



SalesChain is happy to process lease company portfolio files for addition to your SalesChain database.

Your lease coordinator must send portfolio reports via email in the xls formats below to support@saleschain.com. We suggest you send reports once a month or once a quarter depending on your sales volume. More frequent submissions are unnecessary and will result in excess charges on your monthly invoice.

Please make sure all files are clearly named with company name, finance company and date - for example, 'ABCCompanyDLL082018.xls'. Please make sure the subject of your email is clear - for example, 'ABC Company Lease Portfolios August 2018'. **Please make sure all portfolios to be processed are in one email.** Failure to follow these steps may result in delayed processing of your files.

The acceptable files for submission are as follows:

- CFS – Customer Lease Data report
- CIT – Asset List Summary
- DLL – Partner Portfolio Report
- Marlin – Your rep must send you a serialized portfolio report
- TIAA – Portfolio Report with Asset Level Details set to 'Yes'
- US Bank – Maturity Report
- Wells – Portfolio Report
- XFS – Portfolio Report
- Leaf – Lease Expiration report – Flat file format
- Great America – Please let SalesChain know, and we will send you an authorization form. We integrate with GAL directly.

Any active leases in SalesChain absent from the current portfolio report will be marked 'Completed' in SalesChain. For this reason, please make sure you send complete portfolios for your business to avoid an active lease being marked 'Completed'..

We will process files that have 25 rows or more. If the portfolio is smaller, the Help Desk will be happy to show you how to update on your end. Please email support@saleschain.com

Submission of files not in the above format may result in our inability to process or excess charges on your monthly invoice.