

Introducing EasyEdit... Simpler Process Faster Closings

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.

CANCEL NEXT

GO BACK SUBMIT

Complete editable fields, as applicable	. Read attestation message and click the checkbox. Click Nex
Customer Name	Manufacturer Name
Type of Equipment	Model Year
Model Number	ViNSerial Number
Rate and Loan Term	Min-Max Range
Contract Date	

Continuing continuing and the second seco		
Customer Name	Manufacturer Name	
Type of Equipment	/ Model Year	
Model Number Model Number	Vii/Serial Number	
Rate and Loan Term	Min-Max Range	
Contract Date		

RESET

SheffieldFinancial.com 800-438-8892

- Click the Green Check as normal
- On next screen, the following fields are editable:
 1. VIN/Serial #
 - 2. 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)

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.

Sheffield Financial is a division of Truist Bank, Member FDIC. © 2022 Truist Financial Corporation. Sheffield Financial, Truist and the Sheffield Financial logo are service marks of Truist Financial Corporation.