Customer Documentation

ConfigCraft Quote Add-on

The guide for understanding how to collect quote requests from the configurator, prepare an offer, and turn it into an order.

Quote workspace / Quote options / Quote PDF / Email offer / Order conversion

Version 0.2.9 | Edition 1 November 2026

Audience - End customers, sales teams, store managers, and WooCommerce administrators

Goal You will understand when to use a quote instead of direct purchase and how to manage the flow from request to confirmation.

Recommended Path

Read the guide once from top to bottom, then use the sections as an operational reference. The blue callouts highlight decisions that affect pricing, orders, or production.

1. Before You Start: Why Quotes Matter

Not every configurable product should be purchased immediately. Some products need commercial approval, technical review, file validation, or a custom offer. Quote Add-on adds that step without losing the data collected by the configurator.

The customer configures the product, sends a request, and the team receives a complete record. From there the team can prepare an offer, send it by email with a PDF attachment, and convert it into an order when the customer approves.

Direct purchase	Quote request
Fixed price, standard product, no manual review needed.	Price must be confirmed, files may need validation, and commercial terms may vary.
The customer goes directly to cart.	The customer sends the configuration to the sales team.
Immediate order.	Offer, approval, then order.

2. What Quote Add-on Is For

ConfigCraft Quote turns the configurator into a commercial workflow. The customer does not have to buy immediately. They can submit a request, include details, receive a tailored offer, and once the customer confirms it, the team can turn the request into a WooCommerce order.

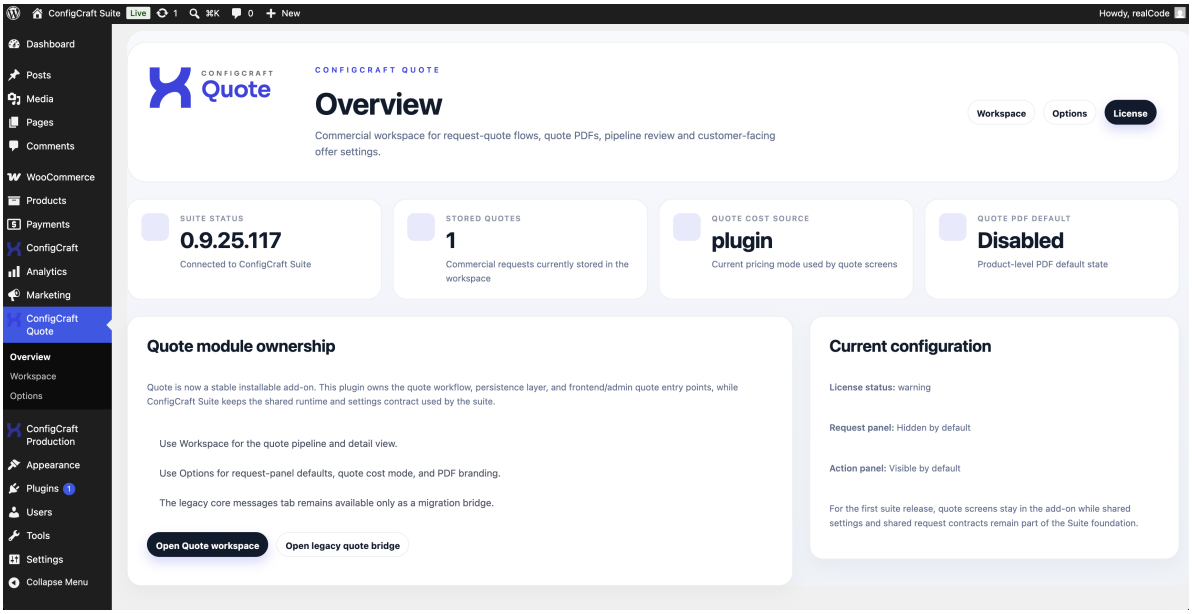
• Dedicated workspace for viewing and managing quote requests.

• Commercial statuses such as new, in review, quoted, approved, converted, closed, and archived.

• Branded quote PDF with title, subtitle, logo, and final note.

• Customer email with quoted amount, message, validity, and attached PDF.

• Conversion from quote to WooCommerce order after approval.



The overview summarizes quote status and module readiness.

3. Requirements and License

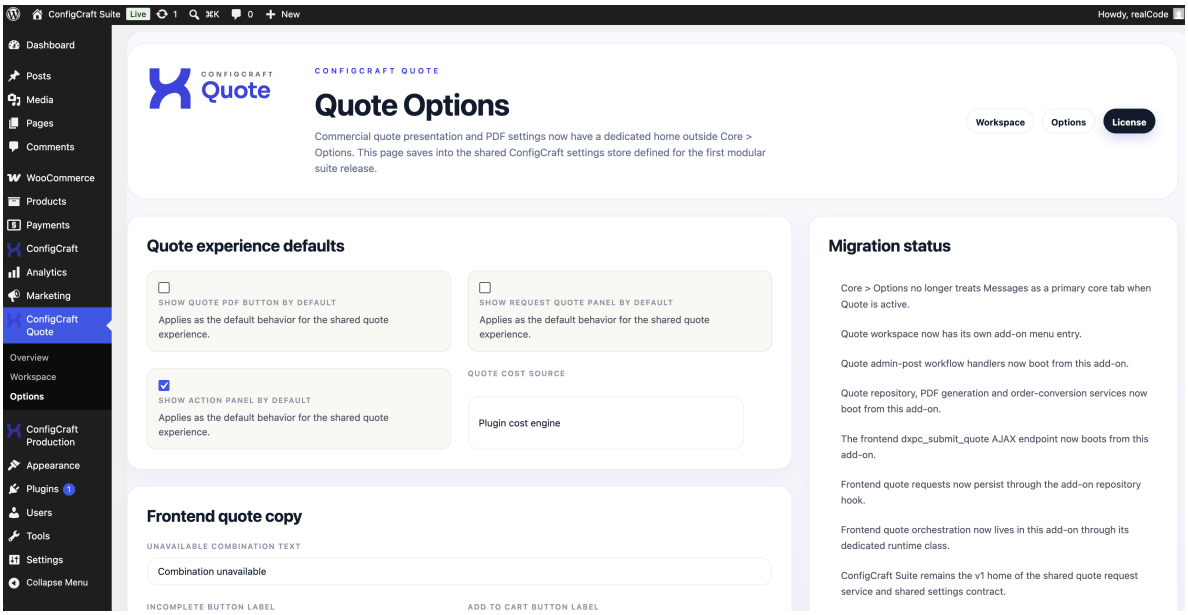
Quote 0.2.9 requires WooCommerce, Free core 0.9.28.3 or later, and the installed, active Pro package. For this edition use Pro 0.2.15 and current Free core 0.9.28.5. Your license must include the Quote entitlement.

1. Install and activate WooCommerce, Free core and the Pro package, followed by Quote.
2. Open ConfigCraft > Options > License, enter the key and check that Quote is active.
3. Open ConfigCraft Quote > Options and configure the workflow and PDFs.
4. Run an end-to-end test in a test environment before customer use.

> A Quote-only license enables the quote workflow, not 3D or advanced pricing. The Pro package remains required for shared services; a separate Pro entitlement is not required for the Quote-only workflow.

4. Primary Options

Option	What it controls	When to change it
Show quote PDF button	Shows the quote PDF button by default.	When you want the customer to download a document right away.
Show request quote panel	Displays the quote request panel.	When the product needs commercial review before purchase.
Show action panel	Shows commercial actions in the frontend.	When you want to guide the customer toward quote request or cart.
Quote cost source	Chooses between plugin engine, WooCommerce price, or hidden costs.	When the price should be visible, alternative, or intentionally hidden.



Quote options are placed next to the explanation of defaults and cost source.

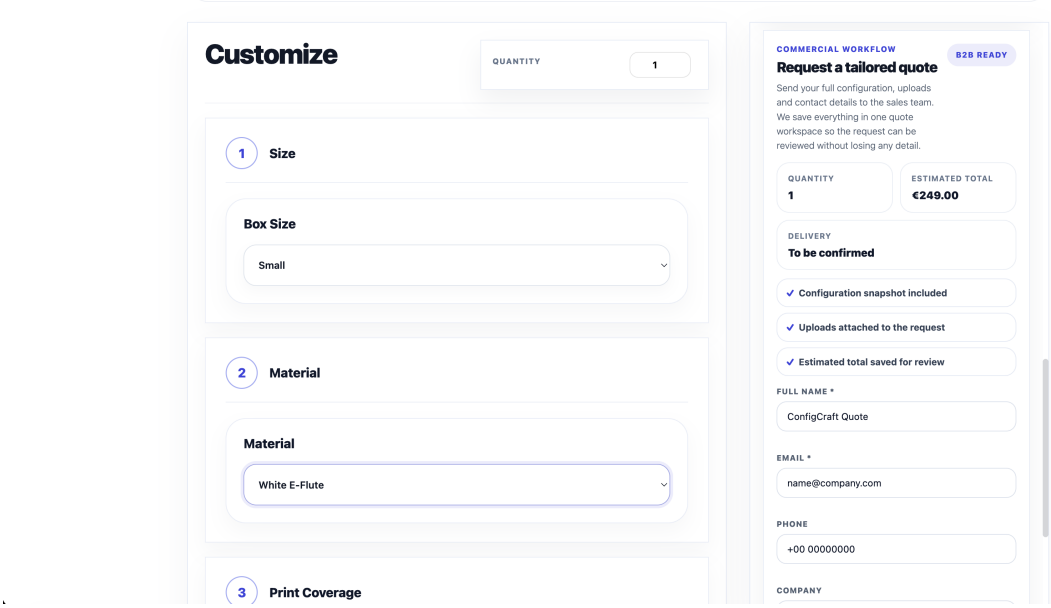
5. Managing a Quote Request

1. Open `ConfigCraft Quote > Workspace`.
2. Open the new request.
3. Review the configuration, quantity, customer data, message, and files.

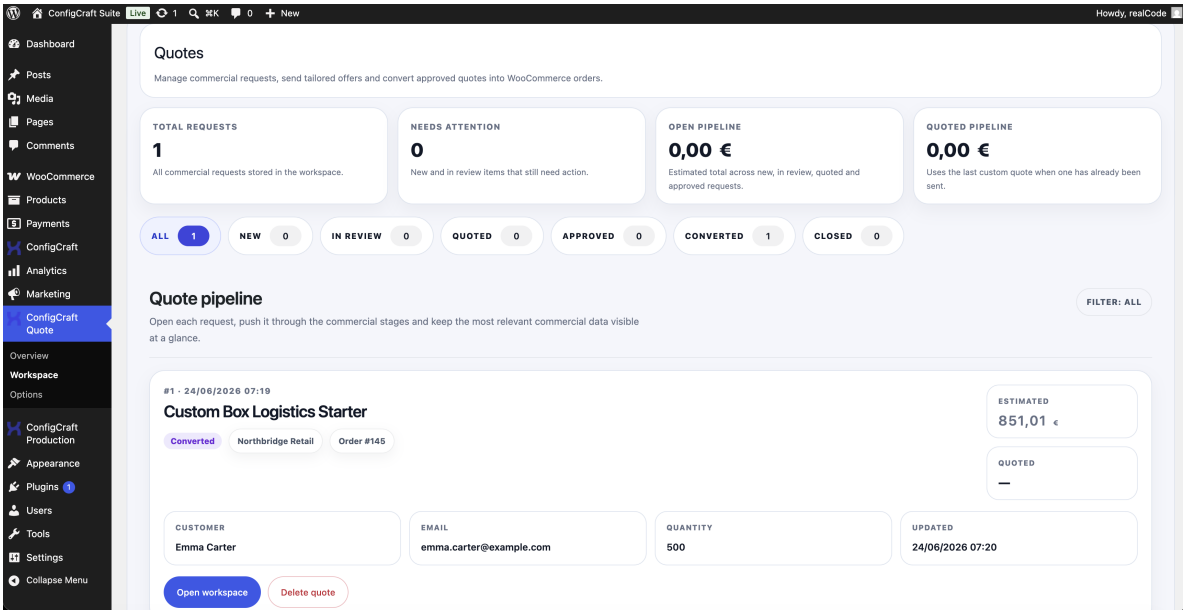
4. Set the status to In review while you assess pricing and feasibility.
5. Fill in the quoted amount, email subject, customer message, validity date, and internal notes.
6. Send the quote so the customer receives an HTML email and PDF attachment.
7. When the customer approves it, convert the request into a WooCommerce order.

Important note Internal notes are not meant for the customer. Use them for margins, special conditions, technical checks, or phone agreements.

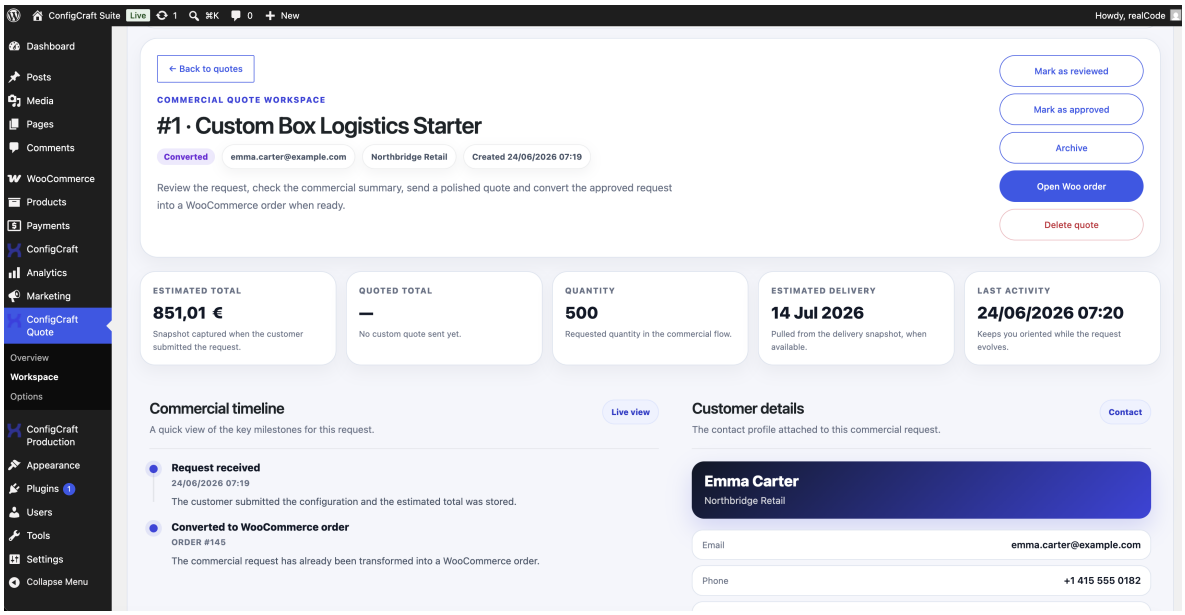
Operational note Email confirmation does not update the status automatically: the team updates the status and converts the order from the workspace.



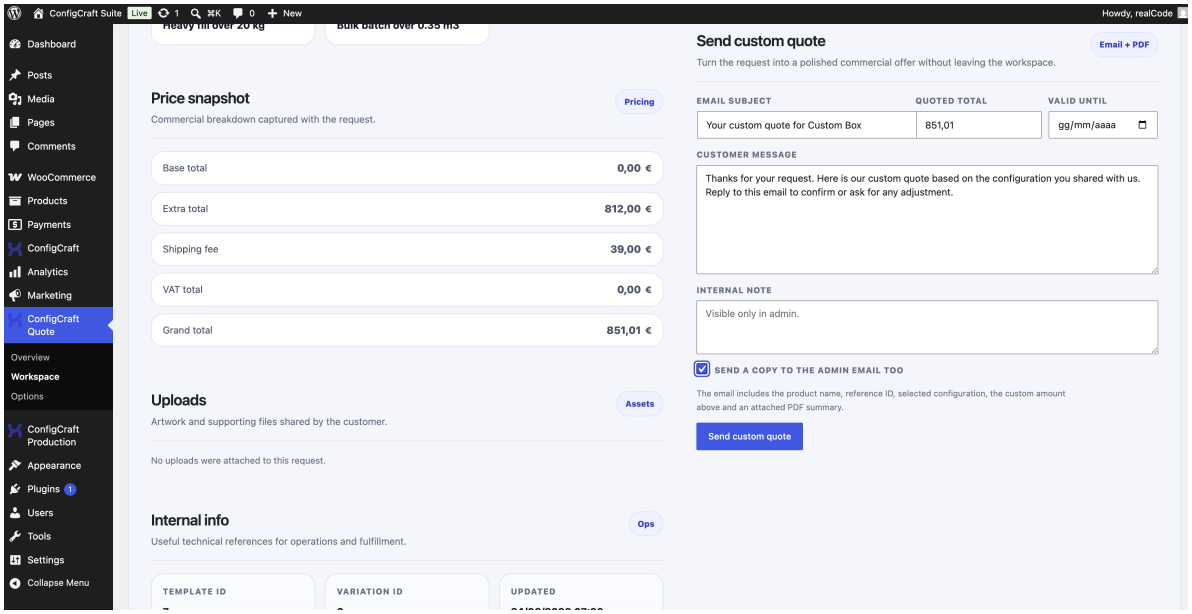
The frontend request panel shows what the customer sends to the team.



The workspace list shows incoming requests and their current status.



The detail screen is shown where review, amount, message, and notes are explained.



The send action is placed next to the commercial follow-up flow.

6. Commercial Example

A customer configures 500 custom boxes with front print, premium finishing, and uploaded artwork. The online price is only an estimate. The team opens the request, reviews the file, adds tooling and special shipping cost, sends a quote valid for 10 days, and later converts it into an order.

Phase	Team action	Result
New request	Review configuration and uploaded files.	Status: In review
Offer	Quoted amount 1,280 with 10-day validity.	Status: Quoted
Confirmation	Customer approves by email; the team updates the status.	Status: Approved
Order	Convert into WooCommerce.	Status: Converted

7. Quote Statuses

Status	Operational meaning	Used by
New	A request has just arrived.	Sales or customer care
In review	The team is checking pricing, files, or feasibility.	Sales plus technical team
Quoted	The offer has been sent to the customer.	Sales
Approved	The customer accepted the offer.	Sales or admin
Converted	The quote has become a WooCommerce order.	Admin
Closed	The request was closed without an order.	Sales
Archived	The request is kept for historical reference only.	Admin

8. Quote Cost Source

This setting decides how costs appear inside the quote flow. It is not only visual; it changes the commercial expectation the customer receives.

Value	What happens	When to use it
Plugin cost engine	Uses the price calculated by ConfigCraft.	Best for matrix pricing or internal pricing rules.
WooCommerce product price	Uses the WooCommerce product price.	Best for fixed or simple-priced products.
Hide quote costs	Hides cost values from the quote panel.	Best for manual quotes or on-request products.

9. Quote PDF

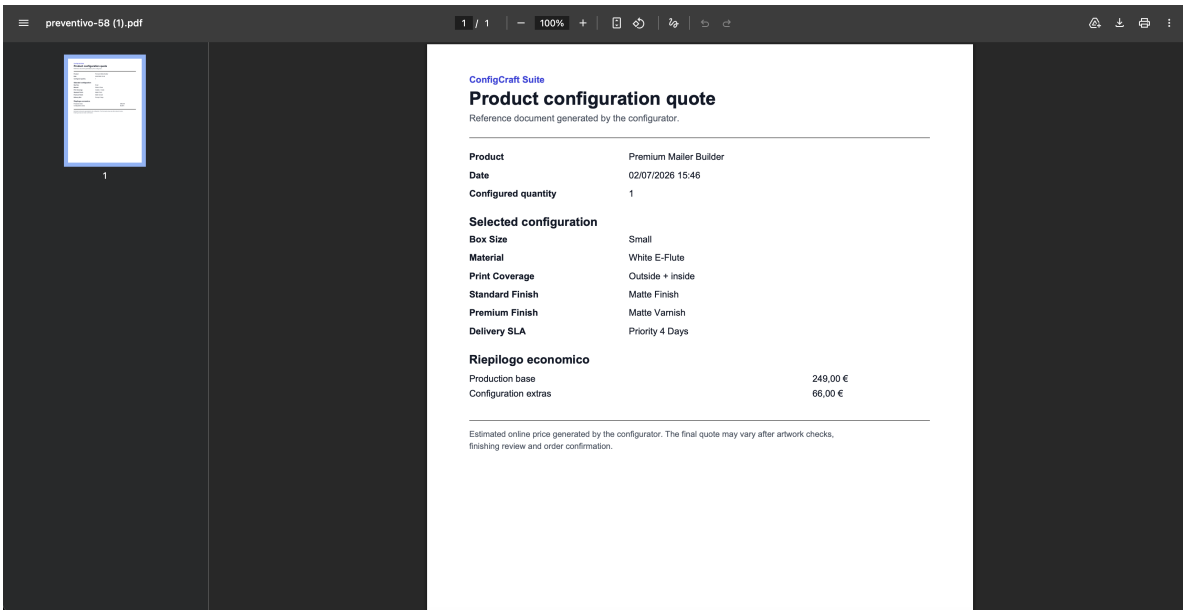
The PDF is the document the customer can save or receive by email. It should not only look good; it must clearly explain the configuration summary, quoted amount, validity period, and final note.

• Use a readable logo that is not excessively wide.

• Avoid generic titles such as Document. Prefer titles like Product configuration quote.

• Use the final note to explain whether artwork review, finishing, or order confirmation may still affect the amount.

• Test the PDF with both a short and a long configuration summary.



The PDF preview appears in the section that describes the customer-facing document.

10. Email Delivery

The add-on relies on WordPress email delivery. If the mail setup is incomplete, the PDF may be generated correctly but the email may never arrive. Always test with a real address before going live.

1. Configure SMTP or a transactional email service.

2. Send a demo quote to your own address.

3. Check subject, sender, reply-to, body content, and attached PDF.

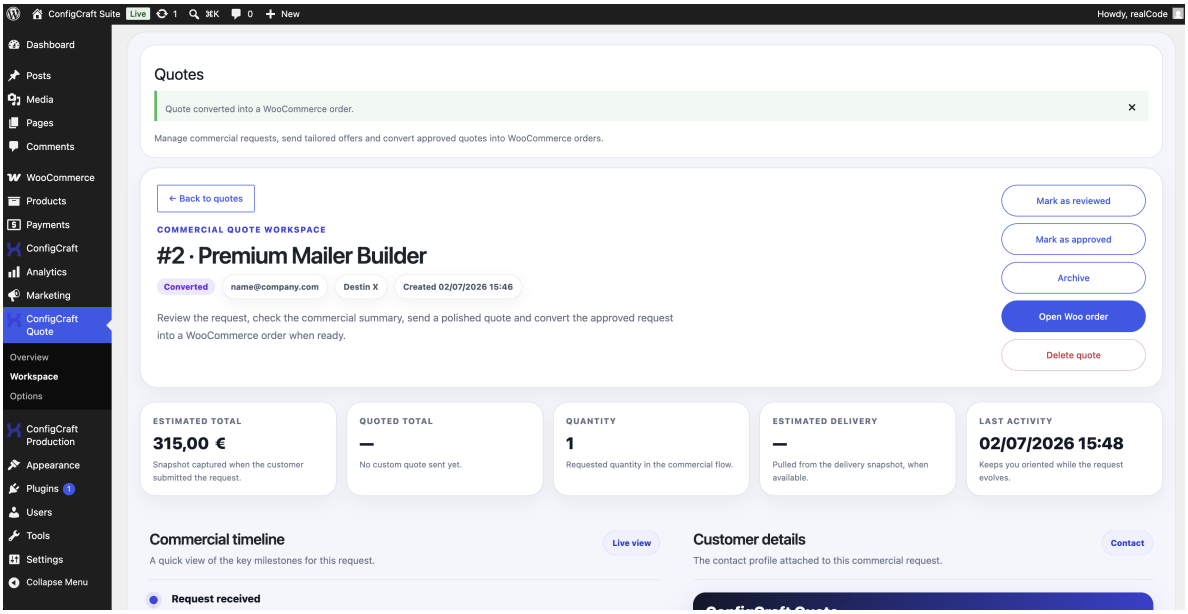
4. Also review spam and promotions folders.

5. If something fails, capture the error shown in the workspace.

11. Converting the Quote Into an Order

Once the commercial negotiation is closed, the quote can become a WooCommerce order. That keeps administration, payment, production, and historical tracking inside one system.

- Convert only after the customer has approved the offer.
- Review the quoted amount and final configuration before conversion.
- If the customer requests changes, send a revised offer instead of converting immediately.
- After conversion, verify that the order contains the ConfigCraft payload and the expected notes.



The order conversion action is shown where the guide explains when to use it.

12. Quote Troubleshooting

Problem	Check	Action
Workspace is locked	The license does not include the Quote entitlement.	Open `ConfigCraft > Options > License` and enable or renew the module.
Email is not sent	SMTP or wp_mail is not working correctly.	Configure SMTP and repeat a demo send.
PDF is not attached	PDF generation failed or filesystem permissions are wrong.	Review logs, uploads, and quote data.
The quoted amount is wrong	The quote cost source does not match the intended flow.	Choose plugin engine, WooCommerce, or hidden costs consistently.

Sales workflows and previews

In the product editor, **Sales workflow** offers Cart only, Cart + quote, Quote only or the global default. Quote only removes purchase actions and prevents direct add-to-cart requests; the customer submits a commercial request.

The product workflow is separate from license entitlements. Test the form in shortcodes or page builders and check selected variations. Explicit read-only admin previews omit quote forms and actions; test submission on a published product in a test environment. After conversion, verify configured quantity, variations, currency, artwork and delivery rules in the order.

3D configurations and document checks

3D also requires an active Pro entitlement. Saved choices are the specification to verify; a model snapshot is a visual reference. Test the complete flow before promising an image in every PDF: configuration, request or order, generated document and email attachment.

Use notes and commercial review for dimensions outside the prepared choices; notes do not automatically change geometry or price. Do not share internal file URLs as public downloads; use the authorized workspace actions.

Updates and support

Before updating, keep a backup and copies of templates, review the release instructions and test the flow on staging. Illustrative screenshots may use labels from an earlier interface; follow this edition’s text for current paths and requirements.

Free support: Community. Eligible commercial purchases: Support. Include versions, reproduction steps and errors; keep passwords and license keys out of public posts.