



## Creating a Credit Card Survey for Collecting Insurance Money

(Visit: <http://ucanr.edu/sites/surveys> to learn more about common uses of the ANR Survey Tool)

### 1. Verify your unit is approved to make credit card authorizations.

- Move (Select “Options” and “Move Copy Delete”) the survey to a unit which accepts credit card payments. This action will attach the survey to a unit with a payment account able to accept credit card payments. If your program is not on the [list of Authorized Units](#), contact your supervisor to identify an appropriate substitute OR initiate a request with CSIT via your portal.

### 2. Add survey questions related to name and an e-mail address.

- Add an e-mail address question to your survey (as this is your mechanism for sending receipts).  
**Note:** You must select the “Email” as your Question Type in order for your question to be considered a valid e-mail question.

### 3. Enable Credit Card Payments from the survey administration menu.

- Go to "Payment Options" then "Credit Card Options" then fill out the Credit Card Options form, including MG account information.
- Credit Card Payment must be activated (checkbox) to be able to add a payment question and to submit for authorization.

### 4. Add a payment question.

- Add a new question and select "Payment" as the Question Type. Enter \$6.00 (or your county-specific annual fee) as payment amount.

### 5. Test the Survey using your own e-mail address so you see what a user would see.

- Select "Test Survey" from the menu and complete the survey as if you were a respondent.
- **Note:** Before the credit card survey is authorized, the test payment server is used, rather than the actual server. Test payments are not real, and will show as "Test \$123" in the survey results.
  - Sample Entry: Card Number: 5454545454545454 / Card Type: MasterCard

### 6. Submit the credit card survey for authorization.

- Visit the ANR Survey System Credit Card Help page to learn who you should contact for credit card help. Be sure to provide the survey name, survey number, and survey location.

### 7. Share your survey with your volunteers.

- Add link (Go to “Create” >>”Survey Link”) to e-mails, newsletters, and/or other reappointment related literature.
- Add link to VMS homepage news (VMS login>>>Manage VMS>>> Home Page News) to ensure easy access for volunteers.

**Note:** you may not use the survey tool to collect donations of any kind. If volunteers ask to donate in addition to the insurance fee, use the “donate now” button.