

Heartland Setup - Plan Command Users

Current Heartland Merchants:

Adding Project Zone & Plan Command is as simple as adding a terminal. As a Heartland Merchant all you need to do to utilize RSA's Suite of Services is to complete and submit a couple of forms.

Not Currently a Heartland Merchant:

No problem we can enroll your business for Project Zone / Plan Command "only" however we encourage you to add your Brick and Mortar locations too to optimize your best pricing.

BOARDING PROCOCESS

1. Heartland Application or updated Application for current Heartland Merchants
2. Internet Addendum, Merchant Order and Receipt Form & Web Connect Form
3. Underwriter Approval – 2 to 4 days

COST & PRICING

1. Current Heartland Merchants will remain at their current pricing structure (no changes or additional fees).
2. New RSA Merchants will be priced according to the RSA Rate Tiers (based on sales volume)
3. Web Connect one time licenses fee \$299.00

CONTACT:

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4 - Easy steps to sign up as a PlanSwift and RSA Referral Partner.



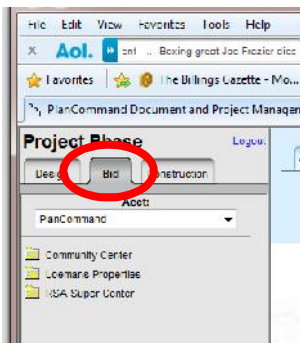
- 1. Click on this link: [Click here to sign up for PlanSwift Referral Partner Program](#)

- 2. Fill out the information completely and please note in the comments section that you're an RSA Member.

Setting up Heartland Account and Planswift AID inside of PlanCommand:

Step 1:

Go to Bid tab on Company Site:



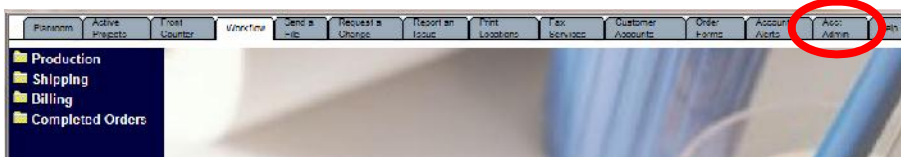
Step 2:

Locate and click the “Operations Tab” that appears on the screen



Step 3:

Locate and click “Account Admin” tab



Step 4:

Complete the Credit Card Vendor information inserting your company Account ID received from Heartland

A screenshot of a web form titled 'Trusted Users'. The form contains several sections: 'Trusted Users' (with a note about login names), a section for 'Do you wish to run all user work online?' with a 'Yes' button, and a section for 'Do you wish to show Bid Data in Planroom?' with a 'Yes' button. Below these are checkboxes for 'Do you wish to allow customers to load from WorkOrders?' and 'Do you want to allow Simple-Pric printer definitions?'. The 'Credit Card Vendor' section is circled in red and contains a dropdown menu for 'Account ID' and a text field for 'Planswift Account: 1111'. A red arrow points from the 'Planswift Account' field to a note box on the right. Below the 'Credit Card Vendor' section is a 'Save' button.

Note:

Enter WebConnect Configuration Portal USERNAME sent by Heartland. It usually is an alpha character username that ends in *net*. ie: xxxnet

Note:

Planswift AID entered here

Step 5: Click “Save” button