

What is LMA.Automate?

LMA.Automate is an online questionnaire that helps LMA members quickly generate draft facility agreements and other select finance documents.

Free vs Premium Version

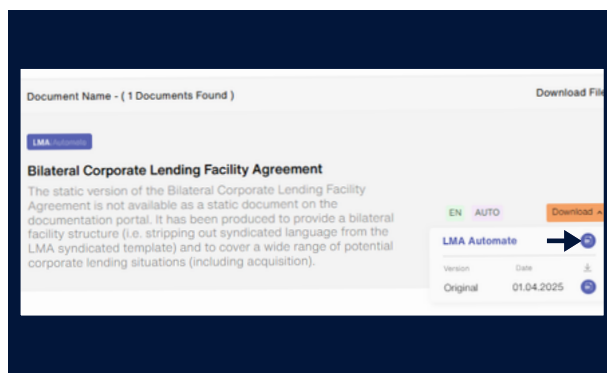
- There are two versions of LMA.Automate that are currently available – the ‘free’ version and the ‘premium’ version.
- The ‘free’ version:
 - is available to all LMA members via the LMA Documentation Hub hosted on our website (www.lma@eu.com)
 - allows members to generate draft documents upon completion of an interactive questionnaire
 - excludes certain functionality that can be found on the ‘premium’ version (e.g. the ability to edit, self-automate, convert to house style, reverse engineer the questionnaire, store the document, track version histories, review an audit trail, collaborate or negotiate a live document or extract or analyse data).
- The ‘premium’ version offers the additional functionality mentioned above and is available to members as a premium service on a separate platform. Please contact LMADocs@lma.eu.com for more information about this version.



Accessing LMA.Automate ‘free’ version

Log in to the LMA website with your member credentials. When browsing through the documents on the LMA Documentation Hub, look for the LMA.Automate icon next to any document you wish to automate (see adjacent screenshot).

Once the relevant document has been identified, click on the icon to open the relevant questionnaire for that document.



Completing the Questionnaire

Enter key details about the document in response to the interactive questionnaire, such as:

- parties
- facility amount
- facility type (term / revolving)
- secured / unsecured
- syndicated / bi-lateral
- currency
- borrower / guarantor structure, etc.

- ✓ As the questionnaire is completed, the fields automatically adjust to ensure that only relevant information is captured.
- ✓ Once the questionnaire is completed, you can click the ‘Done’ icon and the platform will then generate a tailored draft document based on the responses given to the questionnaire.
- ✓ You can then click the ‘Download’ icon to save it to your system.



Personal Data

It should be noted that no personal data is requested. The document will not be stored on any internal systems of the LMA.



For any questions or support using the LMA.Automate questionnaire, please contact us at LMADocs@lma.eu.com.

Disclaimer: This document is intended as an overview and is not intended to be comprehensive. Whilst every care has been taken in its preparation no representation or warranty is given by the LMA or the authors as to the accuracy or completeness of the contents of this document. Most importantly, this document is not intended to provide legal or other advice on any matter whatsoever.
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