



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

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

- Add an e-mail address question to your survey (as this is your mechanism for sending receipts). **Note:** You must select "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" >>> "Credit Card Options" and fill out the "Credit Card Options" form. Include your UC Master Gardener account or subaccount information.
- You must enable your survey to accept credit card payment by clicking the "Credit Card Payment" checkbox.

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 the payment amount.

5. Test the survey using your own e-mail address so you see what users will see.

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

6. Submit your 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 link widely.

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

NOTE: Currently, ANR prohibits collection of donations via the ANR Survey Tool. If volunteers wish to donate in excess of their annual fee, direct them to use the "Donate Now" button on their UCCE homepage.