Summer Fills and Contract Prioritization

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Summer Fill mode follows a different scheduling algorithm designed for delivering to many tanks in a consolidated area, rather than scheduling to achieve optimum drop size efficiencies. Furthermore, this scheduling mode can be used to either top off auto schedule tanks or to prioritize delivering remaining contract gallons.

Summer Fill and Contract Prioritization Terms and Definitions

- **Summer Fill Dates** – These dates define the start and end period of *Summer Fill* mode and are only used by the optimizer when the mode is set to *Summer Fill*.

  Note: If the optimizer is in *Summer Fill* mode and the current date moves past the end date, the optimizer will automatically be switched to *Submodes* mode.

- **Summer Fill Thresholds** – These thresholds override the existing limit and target thresholds for tanks when the mode is set to *Summer Fill* and the Summer Fill Dates are in effect.

  Note: To prevent unpredictable or unintended behavior in the optimizer, these thresholds are limited to a minimum of 5%, maximum of 75%, and a minimum 10-spread between the numbers. Values not adhering to these guidelines will be adjusted as needed when selecting **Save and Close**.

- **Summer Fill Call-in Defaults** – Tanks with a *Call-In* Delivery Type may be set inside Energy Force to be filled during summer fill. In this case, they are treated as keepfull tanks for the duration of summer fill (actual call-in entries will still be treated as call-ins) and are assigned the tank level and kfactor specified here.

- **Summer Fill Max Fill Level** – Sets the *Keepfull Maximum Fill Level* to be used for the duration of summer fill.

- **Summer Fill Minimum Drop** – Sets the *Minimum Drop* size required to run a schedule during summer fill. Higher values will prevent scheduling tanks with smaller drop requirements. Critical tanks are always scheduled.

- **Summer Fill Prioritize Contracts** is the key setting for turning on *Contract Preferred Filling*. Checking this box will limit the tank set received from Energy Force to the following four categories: *Active Contracts, Call-In Entries, Julians,* and *Critical Tanks*. Check this option, whether truly in summer fill season or any time of the year, and the Optimizer will prioritize contract deliveries based on the Summer Fill start/end dates and Fill Thresholds. This means any tank within the range of the thresholds is only going to be a tank with contract fills available. Any tank which falls below the lower threshold, and therefore is critical, will appear regardless of contract or any other setting. As always, if it is critical, the optimizer will always try to deliver it.

Setup Process

Rules

- **Summer Fill Mode** — Energy Force will export designated Summer Fill tanks as they reach or fall below the Summer Fill Target Threshold. A percent update to the tank will qualify as a delivery and the tank will be removed from the Summer Fill list. Once a tank has had one fill, it will not export again for a delivery until it is

at the Summer Fill Critical Limit. Will Call and Julian tanks will export as usual with an active call-in order or when a Julian schedule is due.

- **Contract Prioritization —** The Optimizer+ uses all of the Summer Fill values, but with the caveat that the tank also needs to have available contract gallons, meet the Contract Proportion, and the Minimum Drop Gallons.

Note: The Optimizer+ Summer Fill mode does not adhere to all features the Optimizer+ offers, such as multiple trucks in a route or route exclusions. Summer Fill mode does support Tank Groups.

Customer / Delivery Type Matrix

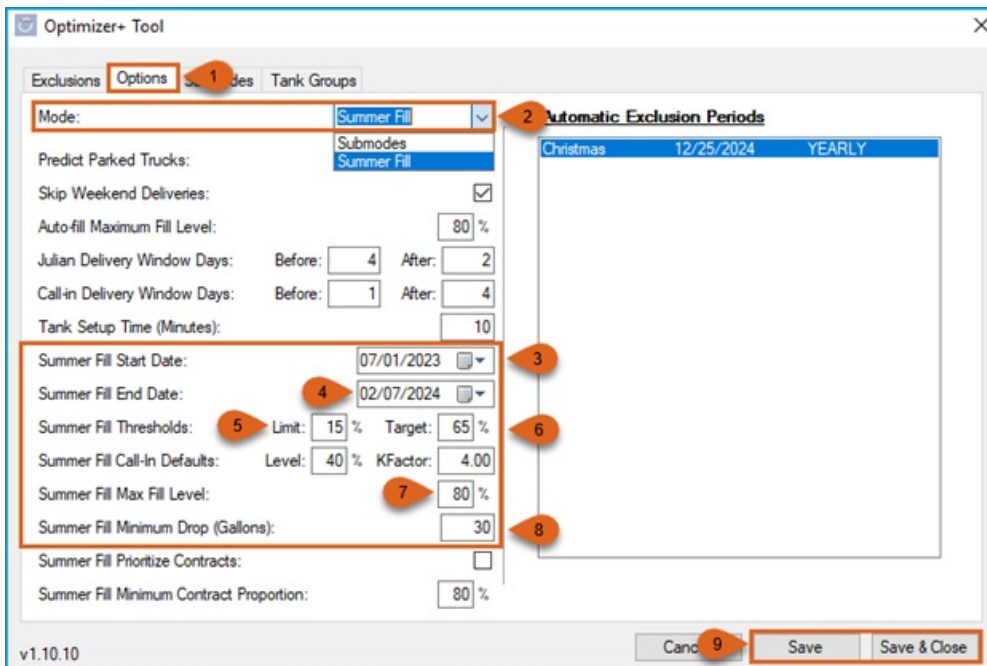Navigate to *Supervisor Menu / Maintenance Menu / Optimizer Maintenance / Customer/Delivery Type Matrix*.

1. Click into the *SummerFill Tank Type* field for the Customer and Delivery Types that have an *A* for *Optigistics Tank Type*, enter *S* in the *SummerFill Tank Type* column.
2. If using a *Customer Type* that gets a Summer Fill paired with a *Delivery Type* of Will Call and has the *Optigistics Tank Type* of C, enter S.

   Note: All other Will Call and Julian Delivery Types will export for a delivery when an active call-in order is entered or a Julian schedule is due.

Optimizer+ Calendar Tool - Summer Fill Mode

Navigate to *Supervisor Menu / Maintenance Menu / Optimizer Maintenance / Optimizer+ Calendar Tool*.
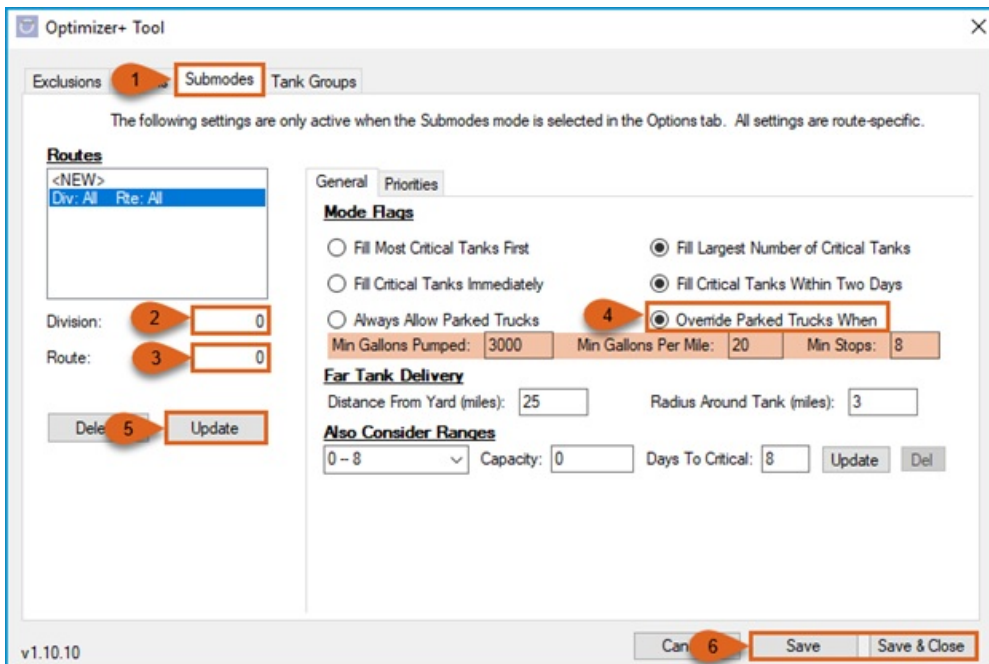
1. Select the *Options* tab.
2. Select *Summer Fill Mode.*
3. Enter *Summer Fill Start Date.*
   a. Cannot enter a future date.
   b. Can enter a date in the past to capture any recent deliveries that qualified as a *Summer Fill* delivery.
4. Enter *Summer Fill End Date.*
   a. The duration of the Summer Fill period will affect the loading of the schedules. A long period in comparison to the quantity of qualifying tanks may result in frequently parked trucks. The *Override Parked Trucks* setting can be used to front load schedules in the beginning of the Summer Fill period. The setup for this option is covered in the following section.
5. Enter the *Summer Fill Threshold Limit.*
   a. This is the value that the Optimizer will deem as the critical limit.
6. Enter the *Summer Fill Target Threshold.*
   a. The value entered is what will qualify a Summer Fill tank to be exported to the Optimizer+ for delivery.
7. Enter the *Summer Fill Max Fill Level* tanks will be filled to during this period.
8. Enter the *Summer Fill Minimum Drop Gallons* that a tank must receive to qualify for a delivery.
9. Once all information is entered click **Save** or **Save & Close.**

   Note: Summer Fill Call-In Defaults remain as they are unless changes are recommended by Optigistics or Energy Force.

Override Parked Trucks

Although Optimizer+ Summer Fill mode does not adhere to many of the additional features, the ability to use the *Override Parked Trucks* setting does exist to front load schedules at the beginning of the Summer Fill period.

Navigate to *Supervisor Menu / Maintenance Menu / Optimizer Maintenance / Optimizer+ Calendar Tool* .
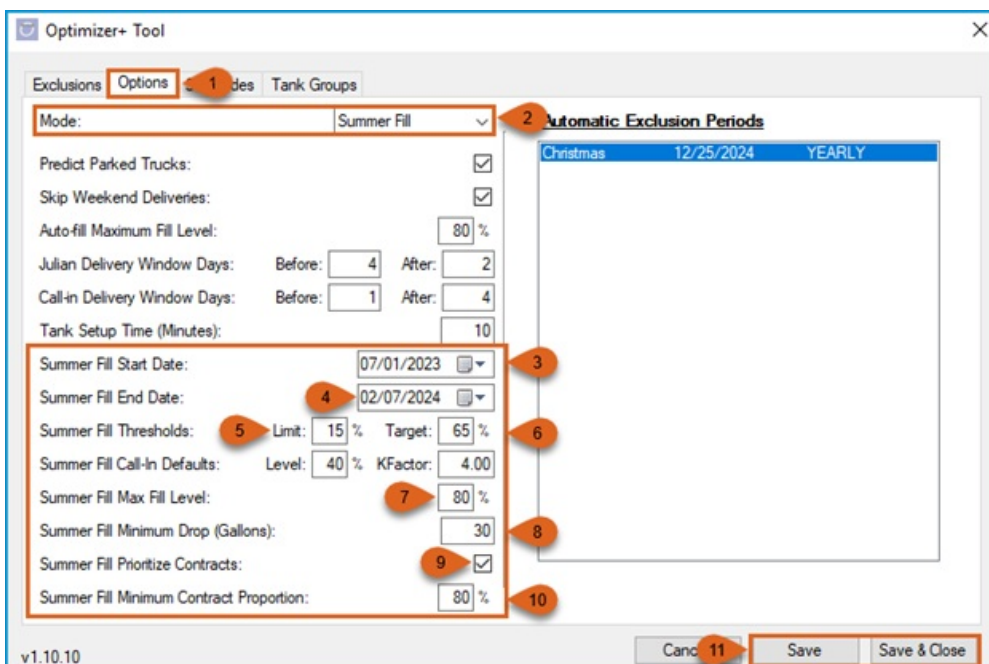
1. Select *Submodes* tab.

2. Enter the *Division* (can be 0 for all).

3. Enter the *Route* number (can be 0 for all).

4. Select the dial *Override Parked Trucks When*.

   Note: Optimizer+ does not use the minimum criteria below the setting while in Summer Fill mode, but rather uses this setting to simply front load the schedules.

5. Click the **Add** or **Update** button.

6. Click **Save** or **Save & Close** to save settings.

Optimizer+ Calendar Tool - Contract Prioritization

Navigate to *Supervisor Menu / Maintenance Menu / Optimizer Maintenance / Optimizer+ Calendar Tool* .

1. Select the *Options* tab.

2. Select *Summer Fill Mode.*

3. Enter *Summer Fill Start Date* (cannot enter a future date).

4. Enter *Summer Fill End Date.*

5. Enter the *Summer Fill Threshold Limit.*

6. Enter the *Summer Fill Target Threshold.*

7. Enter the *Summer Fill Max Fill Level* tanks will be filled to during this period.

8. Enter the *Summer Fill Minimum Drop Gallons* that a tank must receive to qualify for a delivery.

9. Select the checkbox *Summer Fill Prioritize Contracts.*

10. Enter *Summer Fill Minimum Contract* Proportion percentage.

    a. **Example**:

        - The percentage is set to 50%.

        - Tank A has an estimated 200 gallons to deliver to fill to 80%, and it has 80 gallons remaining on its contract. 80 / 200 = 40%. This is *below* the 50% proportion; therefore, it *will not* be eligible for delivery unless it becomes critical defined by the Summer Fill critical limit.

        - Tank B has an estimated 300 gallons to deliver to fill to 80%, and it has 220 gallons remaining on its contract. 220 / 300 = 73%. This percentage is *at or above* 50%, therefore qualifies for delivery.