A clear handoff, from signing to renewal

Start with one agreement and one accountable owner.

Document activity -> workflow follow-up -> checked Contract record -> renewal follow-up

What this guide helps you set up

Use PandaDoc or Docusign activity to start the internal handoff. Check the agreement's terms and bring them into the native HubSpot Contract. Then use Contract dates for renewal follow-up.

> Two triggers, separate setup: a document event starts follow-up; a Contract renewal date starts later work. The standard signing connector does not, by itself, establish an automatic native Contract write.

Before you configure anything

Confirm that your HubSpot subscription includes the required workflows, your signing app is connected, and you have the relevant workflow and Contract permissions. Confirm access to direct Contract creation/editing, including beta enrollment where applicable. Use a test agreement and test recipients.

Choose the agreement, not just the customer

Example: Cedar Vale has Solar Support and Battery Monitoring. Use the source document identity and its intended deal/service to match the correct agreement. Keep the source version, owner, price, payment count, dates and billing choice together.

A useful first outcome

A completed-document event creates one internal review task. Sales Ops can identify the agreement, check the terms and see who acts next. Enable automatic Contract writes only after that separate integration is verified.

This is an implementation guide and proposed process, not evidence that a live signing, billing or renewal workflow has run in the demo account.

Start the workflow from your signing app

Select the provider you actually use.

PandaDoc: document activity

1. In HubSpot, open Automation > Workflows and create a workflow from scratch.
2. Choose a contact-based workflow. PandaDoc's documented activity trigger is contact-based.
3. Set a filter trigger using PandaDoc information. Select Document Action and the completion activity.
4. Add document identity and other criteria appropriate to your process. Do not let every completed document for a contact enter the same handoff.
5. Add an internal notification or review task, with the source and next owner.
6. Test one matching document and one unrelated document before enabling the workflow.

PandaDoc also offers separate deal automations, including selected field/PDF updates. Do not confuse those with the contact-based activity trigger or a native Contract write.

Docusign: envelope activity

1. Create the appropriate contact, company or deal workflow in HubSpot.
2. Select the Docusign event trigger available in the connected app. HubSpot documents the Docusign: Contact timeline event template.
3. Configure the intended completion event and matching criteria; confirm the exact event values in your account.
4. Add the internal review action and source reference.
5. Test a completed test envelope and an unrelated envelope. Confirm the correct record is enrolled.

> Keep sending and signing separate from this follow-up test. If you later add Send Docusign envelope, validate its template and recipient requirements before enabling it.

Sources: PandaDoc HubSpot workflows; HubSpot Use the Docusign integration. Full links are on page 4. UI wording and available actions must be checked in your account.

Connect the terms to the Contract record

Choose and verify the Contract-writing step explicitly.

Documented baseline: create or import

For an agreement prepared outside HubSpot, use the documented direct-create or import route, with the required access. Match the customer, contact, deal, service, price, payment count and dates to the source. Standard imports do not include billing schedules.

Keep the legal document accessible through your approved reference/file process. A native Contract is an internal commercial record; creating it does not replace the signed document.

If you want automatic Contract writes

Treat this as a separate integration implementation. Confirm that your chosen connector or API supports the required native Contract operations in your account. This guide does not establish a built-in Create Contract workflow action or provide a tested API recipe.

Define the document-to-deal match, field mapping, source version and external document identifier. Decide what creates a new Contract and what is allowed to update an existing one. Send missing or conflicting data to a named reviewer. Prevent duplicate records when an event is delivered twice. Record failures and verify the saved result before marking the handoff complete.

Review before the next handoff

Sales confirms the source. Sales Ops checks the Contract against it and requests the manager's review. Confirm your own policy for customer acceptance, Finance approval and ongoing account ownership. These are separate decisions; a review task does not grant them automatically.

> Billing choice matters. With Contract billing off, HubSpot does not create invoices or collect payments for that Contract. Do not turn billing on as part of a document-follow-up test.

Alternative: current accepted HubSpot quotes can create Contracts when configured. Accepted legacy quotes do not use that route. Sources: HubSpot Contract setup, direct creation/import, and Contracts overview.

Add renewal follow-up and test the result

Finish with evidence, then enable the workflow.

Contract renewal workflow

1. In HubSpot Workflows, create a workflow from scratch.
2. Choose Record meets a set of filter conditions, then Contract.
3. Select Renewal date. Set a relative-date condition, such as less than your chosen number of days from now.
4. Add the appropriate owner task or follow-up actions. Decide whether re-enrollment is appropriate for your process.
5. Review the workflow and its test results before turning it on.

HubSpot documents that Renewal date can reflect the contract end or a renewal's effective date, depending on renewal state. Validate the date on your test Contract. Do not assume that showing an alert means a workflow has been configured.

Acceptance checks for the complete process

A matching event starts one correct handoff. An unrelated document does not. Repeated events do not duplicate Contracts. Missing fields and failed writes remain visible for review. The reopened Contract matches the source. Billing is intentional. The renewal test reaches the intended owner at the intended time.

Official references, checked 19 October 2026

PandaDoc workflow triggers
https://support.pandadoc.com/en/articles/9714993-hubspot-workflows

Docusign events and workflows
https://knowledge.hubspot.com/integrations/use-the-docusign-integration

Contract setup and renewal workflows
https://knowledge.hubspot.com/contracts/set-up-contracts

Direct Contract creation and imports
https://knowledge.hubspot.com/contracts/directly-create-contracts-in-hubspot

Contracts and legal-document distinction
https://knowledge.hubspot.com/contracts/understand-contracts-in-hubspot