

LegalThings LegalForm Plugin

LegalForms by LegalThings is a way to create a document by filling in data to populate a LegalDocx template. These are used in a WorkFlow in many ways, from simply creating and sending a contract to incorporating a company. The LegalForm plugin allows a user to start filling in a LegalForm on your WordPress website before they've logged in or created an account on your LegalThings install.

How it works

The plugin retrieves a specified LegalForm and displays it where the shortcode is placed. A user fills in this form, after which a step is appended to the form where the user is asked to create an account for your LegalThings install, or login. This step is generated by the plugin and has the same styling as the rest of the form. A session is created for the (new) user, a WorkFlow is started for this user and the data of the LegalForm is send to it. Afterwards the user is send to the flow, or optionally to a url.

Installation

On your Wordpress admin panel, go to the 'Plugins' panel, click 'Add plugin' and search for 'legalthings legalforms'. If you've found the plugin 'Legalforms' by 'LegalThings', you've found the right one. Install it and once it had finished downloading, activate the plugin. Fill in the necessary data in the settings page.

Settings

Under the settings tab, a new settings page for LegalForms has been created. Here you need to enter a LegalThings base url. This is the url to your LegalThings install and is used to retrieve templates and is also where the WorkFlow is created and the LegalForm is send to.

The standard login email and password are optional and used when you don't want the user to create an account or login, but want to start a WorkFlow for a predefined standard user. This is useful for example when you use a WorkFlow to create an advice based on a number of questions and send it to an email filled in in the LegalForm.

Shortcode

The full shortcode looks like this:

```
[legalforms template="template_ref" flow="flow_ref" material="false"
standard_login="false" done_url="https://mywebsite.com/" alias_key="key"
alias_value="value"]
```

Options:

- **Template**
The reference of the LegalForm template to be displayed.
- **Flow**
The reference of the WorkFlow where the form data needs to be send to.
- **Material**
Boolean whether Bootstrap Material Design or regular Bootstrap is used. Defaults to true.
- **Standard login**
Boolean whether to use the standard login credentials specified in the settings page or to let the user register or login on your install. Defaults to false.
- **Done URL**
The URL where the user is send to after the form has been submitted. If omitted the user will go to the page of the created WorkFlow.
- **Alias key**
Set the alias key used by the WorkFlow. Optional.

- **Alias value**

Set the alias value used by the WorkFlow. Optional.

Styling

All plugin styling is isolated to the plugin HTML by prepending the id 'legalforms-plugin' to all the CSS classes of the plugin and its dependencies, so the rest of the page is not affected. This id can also be used if you want to customize the form design.

The two styling options are to use Bootstrap Material Design or standard Bootstrap.