OptimizerPlus+ Winter Preparation

Last Modified on 04/15/2025 4:23 pm EDT

1.

   Winterize, Service and Inspect your trucks, including any spares

2. Make sure EnergyTrack is fully operational (handhelds charged daily, printers functional, totalizers import properly)

3. Keep extra rolls of printer paper in the cab of each truck

Last Delivery Date Report

Report Menu – Tank Reports #3 Last Delivery Date Report

Last Delivery Date Of Gas

Division   1 ABC PROPANE COMPANY   to   9999
Last Delivery Date   01/01/19   to   08/15/23   Route   1 to   999999   Customer Type   ALL
                          Delivery Type   ALL   Location   ALL   Ownership All

Div	Customer #	Customer Name and Address	Last Delivery Date	Balance
Route	1	WEST AVON		

| 1 | 100000 | DOE,JOHN | 06/14/19 | $4,190.61 |

111 PRODUCTION DRIVE   Tank Serial #   9SF123456
                                 Tank Size   500.00   Type   P
STACYVILLE   IA   Business Owns? Yes   Location   1
            50476-   Delivery Type   2   Customer Type   1

| 1 | 100005 | BROCK,MICHAEL | 11/10/21 | $1,774.68 |

123 ANYWHERE ST   Tank Serial #   SPARE
                                 Tank Size   300.00   Type   P
PENSACOLA   FL   Business Owns? No   Location   2
            32501-   Delivery Type   1   Customer Type   1

| 1 | 100007 | ADAMS,ANSEL | 09/05/19 | $18,537.29 |

123 PRODUCTION DRIVE   Tank Serial #   CUSTOWNS`
                                 Tank Size   1000.00   Type   P
BROWNSBURG   IN   Business Owns? No   Location   2
            46112-   Delivery Type   3   Customer Type   3

| 1 | 10084 | HUNT,SAM | 07/15/20 | $862.61 |

8675 CO ROAD 50   Tank Serial #   123
                                 Tank Size   500.00   Type   P
WINNER   SD   Business Owns? No   Location   2
            57580-   Delivery Type   2   Customer Type   1

- Helps determine which auto-fill customers have not had a delivery since last season
- Run from January 1st through April 30th for all delivery type 2 tanks
- If a customer is on this list, they did not receive a summer or fall fill and are at risk for a run-out
- Enables being pro-active with contacting the customer before a run-out occurs and helps to determine why a customer has not been delivered to as planned

Excel Export Version

Division Number	Customer	Name	Address	Address 2	City	State	Zip	Last Delivery Date	Total Balance	Tank Serial Number	Tank Size	Tank Type	Business Owns	Location Code	Delivery Type	Customer Type
1	100000	DOE,JOHN	111 PRODUCTION DRIVE		STACYVILLE	IA	50476	06/14/2019	4190.61	9SF123456	500	P	Y	1	2	1
1	100005	BROCK,MICHAEL	123 ANYWHERE ST		PENSACOLA	FL	32501	11/10/2021	1774.68	SPARE	300	P	N	2	1	1
1	100007	ADAMS,ANSEL	123 PRODUCTION DRIVE		BROWNSBURG	IN	46112	09/05/2019	18537.29	CUSTOWNS`	1000	P	N	2	3	3
1	10084	HUNT,SAM	8675 CO ROAD 50		WINNER	SD	57580	07/15/2020	862.61	123	500	P	N	2	2	1
1	100005	BROCK,MICHAEL	123 ANYWHERE ST		PENSACOLA	FL	32501	11/10/2021	1774.68	BARN	500	DD	N	1	1	3
1	100007	ADAMS,ANSEL	123 PRODUCTION DRIVE		BROWNSBURG	IN	46112	02/16/2023	18537.29	224455	1500	P	Y	1	3	2
1	10091	WILSON,KIRSTYNN	7142 MILLET LN		AVON	IN	46123	12/24/2019	-1346.48	SJF990	500	P	N	1	1	1
1	10095	WEETS, BONNIE	1630 11TH STREET		LOST NATION	IA	52254	02/01/2021	610.88	UNKNOWN	500	P	N	1	3	1
1	100000	DOE,JOHN	111 PRODUCTION DRIVE		STACYVILLE	IA	50476	11/10/2021	4190.61	GAS22496	100	G	N	2	1	1
1	9876543210	NEWFER, JENNIFER	555 MAINT ST		AVON	IN	12345	11/14/2022	-1097	SJF123	500	P	N	2	1	1

Review the Call-In Entry Screen

- Now is the perfect time to evaluate the Call-In entry program to assess upcoming, pending, or past due deliveries
  - For example, how many call-ins are more than one month old?
  - Highlight, **Ctrl+M**, and press **F3** to remove past due deliveries after investigating
- Every call-in request must be entered in this screen for the OptimzerPlus system to route
- Scheduled Dates and Immediate Fills should be kept to a minimum. Otherwise, these deliveries drive the route for the day

Remote Tank Monitors

Monitors will lessen demand on working K-Factors and Daily Usage

- *Gallons/Percent Update* must be selected on *Meter/Monitor* screen
- *Target* and *Critical Refill Levels* must have a 10% difference
- OptimizerPlus+ routes the tank based on individualized settings per RTM
- Critical set points to consider for high demand tanks:
  - If tank consumes through 30% of its storage within 3 days, set to 30% or 40%, especially if in a remote

area

- If possible, need to upsize storage
- Should be read daily

- Slow consumption customers are routed closer to the lower limit threshold if conditions merit:
  a. Drive by daily
  b. Slow steady usage
  c. In an area with concentrated tanks, and ETC

Review Route Stat Emails

Check daily route stat emails

Daily Status email for Optigistics Log for May 8 2020 5:17AM

Today's Weather:

EDD = Estimated Degree Days

div:1   rg:1   hi:59   low:37   edd:17

Route Delivery Info:

Parked Route\Truck

rt:51 trk:85 parked

Runs | Stops | Gals | Critical Tnk | Hours | Distance | Repeating Tnk (resets each Sunday)

rt:52 trk:9   rns:2 Stp:17 gal:6119.9 crit:14 hrs:9.8 dst:168.9 rep:16

rt: 53 trk:86   parked (E+)   Route has been excluded via Opti Tool

Parked Truck Info:
Parked Tomorrow rt:51 trk:85 drv:37   Predicted to park tomorrow
Unexpected Schedule rt:52 trk:9 drv:76

Previously predicted to park but call-in entry, julian, or % update was entered

Summer Fill:

If active, will display the word Active and the number of tanks left to deliver

(Inactive)

Unscheduled Critical Tanks:
Route 51:

Delv Type| Tank RRN | Cust # | Cust Name| Tank %| Gals to Delv| Predicted Days till Empty

type: KF rrn:31699 cust:111259 name:DOE, JOHN frac:0.20 gtd:600 pdte:8

OptiSched Version: 2020-E Copyright (c) 2008-2020, Optigistics, LLC. All rights reserved.
Schedule Date: Fri May 08 04:12:36 CDT 2020
div: 1 route: 51   Route Summary
...critical gallon projections div: 1 route: 51
Mon 04-27-2020 12 4,655
Tue 04-28-2020 13 4,961
Wed 04-29-2020 14 5,268   Critical gallon accumulations for the week
Thu 04-30-2020 14 5,272
Fri 05-01-2020 14 5,275
Sat 05-02-2020 14 5,282
Sun 05-03-2020 14 5,288
Mon 05-04-2020 14 5,295div: 1 route: 52
div: 1 route: 53
Processing Time Seconds:44
Completed processing of this schedule set--halting

- Are you over-capacity?
  - Run additional trucks if necessary
- Do you have repeating tanks? WHY??
  - Run OptimizerPlus+ Compliancy reports to determine if tanks are being skipped
- Parked Trucks? – Is there an error or does the Opti-Tool need adjusted?

Other Items to Review

Listen to the drivers!!

They're your first line of defense. If something's wrong, or if something changes, it's important to listen and review.

- Drivers are the most important in educating customers to call in at 20%. The customers will help out the drivers. All employees need to stress 20%
- Know which tanks to set up for Auto-Schedule or Will-Call
  - **Wood Burners** – Customer must participate in tracking their tanks
  - **Heat Pumps** – Best handled by monitor
  - **Heat tanks with swimming pool** – Best handled by monitor
  - **Seasonal (lake homes, cabins)** – Best handled by monitor or Julian
    - This customer is your greatest liability risk
  - **Shop/Garage** – Inconsistent usage. Best handled by monitor or Will-Call
- Delivery Types
  - Once a year fill tanks:
    - Set up with *Customer Type* (SummerFill/ Will-Call Winter)/ *Delivery Type* (Will-Call)

Division	Cust Type	Deliv Type	Optigistics Tank Type	SummerFill Tank Type
1	7	1	C	S

Customer Type: Summer Fill\Will Call Winter   Load from Tank

Delivery Type: WILL CALL   Delivery Method CI ☐ Track Usage

- In Matrix set *Optigistics Tank Type* as *C* for winter and *SummerFill Tanks Type* as *S*
  - This will route summer fills more efficiently
  - If customer needs propane in winter, they will need to call
  - This will need to be communicated with customers
- Make sure drivers communicate by the end of each day to prevent duplicate routes
- Review Tanks Not Plotted report daily found at *Customer Menu/Tanks Not Plotted*
- Review HH GPS Changes > .25 Miles exception report
- Review K-Factor deviation reports and adjust K-Factors as necessary
- Ticklers – Make certain driver comments have been reviewed and addressed
- Additional Items for Success
  - Do NOT attempt to play with settings during peak delivery season!
  - If changes are made to trucks, drivers, or route settings, always perform a test run of the OptimizerPlus+ to ensure routes will process without error

OptimizerPlus+ Driver Maintenance

- Make sure driver hours are accurate for the heating season
- **Target Hours** – The minimum number of hours the OptimizerPlus+ should schedule each day
- **Max Hours** – The maximum number of hours for the OptimizerPlus+ to consider for delivery each day (maximum hours are only used if necessary for over-capacity)
- *Target* and *Max Hours* are customizable per driver but should have a 2 hour spread between *Target* and *Max Hours*

## OptimizerPlus+ Calendar Tool

Exclusions

Bad weather pending or a driver on vacation? Make sure to set up Exclusion dates to push projected critical deliveries to an earlier date.

- Helps prevent run outs and over-capacity issues during the time period
- Can be applied to specific routes or all routes
- Automatically turns on and off by itself
- Can also be set annually for holidays such as Christmas or New Year's Day
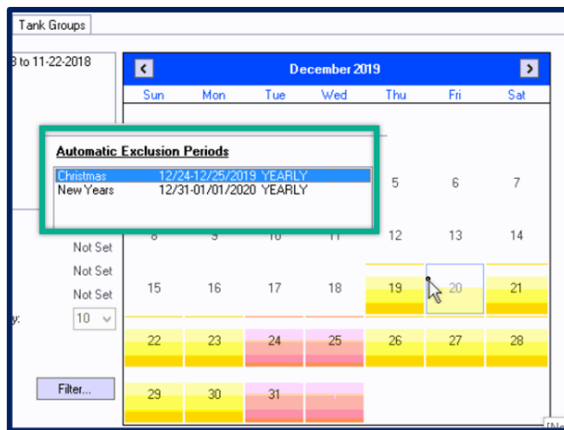
- Excluded date(s) will not have a route unless there is a critical tank still pending or an unexpected critical is scheduled (call-in, Julian)
- In this example, Friday, December 6th, has been excluded for route 1
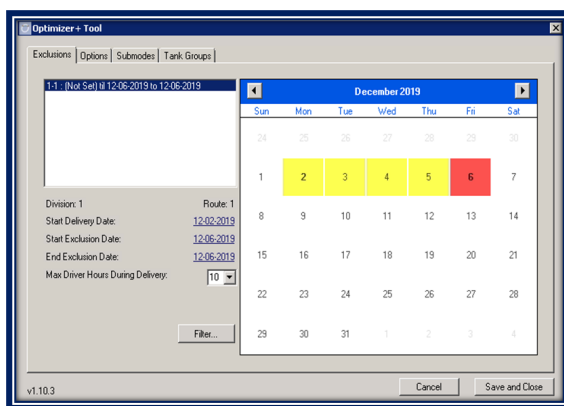
- The delivery window has been set to push forward critical deliveries to Dec 2nd through Dec 5th
- The driver hours have been extended from 8 hours to 10 hours per day
- Route Stats will display the exclusionary delivery period as an *E*
- The day of exclusion displays as an *E+* and the route will be parked

Override Parked Trucks

**Not comfortable with parked trucks in the winter?**
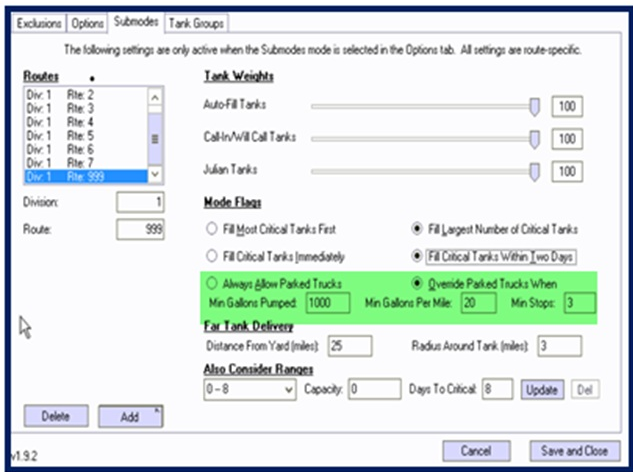
- You can set the OptimizerPlus+ Calendar *Submodes* tab to *Override Parked Trucks* based on minimum delivery criteria
- If a route cannot meet the minimum criteria, it will not generate a route
- You can override parked trucks for all routes, or specific routes
- Standardize if possible, for all your routes!
- Enter *Division* & *Route* and press **Add** button
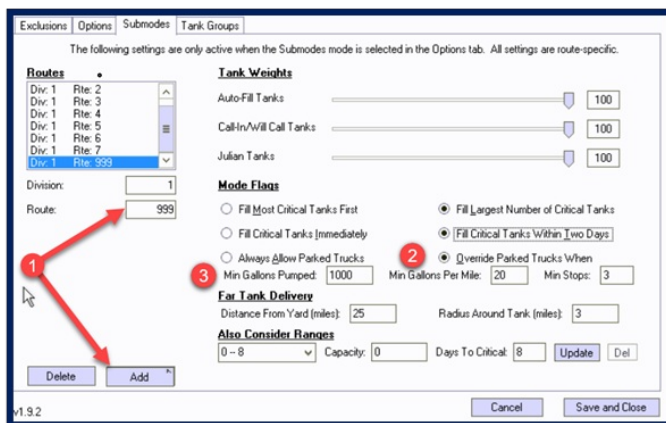
- Select *Override Parked Trucks When* in the *Mode Flag* section
- Enter variables to determine when to over-ride a parked truck
- The example above shows to override if the truck will pump at least 1000 gallons with a minimum of 20 mpg and at least 3 stops
- Select **Update** (**Add** button turns to **Update** when pressed)

Mode Flags

Set *Mode Flags* to tell OptimizerPlus+ how to handle Over-Capacity situations
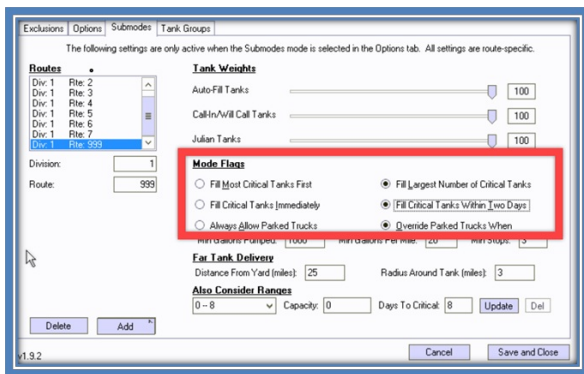
- **Fill Most Critical Tanks First (recommended)** – The OptimizerPlus+ will schedule critical tanks based on current levels of the tanks and estimated days until empty. Tanks with lower capacity are given priority
- **Fill Largest Number of Critical Tanks** – OptimizerPlus+ will prefer to schedule as many critical tanks as possible regardless of estimated days till empty
- **Fill Critical Tanks Immediately** – The OptimizerPlus+ will attempt to schedule all critical tanks on the first day, meaning all tanks will be given the same priority
- **Fill Critical Tanks Within 2 Days** – For large routes, the OptimizerPlus+ will delay scheduling a critical tank until the next day only if the tank's remaining propane allows for it. Tanks estimated to run out on the 1st day is given priority

Ultimate Rule for Success?

Above all else, make sure to drive the route as scheduled!