



User Manual

AI Sales Forecast Module for Odoo v18.0

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1. Introduction

The **AI Sales Forecast** module is an intelligent forecasting solution built natively for **Odoo v18.0 Community and Enterprise Editions**. It uses **Facebook's Prophet** time series forecasting library to deliver accurate, dynamic predictions for future sales. Designed for flexibility and ease of use, this module empowers businesses to make data-driven decisions for inventory planning, demand forecasting, and sales strategy.

Ideal For:

- Business managers aligning operations with projected demand
- Sales teams setting realistic targets
- Analysts seeking data-backed forecasting
- Inventory and supply chain managers aiming to reduce stockouts and overstock
- Any organization using Odoo for predictive planning

The module supports both **overall** and **filtered forecasts**, presented in **List, Graph, and Pivot** views.

2. Features

- **AI-Driven Forecasting**
Leverages AI for accurate and adaptive sales forecasts.
- **Flexible Filtering Options**
Forecast by:
 - Product
 - Product Category

- Customer
- Company
- Input Date Range (From & To): Sales Orders considered for forecasting
- Forecast Date Range (Start & End): Forecasted Sales Period
- **Default Time Range: Used when no Input Date Range is specified**
 - Daily: 60 days
 - Weekly: 12 weeks
 - Monthly: 12 months
 - Quarterly: 24 months
 - Yearly: 5 years
- **Multiple Time Frequencies**

Forecasts can be generated Daily, Weekly, Monthly, Quarterly, or Yearly.
- **Visualizations**

Analyze results via List, Graph (Line, Bar, Pie charts), and Pivot views.
- **Forecast Wizard**

Simple UI for selecting criteria and frequency, with built-in validations.
- **Dynamic Forecast Titles**

Automatically display "**Overall Forecast**" or "**Filtered Forecast**" based on your selections.
- **Save Forecasts**

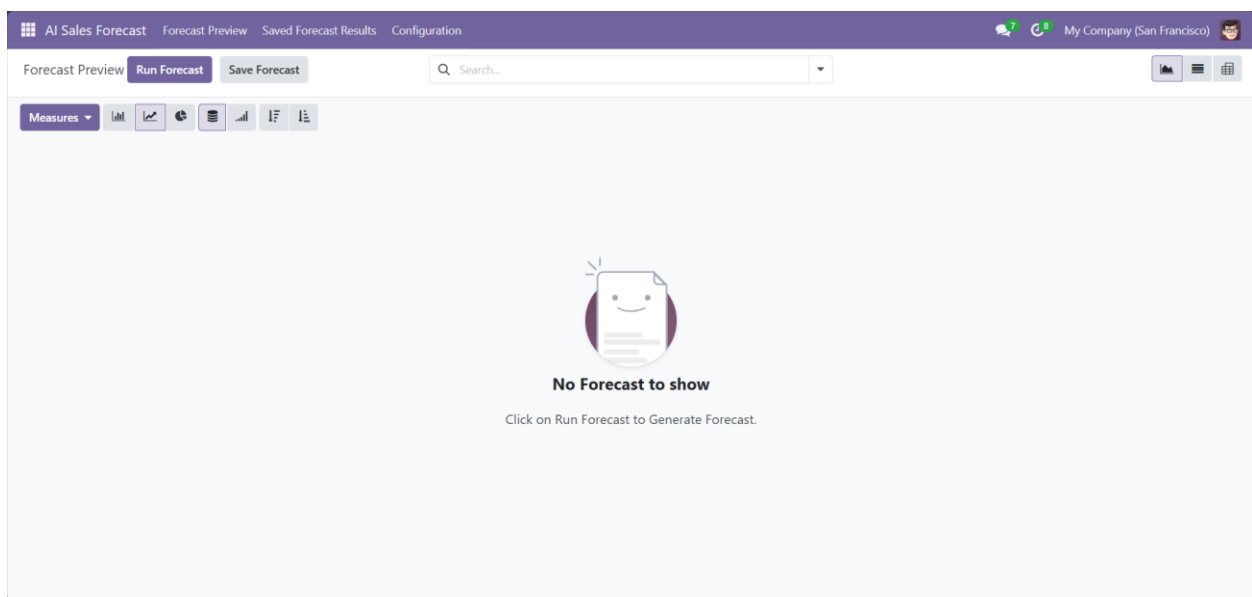
Store results for later comparison, reuse, or auditing, with support for exporting saved data for external analysis or record-keeping.

3. Working

3.1 Navigate to the Module

Go to AI Sales Forecast in the Odoo menu.

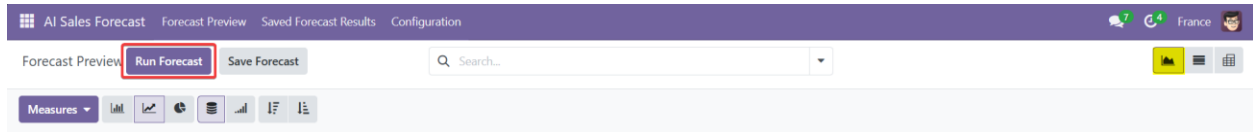
Screenshot 1: Landing Page



3.2 Generating Forecast

1. Click **Run Forecast**.
 - Available in Graph, List and Pivot View Headers.
2. Choose Forecast Frequency (Day, Week, Month, etc.).
3. Set Input Date From and To (defines historical range).
4. Apply desired filters: Company, Customer, Product Category, Product.
5. Click **Run Forecast**.

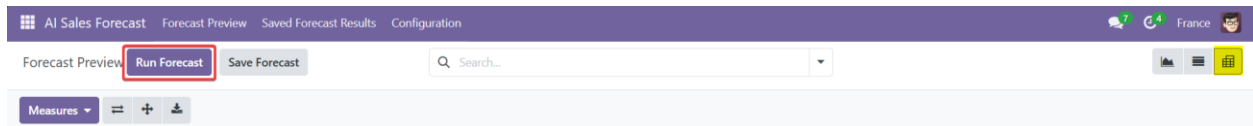
Screenshot 2: Run Forecast Button in Graph View Header



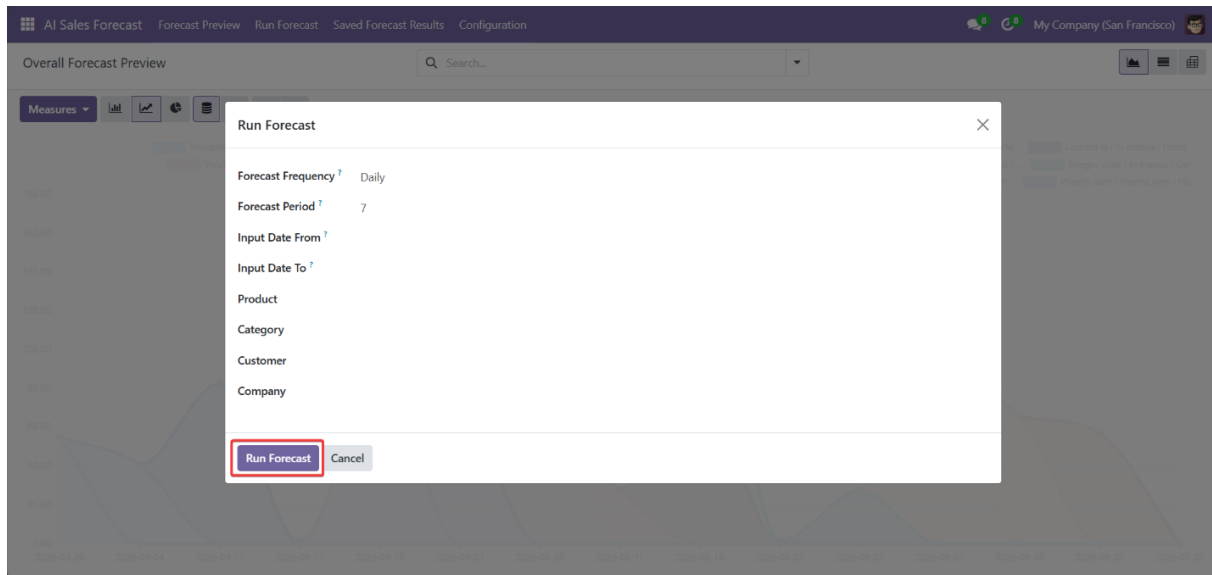
Screenshot 3: Run Forecast Button in List View Header



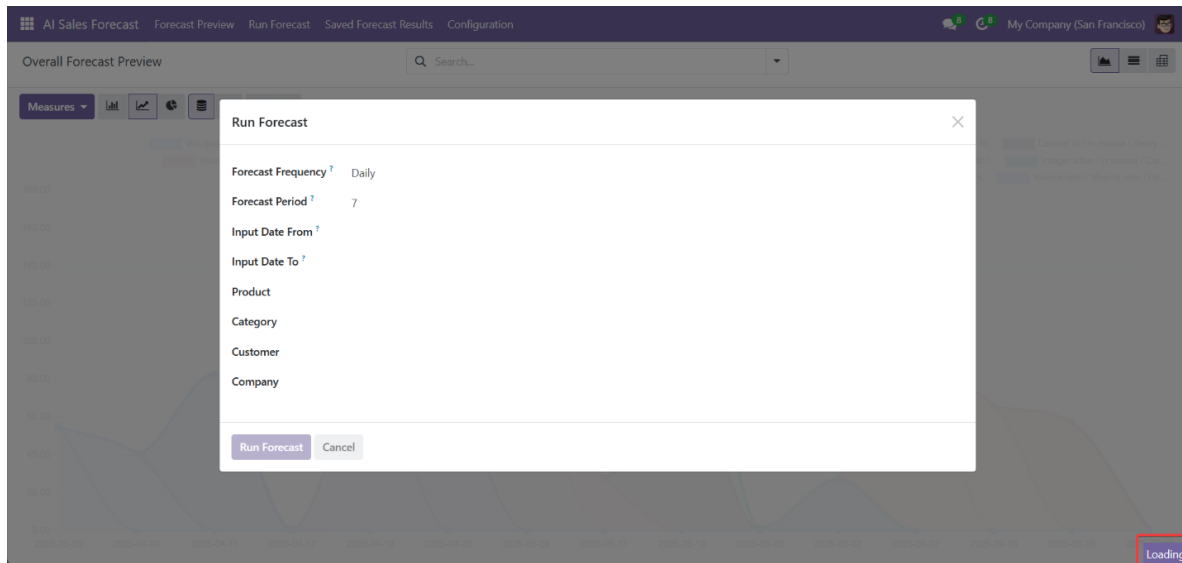
Screenshot 4: Run Forecast Button in Pivot View Header



Screenshot 5: Generate Forecast



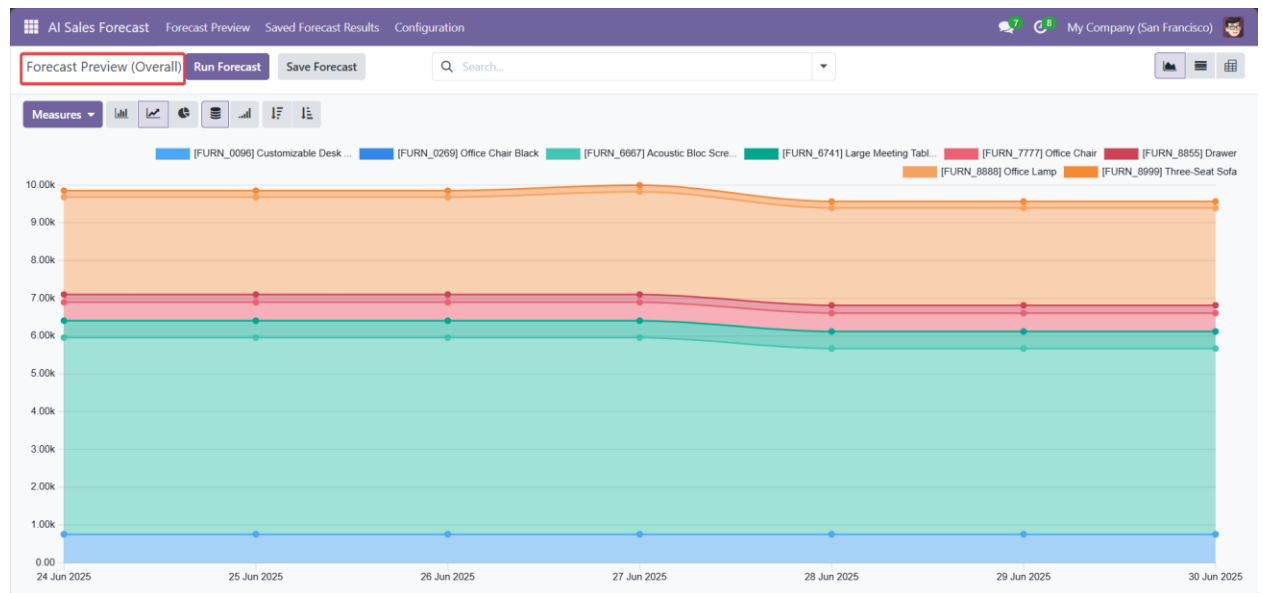
Screenshot 6: Loading Screen



3.2.1 View Forecast Results

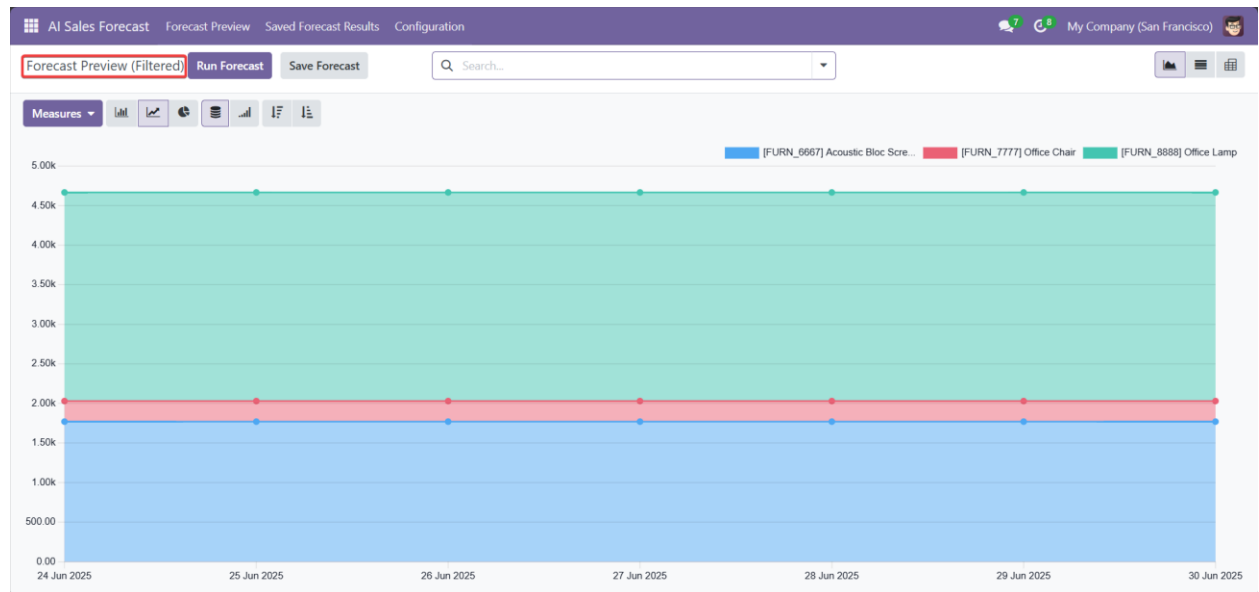
- **Overall Forecast** appears when no filters are applied

Screenshot 7: Overall Forecast Preview



- **Filtered Forecast** appears when any filter is used

Screenshot 8: Filtered Forecast Preview



View Modes:

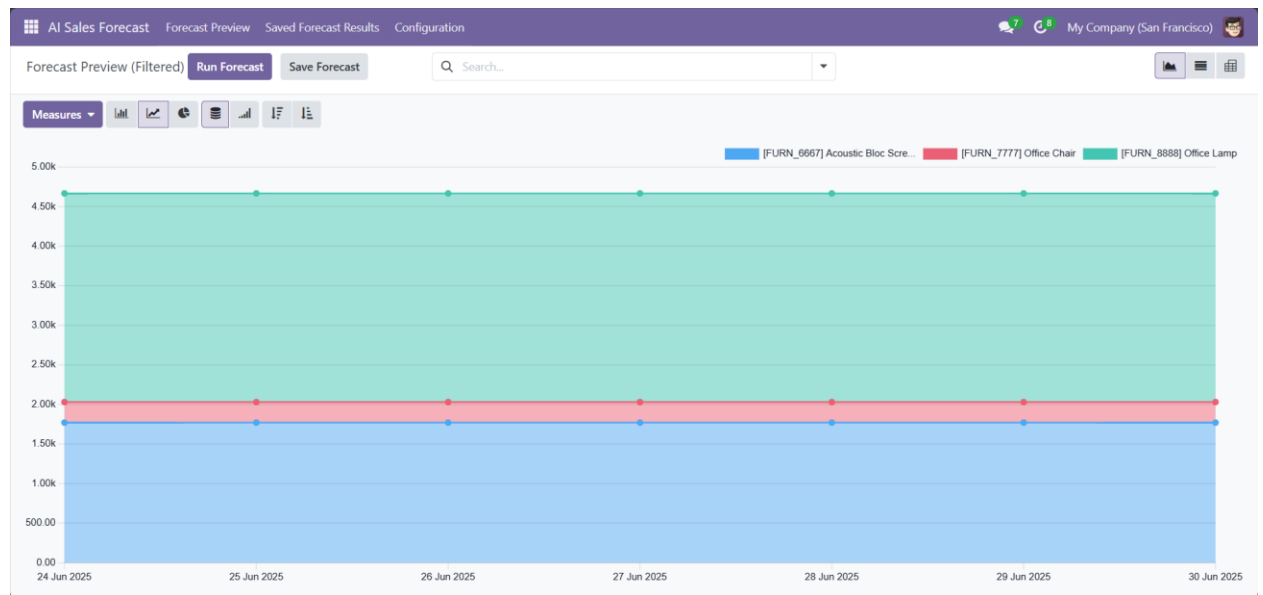
- **List View:** Sales quantity and prices by date

Screenshot 9: List View

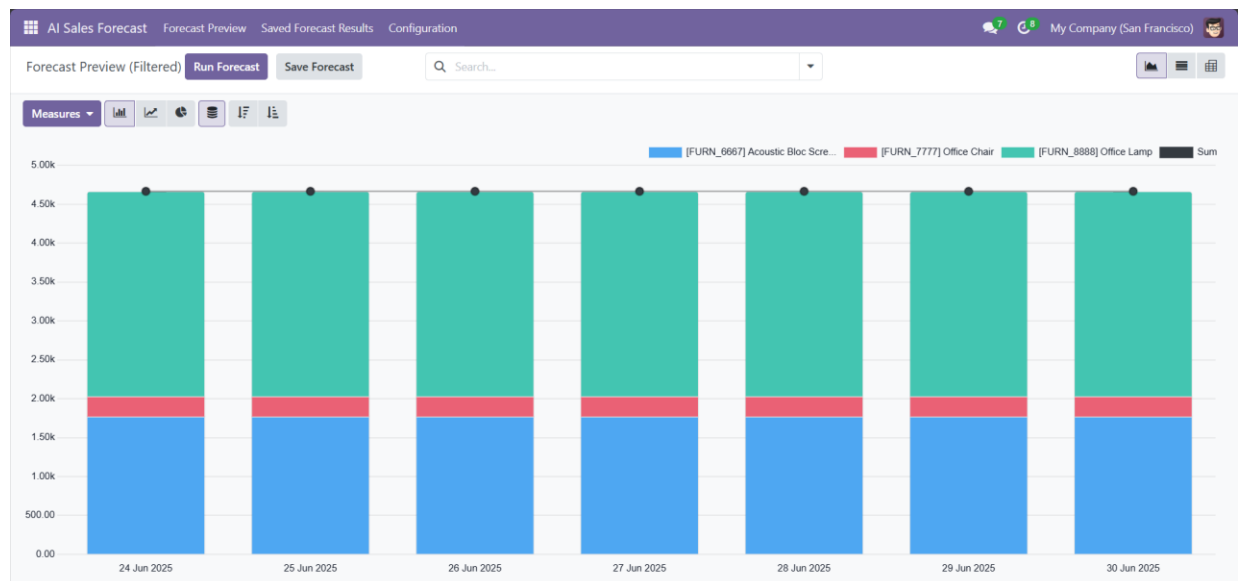
☐ Forecaste...	Forecasted S...	Forecast...	Product	Product Category	Customer	Company
☐ 06/18/2025	262.97	2	[FURN_0269] Office Chair Black	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/19/2025	262.98	2	[FURN_0269] Office Chair Black	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/20/2025	831.37	7	[FURN_0269] Office Chair Black	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☒ 06/21/2025	315.40	3	[FURN_0269] Office Chair Black	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/22/2025	315.42	3	[FURN_0269] Office Chair Black	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/23/2025	341.63	3	[FURN_0269] Office Chair Black	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/24/2025	315.45	3	[FURN_0269] Office Chair Black	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/18/2025	631.02	2	[FURN_6667] Acoustic Bloc Screens (Wood)	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/19/2025	631.24	2	[FURN_6667] Acoustic Bloc Screens (Wood)	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/20/2025	1,982.57	7	[FURN_6667] Acoustic Bloc Screens (Wood)	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/21/2025	755.84	3	[FURN_6667] Acoustic Bloc Screens (Wood)	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/22/2025	756.06	3	[FURN_6667] Acoustic Bloc Screens (Wood)	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/23/2025	818.18	3	[FURN_6667] Acoustic Bloc Screens (Wood)	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
☐ 06/24/2025	756.43	3	[FURN_6667] Acoustic Bloc Screens (Wood)	All / Saleable / Office Furniture	Gemini Furniture	YourCompany

- **Graph View:**
 - Line Charts
 - Bar Charts
 - Pie Charts

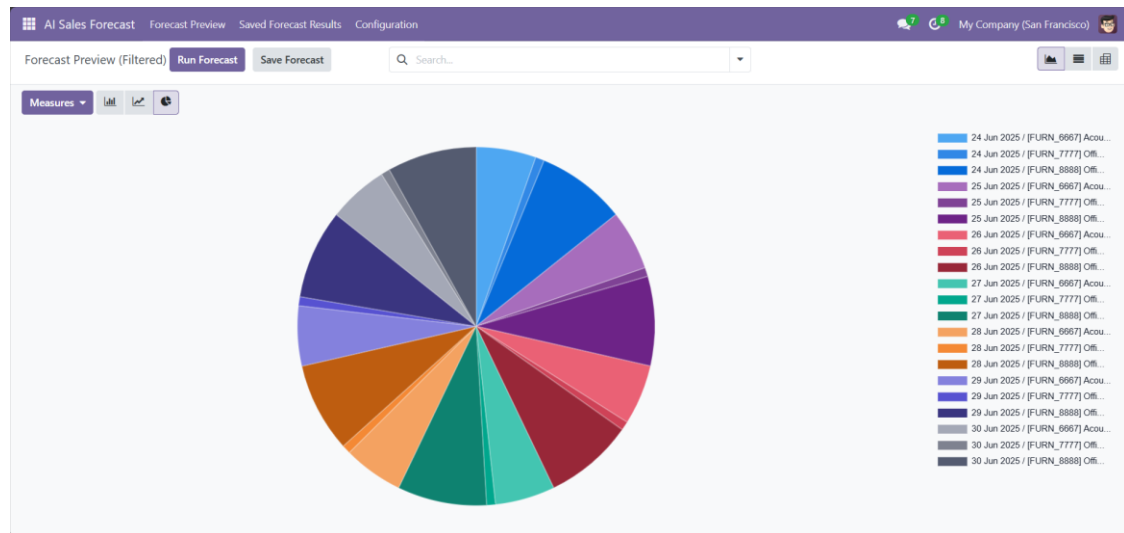
Screenshot 10: Line Chart



Screenshot 11: Bar Chart

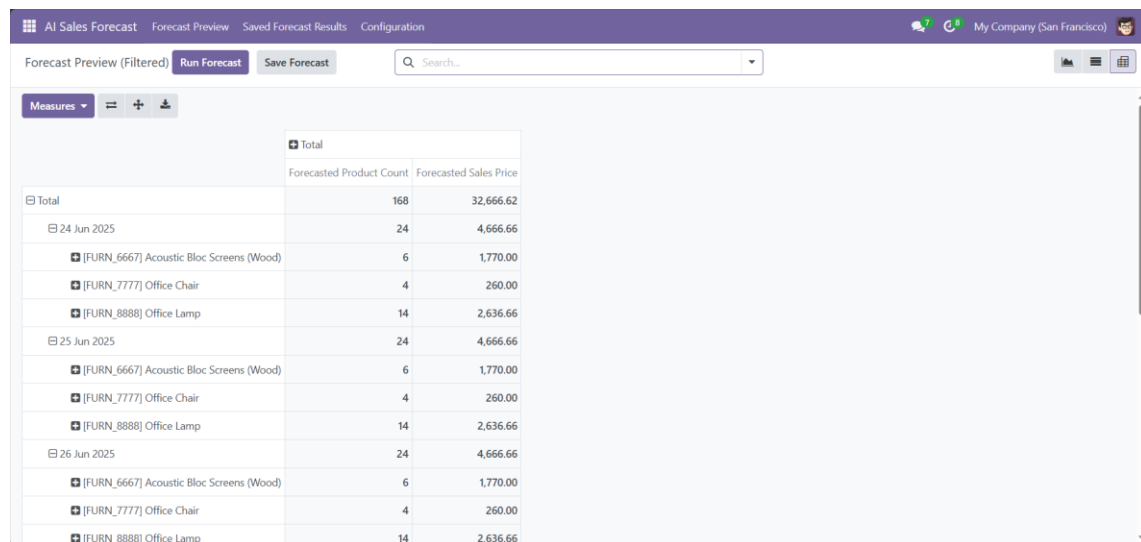


Screenshot 12: Pie Chart



- **Pivot View:**
Break down data by product, customer, or category.

Screenshot 13: Pivot View



Total		Forecasted Product Count	Forecasted Sales Price
Total		168	32,666.62
24 Jun 2025		24	4,666.66
[FURN_6667] Acoustic Bloc Screens (Wood)		6	1,770.00
[FURN_7777] Office Chair		4	260.00
[FURN_8888] Office Lamp		14	2,636.66
25 Jun 2025		24	4,666.66
[FURN_6667] Acoustic Bloc Screens (Wood)		6	1,770.00
[FURN_7777] Office Chair		4	260.00
[FURN_8888] Office Lamp		14	2,636.66
26 Jun 2025		24	4,666.66
[FURN_6667] Acoustic Bloc Screens (Wood)		6	1,770.00
[FURN_7777] Office Chair		4	260.00
[FURN_8888] Office Lamp		14	2,636.66

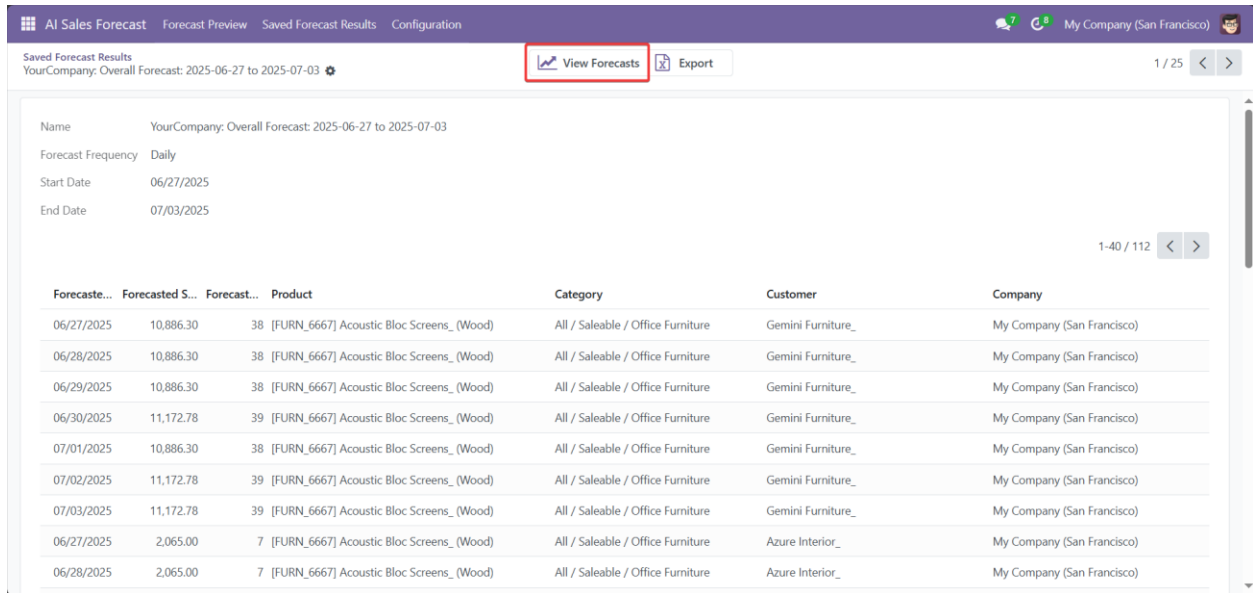
3.2.2 Save Forecast

1. Switch to List View in the forecast preview
2. Click **Save Forecast**
3. The system stores:
 - Auto-generated name (based on filters and date)
 - Date range
 - Frequency
 - Associated records

Screenshot 14: All Saved Forecasts

AI Sales Forecast Forecast Preview Saved Forecast Results Configuration			
Saved Forecast Results Search... 1-25 / 25			
YourCompany: Overall Forecast: 2025-06-27 to 2025-07-03 Day 06/27/2025 to 07/03/2025 View	YourCompany: Overall Forecast: 2025-06-27 to 2025-08-08 Week 06/27/2025 to 08/08/2025 View	YourCompany: Overall Forecast: 2025-07-01 to 2026-01-01 Month 07/01/2025 to 01/01/2026 View	YourCompany: Overall Forecast: 2025-07-01 to 2026-07-01 Quarter 07/01/2025 to 07/01/2026 View
YourCompany: Overall Forecast: 2026-01-01 to 2031-01-01 Year 01/01/2026 to 01/01/2031 View	YourCompany: Overall Forecast: 2025-06-27 to 2026-11-08 Day 06/27/2025 to 11/08/2026 View	YourCompany: Overall Forecast: 2026-01-01 to 2027-01-01 Year 01/01/2026 to 01/01/2027 View	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-26 Day 06/27/2025 to 07/26/2025 View
My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-08-08 Week 06/27/2025 to 08/08/2025 View	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-08-08 Week 06/27/2025 to 08/08/2025 View	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-08-08 Week 06/27/2025 to 08/08/2025 View	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-03 Day 06/27/2025 to 07/03/2025 View
My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-03 Day 06/27/2025 to 07/03/2025 View	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-03 Day 06/27/2025 to 07/03/2025 View	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-03 Day 06/27/2025 to 07/03/2025 View	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-03 Day 06/27/2025 to 07/03/2025 View
Pakistan Company: Filtered Forecast: 2025-06-27 to 2025-07-03	Pakistan Company: Overall Forecast: 2026-01-01 to 2050-01-01	My Company (San Francisco): Overall Forecast: 2026-01-01 to 2050-01-01	Pakistan Company: Filtered Forecast: 2025-06-28 to 2025-07-27

Screenshot 15: Saved Forecasts Individual View

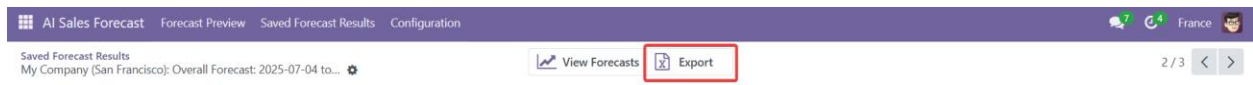


Forecaste...	Forecasted S...	Forecast...	Product	Category	Customer	Company
06/27/2025	10,886.30	38	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
06/28/2025	10,886.30	38	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
06/29/2025	10,886.30	38	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
06/30/2025	11,172.78	39	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
07/01/2025	10,886.30	38	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
07/02/2025	11,172.78	39	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
07/03/2025	11,172.78	39	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
06/27/2025	2,065.00	7	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Azure Interior_	My Company (San Francisco)
06/28/2025	2,065.00	7	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Azure Interior_	My Company (San Francisco)

3.2.3 Export Saved Forecast Results

1. Navigate onto Saved Forecasts Individual View
2. Click on **Export Button**
3. The result will be exported as excel format

Screenshot 16: Export Results feature

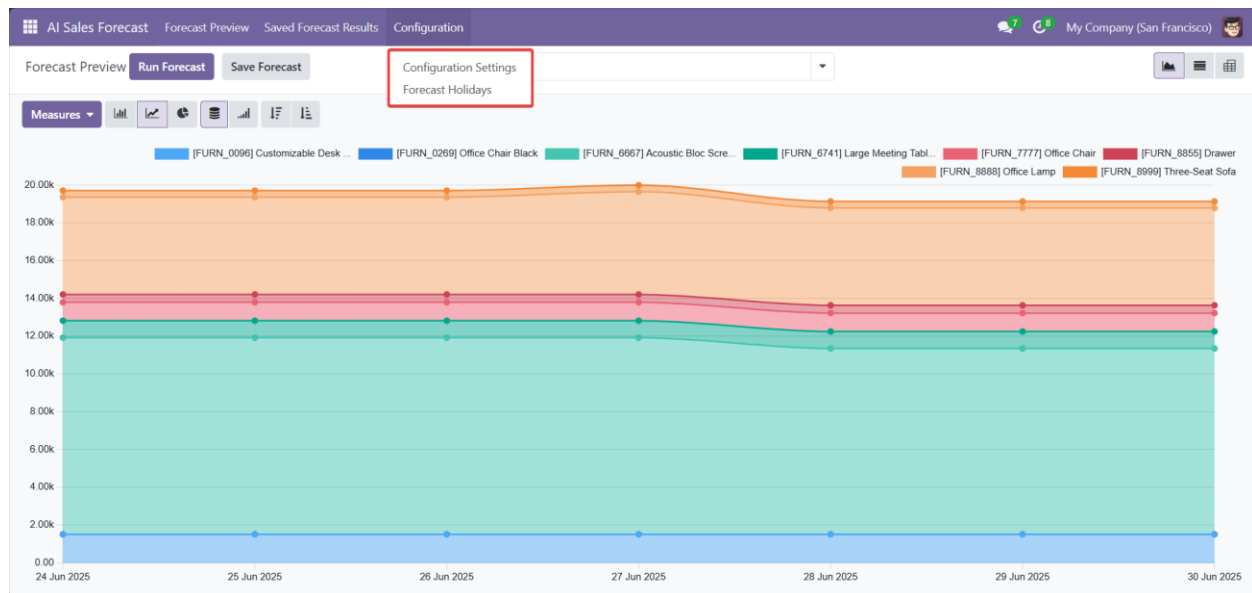


Forecaste...	Forecasted S...	Forecast...	Product	Category	Customer	Company
06/27/2025	10,886.30	38	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
06/28/2025	10,886.30	38	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
06/29/2025	10,886.30	38	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
06/30/2025	11,172.78	39	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
07/01/2025	10,886.30	38	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
07/02/2025	11,172.78	39	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
07/03/2025	11,172.78	39	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
06/27/2025	2,065.00	7	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Azure Interior_	My Company (San Francisco)
06/28/2025	2,065.00	7	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Azure Interior_	My Company (San Francisco)

3.3 Configurations:

Go to: **AI Sales Forecast > Configuration > Settings.**

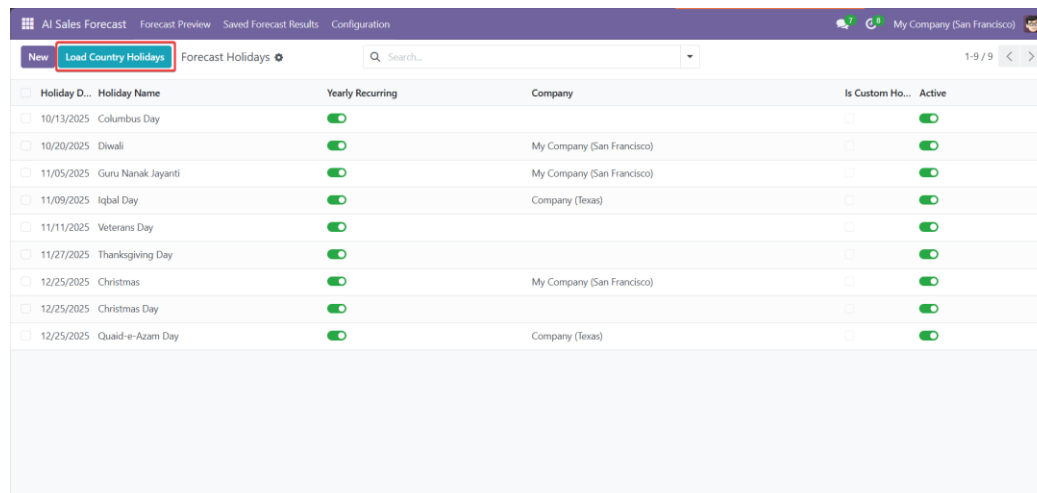
Screenshot 17: Configurations



Adjustable Parameters:

- **Changepoint Prior Scale:**
Controls how quickly the model adapts to trend changes.
- **Seasonality Prior Scale:**
Adjusts how strongly the model considers seasonal patterns.
- **Forecast Holidays:**
Include national holidays or add custom holidays to enhance forecast accuracy.
 - Clicking on 'Load Country Holidays' will load all the holidays for all the countries set.

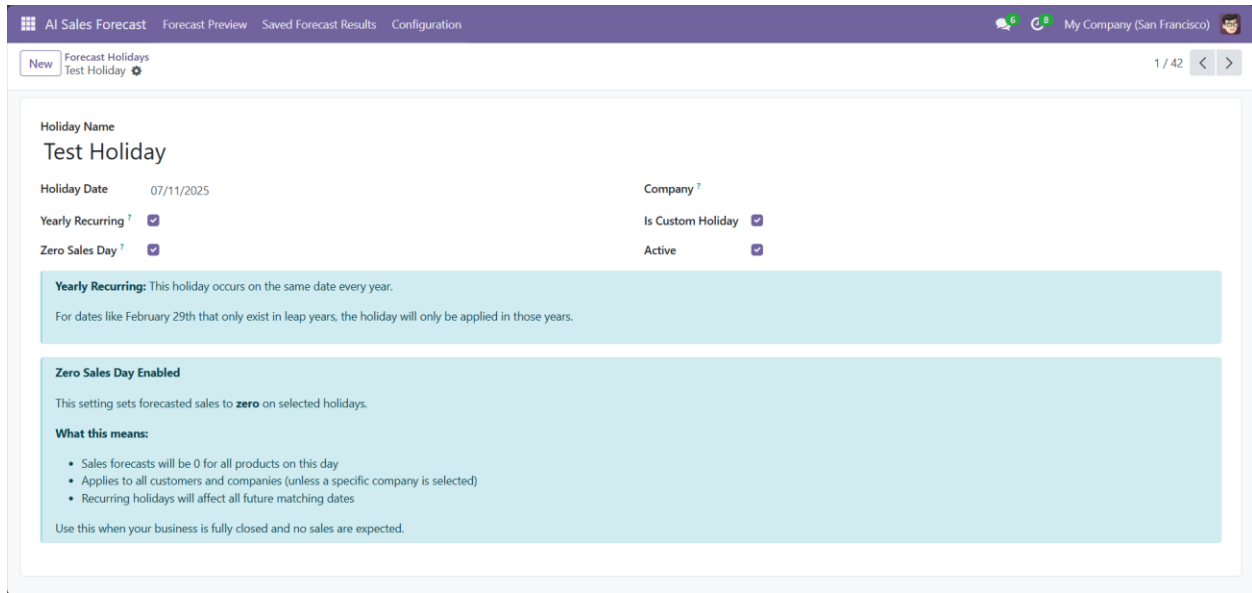
Screenshot 18: Load Country Holidays



Holiday D...	Holiday Name	Yearly Recurring	Company	Is Custom Ho...	Active
10/13/2025	Columbus Day	☒		☐	☒
10/20/2025	Diwali	☒	My Company (San Francisco)	☐	☒
11/05/2025	Guru Nanak Jayanti	☒	My Company (San Francisco)	☐	☒
11/09/2025	Iqbal Day	☒	Company (Texas)	☐	☒
11/11/2025	Veterans Day	☒		☐	☒
11/27/2025	Thanksgiving Day	☒		☐	☒
12/25/2025	Christmas	☒	My Company (San Francisco)	☐	☒
12/25/2025	Christmas Day	☒		☐	☒
12/25/2025	Quaid-e-Azam Day	☒	Company (Texas)	☐	☒

- Click new to add a Custom Holidays, we can mark the flag 'Is Custom Holiday' to differentiate country holidays from Custom Holidays.
- Click on 'Yearly Recurring' to set holidays that occur on the same date every year.
- Click on 'Company' to set the holiday applicable for a particular company only. Leave the field empty to make this holiday global (applicable to all companies)
- Click on 'Zero Sales Day' to set forecasted sales to zero on selected holidays. Use this when your business is fully closed and no sales are expected.

Screenshot 19: Set Custom Holiday, Recurring, Company and Zero Sale Day



The screenshot shows the 'Forecast Holidays' configuration page in the AI Sales Forecast module. The page has a purple header with navigation links: 'AI Sales Forecast', 'Forecast Preview', 'Saved Forecast Results', and 'Configuration'. The user is logged in as 'My Company (San Francisco)'. The main form is titled 'Test Holiday' and includes the following fields and options:

- Holiday Name:** Test Holiday
- Holiday Date:** 07/11/2025
- Yearly Recurring:** ☒
- Zero Sales Day:** ☒
- Company:** (Dropdown menu)
- Is Custom Holiday:** ☒
- Active:** ☒

Below the form, there are two informational boxes:

- Yearly Recurring:** This holiday occurs on the same date every year. For dates like February 29th that only exist in leap years, the holiday will only be applied in those years.
- Zero Sales Day Enabled:** This setting sets forecasted sales to zero on selected holidays.
 - What this means:**
 - Sales forecasts will be 0 for all products on this day
 - Applies to all customers and companies (unless a specific company is selected)
 - Recurring holidays will affect all future matching dates
 - Use this when your business is fully closed and no sales are expected.

Tip: Tweak these values based on your business characteristics for optimal results.

Conditions for Forecast Generation:

- **Minimum Sales Data:**
 - At least two days of historical sales data is required to generate a forecast.
 - Forecast will not run if data exists for only one day or not at all.
 - The same product must be sold on at least two different dates within the selected date range to generate a valid forecast.
- **Sales Data Format:**
 - Sales data must be recorded using standard sales orders or invoices in Odoo.
 - Data should include valid products, quantities, and dates.
- **Date Range Validation:**
 - Input End Date cannot be in the future.
 - Forecast Start Date must be after today (usually from tomorrow).
 - Start Date cannot be after or same as End Date Data should include valid products, quantities, and dates.

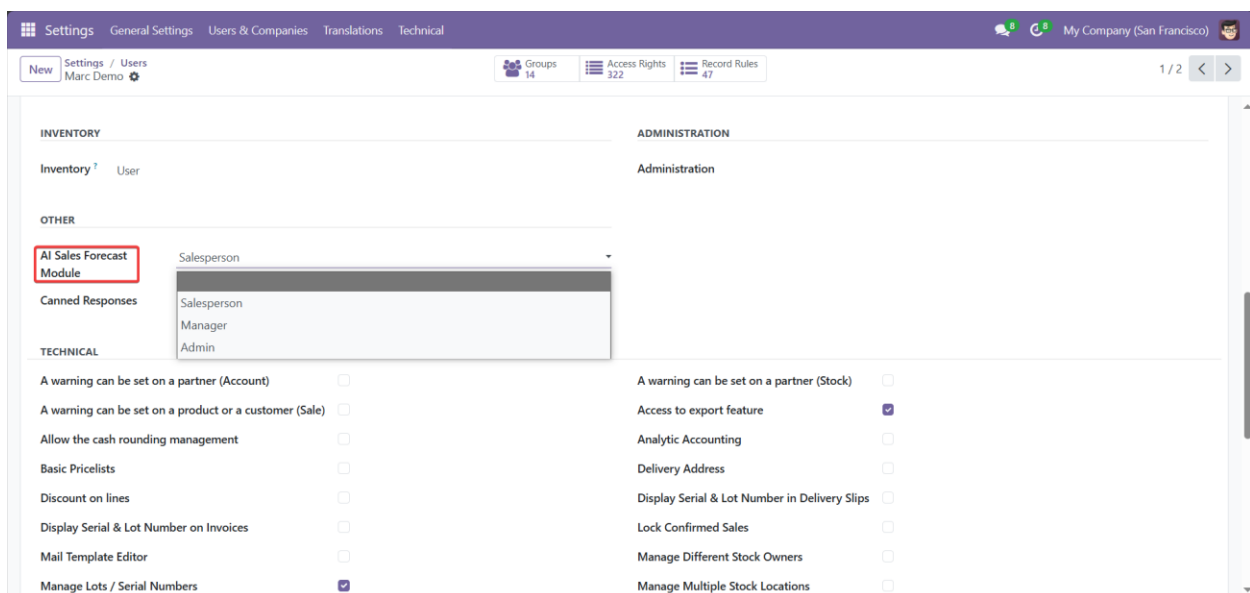
- **Forecast Periods Supported:**
 - Daily, Weekly, Monthly, and Yearly forecasts depending on the available data and configuration.

3.4 User Roles and Privileges

Navigate to: **Settings > Users & Companies > Users > Access Rights**

Role	Access Level	Permissions
Salesperson	Basic	View-only access to forecasts
Manager	Intermediate	Create/edit/delete own forecasts; manage own configurations
Admin	Full	Full control over forecasts and configuration settings

Screenshot 20: Access Rights



4. Technical Requirements / Compatible With:

- **Technical Requirements:**
 - Odoo – base, web, sale
 - Python – prophet, pandas
- **Compatibility:** Odoo Community Edition v18.0, Odoo Enterprise Edition v18.0

5. Changes Log / Release Notes

- Version 1.0.0: July 2025
 - Initial release.

6. Support

If you have questions, use our contact form at webshopextension.com or email at support@webshopextension.com.