

Quote Generator

Installation, quotes, PDFs and privacy

Version 1.1.2 | October 11, 2026

What is included

The installable WordPress plugin contains editable PHP, JavaScript and CSS source, the GPL license, third-party license notices, this guide, installation instructions, privacy notes and the changelog. No activation key or monthly plugin subscription is required. Hosting and email services are separate.

Requirements

Single-site WordPress 6.0 or later; 64-bit PHP 7.4 or later with mbstring; MySQL/MariaDB with InnoDB; writable private storage outside the public document root. GD or a working WordPress image editor is needed for company-logo processing. cURL is recommended for the bundled TCPDF library and optional reCAPTCHA. Multisite is not supported. Release checks used WordPress 7.1.1, PHP 8.4.25, MariaDB 11.8.3 and Twenty Twenty-Five; older minimum versions were not separately tested.

Install or update

Back up the database, plugin files and private PDF folder before upgrading. Test on staging first. Use **Plugins > Add Plugin > Upload Plugin** and select the installable ZIP. Install and activate; for an existing copy choose **Replace current with uploaded**. The owner backup bundle is not an installable plugin. Existing records remain on deactivation. Keep accepted and previously emailed PDFs as historical records; do not overwrite them manually.

Configure the business

Open **Forge Quotes > Settings**. Save company details, notification email, logo, currency symbol and decimal precision, estimate prefix, tax, service choices and PDF header/footer. Use the currency precision consistently once estimates exist. Services accept one option per line or Label|value. Confirm your WordPress mail service works before relying on notifications.

Publish the request form

Add a Shortcode block containing `[forge_quote_form]`. An optional title is supported: `[forge_quote_form title="Request an estimate"]`. Multiple forms can share a page. Submit a test request, verify it under **Forge Quotes > Quote Requests**, and verify the notification reaches your inbox.

From request to estimate

Review and convert

Open a request and select **Create Estimate from Request**. Customer details are copied into the estimate and remain editable before acceptance. Review the title, client name, email, phone, company, expiry date and notes. Conversion does not invent prices; add and save the line items yourself.

Save accurate line items

Each row has a description, quantity and unit price. Add or remove rows as needed; up to 50 rows are supported. Quantities are whole numbers from 1 to 9999. Use plain decimal prices without a currency symbol, comma or scientific notation. Currency precision is configurable from 0 to 4 decimals. The maximum supported amount is 999,999 major units. Invalid entries preserve previously saved estimate data and show an error.

Discounts may be fixed or percentage based. Percentage discounts and tax accept 0-100%; tax is calculated after discount. Example: 250.00 subtotal less 10% discount gives 225.00; 10% tax adds 22.50, producing 247.50. Save and review the displayed totals before sending.

Generate and send a PDF

Use **Generate PDF**, inspect the document, then **Email PDF to client**. The plugin stores PDFs privately and uses authenticated downloads. The updated renderer aligns columns, wraps descriptions and repeats headings on long estimates. Only plain escaped customer text reaches the PDF table. Logos must be valid local JPEG, PNG or WebP images; SVG and remote logos are not used.

Status and historical evidence

A successful WordPress mail handoff moves Draft to Sent. This means accepted for sending, not confirmed inbox delivery. Editing a sent estimate changes it to Needs Resend. Send the updated PDF again. Authorized staff can record acceptance or rejection. Accepted estimates cannot be edited or have replacement PDFs generated; create a revision instead. Sent PDF archives and status history are retained.

When something fails

Check the administrator notice and email attempt history. A rejected email handoff must not mark an estimate as Sent. For missing mail, check your SMTP provider and spam folder. For PDF errors, check private-folder permissions, available disk space, PHP extensions and database health. Do not fix a warning by placing private PDFs in public uploads.

Care for your records

Customer information

Requests and estimates may contain names, email addresses, phone numbers, company names and free-text project details. Information is stored in the WordPress database and generated private PDFs. Notification and estimate emails pass through your configured mail provider. This plugin is not a public customer portal or an electronic-signature service.

Export and erasure

Use **Tools > Export Personal Data** or **Erase Personal Data** after verifying the requester. Erasure anonymizes matching customer fields and attempts to remove personal PDFs. Accepted estimates retain business totals and status. Check the reported result: unresolved cleanup is not a successful erasure. Copies already sent by email and copies in backups need separate handling under your own retention policy.

Spam protection and optional Google service

The public form uses a honeypot and a limit of three valid requests per IP identity per hour. The stored identity is an HMAC, not the raw IP address. Optional reCAPTCHA v3 sends verification information to Google and requires your own keys and an appropriate privacy disclosure. If enabled and verification fails, the submission is rejected. Shared networks may share a rate limit.

Retention and uninstall

Automatic retention is optional and relies on working WordPress scheduled tasks. Accepted estimates are excluded from automatic retention cleanup. Keep database and private-folder backups together. Deactivation preserves records. The delete-data-on-uninstall option is off by default; enabling it before uninstall is destructive and requires a deliberate backup and retention decision.

License and support

Plugin code is distributed under GPL-2.0-or-later; the complete terms are in LICENSE.txt. TCPDF 6.11.2 and its font assets retain their upstream licenses and notices under lib/tcpdf. See THIRD-PARTY-NOTICES.md. This guide does not replace the licenses or add a support-duration or refund promise. For assistance, contact **support@forgelumina.com** with the plugin version, WordPress/PHP versions and a non-sensitive description of the issue. Never send passwords or customer records.

Before customer use

Test your own theme, mail delivery, backups, private storage and a complete request-to-estimate workflow on staging. Compatibility checks do not guarantee every host, theme or other plugin combination. The Forge Lumina store purchase/download transaction remains a separate test.