

Effortless Automation for Energy Operations

Operations teams in energy commodities face extreme complexity, with every trade carrying immense value – and risk. Manual processes, inconsistent data, and lack of visibility increase the likelihood of costly errors, compliance failures, and profit erosion.

ClearOpx™ changes that.

Powered by our Operations Trade Risk Management (OTRM™) Platform, ClearOpx brings agentic automation to the operational layer of energy trading. It connects workflows across the trade lifecycle, enabling teams to reconcile discrepancies early, automate contractual risk analysis, and streamline financial settlement – helping them keep pace with market volatility, reduce exposure, and optimize revenue outcomes.

The Problem

- **Inconsistent Documentation:** Brokers and counterparties use different formats and terms, making document reconciliation a slow and error-prone process.
- **High-Stakes Mistakes:** Lack of automation creates bottlenecks and increases operational overhead. A single error in pricing, quantity, or contractual clauses can result in revenue leakage and significant financial loss.
- **Opaque Contractual Risks:** Hidden clauses, from demurrage to quality waivers, are easily overlooked, creating the potential for disputes, penalties, and lost revenue.
- **Volatile Market Exposure:** Data errors at booking, such as incorrect pricing indexes or differentials, magnify financial exposure as market prices move between trade execution and settlement.

Key Outcomes

- Daily reconciliation times reduced from 2 hours to 30 minutes per employee
- Process standardization for greater productivity and speed with fewer errors
- Time given back to operations teams for renewed focus on higher-value work
- Improved financial controls, cash flow, and fee management
- Increased visibility into positions, exposure, and operational performance

How ClearOpx Helps

- **Automated Trade Reconciliation:** Data normalization across broker recaps, confirmations, and contracts identifies discrepancies early, improving accuracy and reducing downstream rework.
- **Real-Time Confirmation Visibility:** Track status, aging, and discrepancies across trades with dashboards that provide real-time, actionable insights into operational and financial exposure.
- **Contractual Risk Analysis:** Surfaces risky clauses such as demurrage, quality waivers, and compliance red flags, enabling teams to act before execution, avoid disputes, and protect revenue.
- **Exception-Driven Processing:** Agentic automation handles routine processing, with only unresolved discrepancies flagged for manual review – reducing workload while maintaining control.
- **Audit-Ready Oversight:** Every trade confirmation, correction, and approval is logged with a full audit trail, supporting compliance and accurate reporting.

ClearOpx for Energy Operations

ClearOpx has transformed operational insights and workflow automation for energy trading. Our OTRM Platform uses a roster of agents to process high volumes of data and identify discrepancies earlier, empowering teams to act early to prevent revenue leakage and loss.

Our suite of Intelligent Applications, running on the OTRM Platform, provides visibility and control across the trade lifecycle: Trade Capture, Trade Confirmation, Operations Intelligence, Finance Optimization, and Payment Processing.

ClearOpx Capabilities

Workflow Automation:

- Agent-driven workflows coordinate reconciliation, approvals, exception management, and settlement processes, routing issues while maintaining control.

Tracking and Dashboards:

- Intelligent Applications make it easy to manage trade activity, workflows, and exceptions, with audit trails and status tracking across the trade lifecycle.

Interactive Insights:

- Every application offers natural language interaction, integrated within workflows, enabling users to query data insights and investigate issues in more depth.

System Integration

- Works with major CTRM and ETRM systems
- Flexible inbound (email, API, SFTP) and outbound integration
- SaaS, private cloud, or on-premise deployment

Documents Supported

- | | |
|--------------------|-------------------------|
| • Letter of Credit | • Certifications |
| • Contracts | • Shipping Instructions |
| • Statements | • Inspection Reports |
| • Invoices | • Trade Confirmations |
| • Bills of Lading | • Broker Recaps |
| • Packing Lists | • Broker Statements |

Security and Compliance

- SOC 2 Type 2 certified
- SSO and multi-factor authentication
- Data encrypted at rest and in transit



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