# Active Procurement Manage-ment and Portfolio Monitoring

## Procurement | Trade | Generation

As the complexity in trading and procurement of energy products increases – for example, due to volatile energy prices and flexible tranche agreements based on hedge price formulas – the timing of purchase transactions and an efficient, active management of energy procurement processes are becoming more and more important. **Today trading takes place 24 hours a day, seven days a week.**

**New business models and opportunities** emerge in this context. Basic processes, however, such as the management of load forecasts and trading strategies based thereon are becoming much more complex and time-critical. Thus software-supported, permanent monitoring of margins, risks, limits, and market prices, auditable processing and transparent reporting are essential.

**Digitization of trading processes with BelVis⁺ B2B Platform**
The new software for energy traders, producers, buyers, and wholesale customers enables **active procurement management, portfolio monitoring at any time and from anywhere**, and end-to-end contract management from request to completion. The BelVis⁺ B2B Platform offers **benefits for both, end users (energy buyers) and portal providers (energy providers)**:



**Energy Trader / Energy Producer**

**Wholesale Customer / Procurement**

Key Account Manager
- Offer Management

Portfolio Manager / Trader
- Sales Books
- Procurement Forecast

Reporting
- Billing
- CRM
- Key Figures

Market Data
- Prices
- Forecasts

CRM
- Billing
- Contact Data

Buyer / Portfolio Manager
- Procurement
- Forecast
- Risk Management

Reporting
- Billing
- Key Figures

Executive Board
- Key Figures
- Limit Monitoring
- Controlling
- Risk Assessment

**BelVis⁺ B2B Platform**

**⚡ KISTERS**

# BelVis⁺ B2B Platform

— Professional portfolio management for energy buyers in the wholesale market
— Entry advantage for energy providers through diversification in the market and thus faster access to new customers and long-term customer loyalty
— Use of customer data in real time
— A single end-to-end process from offer request to pricing, completion, forecast and procurement/generation to billing
— No separate monthly reporting to energy buyers required
— All decision-relevant information in one portal

The BelVis⁺ B2B Platform acts as the **interface between portfolio manager, key account manager, and clients**. It allows you to offer portfolio management as a service for your clients. Your clients are able to monitor their portfolios whenever they like in the web interface or on mobile devices. This **saves you and your clients valuable working time**.

What's more, the Platform offers **many functions for active procurement management**:

— Manual and automatic creation of status-controlled offers and copies thereof in accordance with audit requirements
— Triggering of procurement positions
— Handling of different products from standard products (base/peak/offpeak) to structured load profiles based on hedge prices to tranche and fund models
— Pricing based on different hedging strategies

Thanks to **direct connection to your PFM system**, all views and information are updated automatically.

## Mobile use: Access to portfolios anytime and anywhere

The BelVis⁺ B2B Platform allows authorized users (energy buyers, providers, etc.) to check the development of the portfolios from anywhere and at any time of the day. The portfolio key figures are also easily accessible from smartphone or tablet.

## Easy integration into the system landscape

The BelVis⁺ B2B Platform is not only seamlessly integrated into the KISTERS PFM solutions BelVis PFM, eRisk and IRM, but also **works with any PFM system**. The platform receives position, deal, and time series data via customized REST services and provides the data in customizable views, allowing data to be combined in many different ways.

The B2B Platform is configured once for your clients by an administrator and/or the key account manager. The **views can be customized according to your clients' needs**. After this configuration, no further action is required as the B2B Platform automatically synchronizes with your PFM system.

## BelVis⁺ B2B Platform as Software as a Service in the KISTERScloud

The BelVis⁺ B2B Platform is also available as Software as a Service from the certified KISTERScloud – as a **cost-effective, fast and flexible** alternative to purchasing a license. This gives you the ability to use the tool for any period of time, including for a short contract term. KISTERS runs the software securely in its own certified data center. Our experts perform maintenance and care of the software and hardware, as well as updates, so that the services are always up-to-date – particularly with regard to data security and protection.

**KISTERS**