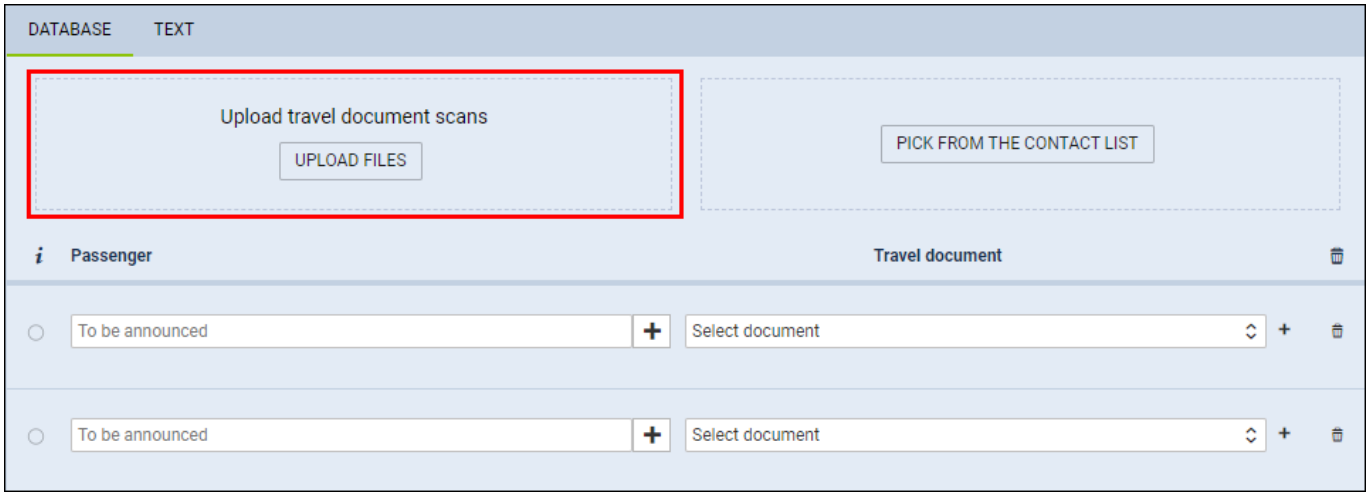
The change of order on the PAX list will be reflected in the documents as well as the handling request.

Selected 'Travel Document' will appear on the PAX Tripsheet document (as long as in Documents Manager it is properly set up) and on the Handling Requests sheet.

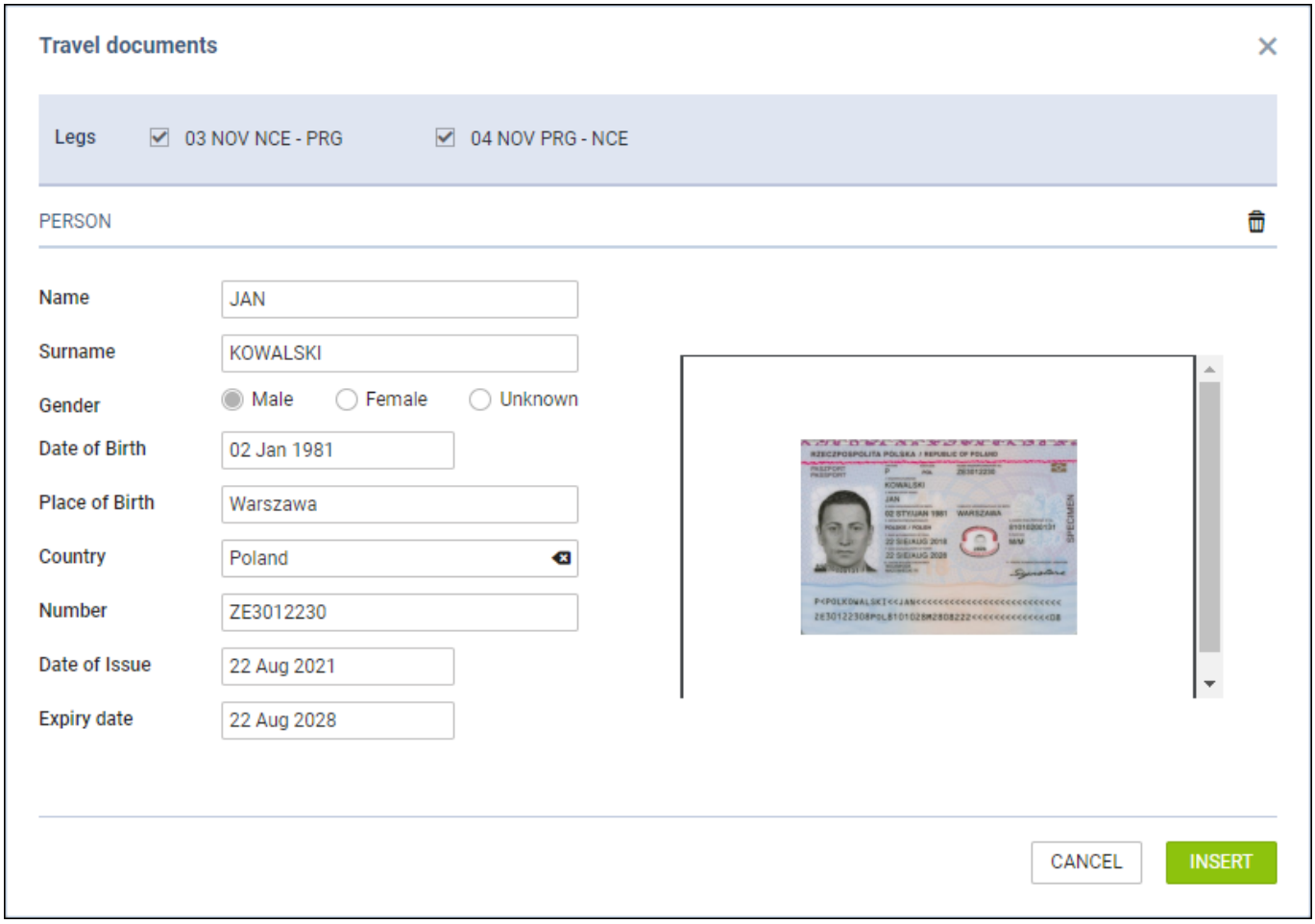
Assigning PAX to the flight by scanning Passport or a National ID

A new possibility of assigning PAX to the flight, by **scanning the passport/National ID**, has been introduced.

In the quote's edition page, tab PAX, click **Upload files** and select a scan of the passenger's travel document (in the below example Passport has been used). The following file formats are recognized .jpg, .png, and .pdf.

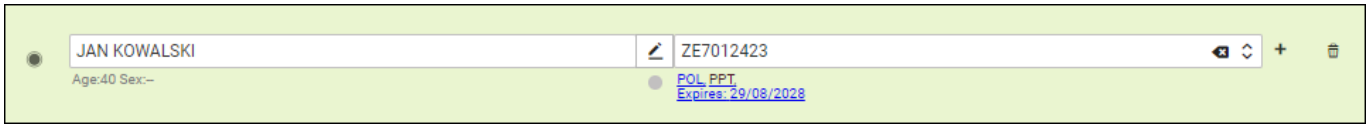


Once the scan has been uploaded, Leon will show a new window with the scan attached. In this new window, it is also possible to **select the flights, to which the person should be assigned** ('Legs' part above the scan).



Almost all the details are inserted automatically apart from the Place of Birth. Gender is recognized subject to the availability in the document.

To add passenger's details to the database (so that it can be used again when the same passenger travels) click a button INSERT and save changes.



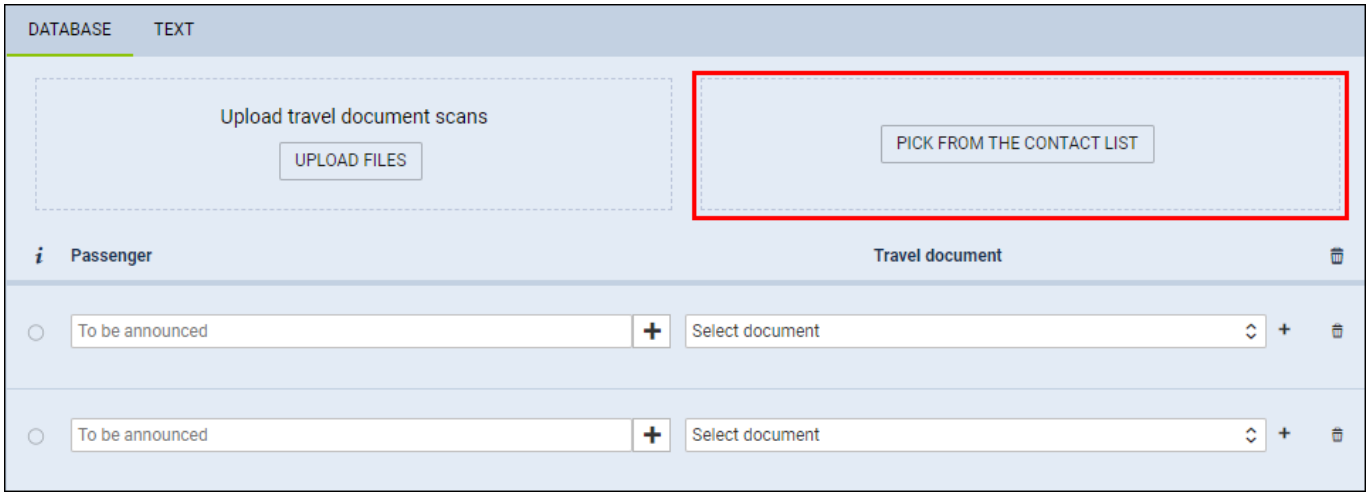
If the quote's requester is a company, then passengers added through this functionality will get added to that company's contacts.

Picking PAX from the contact list

It is now possible to select the PAX on the flights using the **PICK FROM THE CONTACT LIST** option.

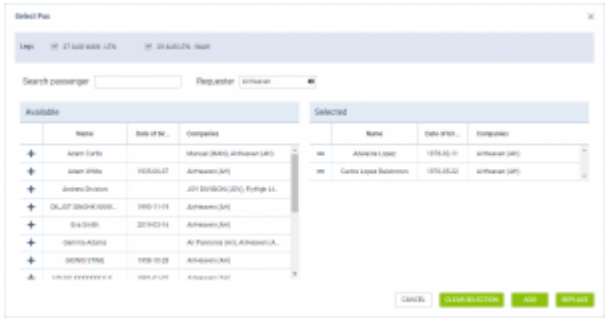
This option allows to quickly select and add the PAX to multiple legs.

Click on the **PICK FROM THE CONTACT LIST** option to open the **Select PAX** pop-up window.



'Select PAX' window

The **Select PAX** window is divided into the following sections:



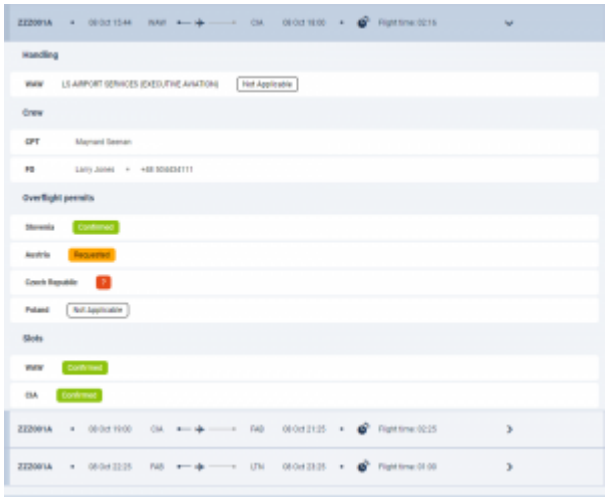
'Select PAX' pop-up window

1. **Legs** - allows selecting the flights upon which the action will be taken. Only flights with PAX are listed. Ferry and 0 PAX flights are omitted
2. **Search passenger** - option to search for PAX. If the 'Requester' is selected, the 'Search passenger' option is looking for the PAX only assigned to this specific Requester
3. **Requester** - automatically selected from the quote
4. **Available passengers** - list of PAX assigned to the Requester Company and containing the basic details (Name, DoB, Companies one is assigned to). If the requester company is not selected the list is empty. In this case 'Search passenger' option needs to be used. Clicking on the **+** next to the PAX name will move the PAX to the **Selected passengers** section
5. **Selected passengers** - PAX selected in the 'Available passengers' section. Press **-** to remove the passenger from the list
6. **Action buttons**:
   - CANCEL - option to cancel PAX selection procedure
   - CLEAR SELECTION - option to clear the list of selected PAX
   - ADD - option to add PAX to selected flights:
     - if there are more PAX names selected than the PAX number, the number of PAX will increase accordingly, i.e. PAX number is 2 but 4 names selected and added - PAX number will increase to 4
     - adding further PAX to the list will not overwrite already added PAX, i.e. adding 2 new PAX to 2 already assigned PAX will increase the PAX number to 4

- REPLACE - option to replace already added PAX with the new ones

---

OPS & CREW



'OPS & CREW' tab in quote edit section

This section is to serve two purposes:

- to provide the information about the progress of the dispatch of the flight by the operator of the Subcharter
- to give the Sales team a quick overview of the progress of the basic dispatch elements of the booked trip performed by OPS

The tab can be **activated** by switchin the privilege **'Sales - OPS & Crew tab'** to 'VIEW'.

Each flight within the **OPS & CREW** tab contains the following sections and details:

1. **Handling**
2. **Crew**
3. **Overflight permits**
4. **Slots**

Flight times are presented in **LT**.

The details in this section are **not editable**.

This tab is mainly designed with the **subcharter** flights in mind.

SHARING



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

SHARING tab allows selecting the data that are to be shared with a requester of subcharter in the

'OPS&CREW' tab in the edit request section.

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

Currently, the following data can be selected:

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



'SHARING' tab

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

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

These settings can be applied **directly in the 'New Phonebook'** in the tab 'SHARING' in the Client profile.

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.

EXAMPLE

To visualise the purpose of this function we can assume two operators:

- **Operator A** - requester of the subcharter
- **Operator B** - provider of the subcharter

It is important to mention that in order for the 'Share' function to work:

- both operators have to use the 'Requests/Quotes' module in Leon
- the trip has to be booked by the provider of the subcharter ('Operator B' in our case)

If 'Operator A' requests the subcharter from the 'Operator B', and subsequently 'Operator B' confirms the subcharter and books the trip within Leon, 'Operator B' is also able to select the data that will be shared with the 'Operator A'.

Once the data to share is selected on a booked trip by the 'Operator B', 'Operator A' will see, but not edit, this data in the 'OPS & CREW' tab on this particular subcharter. This will allow following the

progress of the subcharter.

NOTES



Notes section

In this section, you can add notes for trips on the regular aircraft as well as the subcharter.

Notes added in this section can be then embedded in Sales documents as all of them have the items available in the Available data.

Once the notes are added, click the **SAVE** button in order to save the changes.

There are the following 'Note' fields available:

- **LEGAL NOTE**
  - It should contain any legal regulations applying to the contract
  - Note that applies to and can be sent to end-customer
  - It can be inserted per quote individually, or
  - It can be set up as a default note in Settings > General Settings > 'Sales' tab
  - Applies per the whole request (or trip - if the request is booked)
  - It can be used on Sales Documents (included in the available data in the Documents Manager)
- **CUSTOMER NOTE**
  - Inserted by the Sales team and can contain any important information regarding Client's requirements, such as catering
  - Apply per the whole request (or trip - if the request is booked)
  - It can be used on Sales Documents (included in the available data in the Documents Manager)
- **CANCELLATION POLICY**
  - It should contain the Operator Cancellation policy regulations
  - Note that applies to and can be sent to end-customer
  - It can be inserted per quote individually, or
  - It can be set up as a default note in Settings > General Settings > 'Sales' tab
  - Applies per the whole request (or trip - if the request is booked)
  - It can be used on Sales Documents (included in the available data in the Documents Manager)
- **ADDITIONAL NOTE**
  - It can include notes with any additional important information
  - Applies per the whole request (or trip - if the request is booked)
  - It can be used on Sales Documents (included in the available data in the Documents Manager)
- **SALES NOTES**

    - Important notes by Sales Team
    - Apply per flight on which it is inserted
    - Once the quote is booked and the trip created, the notes can be included in the following documents: Flight Brief (Sales), Charter Agreement (Sales), Crew Tripsheet (OPS), PAX Tripsheet (OPS)
- **AIRCRAFT**
    - Inserted by the Sales team and can contain any important information regarding quoted aircraft, such as Client requirements regarding the aircraft
    - Applies per the whole request (or trip - if the request is booked)
    - It can be used on Sales Documents (included in the available data in the Documents Manager)
- **OPS NOTES**
    - Notes are available only when the trip is booked
    - Apply per flight on which it is inserted
    - It can be used to communicate any issues to the OPS Team
    - It can also be updated by OPS Team and the update will appear in the Sales Panel on the flight
    - Once the quote is booked and the trip created, the notes can be included in the following documents: Flight Brief (Sales), Charter Agreement (Sales), Crew Tripsheet (OPS), PAX Tripsheet (OPS

Additionally, there is a **CANCELLATION NOTES** section available in the **Subcharter** section that:

- apply to the contractual agreement between the operator performing the trip and the subcharter aircraft provider
- they can be inserted manually if the subcharter details are added on a subcharter aircraft in Leon, or
- if the subcharter is requested via Avinode, the 'Cancellation policy' details are fed from Avinode, as long as they're available in the subcharter operator settings
- it can be used on Sales Documents for subcharter (included in the available data in the Documents Manager)

MESSAGES

In this section, you can add any messages regarding this particular trip/quotation. If the request was sent from **Avinode**, you can also reply to the customer from this section.

There are **2 buttons** available in this section:

- **ADD INTERNAL MESSAGE** - this will allow adding an internal message visible only to Leon users. This option is always available
- **REPLY TO CUSTOMER** - contains 2 options:
    - **Avinode** - allows replying to messages and quotations sent from Avinode
    - **Email** - allows sending emails and receiving emails, as long as it is synchronised with a mailbox

ADD INTERNAL MESSAGE



Internal messages

+ADD INTERNAL MESSAGE function is there to allow communicating the stages of the process to the team.

There are 3 options available:

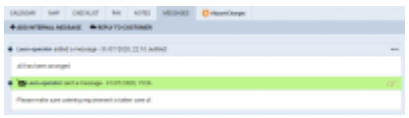
- **ADD** - option to add an internal message as a person servicing the request
- **ADD AS REQUESTER** - adding a message and indicating that this message was added by the requested. Such a message is highlighted green
- **CANCEL** - allows cancelling the message input process

REPLY TO CUSTOMER

There are 2 options available:

- **AVINODE** - if the quote comes from Avinode, this button is selected by default. Allows messaging with the Avinode broker
- **EMAIL** - allows communication directly via email by configuring Leon with an external Mailbox

AVINODE



Messages panel in Leon



Sending a message from Avinode to Leon

Messages inserted in **Avinode** when sending a request to Leon will also show in this section and will be highlighted green.

When the request is **received from Avinode**, you can click on the **REPLY TO CUSTOMER** button and the message will be sent to the Client in Avinode.

In Avinode, the reply will be available in the **'Trips' > 'Buying'** section, as per the screenshot.

Once the message is added you will be able to see who added a message and what day at what time. The times presented in the messages history are in **LT**.

EMAIL

In order to be able to send and receive emails in 'MESSAGES' section, the generic mailbox has to be configure by Leon Team. Please contact support@leonsoftware.com

for the details required to perform the configuration.

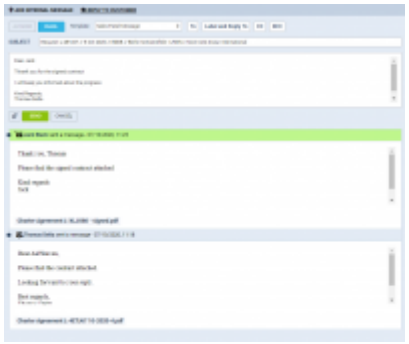
This functionality allows you to send and receive emails directly into Leon and keep the track of your emails in one place.

Before you start using the functionality you need to:

1. Contact support@leonsoftware.com in order to configure a generic mailbox with Leon
2. Create an additional 'Sales Panel Message' email template in the 'Email Templates' section, subsection 'Other'. This will allow you to send an email directly from the 'MESSAGES' section

Once you have your mailbox configured, you can go to Settings > Email Templates > Other and create the 'Sales Panel Message' template.

It is important that the email address provided to Leon is inserted in the 'RECIPIENTS' tab > 'Reply to' box. This email address can also be inserted in another email templates 'Reply to' boxes which will automatically synchronise the emails with the messages section.

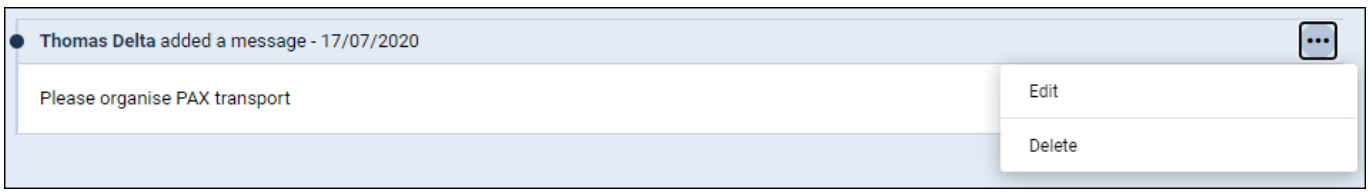


'EMAIL' functionality in Leon

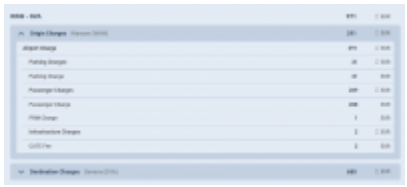
Once you have everything configured, you can start using the functionality:

- any correctly configured types of emails such as Flight Quotation, Charter contract or Sales Panel Message, amongst others, will show in the 'MESSAGES' section upon sending.
- any replies from the Clients to the configured messages will also show in the 'MESSAGES' section. Replies are indicated by **green** background of the bar
- both sent and received emails will be synchronised with the Mailbox and will be available to view in 'Outbox' and 'Inbox' respectively
- address 'To' is automatically generated from Client or Client Representative email address
- it is possible to attach and send files
- files sent by the Client will be received and available to preview in the 'MESSAGES' section
- new message will move the request to the top of the 'Requests/Quotes' list
- 'MESSAGES' section will now refresh automatically

It is also possible to **edit** or **delete** the message (apart from 'EMAILS'). In order to do that, click on **...** on the right-hand side of the existing message box and click on the relevant option.



AIRPORT CHARGES

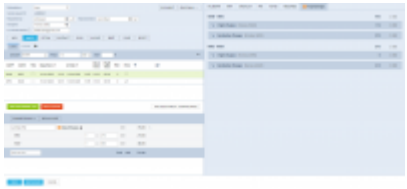


Airport Charges tab

This is not a default tab and needs to be activated in the **Add-ons** section. More information about the 'Airport Charges' activation process can be found here.

This tab is showing the airport charges downloaded from the Airport Charges per route for specific airports, as displayed in the screenshot.

Uploading Airport Charges to the Quote



'Airport Charges' synchronisation example

It is possible to download the Airport Charges directly to the quote.

In order to **download the Airport Charges' to quotation**, the below steps have to be performed:

1. Make sure that the integration with 'Airport Charges' is active
2. Add the 'Landing Fee' item to the quote. The 'Airport Charges' are assigned to this item and recalculate upon clicking on 

icon. As you can see in the screenshot, the total value is a sum of the 'Origin' and 'Destination Charges' and clicking on the arrow next to the 'Landing Fee' will provide you with the breakdown per airport

If the 'Landing Fees' item is included in the Aircraft Fees, the quote will initially calculate the fees based on the default price list unless the 'Airport Charges' option is selected. In this case, the default price will be updated based on the 'Airport Charges' and will overwrite the default one.

If the integration is **not active**, the 'Airport Charges' icon by the 'Landing fees' item will still show but will be disabled.

Subcharter

When you use occasionally subcharter aircraft from another operator, our panel **REQUESTS/QUOTES** allows supporting quoting for external aircraft types with Subcharter option.

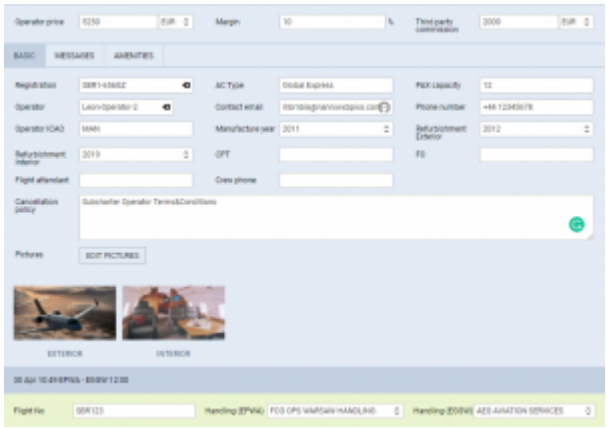
In order to use subcharter option create a quote (or edit the existing ones) and in the **Aircraft** drop-

down box select 'Subcharter' - insert the price, add schedule details (or mark times as 'TBA').

The subcharter details edit window is divided into 2 tabs:

- **BASIC** - contains subcharter details such as aircraft details, crew details, contact details (email and phone no.) and aircraft photos, as long as available in Avinode
- **MESSAGES** - possibility to reply directly to the Operator email (as long as it is available in the 'BASIC' tab)
- **AMENITIES** - possibility to select the amenities available on the aircraft as well as the cabin basic measurements and noise levels
- **SERVICES** - possibility to select the suppliers of services on the flights within the request

Price



Subcharter price section

The 'Price' section is located above the tabs with the subcharter details.

It allows inserting more detailed price that includes:

- **Operator price** - the amount charged by the operator (subcharter price)
- **Margin** - income margin calculated on top of the total cost
- **Third-party commission** - commission paid to the third-party broker

Based on the above elements, the total price is calculated as:

Price = 'Operator price' /(100% - 'Margin'%) + 'Third Party Commission'

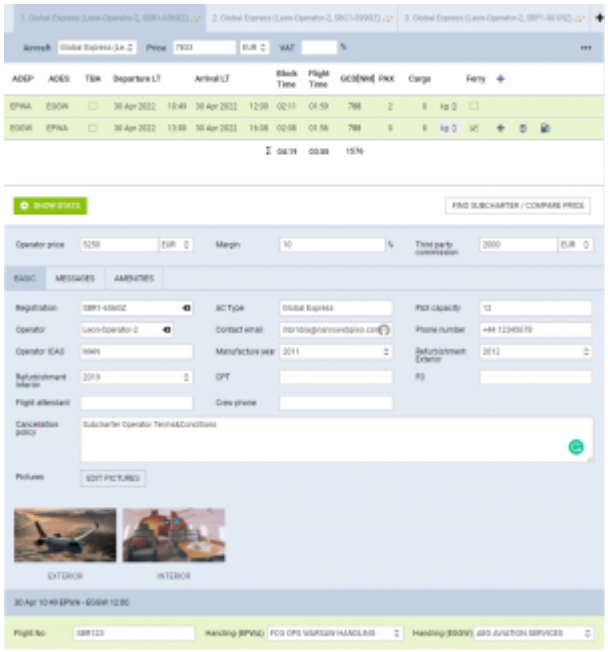
The total price is not editable and keeps the same currency as the price breakdown.



If **VAT value** is inserted, Leon additionally will display **Gross price** value, including VAT.

Hovering the mouse over 'Gross price' amount will display **VAT value**.

Basic



Subcharter tab in Requests/Quotes panel

In a subcharter 'BASIC' section (underneath the itinerary), select an **AC type** (it is mandatory to save the quote if you don't select the type Leon will show a warning). Other details, such as Registration, CPT, FO and FA are not mandatory.

Cancellation policy in the subcharter details section is the policy that applies to the contractual agreement between the operator performing the trip and the subcharter aircraft provider.

It can be inserted manually if the subcharter details are added on a subcharter aircraft in Leon.

If the subcharter is requested via **Avinode**, the 'Cancellation policy' details are fed from Avinode, as long as they're available in the subcharter operator settings.

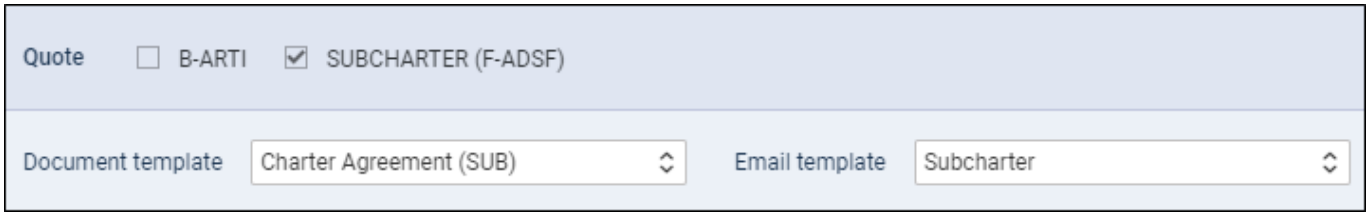
It is also possible to select **Handling agents** for Subcharters. Handlers can be selected from the drop-down list. However, if in a section General Settings > Sales Module a checkbox **Select handling agents on subcharters automatically** is unmarked, Leon will not show handlers automatically.

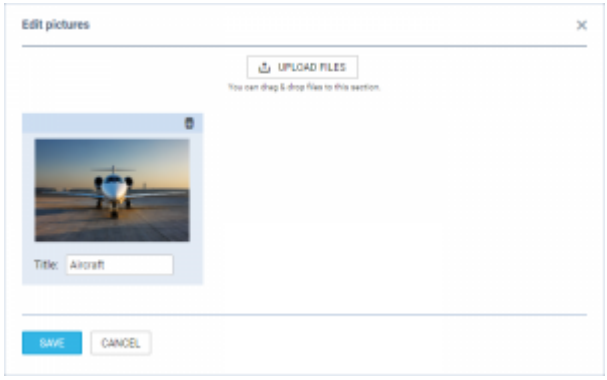
If we already used subcharter functionality in the past, Leon will search for an aircraft that was previously used. The dropdown list will display both aircraft registration and the operator name in the format **Registration, Operator name**. The aircraft is suggested based on the date of the last request created on this particular aircraft.

Once we select the aircraft, all the data is copied from the previous request, including type, crew, aircraft details and photos. The only input that is **not copied** is the subcharter price.

Once the subcharter quote is saved you can manage it just like a standard quote. There is one exception - you cannot physically book subcharter quote as an option / confirmed flight into the OPS module. However, you can still change the status to 'option' and book, but the quote will not be booked.

You can send **Flight Quotations** containing normal and subcharter quotes. You can send subcharter **Contract** and **Flight Brief** for subchaters using documents templates which can be customized from Documents Manager and **Email Templates** from Email Templates panel. In both of these panels, you have access to fields values provided in 'Subcharter' tab of the right panel.





Uploading photos in Subcharter Tab

You can also upload photos of the Subcharter aircraft.

Uploading photos

In order to do it, click on the **'EDIT PICTURES'** button.

A pop-up window will appear with the **'UPLOAD FILES'** button which will allow you to upload photos from your computer.

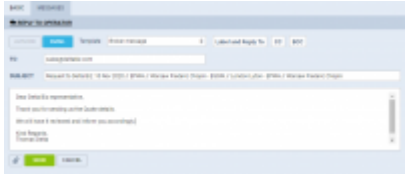
Once you selected the photos, in the 'Edit pictures' pop-up window, you have to assign a title to each of the uploaded photos (example in the screenshot).

Clicking 'SAVE' will upload the photos.

It is possible to **embed the uploaded photos within subcharter sales documents**. When naming uploaded photos you need to make sure that the **title matches the title used in the HTML**.

If the subcharter flight is requested by using the **'FIND SUBCHARTER'** button, the photos, if available, will download automatically to the subcharter section.

Messages tab


'Messages' tab in Subcharter

In this tab, it is possible to reply directly to the Operator.

In order to reply directly to the Operator, Operator's email has to be inserted in the **Contact email** box in the 'BASIC' tab.

In order to reply to Operator press **REPLY TO OPERATOR** link and select the **EMAIL** option. The operator's email will be picked from **Contact email** in the 'BASIC' tab.

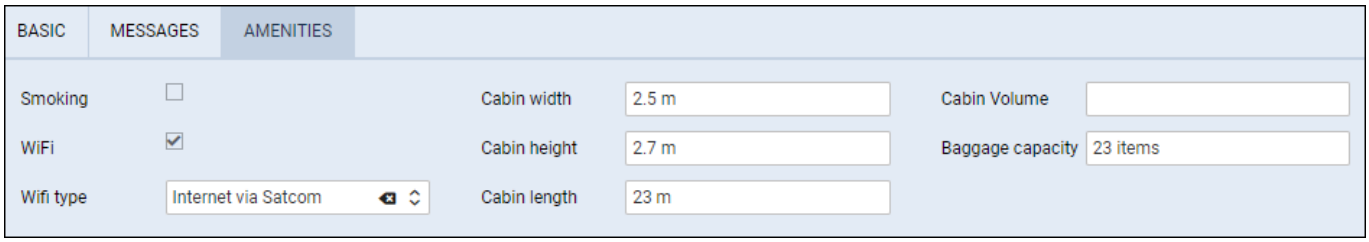
Select 'Subcharter message' template in the dropdown. 'Subcharter message' email template needs to be created in 'Settings' > 'Email templates'

Currently, replies from all the brokers will display under one 'Messages' window.

Amenities

It is possible to add **Amenities** when creating a quote on **Subcharter** aircraft. In the quote's edition for Subcharter, there is a dedicated new tab 'Amenities' where it's possible to add several amenities, such as:

- **Smoking & Wifi** - mark checkboxes to enable them.
- **Wifi type** - select between Internat via Satcom, KA band, KU band, SBB (Swift Broadband) and Iridium.
- **Cabin details** - width, height, length and volume.
- **Baggage capacity** - add a number of items.



Amenities can be added to 'Flight Quotation' document, by using item: 'quote > aircraft > aircraftAmenities' from 'Available data' of the Documents Manager panel.

Leon will also show 'Wifi' & 'Smoking' amenities for Subcharters downloaded from **Avinode**, which are defined in Avinode's section: Aircraft > Fleet edition > Update amenities.

Services

In this tab, it is possible to select and overview the suppliers of the services on the flights within the request.

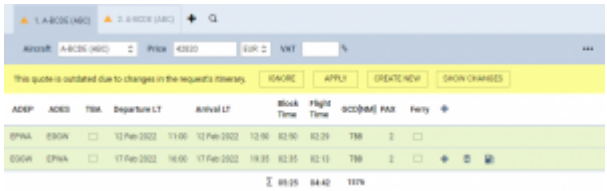
The services included are:

- **Handling ADEP** and **Handling ADES**
- **Catering**
- **PAX Transport ADEP** and **PAX Transport ADES**

The providers of the services have to be selected manually.

SCHEDULE UPDATE

The requested schedule can be updated using the **EDIT REQUEST** button located next to the 'Request ID'.



Available options after the schedule is edited

After the changes are performed in the 'EDIT REQUEST' pop-up window and applied ('UPDATE' button), the yellow strip will appear in the request edit section with the following options:

- **IGNORE** - does not apply any changes
- **APPLY** - the update will be accepted and reflected in the updated itinerary
- **CREATE NEW** - new itinerary on the same aircraft will be created within the same request (the second tab with the updated itinerary)
- **SHOW CHANGES** - displays the history of changes of the request

Once the changes are applied, they will reflect in the main 'Requests/Quotes' view.

From:
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Last update: **2022/06/17 20:31**