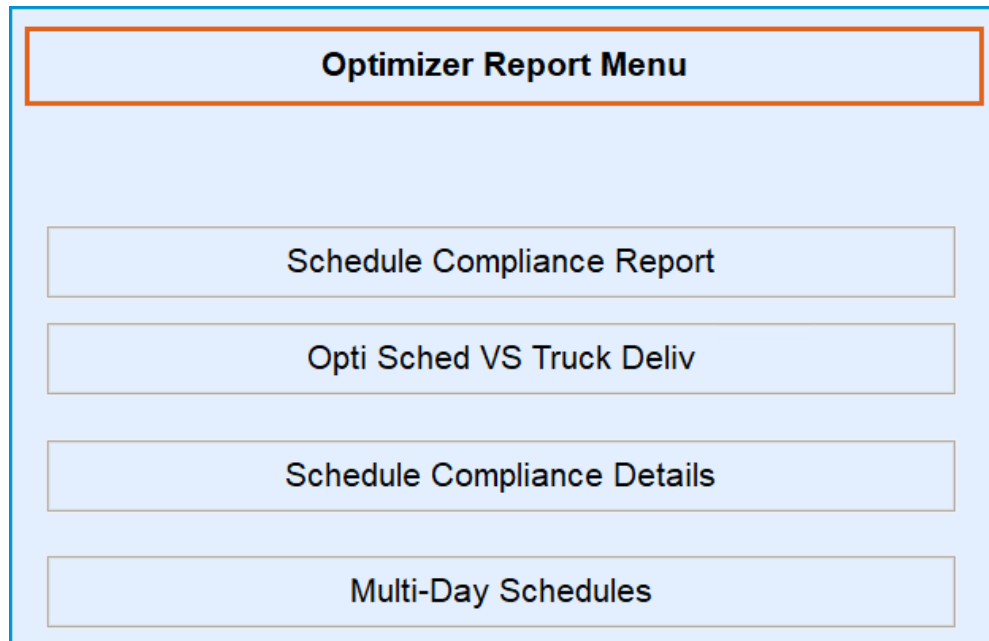


OptimizerPlus+ Compliance Reports

Last Modified on 04/15/2025 4:03 pm EDT

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. All routes display on the reports.



Schedule Compliance Report

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

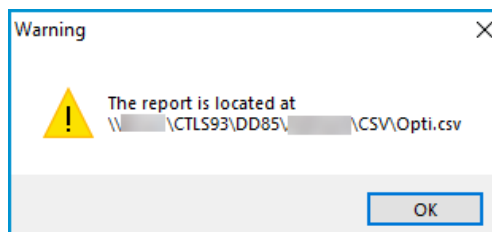
This report is processed by a date range with the option to select specific *Locations* or *Routes*. It is recommended to *Exclude Saturdays* and *Exclude Sundays* unless drivers actively deliver on those days. This report automatically opens in excel and auto-saves to the CSV folder located within the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

A screenshot of the 'Optimizer Compliance Report' dialog box. The window has a title bar with the 'ef' logo and the text 'Optimizer Compliance Report'. Inside the window, there are two date input fields: 'From Date' with the value '01/01/24' and 'To Date' with the value '01/31/24'. Below these are two text input fields: '(Leave Blank for ALL) Locations' and '(Leave Blank for ALL) Routes'. There are two checkboxes: 'Exclude Saturdays?' which is checked, and 'Exclude Sundays?' which is also checked. At the bottom center, there is a button labeled 'Run Report'.

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.

- Enter specific *Routes* or leave blank for all.
- If the drivers do not actively drive on Saturdays and Sundays, check the boxes for *Exclude Saturday* and *Exclude Sunday*.
- Select **Run Report**.
- 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.

- Selecting **OK** automatically opens the report in Excel.
- Click the red X in the top right corner of the *Optimizer Compliance Report* to Exit.

Example Schedule Compliance Report:

01/01/2024 - 01/12/2024									
Location: All Locations									
Route: All Routes									
Date		Opti Sched	Opti Deliv	Percent Update	Non-Sched. Deliv	Tot Deliv.	Mileage	Gallons	
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	
OptimizerPlus Delivery Compliance		191	138	13	0	138	983.9	59323.5	
			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%						

- Specified parameters for the report.
- Driver Name* and *Route Number* — Each driver will be displayed separately.
- Date of the schedule (time displayed is when the OptimizerPlus+'s schedule was created in Energy Force).
- Number of deliveries scheduled by OptimizerPlus+ for that date.

5. Number of completed deliveries that were OptimizerPlus+ scheduled.
6. Number of *Percent Updates* completed that were OptimizerPlus+ scheduled.
7. Number of *Non-Scheduled Deliveries* completed (not OptimizerPlus+ scheduled).
8. Sum of all completed deliveries for that date (excludes % updates).
9. Total *Mileage* calculated by OptimizerPlus+ to drive on that day's schedule.
10. Total *Gallons* calculated by OptimizerPlus+ 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 OptimizerPlus+ 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 *OptimizerPlus+ 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 OptimizerPlus+ scheduled deliveries.
14. **Tot Deliv.** — Sum of deliveries made for the report date range.
15. **Mileage** — Sum of OptimizerPlus+ calculated miles to drive for the report date range.
16. **Gallons** — Sum of OptimizerPlus+ 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%					

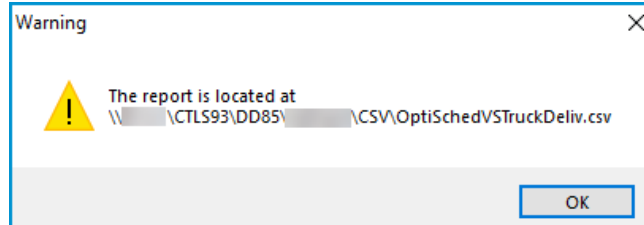
Opti Sched VS Truck Deliv Report

The *Opti Sched VS Truck Deliv* report is designed to show the number of deliveries, miles, gallons, and hours scheduled by OptimizerPlus+ 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



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:

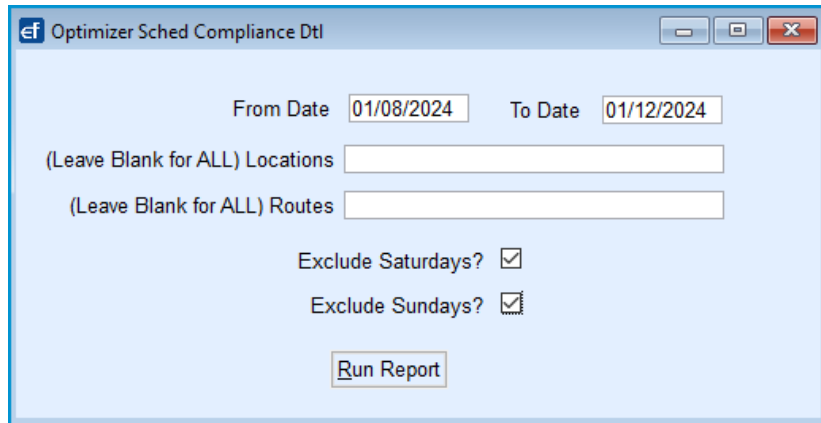
01/08/2024 - 01/12/2024									Truck Import				
Date	Opti Sched	Opti Deliv	Percent Update	Non-Sched. Deliv	Tot Deliv.	Mileage	Gallons	Hours	Tot Deliv.	Mileage	Gallons	Hours	
Driver: 14 - JUSTIN TIME / Route: 1									14 - JUSTIN TIME				
01/08/2024 4:04	18	13	2	7	20	152.2	3725.7	8.4	18	172	4234	11.22	
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 OptimizerPlus+ 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

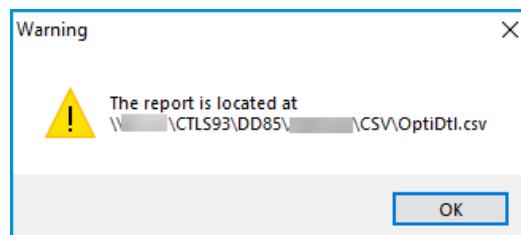
The *Schedule Compliance Details* report shows each customer account scheduled by OptimizerPlus+ as well as the customers that the driver delivered to that were unscheduled. An *Explanation* column is provided to allow management to take notes as to why a delivery was or was not made.

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:

Optimizer Schedule Compliance Detail																	
Date: 10/01/2024 - 10/15/2024																	
Location: All Locations																	
Route: All Routes																	
Exclude Saturdays: True																	
Exclude Sundays: True																	
Schedule Date	Driver Number	Driver Name	Route	Customer Number	Customer Name	Tank RRN	Tank Capacity	Opti Run	Opti Sequence	Opti Ticket	Opti Gallons	Percent Upd	Non-Schedule	Non-Schedule	Journal	Delivery Type	Explanation
20241010	2340	JOHN DOE	101	162229		1685	1000						203817	342.4	12506	1	
20241010	2340	JOHN DOE	101	883413		5260	1000						203818	516.4	12506	2	
20241010	2340	JOHN DOE	101	611860		4511	1000						203819	347.2	12506	1	
20241010	2340	JOHN DOE	103	443100		6997	500	1	1							2	
20241010	2340	JOHN DOE	103	12114		743	500	1	2							2	
20241010	2340	JOHN DOE	103	13179		1341	500	1	3							2	
20241010	2340	JOHN DOE	103	352268		10932	250	1	4							1	
20241010	2340	JOHN DOE	103	120501		9616	100	1	5							2	
20241010	2340	JOHN DOE	103	120501		9627	125	1	6							2	
20241010	2340	JOHN DOE	103	12527		1007	1000	1	7	203820	501.4					2	
20241010	2340	JOHN DOE	103	12445		932	3000	2	1							2	
20241010	2340	JOHN DOE	103	Totals							501.4	0		3	1206		

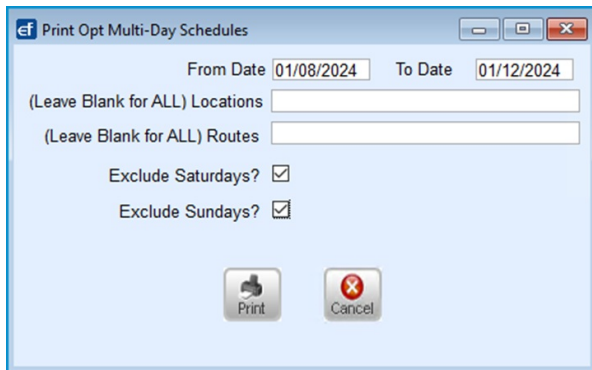
1. Specified parameters for the report.
2. *Driver Name*, *Number* and *Route Number* – Each displayed in separate columns.
3. Customer details including *Customer Name* and *Customer Number*.
4. *Opti Run* – If OptimizerPlus+ scheduled the customer, the OptimizerPlus+ scheduled *Run* will be displayed, if blank this was a non-scheduled delivery.
5. *Opti Sequence* – If OptimizerPlus+ scheduled the customer, the OptimizerPlus+ scheduled *Stop* will be displayed, if blank this was a non-scheduled delivery.
6. *Opti Ticket* – The delivery ticket invoice number from Energy Track, if blank the scheduled delivery was not made.
 - o These numbers should be in sequential order from Energy Track showing they were delivered in the order they were scheduled.
 - o Smaller numbers are *Percent Updates*.
7. *Opti Gallons* are the OptimizerPlus+ scheduled gallons that were invoiced to the customer for that delivery.
8. *Percent Updates* completed for OptimizerPlus+ scheduled deliveries.
9. *Non-Sched Ticket* is the Delivery Ticket Invoice number from Energy Track for non-scheduled deliveries.
10. *Non-Sched Gal Dlv'd* 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 *Opti Gallons* that were scheduled by OptimizerPlus+.
16. Sum of all *Percent Updates* that were scheduled by OptimizerPlus+.
17. Sum of the *Non-Scheduled Deliveries*.
18. Sum of the *Non-Scheduled Gallons* that were delivered.
19. *Tank RRN*

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 made 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