

# Route Exclusion Periods

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An Exclusion Period for a route is a beneficial feature to accommodate driver's time off for vacation and holidays, office meetings, and/or upcoming inclement weather conditions. The *Exclusions* tab maintains each route's specific Exclusion Periods. It contains the list of exclusions, information pertaining to the selected period, and a calendar to display a visual representation of the Exclusion Periods.

## Note the following:

- Exclusion periods are not supported in Summer Fill mode.
- Specific Call-In Delivery dates are not supported during Exclusion Periods.
- Tank Groups are supported during Exclusion Periods.

## Rules

- **One-time Route Exclusion Period** – The OptimizerPlus+ reviews all tanks to see which ones may potentially be eligible for delivery during the Excluded Dates. Any qualifying tanks will be scheduled across the delivery period, with the start of the period front-loaded with schedules. If there is not a backlog of tanks requiring deliveries or tanks that are defined as critical to the OptimizerPlus+, the route should successfully Park for the Exclusion Days.  
If a Delivery Period is set up over a weekend, the OptimizerPlus+ will continue to make an effort to push deliveries to Friday and Monday, however it is quite possible to see schedules occur on the weekend.
- **Automatic Exclusion Periods** – Work similarly to *One-time Route Exclusion Periods*, however a recurrence frequency is established, and they are universally applied to all OptimizerPlus+ routes.

The OptimizerPlus+'s success in adhering to Exclusion Periods relies on requests being of a short duration and a small number of periods used during the season. For some routes, excluding one schedule day may create a backlog of near empty tanks that is difficult to recover. Such recoveries are dependent on excess delivery capacity which will vary between routes and the time for which an exclusion is requested.

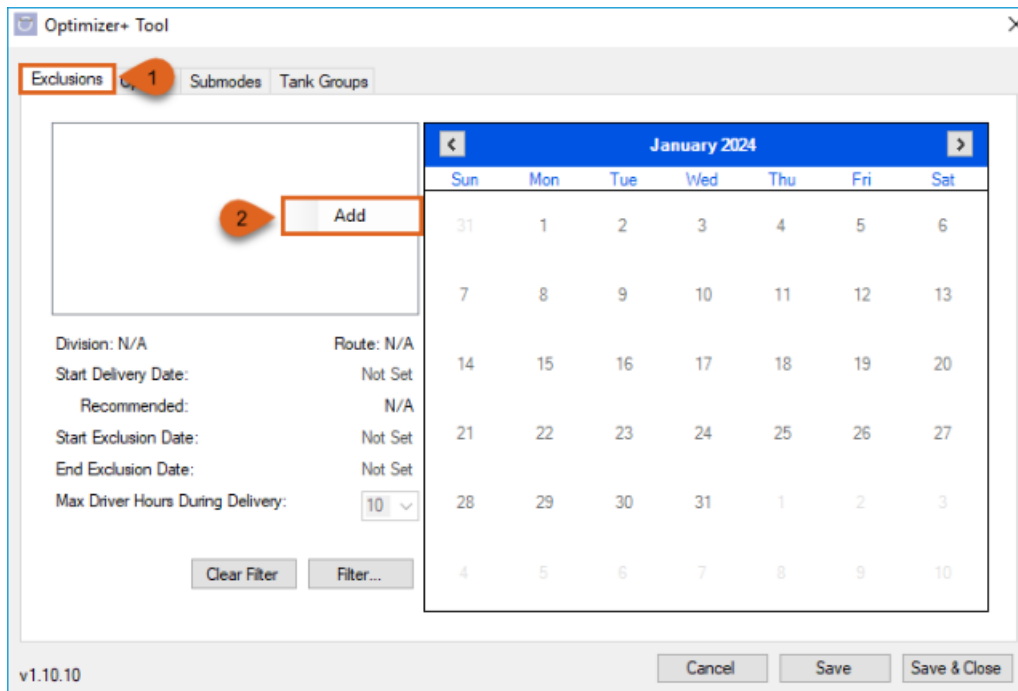
**Note:** Use this capability sparingly. The more the OptimizerPlus+'s flexibility to choose tanks is restricted, the poorer the quality of schedules will become. If used to excess, exclusion scheduling may create unrecoverable tank backlogs and produce run out situations.

## Warnings:

- An exclusion period setup for more than a total of 8 days will be ignored by the OptimizerPlus+.
- An excessive delivery period in comparison to the duration of the Excluded day(s) may result in tanks getting scheduled at high levels in the first few days of the period.

## Adding an Exclusion Period

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



1. Click on the **Exclusions** tab.
2. Right-click in the white box and select **Add** from the pop-up menu.

3. Enter the *Division*.
4. Enter the *Route*.
5. Click **Add**.

**Note:** Combinations of commas and dashes may be used to specify multiple divisions or routes. For example, entering 1-3,5,8 in the *Route* field means routes 1, 2, 3, 5, and 8 will follow the Exclusion Period created. Entering a '0' for the *Division* and *Route* will create a period that applies to all OptimizerPlus+ routes.

6. Click on **Not Set** for *Start Delivery Date* and using the calendar to the right, select the start of the delivery period.
7. Click on **Not Set** for *Start Exclusion Date* and using the calendar to the right, select the starting date for the route exclusion period. (Start of Parked Date)

8. Click on **Not Set** for *End Exclusion Date* and using the calendar to the right, select the ending date for the route exclusion period. (End of Parked Date)
9. From the drop-down menu, select the *Max Driver Hours During Delivery* value to define the maximum allowed duration of the schedule
10. Click **Save** or **Save & Close** if no other changes need to be made in the *Optimizer+ Tool*.

**Note:** All dates are required for a valid Exclusion. Any dates listed as **Not Set** indicates that a specific date has not been assigned, therefore that exclusion is invalid and the OptimizerPlus+ will not use the period until all dates are entered.

The screenshot shows the 'Optimizer+ Tool' window with the 'Exclusions' tab selected. The interface includes a list of exclusions, a calendar for January 2024, and fields for Division, Route, Start Delivery Date, Recommended, Start Exclusion Date, End Exclusion Date, and Max Driver Hours During Delivery. Numbered callouts 6 through 10 highlight specific fields and buttons.

January 2024						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Fields and buttons highlighted in the image:

- 6: Start Delivery Date field (Not Set)
- 7: Start Exclusion Date field (Not Set)
- 8: End Exclusion Date field (Not Set)
- 9: Max Driver Hours During Delivery dropdown (10)
- 10: Save button

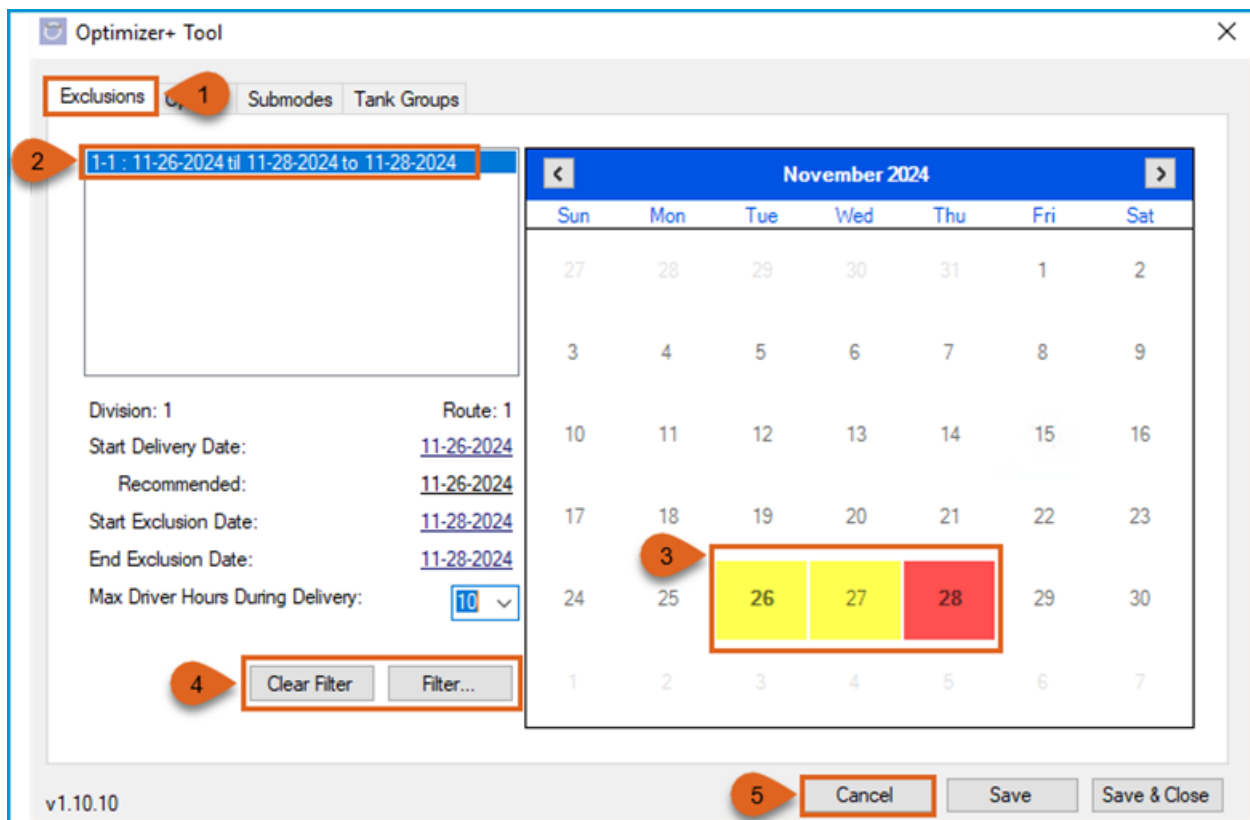
## Viewing an Exclusion Period

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

1. Select the *Exclusions* tab.
2. The box will display the *Div-Route : Start Delivery Date til Start Exclusion Date to End Exclusion Date*.
3. The yellow dates will indicate the Delivery Days for the Exclusion Period and the red date(s) will show the day(s) of the Route Exclusion Period.

**For example:** The exclusion is set up for Division 1 – Route 1. It is set to *park* the route on November 28<sup>th</sup>, using the 26<sup>th</sup> and 27<sup>th</sup> as the delivery days. The OptimizerPlus+ can build a schedule up to 10 hours long on those 2 delivery days.

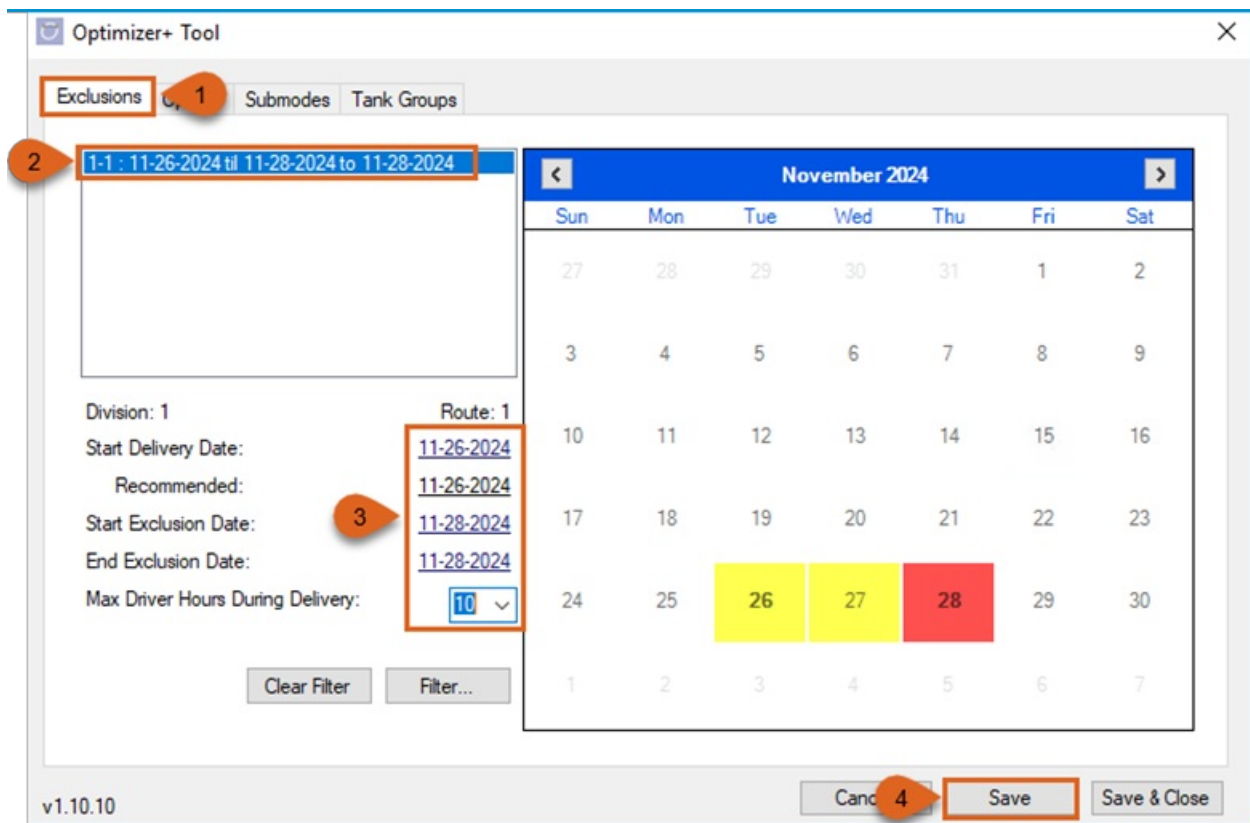
4. **Clear Filter** and **Filter...** buttons can be used to search for exclusions by Divisions and/or Routes.
5. After viewing, click on **Cancel** to close the *Optimizer+ Tool*.



## Editing an Exclusion Period

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

1. Select the *Exclusions* tab.
2. Select the Exclusion to be edited.
3. Any of the dates and driver Max Hours can be edited.
4. Click **Save** or **Save & Close** if no other changes need to be made in the *Optimizer+ Tool*.



## Deleting an Exclusion Period

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

1. Select the *Exclusions* tab.
2. Select the Exclusion to be deleted.
3. Right-click and select **Delete**.
4. Click **Save** or **Save & Close** if no other changes need to be made in the *Optimizer+ Tool*.

**Optimizer+ Tool**

Exclusions Options Submodes Tank Groups

1-1 : 11-26-2024 til 11-28-2024 to 11-28-2024

Add  
Delete

**November 2024**

Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2
3	4	5	6	7	8
10	11	12	13	14	15
17	18	19	20	21	22
24	25	26	27	28	29
1	2	3	4	5	6

Division: 1 Route: 1

Start Delivery Date: [11-26-2024](#)

Recommended: [11-26-2024](#)

Start Exclusion Date: [11-28-2024](#)

End Exclusion Date: [11-28-2024](#)

Max Driver Hours During Delivery: 10

Clear Filter Filter...

v1.10.10 Cancel Save Save & Close

## Automatic Exclusion Periods

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

1. Select the *Options* tab.
2. Right-click in the white box under *Automatic Exclusion Periods* and select **Add** from the pop-up menu.
3. In the *Add Automatic Exclusion* window, enter the *Name*.
4. Set the *Recurrence*: Weekly, Monthly, Yearly.
5. Enter *Calendar* icon to select the date or date range all routes will be Excluded (parked).
6. *Delivery Days* will auto populate to the *Recommended Days*, update if desired.
7. From the drop-down menu, select the *Max Driver Hours During Delivery* value to define the maximum allowed duration of the schedule.
8. Click **Add**.
9. Click **Save** or **Save & Close** if no other changes need to be made in the *Optimizer+ Tool*.

Optimizer+ Tool

Exclusions Options **1** Schedules Tank Groups

Mode: Submodes

Predict Parked Trucks: ☒

Skip Weekend Deliveries: ☒

Auto-fill Maximum Fill Level: 80 %

Julian Delivery Window Days: Before: 4 After: 2

Call-in Delivery Window Days: Before: 1 After: 4

Tank Setup Time (Minutes): 10

Summer Fill Start Date: 07/01/2023

Summer Fill End Date: 01/29/2024

Summer Fill Thresholds: Limit: 15 % Target: 70 %

Summer Fill Call-In Defaults: Level: 40 % KFactor: 4.00

Summer Fill Max Fill Level: 80 %

Summer Fill Minimum Drop (Gallons): 75

Summer Fill Prioritize Contracts: ☐

Summer Fill Minimum Contract Proportion: 80 %

**Automatic Exclusion Periods**

**2** Add

v1.10.10

Cancel **9** Save Save & Close

Add Automatic Exclusion

Name: **3** Christmas

Recurrence: **4** Yearly

Start Date: **5** Wednesday, December 25, 2024

End Date: Wednesday, December 25, 2024

Delivery Days: **6** 2 **7** Max Driver Hours: 10

Recommended Days: 2

**8** Add

**Note:** The automatic exclusion can immediately be viewed in the calendar on the Exclusions tab. The yellow dates will indicate the Delivery Days for the Automatic Exclusion Period and the red date(s) will show the day(s) of the Route Exclusion Period effective for all routes.

Optimizer+ Tool

Exclusions

Options

Submodes

Tank Groups

Division: N/A

Start Delivery Date:

Recommended:

Start Exclusion Date:

End Exclusion Date:

Max Driver Hours During Delivery:

10

Route: N/A

Not Set

N/A

Not Set

Not Set

Clear Filter

Filter...

<

December 2024

>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

v1.10.10

Cancel

Save

Save & Close

**WARNING:** Users assume all risks associated with modifying the behavior of the OptimizerPlus+ from its default or recommended settings.