# Optimizer+ Compliance Reports

Optimizer Compliance Reports are in the *Main Menu / Management Reports / Optimizer Report Menu*. Optimizer Compliance reports can be generated based on a specified time period allowing management to review the overall compliancy of a driver and their respective route.
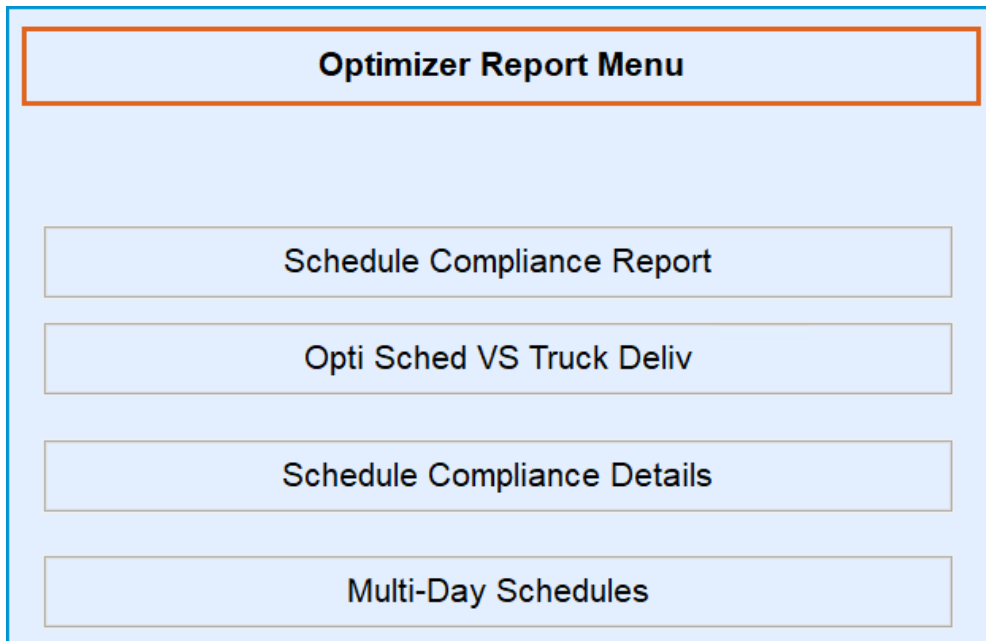
Schedule Compliance Report

The *Schedule Compliance Report* will contain an overview of each Optimizer driver's compliancy based on deliveries made that were scheduled by the Optimizer as well as the deliveries that were not completed.

This report is processed by a date range with the option to select specific *Locations* or *Routes*. It is recommended to *Exclude Saturdays* and *Exclude Sundays* unless drivers actively deliver on those days. This report automatically opens in excel and auto-saves to the CSV folder located within the Energy Force data folder structure as *Opti.csv*.
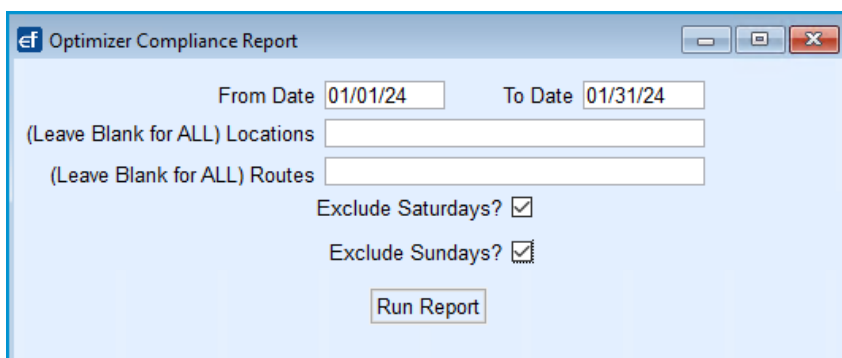
To process the report:

1. Select **Schedule Compliance Report**.

2. Input date range in *From Date* and *To Date*.

3. Enter specific *Locations* or leave blank for all.

4. Enter specific *Routes* or leave blank for all.

5. If the drivers do not actively drive on Saturdays and Sundays, check the boxes for *Exclude Saturday* and *Exclude Sunday*.

6. Select **Run Report**.

7. The program will begin to process the report and once complete will indicate the report has finished and
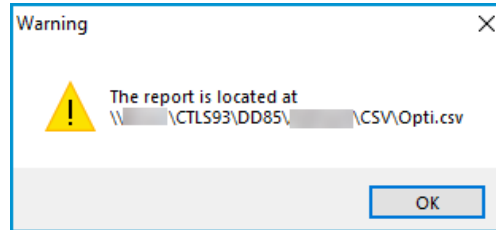
where the saved file can be found.

8. Selecting **OK** automatically opens the report in Excel.

9. Click the red **X** in the top right corner of the *Optimizer Compliance Report* to Exit.

Example Schedule Compliance Report:

Date	Opti Sched	Opti Deliv	Percent Update	Non-Sched. Deliv	Tot Deliv.	Mileage	Gallons
01/01/2024 - 01/12/2024 Location: All Locations Route: All Routes							
Driver: 14 - JUSTIN TIME / Route: 1							
01/02/2024 2:31	22	7	4	0	7	127.4	7928.3
01/03/2024 3:20	24	16	0	0	16	116.8	7749.4
01/04/2024 3:25	22	12	1	0	12	110.7	5912.7
01/05/2024 4:09	20	18	1	0	18	107.6	6555.3
01/08/2024 2:31	20	16	1	0	16	125.5	5422.8
01/09/2024 3:53	18	13	1	0	13	130.8	5920.8
01/10/2024 3:44	20	16	1	0	16	105.5	5503.8
01/11/2024 3:53	23	19	3	0	19	78.7	6771.5
01/12/2024 3:40	22	21	1	0	21	80.9	7558.9
	191	138	13	0	138	983.9	59323.5
OptimizerPlus Delivery Compliance		72.25%	6.81%				
		79.06%					
Driver: 42 - CLARK KENT / Route: 2							
01/02/2024 2:31	8	7	0	12	19	79.1	2155.1
01/03/2024 3:20	10	7	2	2	9	80.5	2926.7
01/04/2024 3:25	15	12	0	2	14	160.3	4439.5
01/05/2024 4:09	6	5	0	6	11	51.8	1395.4
01/08/2024 2:31	13	11	0	8	19	87.1	4418.7
01/09/2024 3:53	14	10	1	2	12	107.7	4395.8
01/10/2024 3:44	16	15	1	1	16	99.4	4926.8
01/11/2024 3:53	9	8	0	2	10	98.4	3614.3
01/12/2024 3:40	17	15	1	2	17	122.5	4673.8
	108	90	5	37	127	886.8	32946.1
OptimizerPlus Delivery Compliance		83.33%	4.63%				
		87.96%					

1. Specified parameters for the report.

2. *Driver* Name and *Route* Number — Each driver will be displayed separately.

3. Date of the schedule (time displayed is when the Optimizer's schedule was created in Energy Force).

4. Number of deliveries scheduled by the Optimizer for that date.

5. Number of completed deliveries that were Optimizer scheduled.

6. Number of *Percent Updates* completed that were Optimizer scheduled.

7. Number of *Non-Scheduled Deliveries* completed (not Optimizer scheduled).

8. Sum of all completed deliveries for that date (excludes % updates).

9. Total *Mileage* calculated by the Optimizer to drive on that day's schedule.

10. Total *Gallons* calculated by the Optimizer to deliver on that day's schedule.

11. Sum of all *Optimizer Scheduled Deliveries* for that driver during the report date range.

12. Percentage of completed deliveries and completed Percent Updates to the Optimizer scheduled deliveries.

    ○ In the above illustration, Driver 14 completed 138 of the 191 scheduled deliveries to equal a 72.25% *OptimizerPlus Delivery Compliance* rate.

    ○ Of the 191 Optimizer scheduled deliveries, Driver 14 completed 13 *Percent Updates* to equal a 6.81% *OptimizerPlus Delivery Compliance* rate.

13. Combined *OptimizerPlus Delivery Compliance* rate of completed *Optimizer Deliveries* and *Percent Updates*.

    ○ For the date range of 1/1 – 1/12 (excluding weekends), Driver 14 delivered or performed a *Percent Update* on 79.06% of the Optimizer scheduled deliveries.

14. **Tot Deliv.** — Sum of deliveries made for the report date range.

15. Mileage — Sum of Optimizer calculated miles to drive for the report date range.

16. Gallons — Sum of Optimizer calculated gallons to deliver for the report date range.

The report will calculate a combined compliance rate and totals of all drivers listed in the report.

|							
Final Totals:	675	542	37		69	611	4567.2	203051
OptimizerPlus Delivery Compliance		80.30%	5.48%				
		85.78%					

Opti Sched VS Truck Deliv Report

The *Opti Sched VS Truck Deliv* report is designed to show the number of deliveries, miles, gallons, and hours scheduled by the Optimizer versus what the driver delivered.

This report is processed by a date range with the option to select specific *Locations* or *Routes*. It is recommended to check the boxes for *Exclude Saturdays?* and *Exclude Sundays?* unless drivers actively deliver on those days. This report automatically opens in excel and auto-saves to the CSV folder located within the Energy Force data folder structure as *OptiSchedVSTruckDeliv.csv*.

To process the report:

1. Select **Opti Sched VS Truck Deliv**.

2. Input date range in *From Date* and *To Date*.

3. If the drivers do not actively drive on Saturdays and Sundays, check the *Exclude Saturdays?* and *Exclude Sundays?* boxes.

4. Select **Run Report**.

5. The program will begin to process the report and once complete will indicate the report has finished and

   Warning ✕

   ⚠ The report is located at
   \\⬛⬛⬛\CTLS93\DD85\⬛⬛⬛\CSV\OptiSchedVSTruckDeliv.csv

   [OK]
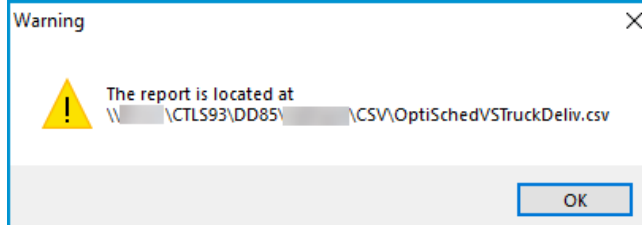
   where the saved file can be found.

6. Selecting **OK** automatically opens the report in Excel.

7. Click the red **X** in the top right corner of the *Opti Sched VS Truck Deliv* to Exit.
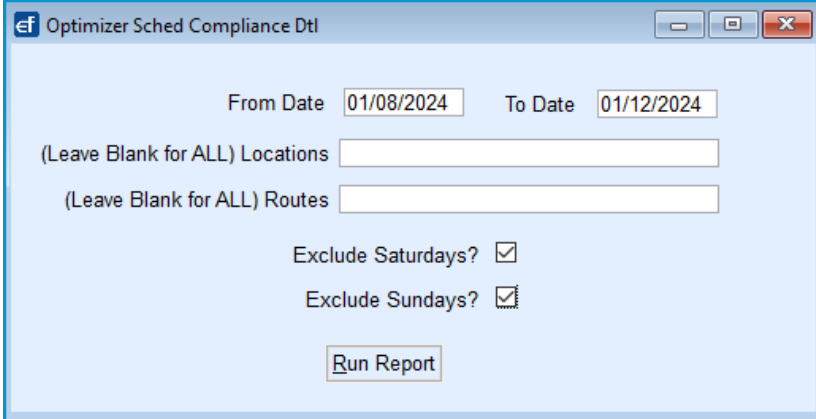
Example Opti Sched VS Truck Deliv Report:

01/08/2024 - 01/12/2024										Truck Import		
Date	Opti Sched	Opti Deliv	Percent Update	Non-Sched. Deliv		Tot Deliv.	Mileage	Gallons	Hours	Tot Deliv.	Mileage Gallons	Hours
Driver: 14 - JUSTIN TIME / Route: 1										14 - JUSTIN TIME		
01/08/2024 4:04	18	13	2	7		20	152.2	3725.7	8.4	18	172	4234	11.22
01/09/2024 4:04	26	23	0	5		28	87.9	5442.5	8.6	26	135	6248	10.47
01/10/2024 4:04	21	15	0	3		18	138.5	4435.6	8.7	18	198	4357	10.63
01/11/2024 4:03	23	20	0	1		21	114.7	4189.5	8.4	21	175	4474	10.97
01/12/2024 4:03	18	15	0	4		19	141.2	3458	8.1	18	216	4051	12.02
	106	86	2	20		106	634.5	21251.3	42.2	101	896	23364	55.31
OptimizerPlus Delivery Compliance		81.13%	1.89%									
		83.02%										
Driver: 42 - CLARK KENT / Route: 2										42 - CLARK KENT		
01/08/2024 4:04	17	12	0	7		19	145.8	4796.4	8.5	19	362	5500	8.95
01/09/2024 4:04	22	17	0	3		20	100.1	4679.8	8.2	20	105	5070	8.62
01/10/2024 4:04	19	15	0	8		23	151	4372.4	8.9	5	98	1489	2.42
01/11/2024 4:03	19	16	2	5		21	158.2	4158.5	8.2	21	210	5119	9.72
01/12/2024 4:03	20	18	2	6		24	142.4	3374.5	7.8	24	221	5625	11.75
	97	78	4	29		107	697.5	21381.6	41.6	89	996	22803	41.46
OptimizerPlus Delivery Compliance		80.41%	4.12%									
		84.54%										
Driver: 9 - BRIAN BOOKER / Route: 3										9 - BRIAN BOOKER		
01/08/2024 4:04	25	19	1	3		22	104.8	4214.5	8.7	22	105	4110	9.1
01/09/2024 4:04	24	19	5	8		27	112	4026.1	8.7	26	96	4719	9.12
01/10/2024 4:04	24	12	0	4		16	81.7	4513.2	8	16	98	3791	8.95
01/11/2024 4:03	33	28	3	4		32	163.2	6454.4	12.1	19	127	4700	8.27
01/12/2024 4:03	16	16	0	7		23	107.9	3143.2	6.2	20	150	4347	9.3
	122	94	9	26		120	569.6	22351.4	43.7	103	576	21667	44.74
OptimizerPlus Delivery Compliance		77.05%	7.38%									
		84.43%										
Final Totals:	325	258	15	75		333	1901.6	64984.3	127.5	293	2468	67834	141.51
OptimizerPlus Delivery Compliance		79.38%	4.62%									
		84.00%										

1. The Optimizer schedule information including how many non-scheduled deliveries made.

2. The driver information from the imported Energy Track Trip.

3. Total compliance details for the driver.

4. Total compliance for all drivers combined.

Schedule Compliance Details

The *Schedule Compliance Details* report shows each customer account scheduled by the Optimizer as well as the customers that the driver delivered to that were unscheduled.   An *Explanation* column is provided to allow management to take notes as to why a delivery was or was not made.

This report is processed by a date range with the option to select specific *Locations* or *Routes*. It is recommended to check the boxes for *Exclude Saturdays?* and *Exclude Sundays?* unless drivers actively deliver on those days. This report automatically opens in excel and auto-saves to the CSV folder located within the Energy Force data folder structure as *OptiDtl.csv*.


To process the report:

1. Select **Schedule Compliance Details**.
2. Input date range in *From Date* and *To Date*.
3. Enter specific *Locations* or leave blank for all.
4. Enter specific *Routes* or leave blank for all.
5. If the drivers do not actively drive on Saturdays and Sundays, check the *Exclude Saturdays?* and *Exclude Sundays?* boxes.
6. Select **Run Report**.
7. The program will begin to process the report and once complete will indicate the report has finished and
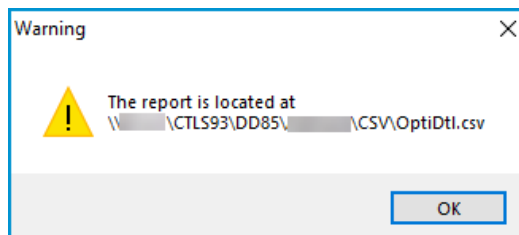
   where the saved file can be found.
8. Selecting **OK** automatically opens the report in Excel.
9. Click the red **X** in the top right corner of the *Optimizer Sched Compliance Dtl* to Exit.

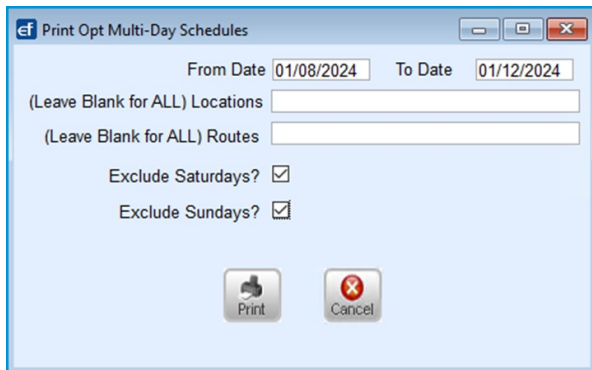**Example Optimizer Sched Compliance Dtl Report:**

Date: 01/02/2024 - 01/05/2024
Location: All Locations
Route: All Routes
Exclude Saturdays: False
Exclude Sundays: False

For Date: 01/02/2024

Driver/Route/Customer	Run	Opti Seq	Opti Ticket	Opti Gal Dlvd	Percent Update	Non-Sched Ticket	Non-Sched Gal Dlvd	Journal	Explanation	Total Tank Capacity	Delivery Type
Driver: 14 - JUSTIN TIME / Route: 1											
Customer 352702-CHOVEY, ANNE	1	1	252327	205.4				9584		500	2
Customer 493549-DOOLITTLE, LIZA	1	2	934		75%			9584		500	2
Customer 382435-O'SUN RAY	1	3	252329	180.3				9584		1000	3
Customer 324120-SMITH, JOHN	1	4	935		75%			9584		500	2
Customer 382715-WALKER, TEX	1	5	252328	299.1				9584		500	2
Customer 382229-GRATER, ALLIE	2	1								500	3
Customer 382117-MCGUIRE, JERRY	2	2	252330	120.7				9584		500	2
Customer 375853-CONCRETE STARS, LLC	2	3	252331	109.5				9584		500	3
Customer 880097-LOVE, PATTY	2	4	252332	674.3				9584		1000	2
Customer 382463-LANE, LOIS	2	5								500	2
Customer 303608-JACKSON, BEN						252333	79.1	9584		500	2
Customer 626596-JOHNSON, CRAIG						252334	250.1	9584		500	2
Customer 383940-TURNER, PAIGE						252335	265.5	9584		500	2
Total Counts				1589.3	2	3	594.7				

1. Specified parameters for the report.

2. *Driver* Name and *Route* Number — Each driver will be displayed separately.

3. Customer details including Customer Number and name.

4. Run — If the Optimizer scheduled the customer, the Optimizer scheduled *Run* will be displayed, if blank this was a non-scheduled delivery.

5. Opti Seq — If the Optimizer scheduled the customer, the Optimizer scheduled Stop will be displayed, if blank this was a non-scheduled delivery.

6. The *Opti Ticket* number is the delivery ticket invoice number from Energy Track, if blank the scheduled delivery was not made.
   - These numbers should be in sequential order from Energy Track showing they were delivered in the order they were scheduled.
   - Smaller numbers are *Percent Updates*.

7. *Opti Gal Dlvd* are the Optimizer scheduled gallons that were invoiced to the customer for that delivery.

8. *Percent Updates* completed for Optimizer scheduled deliveries.

9. *Non-Sched Ticket* is the Delivery Ticket Invoice number from Energy Track for non-scheduled deliveries.

10. *Non-Sched Gal Dlvd* are the invoiced gallons delivered for non-scheduled deliveries.

11. Sales *Journal* ID with the deliveries.

12. *Explanation* is a field provided by the program for documentation purposes.

13. *Total Tank Capacity*.

14. *Delivery Type*.

15. Sum of all delivered gallons that were scheduled by the Optimizer.

16. Sum of all percent updates that were scheduled by the Optimizer.

17. Sum of the non-scheduled deliveries.

18. Sum of the non-scheduled gallons that were delivered.

Multi-Day Schedules

The *Multi-Day Schedules* report displays the number of times a tank was scheduled before a delivery or Percent Update was made. A Ticket Number is an indicator as to when the delivery was made. If the delivery was made the 1st day it was scheduled, the tank will not appear on this report. If a delivery was not make when first scheduled, it will start to show on this report and will show an instance for each time until a delivery is made.

This report is processed by a date range with the option to select specific *Locations* or *Routes*. It is recommended to check the boxes for *Exclude Saturdays?* and *Exclude Sundays?* unless drivers actively deliver on those days. This report automatically opens in excel and auto-saves to the CSV folder located within the Energy Force data folder structure as *OptiMultiDaySchedules_username.csv*.

To process the report:

1. Select **Multi-Day Schedules**.

2. Input date range in *From Date* and *To Date*.

3. Enter specific *Locations* or leave blank for all.

4. Enter specific *Routes* or leave blank for all.

5. If the drivers do not actively drive on Saturdays and Sundays, check the *Exclude Saturdays?* and *Exclude Sundays?* boxes.

6. Select **Print**.

7. The report will process and will automatically open in Excel. It will be named OptiMultiDaySchedules_username.csv where *username* is the Energy Force username for the current logged in user and saved in the CSV folder.

8. Click the red **X** in the top right corner of the Opt Multi-Day Schedules to Exit.

Example:

Optimizer Multi-Day Schedules
Schedule Dates: 01/08/2024 - 01/12/2024
Locations: All
Routes: All
Exclude Saturdays: No
Exclude Sundays: No
Report Date: 02/08/2024 - 15:01:29

Customer Number	Customer Name	Tank RRN	Delivery Type	Location	Route	Schedule Date	Truck Number	Est % Left	Total Tank Capacity	Ticket Number	Gallons Delivered
454676	GRATER, ALLIE	1130	1	2	1	01/11/2024	2301	20	250		
454676	GRATER, ALLIE	1130	1	2	1	01/12/2024	2301	20	250		
352432	CANARD, DONALD	7788	1	2	1	01/08/2024	2301	25	500		
352432	CANARD, DONALD	7788	1	2	1	01/10/2024	2301	25	500		
352432	CANARD, DONALD	7788	1	2	1	01/11/2024	2301	25	500		
352432	CANARD, DONALD	7788	1	2	1	01/12/2024	2301	25	500	812548	301.3
366799	TEAK, ANN	7809	1	3	3	01/10/2024	2708	40	120		
366799	TEAK, ANN	7809	1	3	3	01/12/2024	2708	40	120		
746967	SMITH, JOHN	1833	2	3	3	01/10/2024	2708	25	500		
746967	SMITH, JOHN	1833	2	3	3	01/11/2024	2708	24	500		
746967	SMITH, JOHN	1833	2	3	3	01/12/2024	2708	23	500		
375380	CONCRETE STARS, LLC	8187	1	3	3	01/08/2024	2708	30	500		
375380	CONCRETE STARS, LLC	8187	1	3	3	01/10/2024	2708	30	500		
375380	CONCRETE STARS, LLC	8187	1	3	3	01/11/2024	2708	30	500	812538	279.5
532769	JONES, BEN	7829	1	3	4	01/08/2024	4251	29	500		
532769	JONES, BEN	7829	1	3	4	01/09/2024	4251	27	500	812523	153.4
988692	CUDA, BARRY	7875	3	3	4	01/08/2024	4251	5	8000		
988692	CUDA, BARRY	7875	3	3	4	01/09/2024	4251	5	8000		
988692	CUDA, BARRY	7875	3	3	4	01/10/2024	4251	5	8000	812529	2710.9