



CERTWRIGHT CORE

User Manual

Install, configure and operate your complete everyday certificate workflow

For CertWright Core 2.1
Prepared September 2026

Welcome to CertWright

CertWright connects a WordPress form to a complete certificate process. When someone submits the form, CertWright can create a numbered PDF certificate, add a verification QR code, save the certificate record and place the delivery email in a reliable queue.

This manual covers CertWright Core. Core provides the full everyday workflow for one website and one Primary Certificate design. CertWright Pro adds scale features such as multiple certificate types, conditional routing, reusable templates, branding profiles, bulk issuing and expiry reminders.

The basic workflow

Stage	What happens
1. Collect	A visitor completes your chosen form.
2. Map	CertWright reads the name, email and other fields you selected.
3. Create	A numbered PDF certificate and QR code are generated.
4. Deliver	The certificate email is queued and sent with the PDF attached.
5. Verify	The certificate can be checked through your public search page or QR code.
6. Manage	You can view, edit, regenerate, email, revoke, archive or restore the record.

Important: CertWright creates certificates from new form submissions after the mapping is saved. It does not create certificates from old entries automatically.

Contents

Welcome to CertWright	2
The basic workflow	2
1. Before you begin	5
Required items	5
Supported form makers	5
2. Install CertWright	6
Install from the WordPress Plugin Directory	6
Install from a downloaded ZIP file	6
After activation	6
Install your form maker	6
3. Complete the first setup	7
Organisation	7
Certificate wording	7
Email infrastructure	7
4. Set the certificate design	8
Choose the orientation	8
Branding images	8
Adjust the layout	8
5. Build the certificate form	9
Minimum fields	9
Useful optional fields	9
Name-field choices	9
6. Choose the form maker and map its fields	10
Load the form	10
Map the required fields	10
Required mapping rule	10
7. Configure the Primary Certificate	11
Primary Certificate settings	11
Certificate numbers	11
8. Create the public verification page	12

Create the page	12
9. Run the first end-to-end test	13
10. Manage certificates	14
Available actions	14
11. Monitor certificate email	15
Queue views	15
Useful controls	15
12. Dashboard, logs and diagnostics	16
Dashboard	16
Logs	16
Tools and Diagnostics	16
13. Troubleshooting	17
14. Backups, updates and safe operation	18
Before updating	18
After updating	18
Privacy and security	18
15. Launch checklist	19
16. Quick reference	20
CertWright administration menu	20
Public shortcode	20
Support	20
17. Contact CertWright	21
What to include	21
CertWright	21

1. Before you begin

You need administrator access to the WordPress website. CertWright appears only to users who can manage website options.

Required items

- A working WordPress website.
- One supported form plugin installed and activated.
- A form that collects at least a name and an email address.
- A working WordPress email service. SMTP is strongly recommended for reliable delivery.
- A background image for the certificate. A logo, signature and transparent frame are optional.
- A recent backup before making major changes on a live website.

Supported form makers

Form maker	What to know
Contact Form 7	Install Flamingo if you also want WordPress to retain submitted entries.
Fluent Forms	The free version is sufficient for normal CertWright use.
Formidable Forms	The free version is supported.
Forminator	Use its normal form fields and submission workflow.
Gravity Forms	A paid Gravity Forms licence may be required by its publisher.
Ninja Forms	The free version is supported.
WPForms	The free version is supported for normal mapped fields.

Choose one form maker for your first test. Do not build the same certificate form in several form plugins at once. A simple first test is easier to diagnose.

2. Install CertWright

Install from the WordPress Plugin Directory

CertWright can be found in the official WordPress Plugin Directory and installed directly from your WordPress administration area.

1. Sign in to the WordPress administration area.
2. Open Plugins > Add New Plugin.
3. Enter CertWright in the Search Plugins box.
4. Find the official CertWright listing and confirm that the plugin name and publisher are correct.
5. Select Install Now.
6. When installation finishes, select Activate.
7. Open CertWright > Dashboard to begin the setup.

Install from a downloaded ZIP file

1. Sign in to the WordPress administration area.
2. Open Plugins > Add New Plugin.
3. Select Upload Plugin.
4. Choose the CertWright ZIP file. Do not unzip it first.
5. Select Install Now.
6. When installation finishes, select Activate Plugin.

After activation

A new CertWright menu appears in the WordPress administration menu. Open CertWright > Dashboard. Check the System Health panel. The uploads folder, PDF service, database and email queue should show as ready or available.

If a required table or folder is missing, open CertWright > Tools and select Repair Database and Folders. This repair does not delete certificate records or generated certificates.

Install your form maker

1. Open Plugins > Add New Plugin.
2. Search for the form maker you want to use.
3. Install and activate it.
4. Create and publish your form before opening CertWright Form Mapping.

3. Complete the first setup

Open CertWright > Settings. Work through the page from top to bottom, then save once at the end.

Organisation

Setting	What to enter
Organisation Name	The organisation that issues the certificate.
Representative Name	The person whose authority appears on the certificate.
Representative Title	For example: Director, Course Coordinator or Authorised Representative.
Recipient Designation	The description printed beneath the recipient name, such as Recipient, Graduate or Member.

Certificate wording

- Certificate Headline: the main heading, such as Certificate of Achievement. Start a new line where you want the heading to break.
- Text Beneath Recipient Name: the certificate statement. Use {organisation_name} and {recipient_name} where those values should be inserted automatically.

Email infrastructure

- Keep Enable automatic certificate email queueing selected.
- Enter a recognisable From Name.
- Enter an email address on your website domain, or leave it blank to use the WordPress administrator email.
- Keep Attach the generated PDF selected.
- The normal starting values of 5 Maximum Attempts and a Worker Batch Size of 5 are suitable for most websites.
- A Log Retention period of 90 days is a practical starting point.

CertWright uses WordPress mail delivery. If messages are unreliable, configure an SMTP plugin and send its own test email before testing CertWright.

4. Set the certificate design

CertWright groups certificate design into four setup tabs: 1. Template Library, 2. Certificate Text, 3. Branding and 4. Template Designer. Core uses the Primary Certificate, global branding and Primary layout.

Choose the orientation

1. Open CertWright > Settings and find Certificate Compatibility Settings.
2. Choose Portrait or Landscape under Primary Orientation.
3. Keep Include the verification QR code selected if you want recipients to scan and verify the certificate.
4. Upload images that match the selected orientation.

Branding images

Image	Requirement
Full-page background	Required. Use a PNG or standard RGB JPG in the selected orientation.
Certificate frame	Optional. Must be a PNG with a genuinely transparent centre and matching orientation.
Logo	Optional. PNG is recommended when transparency is needed.
Signature	Optional. PNG is recommended when transparency is needed.

Select Save Settings and Resize Images. CertWright keeps the original Media Library images and creates correctly sized working copies. A landscape-oriented and a portrait-oriented background and frame must be uploaded to WordPress. Then select the background and frame that match the active orientation. CertWright does not rotate portrait artwork into landscape or landscape artwork into portrait.

Adjust the layout

1. Open CertWright > Template Designer.
2. Confirm that the Active orientation is correct.
3. Drag the certificate elements into position and adjust the available controls.
4. After you have placed all the design elements, regenerate your test certificate and check that the elements are placed in the correct places on the certificate.
5. Select Save Template Layout.
6. If needed, redesign and test again until you are satisfied.
7. Use Restore Default Layout only when you deliberately want to discard the saved positions for that orientation.

5. Build the certificate form

Create the form in your chosen form plugin. Keep the first form simple. You can add optional fields after the basic workflow works.

Minimum fields

- Some form makers supply only a single field for the user's name. CertWright is designed to detect multiple names, separate them automatically, and place them correctly on your certificate.
- A name. This may be one Full Name field or separate Given Name and Family Name fields.
- An Email field.
- A Submit button.

Useful optional fields

- Middle name
- Signature
- Phone
- Street address
- Suburb or city
- State or region
- Postcode
- Certificate reason or description

Name-field choices

Your form	How CertWright should be mapped
One Full Name field	Map it to Name (one full-name field). Leave Given, Middle and Family name unmapped.
Separate name fields	Map Given name and Family name. Map Middle name only if your form has it. Leave the one-field Name mapping empty.

When one Full Name field is used, one word is kept as the given name; with two words, the second is the family name; with three or more words, the first is the given name, the last is the family name and the words between become the middle name.

Publish or save the form. If the form plugin provides a shortcode or block, place it on a normal WordPress page and publish that page.

6. Choose the form maker and map its fields

Mapping tells CertWright exactly which form field supplies each certificate value.

Load the form

1. Open CertWright > Form Mapping.
2. Open the Form provider list and choose your form maker.
3. If it says (not installed), install and activate that form plugin first.
4. Under Certificate form, choose the form you created.
5. Select Load fields.

Map the required fields

1. For a single name field, map Name (one full-name field). For separate fields, map Given name and Family name.
2. Map Email. Email is always required.
3. Map each optional value that your form collects. Leave unused items as Not mapped.
4. For Core, keep the Primary Certificate selected.
5. Set Primary number prefix. Use short letters and numbers, such as CW, COURSE or MEMBER. Do not add spaces or punctuation.
6. Choose the Initial status. Active is suitable for certificates that should be valid immediately. Pending is useful when an administrator must approve them first.
7. Select Save mapping.

Required mapping rule

A mapping is valid only when it contains an email address and either one Full Name field or both a Given Name and a Family Name field. Do not map both name methods unless you have a specific reason.

If fields are missing, return to the form maker, save the form again, then reload the fields in CertWright. Do not guess field numbers.

7. Configure the Primary Certificate

Open CertWright > Certificate Types. CertWright Core uses one Primary Certificate. You can edit its wording and numbering without creating several certificate programmes.

Primary Certificate settings

- Name: the internal description of the certificate type.
- Key: a permanent lowercase identifier. The Primary key should not be changed casually.
- Number prefix: letters and numbers placed at the start of each certificate number. Keep it short.

Certificate numbers

CertWright maintains a sequence and creates a unique number for each certificate. Choose the prefix before issuing live certificates. Changing the prefix later affects new certificate numbers; it does not rewrite previously issued numbers.

Avoid reusing certificate numbers manually. A certificate number is part of the public verification record.

8. Create the public verification page

The public search page lets a visitor check a certificate using the recipient email address or certificate number. The QR code points into the same verification system.

Create the page

1. Open Pages > Add New Page.
2. Name the page Certificate Search or Verify a Certificate.
3. Add a Shortcode block.
4. Enter [certificate_search] into the block.
5. Publish the page.
6. Open CertWright > Certificate Search and confirm that CertWright recognises the public page.

Test the search after issuing your first certificate. Search once with the certificate number and once with the recipient email address. Scan the QR code from another device if possible.

Do not place private administration details on the verification page. The shortcode displays the controlled public verification result.

9. Run the first end-to-end test

Use a real email address you can check. A successful test proves that the form, mapping, PDF, queue, email and verification system are connected.

1. Open the published form in a private browser window.
2. Enter a test name and email address. Complete any other required fields.
3. Submit the form once.
4. Open CertWright > Certificates and confirm that one new certificate appears.
5. Open the certificate record. Check the name, email, certificate number, type, dates and status.
6. Select View PDF. Check the wording, images, orientation, QR code and element positions.
7. Open CertWright > Email Queue. Select Process Queue Now if you do not want to wait for the automatic five-minute worker.
8. Check the recipient inbox and spam folder. Open the attached PDF.
9. Use the public search page and QR code to verify the certificate.

Submit the form only once during the first test. Multiple rapid submissions create multiple genuine certificate records and can make diagnosis confusing.

10. Manage certificates

Open CertWright > Certificates to review issued records. Open an individual record to see the certificate details, submission data, system information and audit history.

Available actions

Action	Use it when
Save Changes	A name, email address, type or date must be corrected.
View PDF	You want to inspect the certificate in the browser.
Download PDF	You need a local copy.
Regenerate PDF	Saved details, wording, branding or layout changed and the PDF must be rebuilt.
Email Certificate	The certificate should be placed in the delivery queue again.
Revoke Certificate	The certificate must remain on record but show as invalid. Enter a clear reason.
Archive Certificate	Remove it from routine lists while preserving its record, PDF and verification data.
Restore Certificate	Return an archived record to its earlier status.
Move to Trash	Remove it from normal use while preserving the database record and generated PDF.

CertWright preserves certificate history. Revoking, archiving or trashing is safer than deleting records outside the plugin.

11. Monitor certificate email

Open CertWright > Email Queue. The queue separates certificate creation from email delivery, so a temporary mail failure does not destroy the certificate.

Before relying on certificate email, set up an authenticated email server or SMTP service such as GoSMTP. Create a strong, unique password for the sending mailbox, enter the SMTP details in WordPress and send a successful test message.

Queue views

- Waiting to be sent: new messages that have not yet been attempted.
- Retrying: messages waiting for another attempt.
- Sending: a worker is currently processing the message.
- Delivered: WordPress reported a successful send.
- Delivery failed: all configured attempts failed or a non-recoverable error occurred.

Useful controls

- Process Queue Now sends queued items immediately instead of waiting for the automatic worker.
- Retry selected returns chosen failed items to the queue.
- Delete selected removes queue rows, not the certificate records.
- The Last Error column usually contains the most useful delivery clue.

A Delivered status means WordPress handed the message to its mail system; it does not guarantee that the recipient's mail provider placed it in the inbox. Use authenticated SMTP and check the SMTP log when delivery is disputed. Download the log and load it into your AI program, then ask it to analyse the log and report how to fix the problem. If all else fails, send a technical support request through the CertWright website.

12. Dashboard, logs and diagnostics

Dashboard

The Dashboard summarises active, revoked, archived and trashed certificates, recent activity, email-queue counts, system health and version information. Check it after updates and whenever normal processing appears to stop.

Logs

Open CertWright > Logs to examine recorded actions and errors. When asking for support, include the exact error message, the approximate time, the certificate number and what you did immediately before the problem.

Tools and Diagnostics

Tool	Purpose
Repair Database and Folders	Checks and repairs the database schema and runtime folders.
Release Stale Queue Locks	Releases a mail worker lock left behind after an interrupted process.
Retry All Failed Emails	Returns all failed delivery items to the pending queue.
Process Queue Now	Runs a larger queue batch immediately.
Delete Expired Log Files	Deletes log files older than your configured retention period.

The listed maintenance actions are designed not to delete certificate records or generated certificates. Even so, keep current backups before maintenance on a production website.

13. Troubleshooting

Problem	Checks
Form provider says not installed	Install and activate that form plugin, then reload Form Mapping.
Form is missing from the list	Save the form in its form maker, confirm it is not in Trash, and reload Form Mapping.
Fields are missing	Save the form again, select it again and use Load fields. Do not guess field IDs.
No certificate is created	Confirm the mapping was saved, required name and email fields are mapped, then check Logs.
PDF is blank or broken	Check System Health, confirm the background image is valid, then repair folders and regenerate the PDF.
Wrong orientation	Change Primary Orientation only in Settings > Branding, upload matching artwork, save, adjust Template Designer and regenerate.
Email has no attachment	Confirm Attach the generated PDF is selected and verify that the PDF exists before resending.
Email does not arrive	Process the queue, read Last Error, test SMTP, check spam and confirm the recipient address.
QR code does not verify	Confirm Include QR Code is selected and the public page contains [certificate_search].
Old PDF still appears	Regenerate the certificate, clear website caches and reopen it in a private window.

For support, do not send WordPress passwords, hosting passwords, SMTP passwords, Stripe secret keys or complete licence keys. Screenshots and exact error messages are usually enough to begin diagnosis.

14. Backups, updates and safe operation

Before updating

- Back up the WordPress database and wp-content files.
- Confirm that at least one recent certificate can be viewed and verified.
- Record the current CertWright version shown on the Dashboard.

After updating

- Open CertWright Dashboard and check System Health.
- Open Tools and confirm that the database tables are available.
- Submit one test form, inspect its PDF, process its email and verify it publicly.
- Clear page caches if administration or public displays appear outdated.

Privacy and security

- Collect only the personal information needed for the certificate programme.
- Give WordPress administrator access only to trusted people.
- Keep WordPress, CertWright, the form maker and SMTP plugin updated.
- Use HTTPS on the website.
- Do not expose WordPress upload folders through insecure directory listings.
- Follow the privacy and record-retention laws that apply to your organisation and location.

Do not uninstall CertWright as a troubleshooting shortcut on a live site until you have a verified backup and understand how that release handles stored data.

15. Launch checklist

Complete this checklist before giving the form link to real recipients.

Done	Check
☐	CertWright is installed and activated.
☐	Dashboard System Health shows the required services as ready.
☐	A supported form maker is installed and activated.
☐	The certificate form is published.
☐	The correct form provider and form are selected in Form Mapping.
☐	Name and email fields are mapped correctly.
☐	The certificate prefix is final and the initial status is correct.
☐	Organisation, representative and certificate wording are correct.
☐	Portrait or landscape orientation is correct.
☐	Background, frame, logo and signature display correctly.
☐	Template Designer positions are saved.
☐	Automatic email queueing and PDF attachment are enabled.
☐	SMTP has passed its own test.
☐	The public page contains [certificate_search].
☐	One private-window form submission created exactly one certificate.
☐	The PDF looks correct and the email arrived with its attachment.
☐	The certificate number and QR code both verify successfully.
☐	A current website backup exists.

16. Quick reference

CertWright administration menu

Menu	Main purpose
Dashboard	Overview, activity, health and version information.
Certificates	View and manage certificate records and PDFs.
Certificate Types	Configure the Primary Certificate wording and numbering.
Certificate Search	Review the certificate search and verification setup.
Email Queue	Monitor, process and retry certificate delivery.
Logs	Review recorded actions and errors.
Form Mapping	Choose the form maker, form and source fields.
Template Designer	Position certificate elements.
Settings	Organisation, wording, delivery, orientation, QR and branding.
Tools	System health, database checks and safe maintenance.
Contact Support	Email CertWright support at support@certwright.app .
Upgrade to Pro	Compare optional scale and automation features.

Public shortcode

Use `[certificate_search]` in a WordPress Shortcode block to create the public certificate verification page.

Support

Email support@certwright.app. Include the plugin version, WordPress version, form maker, certificate number, exact error and relevant screenshots.

17. Contact CertWright

For questions and technical support, email support@certwright.app. The CertWright Contact page provides this email address as the only contact method.

What to include

- Say whether you use CertWright Free or CertWright Pro.
- Include your WordPress version, CertWright version and form maker.
- Describe what happened immediately before the problem appeared.
- Copy the exact error message or attach a screenshot.
- For licence help, email from the address connected to your purchase.

Do not send passwords, Stripe secret keys, full activation keys or other private login details.

CertWright

Create certificates. Deliver them reliably. Keep a permanent record. Let the public verify them.