

Information Capture

Summary

You may want to capture information in your onboarding flow, whether it's a customer's email for communication purposes, alias, first name, or other fields.

We have a few fields pre-made for you. All the fields but 3 are standard input fields, but these 3 have custom attributes:

1. Email
2.
 - this field has standard email validators and is unique for each project environment (Sandbox/Live).
3. Username
4. this field a sting that is unique for each project, which the following validations:1. Letters A-Z, a-z, numbers 0-9, or symbols ! # % ?
5.
 1. Must be length 5 to 20
6.
 1. Cannot contain consecutive symbols
7. T-shirt size
8.
 - this field is a dropdown with the standard options available (XS, S, M, L, XL, XXL).

Usage

We want to make this as simple for you. Go to the [configurations page](#) and click on the Customer Information Capture card.

Here you specify which fields you want to collect during onboarding. For each field, you can:

1. Enable for sandbox/live
2. Select whether this is optional or mandatory.

Simply save the settings and on the next log in, a user be prompted to enter the information in onboarding.

But wait, what happens with your current users if you change the settings?

No big deal. If you make certain fields required, then the next time a user connects to your application, we'll ask them to enter the field that you just made mandatory. That way, your users will stay up to date with the fields that you need.

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