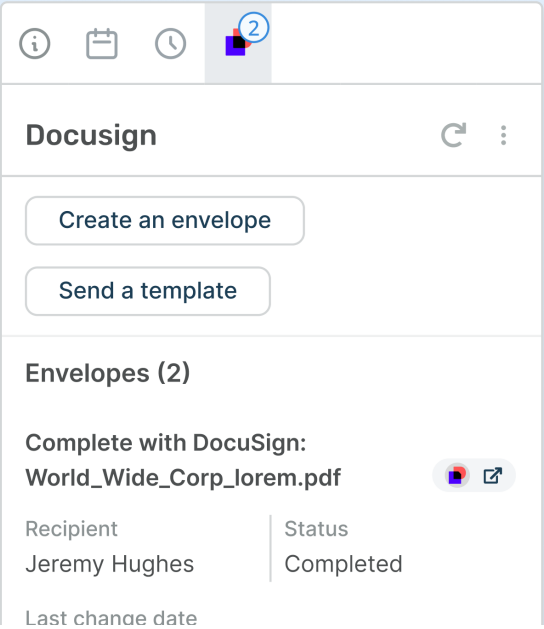
Send & Track DocuSign Documents in Deskpro

2025-09-23 - Lara Proud - Comments (0) - Product (Admin)

You can now manage document signing workflows for your users directly from Deskpro with our **DocuSign App** integration.



With DocuSign you can:

- **Automatic User Matching:** Deskpro users are matched to DocuSign recipients using their email address.
- **Manual Matching Option:** If no match is found, you can link a DocuSign user manually.
- **View Document Status:** See all envelopes (documents) linked to the user, including whether they've been completed.
- **Send New Documents:**
    - Choose a DocuSign template.
    - Select recipients (Deskpro autofills the current user's email, but you can add more).
    - Add a subject and message.
    - Send directly via email from Deskpro.

This makes it easier for agents to track and send signature requests without ever leaving the help desk.