

EasyEdit Instruction Guide

When completing a customer's contract online in the Sheffield Dealer Suite you will now be able to adjust the VIN/Serial # and Invoice amount within certain parameters. The contract date will also default to today's date when printing the contract and cannot be adjusted.


Dealer Approval

Complete editable fields, as applicable. Read attestation message and click the checkbox. Click Next

Name Customer Name	Manufacturer Manufacturer Name
Equipment Type of Equipment	Model Year Model Year
Model Number Model Number	VIN/Serial Number Vin/Serial Number
Rate/Term Rate and Loan Term	Min-Max Range Min-Max Range
Contract Date Contract Date	Invoice Amount Invoice Amount (\$)

☒ I attest that the information above is accurate and I am in compliance with the Sheffield Financial Dealer Standards and Sheffield Financial Program Guidelines.

RESET CANCEL NEXT

- Click the **Green Check** as normal 
- On next screen, the following fields are editable:
 - VIN/Serial #
 - Invoice Amount
- The MIN – MAX range will be your limits to work within on a customer's contract amount
- The Contract Date field will automatically change to today's date
- To erase the editable fields, click **Reset**
- To cancel changes and return to Status of Applications screen, click **Cancel**
- When your changes are complete, click the attestation box and then **Next**

To Confirm Changes:

- After clicking **Next**, you will have the chance to verify your changes and make corrections by clicking **Go Back**
- You will not be able to make edits on the Confirm Changes screen
- When you are satisfied with your changes, click **Submit** to proceed to the Print Contract screen
- The rest of the contracting process remains the same
- To ensure timely funding, please make sure the last revision of your customer's contract through EasyEdit is what gets signed and submitted for payment.**

This includes revisions through EasyEdit for:

- Invoice Amount**
- VIN/Serial #**
- Contract Date (which is automatically adjusted to current date by going through the EasyEdit)**

SheffieldFinancial.com
800-438-8892

Once you have completed the Easy Edit process and the customer has signed a contract, please do not go back into Easy Edit feature unless you need a new contract for the customer to sign. The contract date will automatically be updated again when the green checkmark is selected in the Action column and will not match what the customer originally signed. This can delay processing of the funding documents.