

OptimizerPlus Winter Preparation

Last Modified on 08/14/2023 11:58 am 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

Div	Customer #	Customer Name and Address	Last Delivery Date	Balance
Route	2	ROL H.L.P.		
1	81729	[REDACTED]	03/15/19	\$930.06
			Tank Serial # 79-49	
			Tank Size 1000.00	Type P
			Business Owns? No	Location 20
			Delivery Type 2	Customer Type 7
Added to EP-keep full and will watch tank for 1st year to make sure the computer is tracking it correctly as well. Sara 9/25/18.				
1	840	[REDACTED]	03/28/19	\$0.00
			Tank Serial # 33942	
			Tank Size 600.00	Type P
			Business Owns? Yes	Location 20
			Delivery Type 2	Customer Type 1
1	15806	[REDACTED]	03/01/19	\$0.00
			Tank Serial # 18433	
			Tank Size 1000.00	Type P
			Business Owns? No	Location 20
			Delivery Type 2	Customer Type 7
1	16696	[REDACTED]	01/31/19	\$9.04
			Tank Serial # 69694	
			Tank Size 500.00	Type P
			Business Owns? No	Location 20
			Delivery Type 2	Customer Type 7

- 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

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
Division Number	Customer Name	Customer Address	Address	Address 2	City	State	Zip	Last Delivery Date	Total Balance	Tank Serial Number	Tank Size	Tank Type	Business Owns	Location	Delivery Type	Customer Type	
1	117800 JOHN DOE		1835 TUCKER AVE		ANYWHERE	IN	46123	3/16/2021	0	95E188638	500	P	Y		4	2	6
1	193400 JANE DOE		3231 140TH ST		ANYWHERE	IN	46123	3/9/2021	0		1070924	1000	P	Y	4	2	6

REVIEW THE CALL-IN ENTRY SCREEN

Customer #	Name	Pend	Div	Route	Est %	Est Del	Min Gal	Min Dollars	Scheduled	Imm Fill	Tck Pr
100007	ADAMS, ANSEL	N	1	1	15	325	0	0.00	00/00/00	No	N
100005	BROCK, MICHAEL	Y	1	1	10	210	0	0.00	00/00/00	No	N
100007	ADAMS, ANSEL	N	1	3	20	600	0	0.00	00/00/00	No	N

Map / Optimizer
 Truck Run Sequence Scheduled 00/00/00

Comment: Collect payment before delivery
 Call In: 09/18/19 10:37 am Entered By: sfaherty

Serial Number: _____ Special Instr: _____ Current: \$1,547.96
 Est Gals Left: 0.00 0% Capacity: 0 Total Cap: 0 Phone: (317)999-4444 30-Day: \$0.00
 Last Del Date: 00/00/00 Bus Out: _____ Address: 987 RONALD REGAN PARKWAY 60-Day: \$0.00
 Customer Type: 0 90-Day: \$14,079.54
 Delivery Type: 0 Total: \$15,627.50
 Terms Code: 2 Del Addr: BROWNSBURG, IN 46112 Credit Limit: \$0.00
 Price Code: 0 0.0000 Loc: _____

Buttons: Call In History, Pending Orders, View All, Send, Email, Calc. Dir, Ticker, Create, Cancel

- 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 OptimizerPlus 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

Meter Number	Meter Type	Cycle	All	Billing Date	Last Reading	Reading Date	Daily-Use	K-Factor	Elev Cd	Installed
01234	12	2	A	09/01/19	0	09/01/19	0.00	4.00	1	00/00/00

Location: 2 BROWNSBURG
 Price Code: 2 Tier A COMMERCIAL
 Default Dept: 1001 COMMERCIAL PROPANE
 Deposit / Date: \$0.00 00/00/00
 Manufacturer: OTODATA
 Sales YTD: \$0.00 Gallons Billed YTD: 0.00
 Meter Tied to Tank: 540 Customer #: 10092 BOB'S CRAB SHACK
 Tank Serial Number: 987SF009 Capacity: 2000.00
 Hold Estimates: No Release Date: 00/00/00 Update K-Factor: Yes
 Route: 3 BROWNSBURG Sequence Number: 0

Remote Tank Monitoring
 No RTM
 Gallons/Percent Update Only
 RTM with Consumption Billing
 Automatic Meter Read

Target Refill Level: 30%
 Critical Refill Level: 20%

Buttons: Inventory Hist, Change Inventory Status, View Temp Readings, Recurring Billing, Inventory Balance, Print

- Gallons/Percent Update must be selected on *Meter\Monitor* screen
- *Target* and *Critical Refill Levels* must have a 10% difference
- Optimizer 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 Route Summary

div: 1 route: 51
 ...critical gallon projections div: 1 route: 51
 Mon 04-27-2020 12 4,655
 Tue 04-28-2020 13 4,961 Critical gallon accumulations for the week
 Wed 04-29-2020 14 5,268
 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 5,295 div: 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 Optimizer 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 YOUR 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:

Delivery Type: Delivery Method

- 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 Optimizer to ensure routes will process without error

OPTIMIZER DRIVER MAINTENANCE

Division Number	Driver	Driver Type	Pay Rate	Target Hours	Max Hours	Truck	Truck Division	RRN
	2	hourly		8.00	10.00	30	1	19
1	3	hourly		8.00	10.00	5734	1	4,495
1	4	hourly		8.00	10.00	31	1	4,494
1	5	hourly		8.00	10.00	5735	1	4,496
1	6	hourly		8.00	10.00	84	1	4,493
1	7	hourly		8.00	10.00	45	1	17

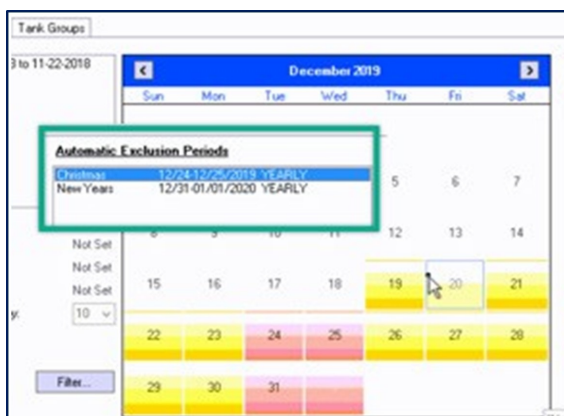
- Make sure driver hours are accurate for the heating season
- Target hours are the minimum number of hours the optimizer should schedule each day
- Max Hours - the maximum number of hours for the Optimizer to consider for delivery each day (maximum hours are only used if necessary for over-capacity)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

OPTIMIZER+ CALENDAR TOOL

Exclusions

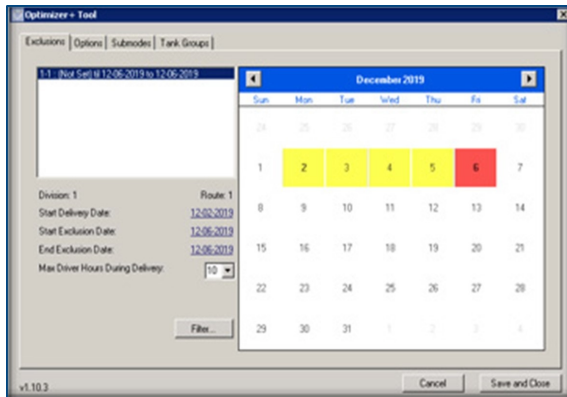
Bad weather pending or a driver on vacation? Make sure to set up Exclusion dates to push projected critical deliveries to an earlier date.

- 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.

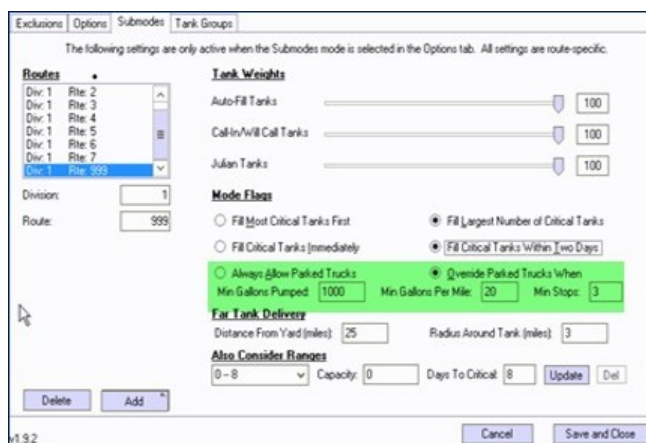


- The delivery window has been set to push forward critical deliveries to Dec 2nd through Dec 5th.
- The driver hours have been extended from 8 hours to 10 hours per day
- Reference pages 3-6 of the Opti+ Calendar Tool Manual for a full set of instructions on setting up exclusion periods
- Route Stats will display the exclusionary delivery period as an “E”
- The day of exclusion displays as an “E+” and the route will be parked



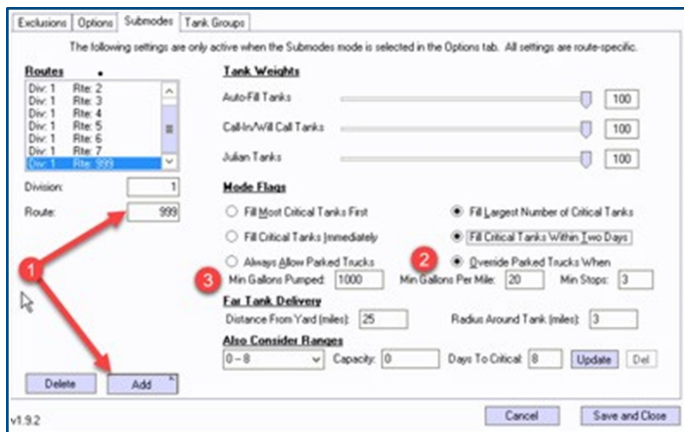
OVERRIDE PARKED TRUCKS

Not comfortable with parked trucks in the winter?



- You can set the Optimizer+ 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

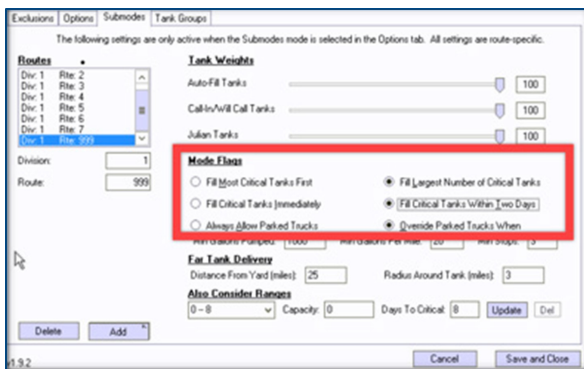
- Standardize if possible, for all your routes!
- Enter *Division & Route* and press **Add** button



- 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)
- *Reference pages 11 & 12 of the Opti+ Tool User Manual for detailed instructions.*

MODE FLAGS

Set Mode Flags to tell Optimizer+ how to handle Over-Capacity situations



- **Fill Most Critical Tanks First (recommended)** - the optimizer 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** – Optimizer will prefer to schedule as many critical tanks as possible regardless of estimated days till empty.
- **Fill Critical Tanks Immediately** – The optimizer 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 Optimizer 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?

D.T.D.R.

DRIVE THE DARN ROUTE!

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

Contact support at Software Solutions Integrated, LLC BEFORE issues spiral out of control.

THANK YOU!

Support **800-783-6560 Ext 1**, or support@energyforce.net