



How Phundex Helps Manage the NDA Process

Do you seem to spend hours dealing with NDAs? Creating them, getting them signed, storing them in your files and then trying to remember where they are stored can be time-consuming.

At Phundex, we've solved that problem. We've adopted OneNDA, a streamlined Mutual NDA designed and approved by legal firms in the UK, the US and Australia. We've also created a OneNDA Pathway, which you can use to set up your NDA files to manage the process more efficiently.

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Select our OneNDA Pathway, and you'll have all the templates you need to create NDAs. We've included the original OneNDA version, which explains how OneNDA came about and who was involved with its creation. We've also included version 2 in both Word and pdf format, giving you flexibility for your template. If you prefer, you can upload your template, so your Team uses your specific version. You can archive our versions if you don't want your Team to use them, making it easy to update with your organisation's most recent approved version.

You can now create specific NDAs from those templates, making it easy to see what NDAs you've created, whether they've been sent, and, importantly, storing the signed copies in a central location. When you start each NDA, we recommend using a standard naming convention to make it easy to locate them in the associated NDA Pathway data room. You might want to use a format like: [Name of parties | Name of Document | Date of Document]. Whatever you choose, you want to ensure you can quickly identify the document in the data room. We provide several ways to view and sort documents in the data room and the NDA Pathway, making it easy to locate records when needed.

You can assign getting signatures to specific Team Members or manage it by a central person or Team. Once the templates have been customised and are ready for signature, you can send them out directly from Phundex to your preferred e-signature platform for signature without leaving the Phundex platform. Depending on which e-signature system you use, Phundex may be able to return the signed document directly to the Pathway. If your e-signature system can't return it to the Phundex platform, you can easily upload the signed copy as the updated version into the Phundex NDA Pathway data room. You can also upload NDAs signed outside Phundex to store centrally.

Need the NDA for a specific transaction? You can copy the Task with the signed NDA by including the final document content in the Transaction Pathway, so you have it handy. Or you can set up an NDA within a Transaction Pathway and then copy it into the central NDA Pathway to keep a complete record of all NDAs on file.



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To book a demo or do a trial, you can either use the link on our website or email support@phundex.com, and they will be happy to set it up for you.