User Manual

AI Sales Forecast Module for Odoo v19.0

Table of Contents

1.   Introduction

The **AI Sales Forecast** module is an intelligent forecasting solution built natively for **Odoo v19.0 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:

  o   Product

  o   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

From the Odoo main menu, navigate to **AI Sales Forecast.**
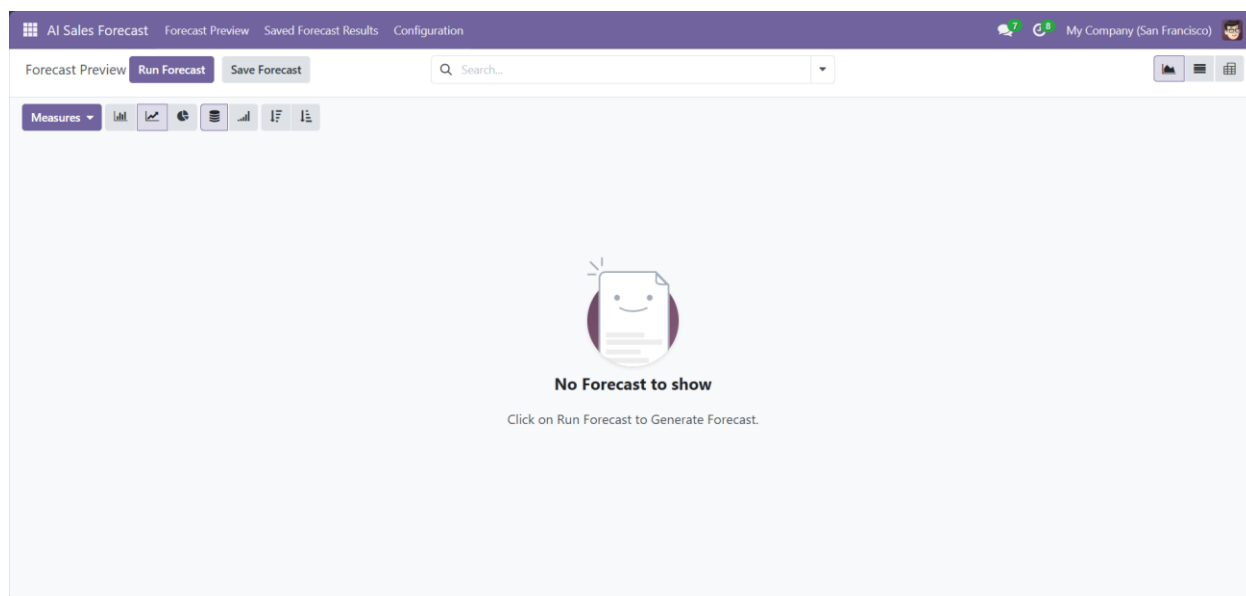
Fig 1: Landing Page

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.
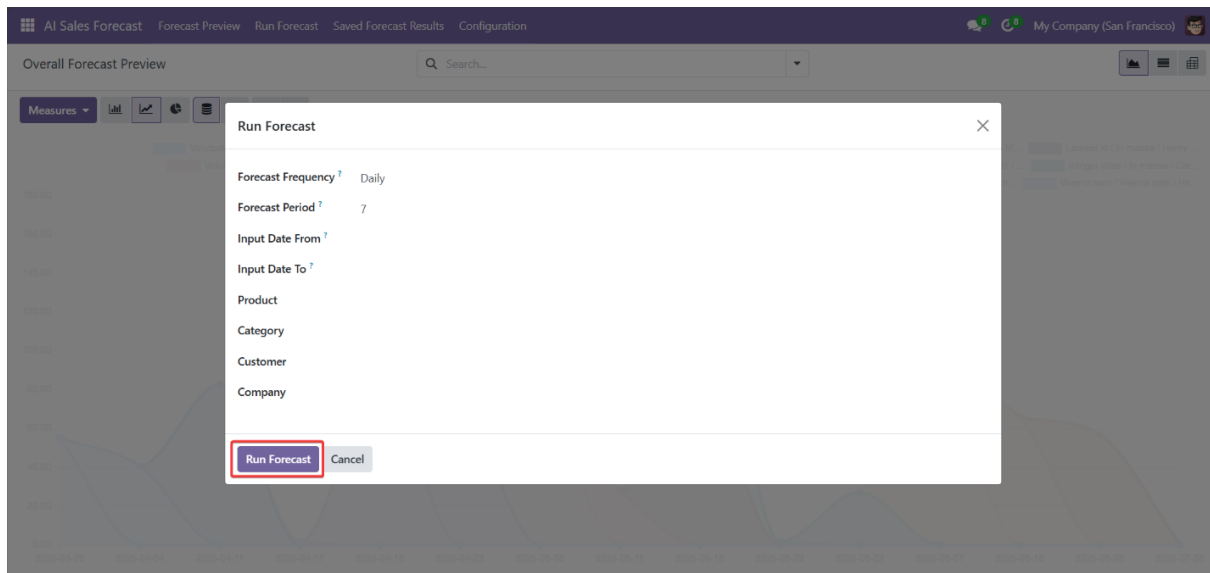5. Click **Run Forecast.**
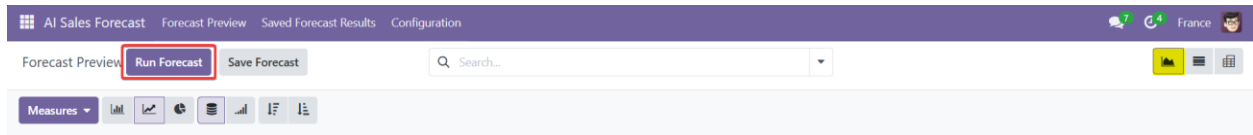
Fig 2: Run Forecast Button in Graph View Header
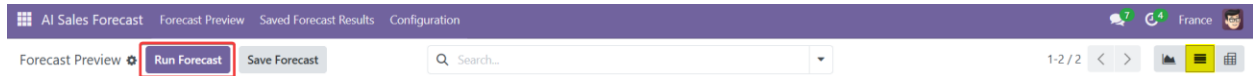
Fig 3: Run Forecast Button in List View Header
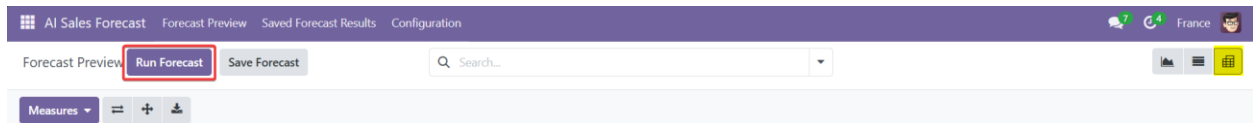
Fig 4: Run Forecast Button in Pivot View Header

Fig 5: Generate Forecast
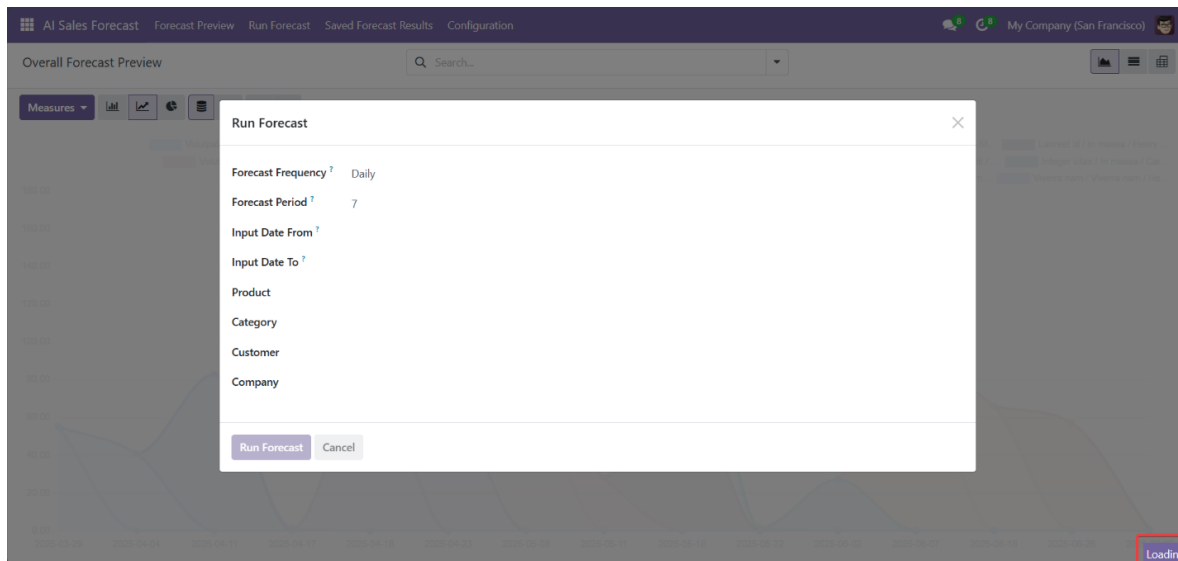
Fig 6: Loading Screen

3.2.1 View Forecast Results

- **Overall Forecast** appears when no filters are applied
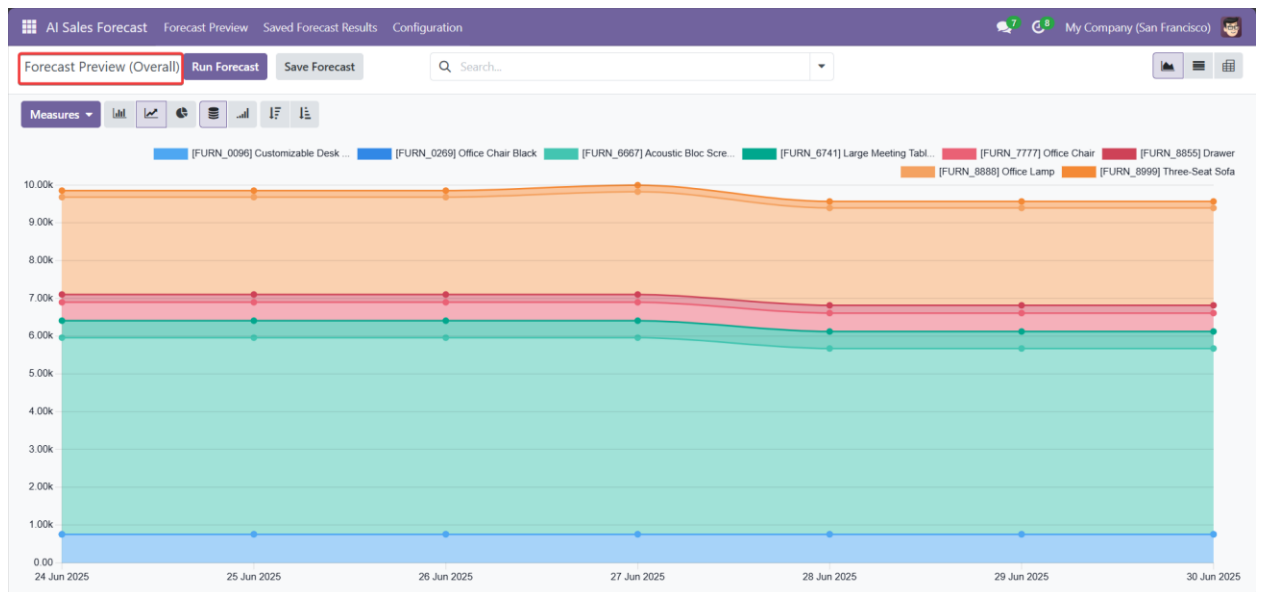
Fig 7: Overall Forecast Preview

- **Filtered Forecast** appears when any filter is used
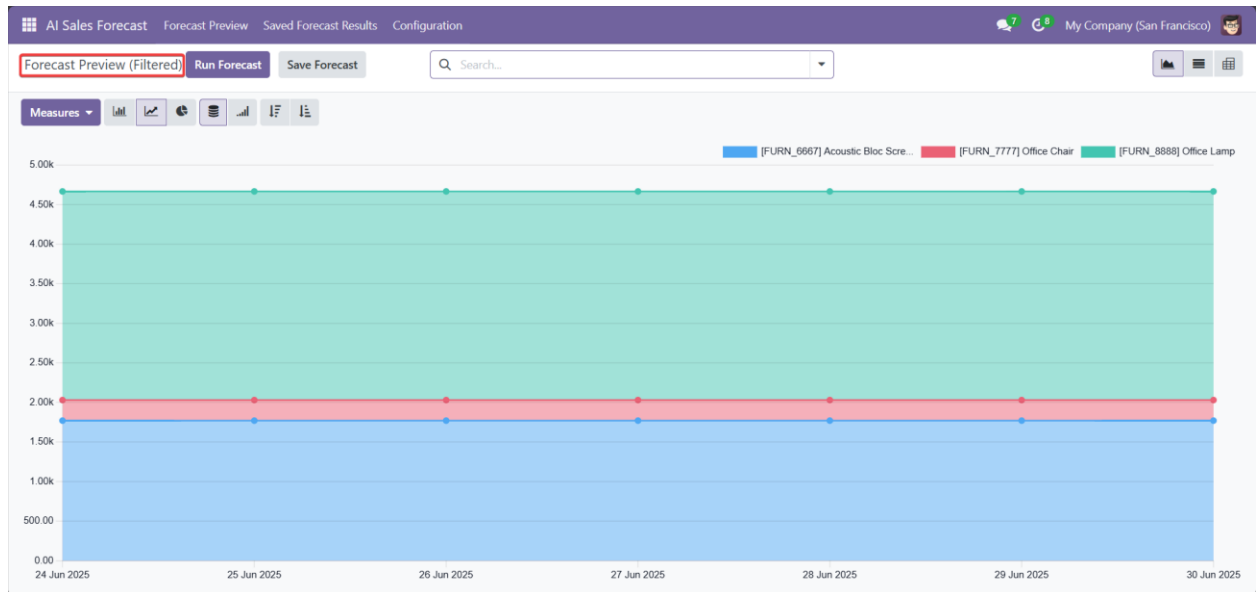
Fig 8: Filtered Forecast Preview

View Modes:

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

Fig 9: List View

- **Graph View:**
  - o Line Charts
  - o Bar Charts
  - o Pie Charts
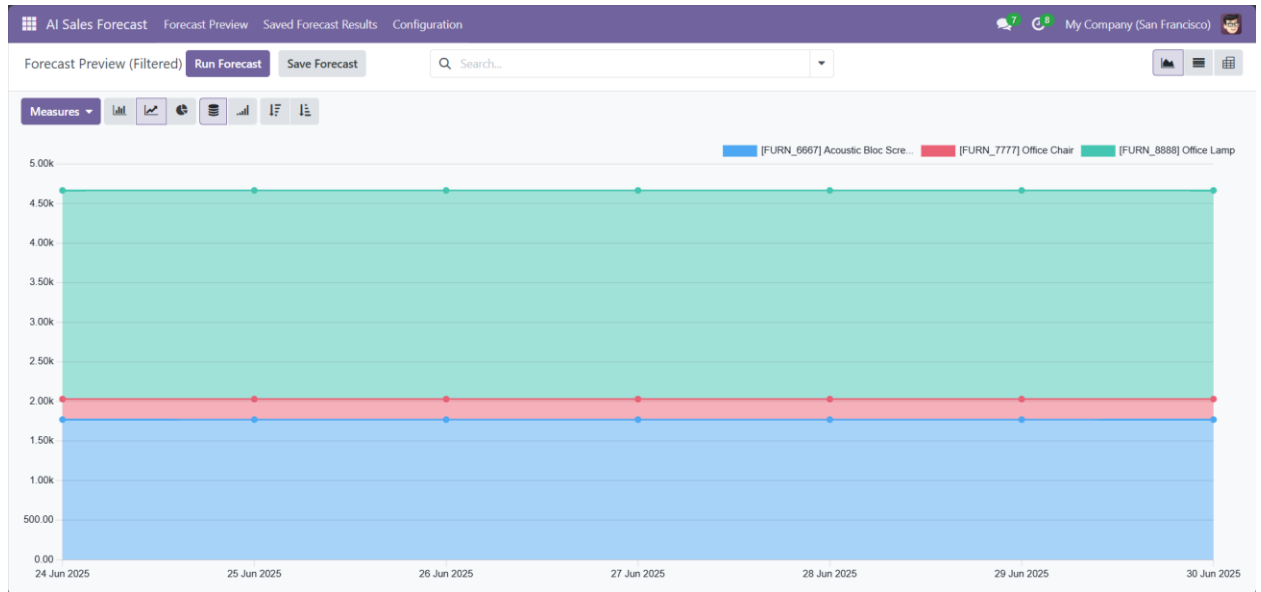
Fig 10: Line Chart
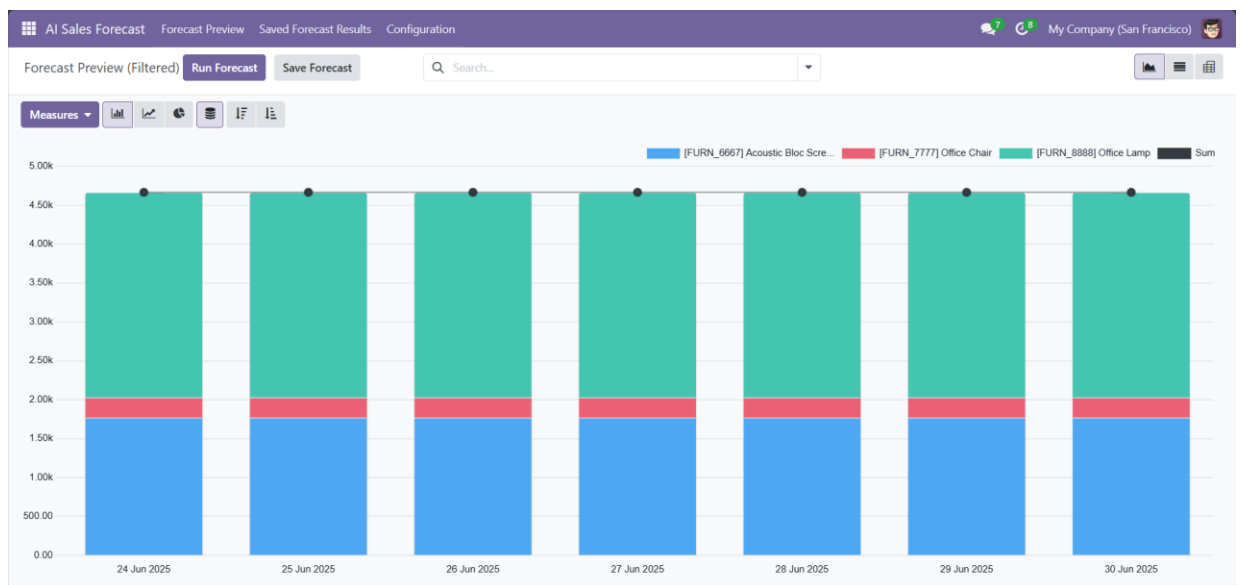
Fig 11: Bar Chart
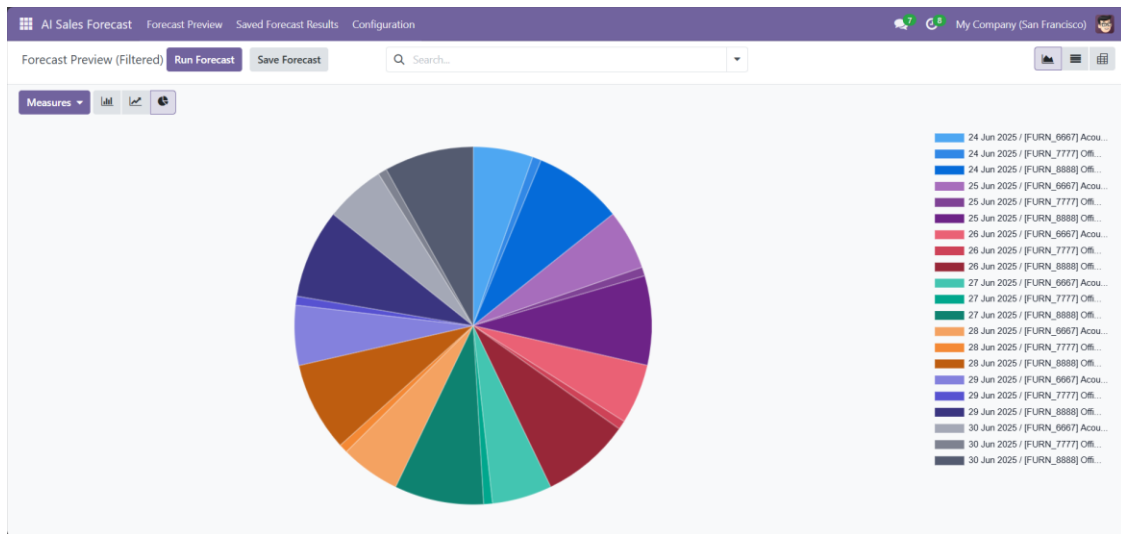
Fig 12: Pie Chart

- **Pivot View:**

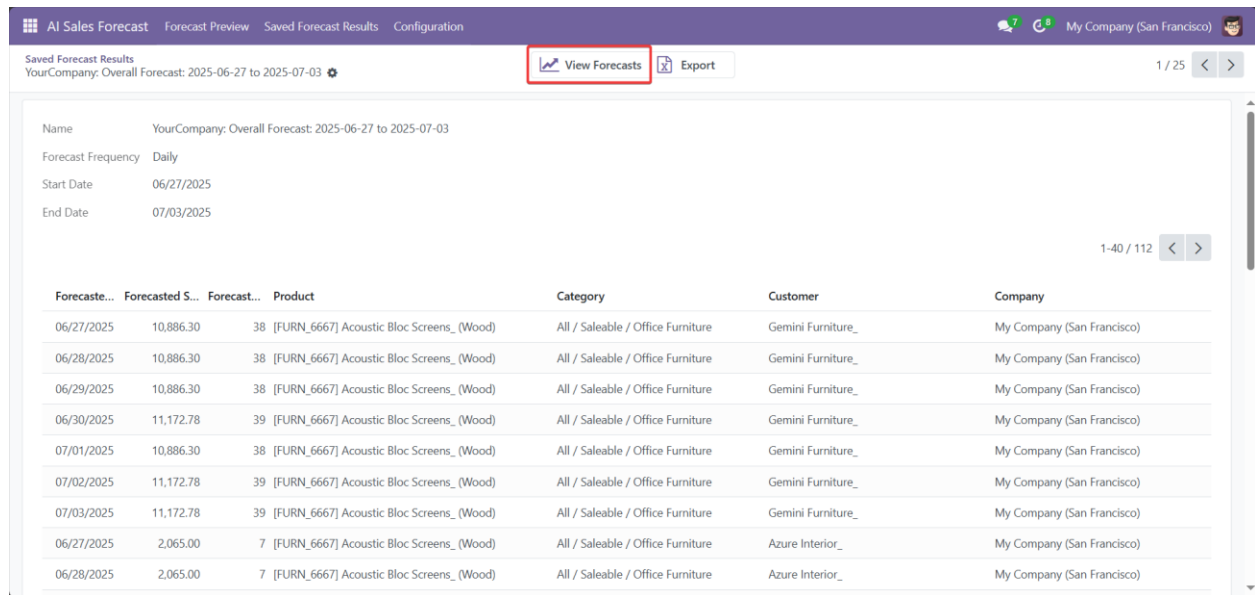 Break down data by product, customer, or category.

Fig 13: Pivot View

3.2.2 Save Forecast

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

Fig 14: All Saved Forecasts

Fig 15: Saved Forecasts Individual View

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

Fig 16: Export Results feature

3.3 Configurations:

Go to: **AI Sales Forecast > Configuration > Settings.**
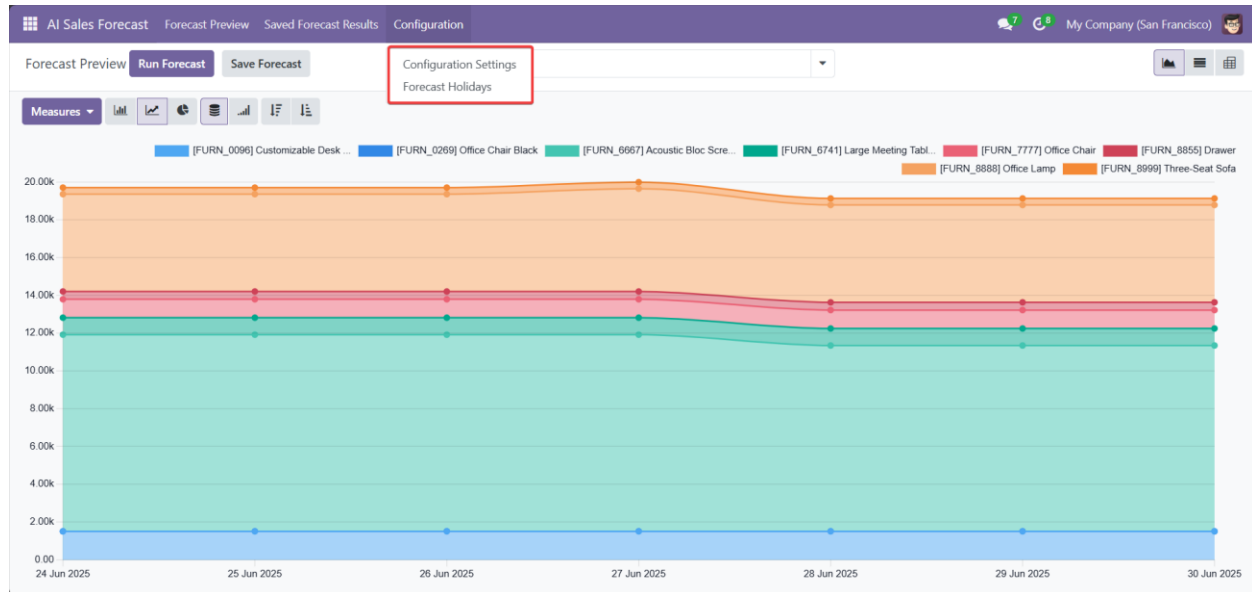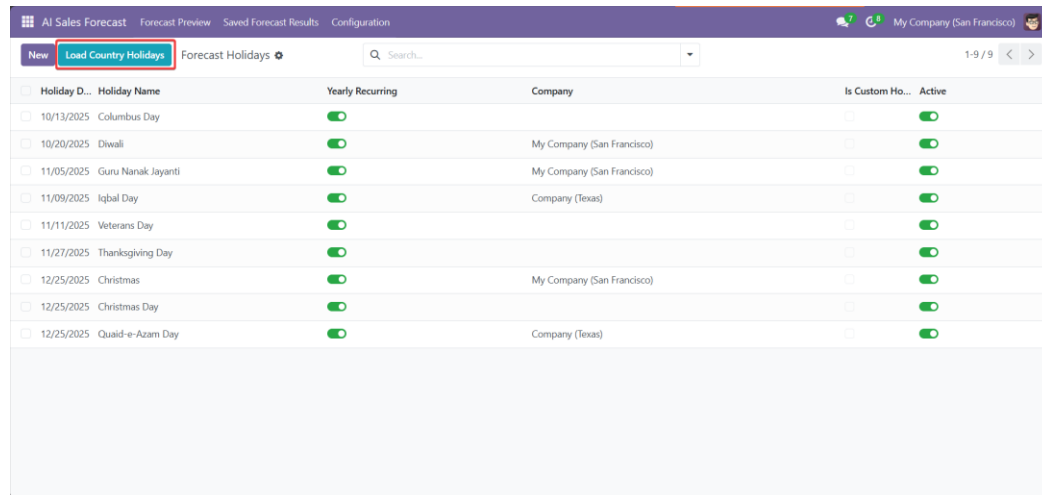
Fig 17: Configurations

Adjustable Parameters:
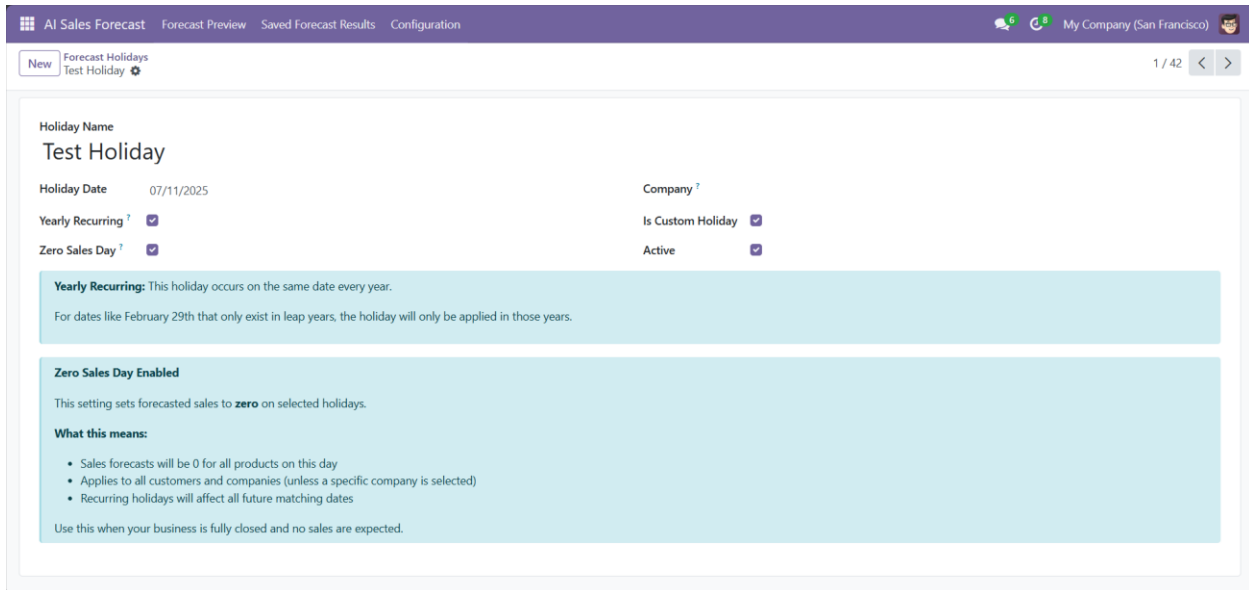
- **Changepoint Prior Scale:**

  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.

Fig 18: Load Country Holidays

- o Click new to add a Custom Holidays, we can mark the flag 'Is Custom Holiday' to differentiate country holidays from Custom Holidays.
- o Click on 'Yearly Recurring' to set holidays that occur on the same date every year.
- o 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)
- o 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.

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

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).

        o   Start Date cannot be after or same as End Date Data should include valid products, quantities, and dates.

- **Forecast Periods Supported:**
  - o 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
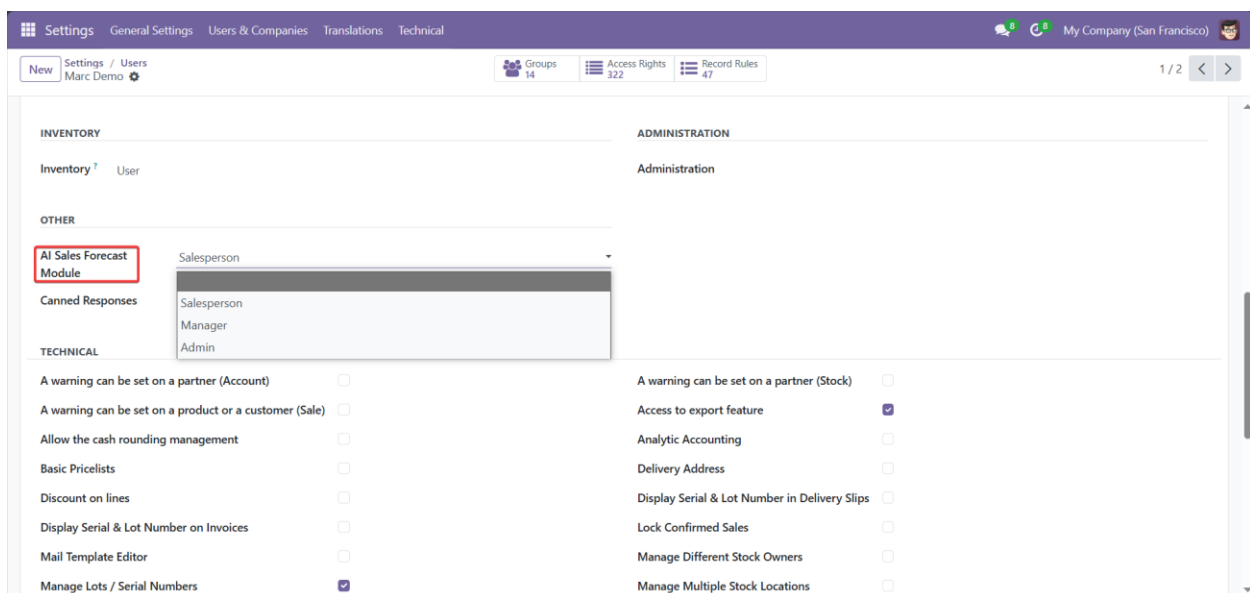
Fig 20: Access Rights

4. Technical Requirements / Compatibility

- **Technical Requirements**:

    o **Odoo Modules:** base, web, sale

    o **Python Libraries:** prophet, pandas

- **Compatibility**

    o Odoo Community Edition v19.0

    o Odoo Enterprise Edition v19.0

5. Changes Log / Release Notes

- Version 1.0.0: December 2025

    o Initial release.

6. Support

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