Solution description

D3Energy

2025

Seyfor

D3Energy

– a comprehensive solution for the energy sector

The solution is designed for companies that operate as traders and distributors (including LDS), as well as suppliers to end customers in commodity sectors such as electricity, natural gas, heat, water, e-mobility, and CNG.

It is a modular solution. Each module represents and supports a specific process area, ranging from customer acquisition, contract management, supplier switching, and invoicing, to customer pricing, forecasting, and direct commodity trading on exchanges. It also includes power balancing services and functionality for acting as a flexibility aggregator. These areas are procedurally interconnected and together form a complete, integrated solution.

D3energy.cz

D3Energy

Obsah

Ø1 CRM LEONARDO

CRM Leonardo is focused on commodities (electricity, natural gas, e-mobility) and non-commodity services (e.g. installation of photovoltaic systems, heat pumps). In general, it supports both consumption and production processes. “From business opportunity to offer to contract and digital signature – this is just a small part of what CRM Leonardo offers.”

D3energy.cz

Customer card

Complete record of all customer data (new and existing), including their categorization. Customer information can be captured:

- Automatically from available data sources (commercial and insolvency registers)
- Regularly imported from existing information systems

The history of communication with customers is stored through the activities carried out (email, meetings, telephone calls, etc.).

DMS (Document Management System)

Complete DMS solution for creating and managing various document templates (e.g. generating quotations, contracts, and orders). All document history is stored in one place – directly with the customer or business opportunity.

Business Opportunities (Leads)

Leads can be targeted according to:

- **Product** – commodity products (electricity, gas, heat, CNG, etc.) and non-commodity products/services (e.g. service orders, installation of photovoltaic power plants, heat pumps, etc.)
- **Customer type** – acquisition, cross-selling, retention, etc.

Business Plan

Business plans can be created across the entire CRM Leonardo. A business plan can focus on a sales representative, products, volume (MWh/EUR), and so on. Progressive execution of the plan is displayed graphically with the option of a detailed breakdown.

From lead to offer, all the way to the contract and its digital signature — that's just a fraction of what the Leonardo CRM can do.

Calendar

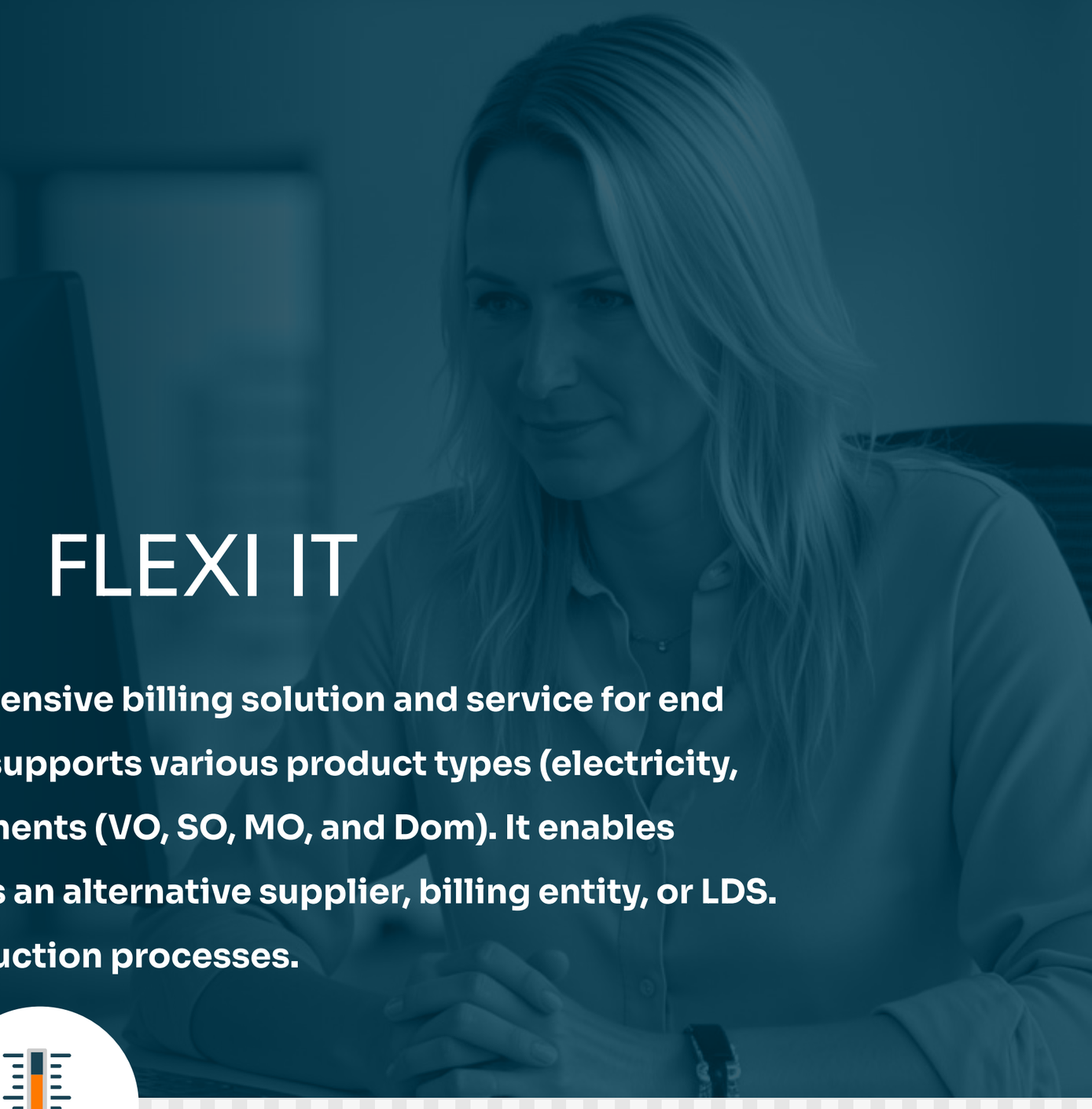
Provides full integration with MS Outlook at both mail and calendar levels. The calendar module offers a graphical overview of scheduled activities and supports rescheduling via simple drag-and-drop, along with an overview of other users' shared calendars.

Dashboard

A user's dashboard can be composed of information and applications relevant to their role. Dashboards can vary depending on the user role (business manager, management, call center, etc.), the type of data, and the form of display.

Reporting

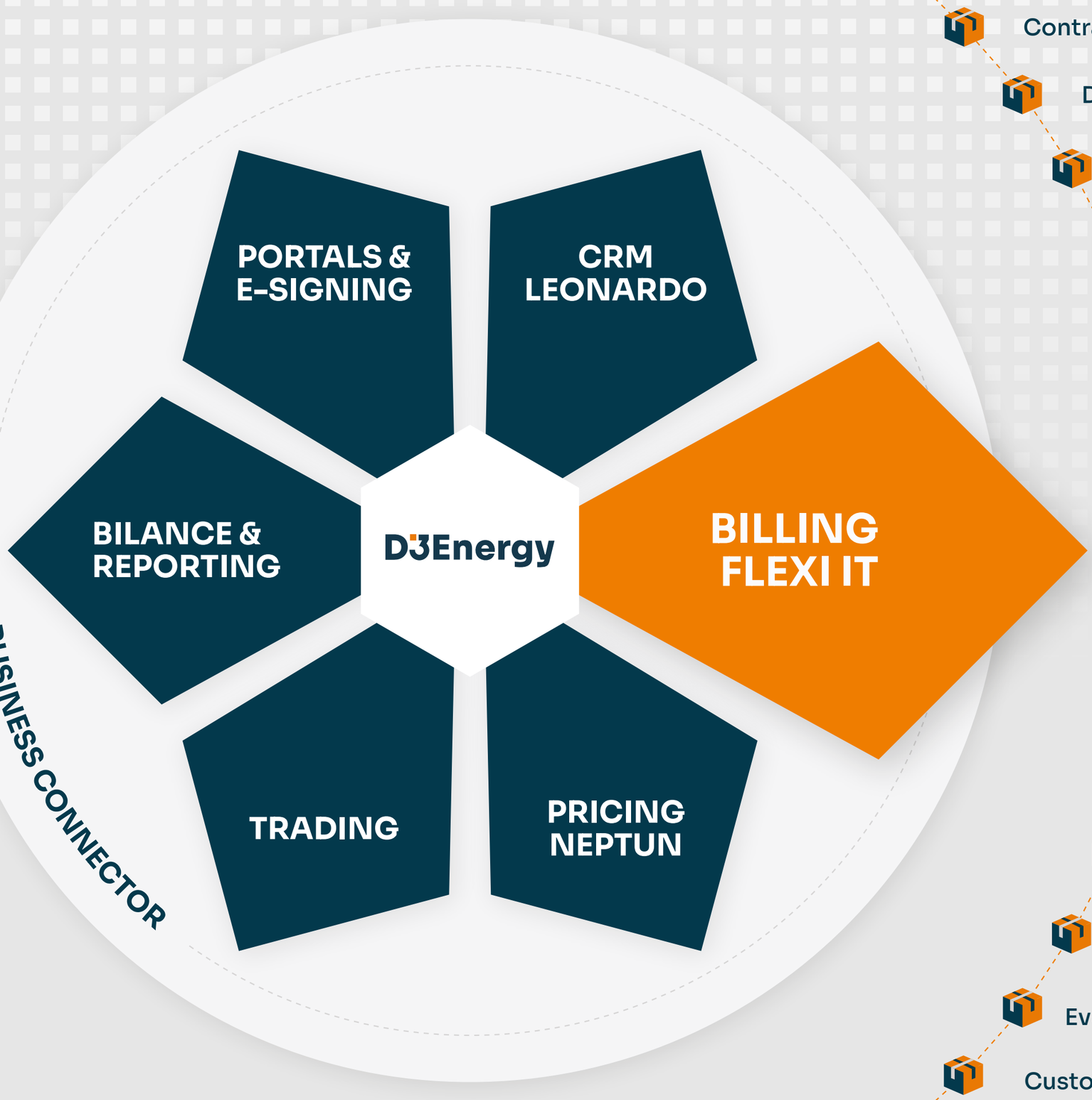
The solution includes a customizable module for creating reports, analytical views, and OLAP cubes. Each report is generated graphically or in various electronic formats. Reports can be sent via email at a specified time.



02

BILLING FLEXI IT

The FLEXI IT module provides a comprehensive billing solution and service for end customers in the energy sales sector. It supports various product types (electricity, gas, heat, and water) and customer segments (VO, SO, MO, and Dom). It enables operation in various modes, including as an alternative supplier, billing entity, or LDS. It supports both consumption and production processes.



- Customer
- Contracts
- Deposits and invoices
- Communication with OTE
- Supplier switch
- Reminders
- Products and price lists
- Commissions and partner networks
- Payment matching
- Commodity accounting
- Uninvoiced consumption
- Workflow
- E-contracting
- Events and campaigns
- Customer portal
- Business portal

D3energy.cz

Master Data

Master data refers to basic customer information.

Basic structure: person, business name.

Data logic (1:N): Customer > Contract Account > Contract > Receiving Transfer Point.

Documents are generated automatically:

- Termination
- Power of Attorney
- Contract
- Terms and Conditions
- Advance calendar
- Advance invoices
- Settlement
- Invoices

Payment Calendar

Based on the created contract, the system generates a payment calendar:

- Individual invoicing and payment cycle settings (amount and frequency)
- Bulk document generation
- Payment calendar and invoice creation

Supplier Change Process – Automated

Full support for all applicable processes related to supplier change. Users are regularly notified about the status and next steps for each customer, including their complete history.

Communication with Distributors / OTE

Communication with the Czech Energy Market Operator (OTE) is handled via a dedicated module using the necessary certificate.

The communication is server-based, where message types are received and generated (*.xml and *.xsl), with full support for processes such as meter readings and supplier changes.

Billing

Invoices are created based on incoming entitlements or meter readings / import files.

Includes an overview of billing and informational items: business component, distribution, environmental tax, billing items.

Provides a summary of consumption.

Settlement is carried out in bulk. If an anomaly is detected, the operator is prompted to resolve it.

Invoicing

The invoicing process is closely linked to the billing process and includes the following capabilities:

- Mass and individual invoice generation
- Review of issued documents for accuracy
- Summary of received payments (SALDOKONTO)
- E-invoicing support

Payment matching

Pairing of payments is done automatically on expected payments and incoming statements. Within the matching mechanism, there are seven methods applicable to a single statement. There is also the option of using the unexplained payments module.

- It runs according to set scenarios and criteria in several phases.
- The operator has the Unexplained Payments module at their disposal.
- The option to use the A-Account.

Integrated Commodity Accounting

The solution includes integrated commodity accounting, which consolidates and transfers data into operational accounting systems.

- General and subsidiary ledgers
- Financial outputs for regulatory authorities

Products and Price Lists

Product and pricing configuration is managed through a dedicated module:

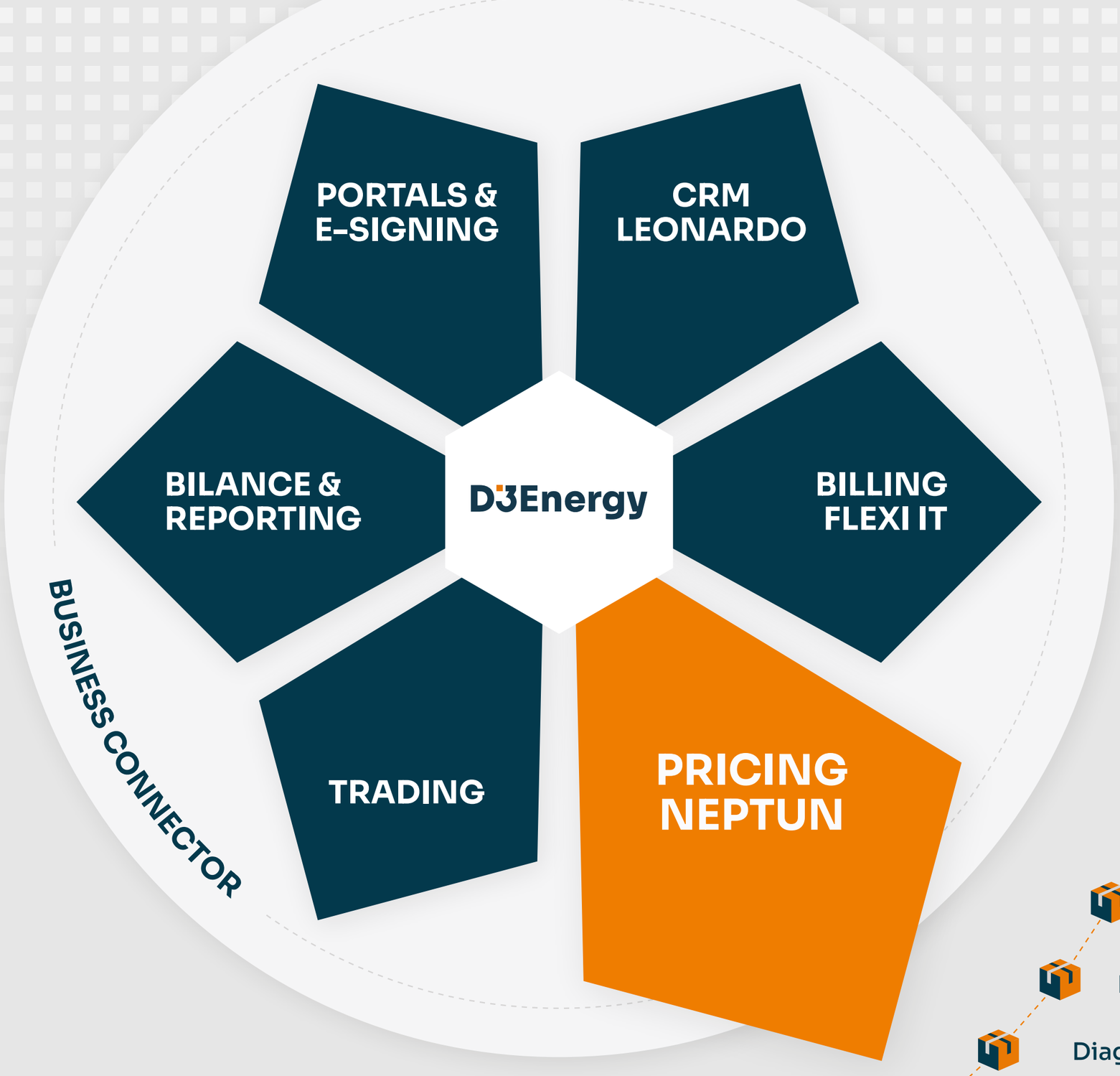
- Set up of product pricing, including pricing models
- Definition of individual product prices and price lists by the administrator (with historical records maintained)

Reporting

Reports are organized logically based on the area they cover (billing, saldokonto, accounting, supplier switching, etc.).

03 PRICING NEPTUN

The valuation process is managed by its own module. Input data includes details about the entity being valued (e.g. company, segment), followed by the application of predictive models, diagram adjustments, and routing of the valuation request to the appropriate individuals or departments. The module outputs customer quotations. If the customer accepts the price, the system creates a basis for procurement (e.g. purchase envelopes, tranches).



- Valued entity
- Approval/Rejection of purchase price
- Acceptance of valuation
- Quotes
- Hedging
- Acquisition of tranches
- Product configurator
- Diagram
- Procurement portal

D3energy.cz

Valued Entity

Manages records and workflows related to valued entities, including ranking and associated master data. Allows creation of various data aggregations by entity, including predictive models.

Requirement

A valuation request can be created per receiving transfer point or for a listed receiving transfer point. Each request is categorized by commodity and managed through the system's workflow.

Purchase Price Approval / Rejection

This process is used to review and ultimately approve or reject a proposed purchase price.

Award Acceptance

Provides an overview of the awarded pricing variants, including their acceptance or rejection status.

Approval of Coefficients

Provides an overview of generated coefficients, with the option to correct or approve them.

Ensuring

Supports consumption forecasting through procurement, commonly referred to as an "envelope" (an aggregation of receiving transfer points as required).

Tranche Acquisition

Recording and creating tranches based on approved coefficients.

- Maintaining records of approved coefficients for individual clients by commodity, year, and procurement envelope. Calculation of required tranche sizes (tranche calculator) based on approved coefficients. Execution of tranche acquisitions using specific coefficients.

Diagram

A graphical tool that enables working with diagrams based on mathematical operations (unary, binary, etc.), including the composition of diagrams and their shifting over time.

Reward your customers for both consumption and production — Neptun can handle it all.

04 TRADING

The D3Energy Trading Module is a comprehensive solution designed to support the procurement and trading of electricity and natural gas. It ensures full compliance with current and forthcoming EU and national energy market regulations, while offering advanced tools for portfolio management, consumption forecasting, pricing, and contract management. The module also covers processes for companies providing power balancing services or acting as flexibility aggregators.

D3energy.cz

These activities include:

- Registration of market operators
- Management of contractual relationships
- Maintenance of trading books
- Recording of bilateral contracts
- Market support activities:
  - Trading on short-term markets
  - Trading on the day-ahead market
  - Trading on intraday markets
  - Trading on the unused flexibility market
- Nomination of internal portfolio quantities

Portfolio data is organized into structured trading books for clarity. The solution is enhanced by a range of reports, evaluations, and visual dashboards. All internal processes and external communications are fully automated through workflow management.

Portfolio Management

- Master data is sourced from either an internal database or the energy market operator (as part of master data entry).
- Provides a summary of all receiving transfer points, grouped by commodity (including TDD class, capacity, region, etc.).

Consumption Forecast and TDD Conversion Model

- Generates time series based on recalculated annual consumption
- Updates regional temperatures daily (manually or automatically)
- Automatically recalculates TDD values and consumption diagrams
- Uses historical consumption diagrams to generate index curves for contract distribution
- Matches final consumption curves with procurement contracts

HPFC (Hourly Pricing Forward Curve)

A submodule used for predicting the future development of energy prices (resulting in an hourly price projection over time).

Forecasting is based on:

- Historical time series data (e.g. from OTE or exchanges)
- External pricing inputs (e.g. market data, internal coefficients)

Contract Management & Trading Books

- Manages records of bilateral wholesale contracts with counterparties.
- Supports:
  - Standard contracts
  - Daily contracts
  - Flexible contracts
  - TNF contracts (Unused Flexibility Markets)
- Each contract includes volume profiles and actual unit prices.
- Provides multi-dimensional views for profitability analysis.
- Integrates with the Pricing Module for contract valuation and linking to customer accounts.

Daily Operations & Nominations

- Manages short and long positions using the Scheduling module
- Executes daily trades through flexible contracts
- Automates nomination to OTE using standardized XML via the D3 Business Connector interface

Covers nominations for:

- Day-ahead market
- Intraday market
- Unused flexibility market

An elegant tool for traders that makes it easy to purchase efficiently and manage production resources.

05

BILANCE & REPORTING

This management tool enables reporting across all areas of the energy company. Input to the Balance Sheet module is drawn from pricing, procurement, billing systems, and other integrated solutions.

- Controlling
- Balancing data warehouse
- Consumption trends
- Financial indicators

Balance Sheet Data Warehouse

Based on OLAP cube logic. It uses dimensions and metrics to aggregate values accordingly.

Examples include:

- **Dimensions** – time information, customer, OPM, etc.
- **Metrics** – e.g. quantity, unit price

Derived Indicators and the Transaction Principle

In addition to real-world indicators and metrics, the data warehouse includes a set of derived dimensions and metrics that represent specific mathematical operations.

Users also benefit from the transaction principle, which allows them to view data in its current state (real-time) as well as how it appeared at any given point in history.

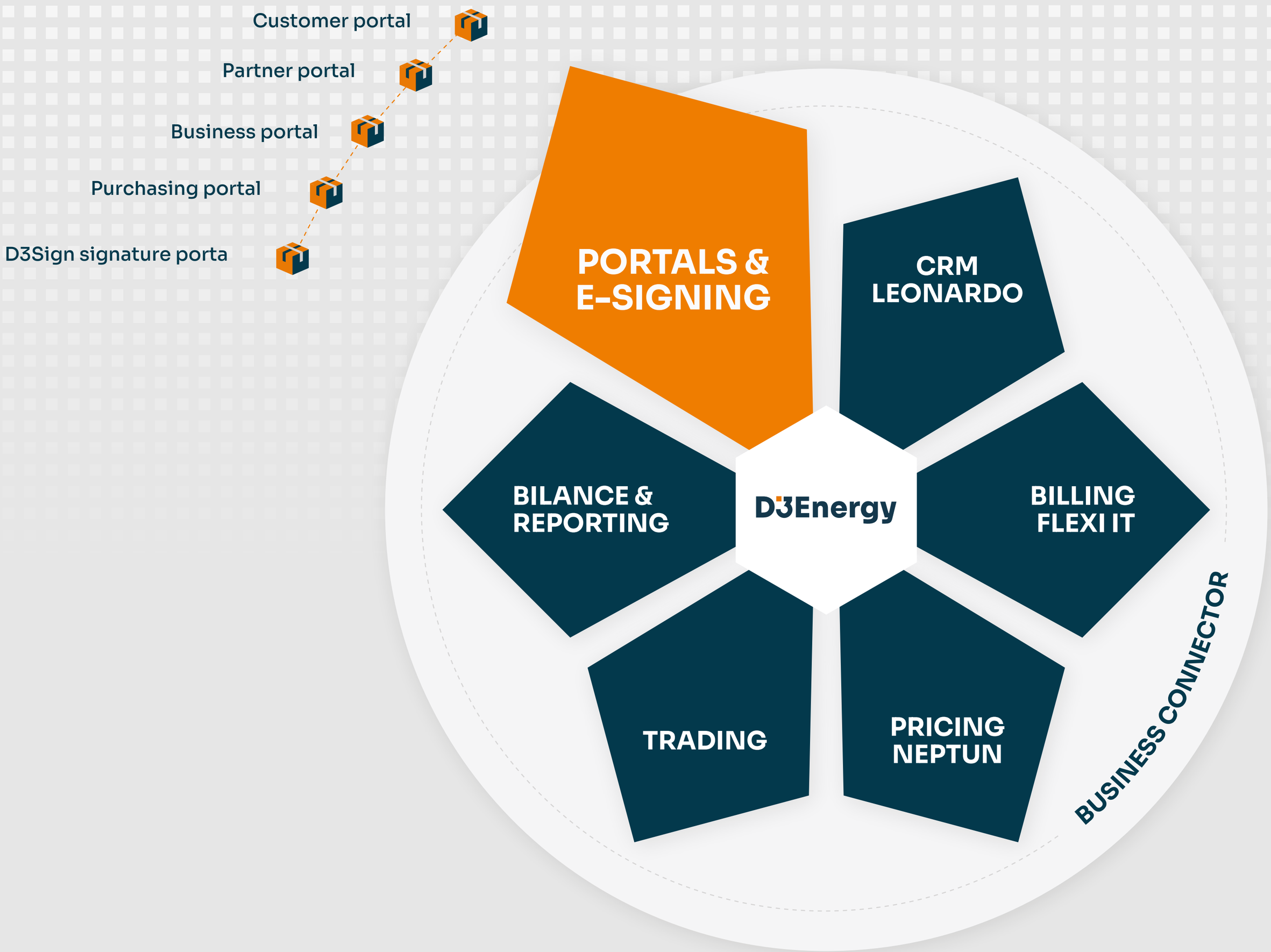
The content of the balance module is presented through dashboard widgets, tables, and charts.

A global view of purchasing and invoicing economics is crucial for determining the direction a supplier should take.

Ø6

PORTALS & E-SIGNING

This portal solution is available to customers as soon as they register for access to utility bills. It also allows them to monitor change requests and modify payment transactions. The D3Sign electronic signature portal is available for contract negotiation.



01
D3Sign Portal

D3Sign is a standalone e-signature portal that enables different systems to facilitate electronic document signing between customers and suppliers. It allows individual customers or groups of customers to sign documents based on predefined workflow scenarios. These workflows can vary depending on customer requirements and may include SMS confirmation, stylus, keyboard input, or combinations of these options.
Storing and timestamping signed documents in a secure data vault is, of course, included.

Documents (Contracts, Powers of Attorney, and Invoices)

The document generation process is handled by the information system, which forwards the generated document to the **D3Sign** signature portal. Each document includes a signature anchor, allowing the customer to sign in the designated area.
It is also possible to use a signature wheel — particularly useful when multiple people need to sign on behalf of the customer.

Signature Portal

The signature portal serves as the entry point for the customer. The system generates a signature request containing a direct link to the documents stored in the portal. The customer receives an email with a web link to the D3Sign signature portal.
The documents are ready for signing. They can be viewed or downloaded, including any unsigned attachments. The customer can also choose which documents they want to sign at any given time.

Electronic Signature

The signature can be created manually (e.g. using a mouse or touchscreen device), or by entering the customer's name in a text field, which is then converted into a handwriting-style font. Signature scenarios may involve a combination of the following methods:

- SMS confirmation
- Stylus
- Keyboard input
- Digital certificate

An electronic stamp (a certificate with a timestamp) can be added to signed documents to verify their authenticity. It may also include the following:

- A field indicating consent to the processing of personal data
- The place of signing
- The date of signing – automatically set to the current date

Web Portals

The web portal is designed to support different types of users, such as customers, business partners, or external traders. Depending on the user's role, different types of web portals are available:

- Customer portal
- Purchasing portal

02
Customer Portal
(Consumption and Production)

The Customer Portal is a web application that provides a centralized environment for viewing consumption, managing contracts, entering data manually, and accessing other features.

Customer Registration Process

If a customer has not yet registered for portal access, they are guided through a registration form that walks them through the full sign-up process. Once completed, the customer becomes a full portal user with automatically generated login credentials.

Customer Account Information

Contains basic customer data necessary for sending invoices, deposit schedules, and other printed materials. The ability to edit this information is linked to back-office validation processes that must approve the changes.

Invoices and Advances

Provides detailed information about invoices and advance payments, with the ability to download them directly from the portal.
Additionally, customers can use the invoice simulation feature designed for end users. Another option is to pay directly via a QR code from within the browser.
Beyond individual documents, customers can view and work with their full balance overview, showing all outstanding and paid documents.

Receiving Transfer Points (RTP)

Displays an overview of all active RTPs for the customer.
For each RTP, consumption and planning diagrams are available.
For the selected customers, the option to enter self-read meter readings is also available.

Requests (Ticket Management)

If a customer has a request for their supplier, it can be submitted via the web portal.
Based on the request type, the system automatically delegates the task to the appropriate responsible person. The resolution status is then displayed back to the customer through the portal.

Messages

The portal allows communication with customers via internal messages. These messages can include short text along with attached documents.
The system also tracks whether a message has been delivered and read by the customer.

Documents for Download

Documents or templates intended for customers are provided through a dedicated module, where files are made available for direct download.
The supplier decides which documents are visible to customers.

Pricelists

Current pricelists can be downloaded and viewed by customers directly from the web portal.

Service

If a customer needs support, they can submit a service request via the portal and track its resolution.
Each request is logged with a priority level and assigned to the appropriate person as a task.

03

Purchasing Portal

The Purchasing Portal is the central communication interface between the customer—who purchases and allocates the required commodity volume (electricity, natural gas)—and the supplier—who ensures the delivery and provides capacity and expertise.
The portal is a web-based application connected to the pricing tool and the Neptun module. Based on customer requirements, individual purchases are defined and then executed by the trading department.

Purchasing Zone

Users access the purchasing zone through two-factor authentication. After logging in, purchase options are displayed based on preconfigured purchase windows (aligned with market rules).
Users can purchase individual tranches based on current pricing information. The portal continuously reports the purchase status and available options.
The interface provides customers with a complete overview of their purchases, envelopes, and purchasing years. The system also supports purchases across multiple companies and for both commodities—electricity and natural gas.

Reports and Charts

Statistical overviews are presented through charts showing actual consumption, planned values, and quantities purchased.
Customers can download the current diagram for each RTP in XLSX format. Within this file, adjustments to the diagram can be made within a defined range. Conditions for allowed changes can be configured in the administration settings.

Purchase Diagrams

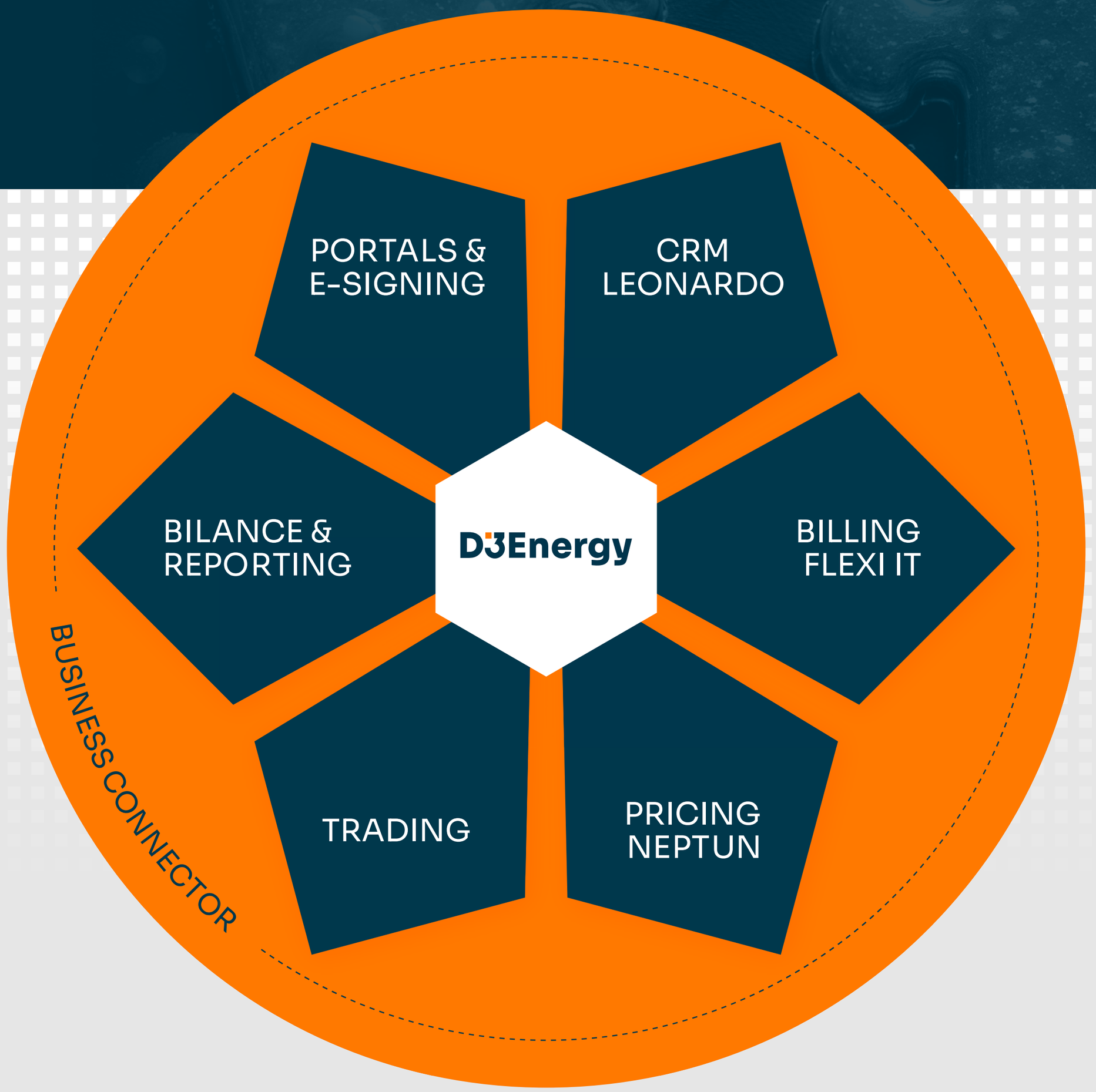
Commodity purchases are made by adding the required volume, either as a percentage or in MWh—depending on the selected product.
A one-click function can calculate the remaining percentage or MWh needed to reach 100% of the agreed diagram. The purchased quantity is then shown in the chart.
Before finalizing a purchase, the system checks whether the minimum volume has been met and whether any residual quantity remains that cannot be fulfilled due to restrictions or system-defined rules.

07

BUSINESS CONNECTOR

The Business Connector module handles data inputs at two levels:

- **Existing data** – From internal systems (e.g. SAP), including consumption data, RTPs, and historical time series, which can be imported into D3Energy via standardized, pre-configured communication.
- **OTE data (direct communication)** – The module communicates directly with OTE via certified, server-to-server connections. Consumption data is exchanged in XML format and integrated into the system.



D3Energy

Looking for a similar solution?

Lenka Svrčinová | lenka.svrcinova@seyfor.com | +420 739 603 707

D3energy.cz