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User Manual

AI Sales Forecast Module for Odoo v19.0

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## 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:
  - 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**

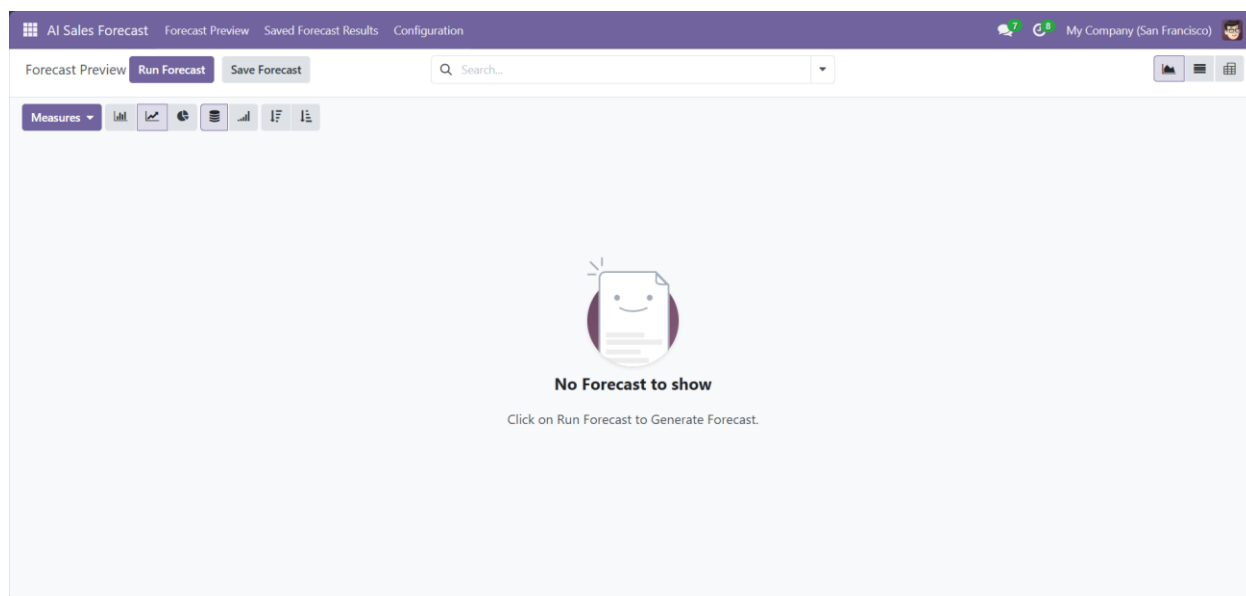
Automatically display "**Overall Forecast**" or "**Filtered Forecast**" based on your selections.
- **Save Forecasts**

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

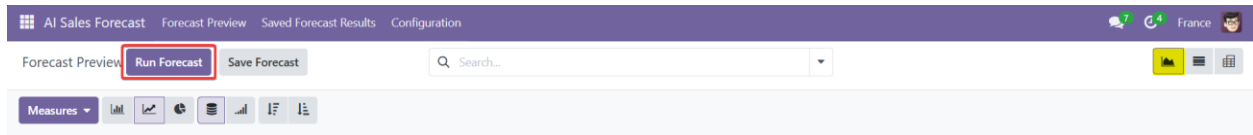
From the Odoo main menu, navigate to **AI Sales Forecast**.



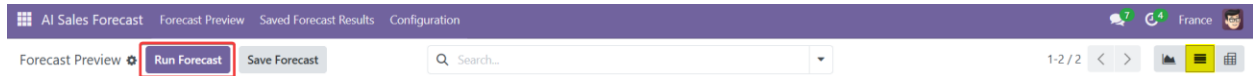
*Fig 1: Landing Page*

#### 3.2 Generating Forecast

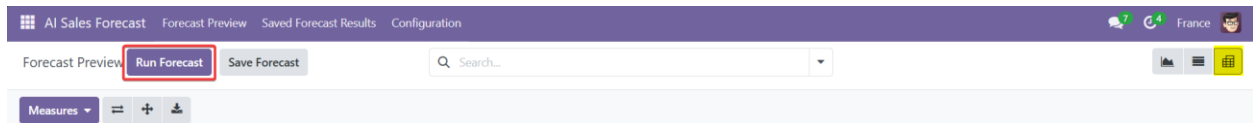
1. Click **Run Forecast**.
  - Available in Graph, List and Pivot View Headers.
2. Choose Forecast Frequency (Day, Week, Month, etc.).
3. Set Input Date **From** and **To** (defines historical range).
4. Apply desired filters: Company, Customer, Product Category, Product.
5. Click **Run Forecast**.



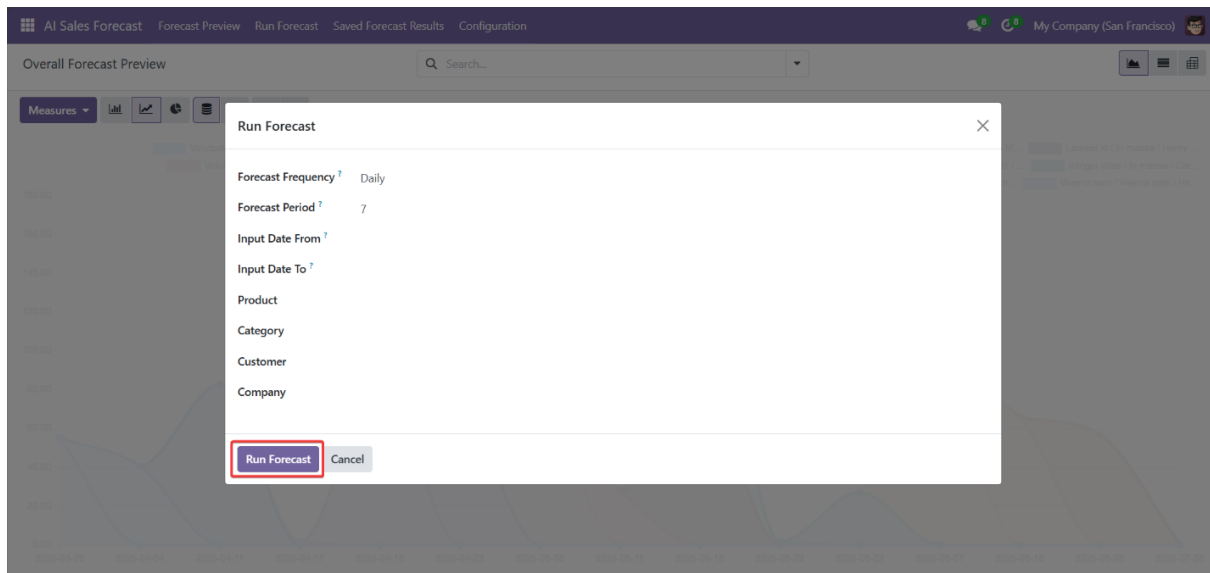
*Fig 2: Run Forecast Button in Graph View Header*



*Fig 3: Run Forecast Button in List View Header*



*Fig 4: Run Forecast Button in Pivot View Header*



*Fig 5: Generate Forecast*

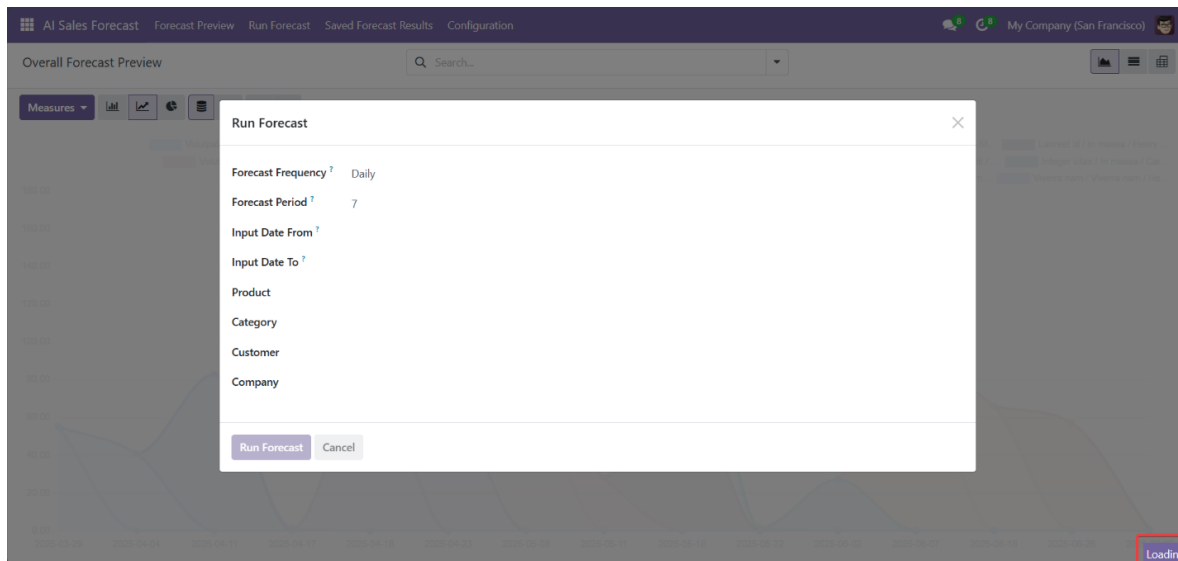


Fig 6: Loading Screen

### 3.2.1 View Forecast Results

- Overall Forecast appears when no filters are applied

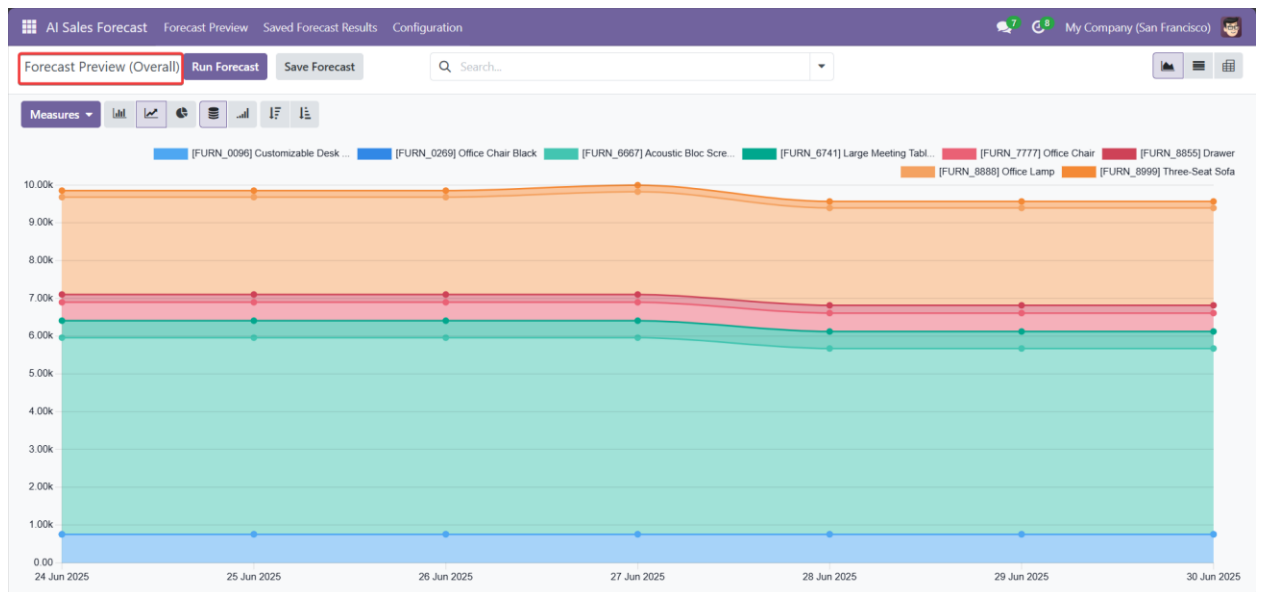


Fig 7: Overall Forecast Preview

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

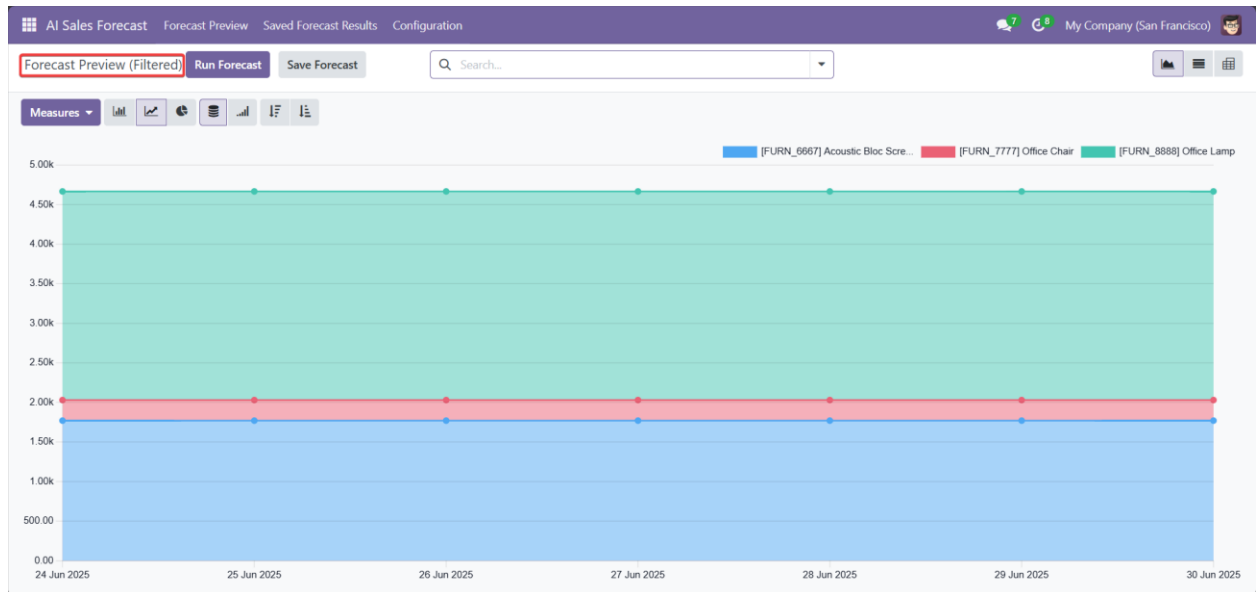


Fig 8: Filtered Forecast Preview

## View Modes:

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

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

Fig 9: List View



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

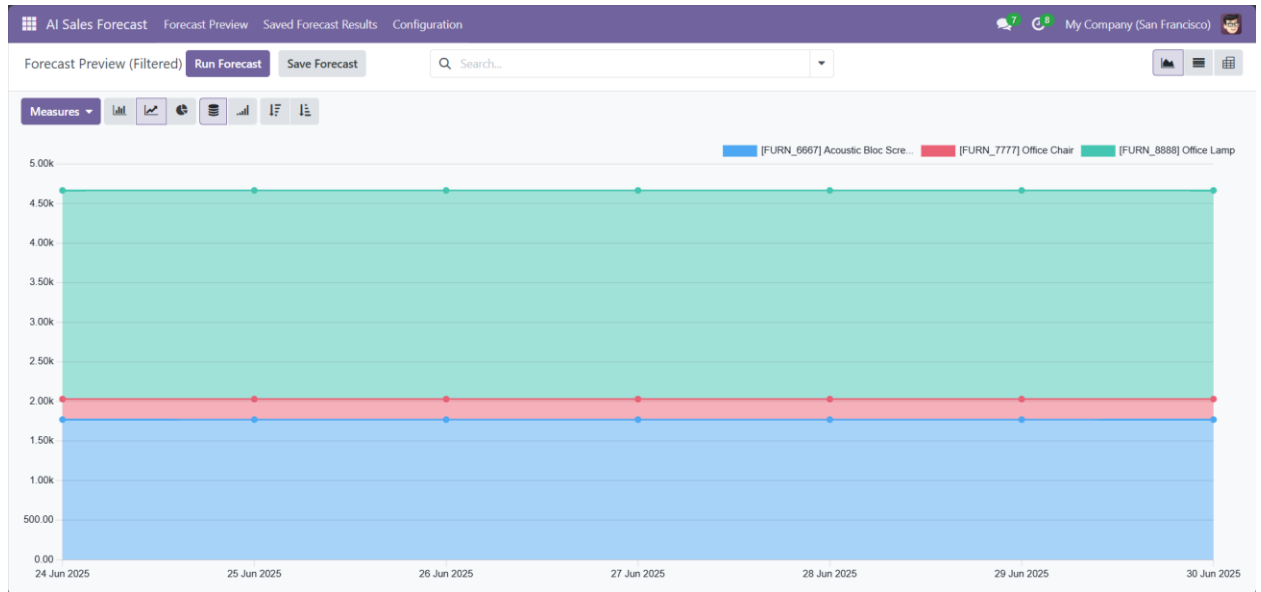


Fig 10: Line Chart

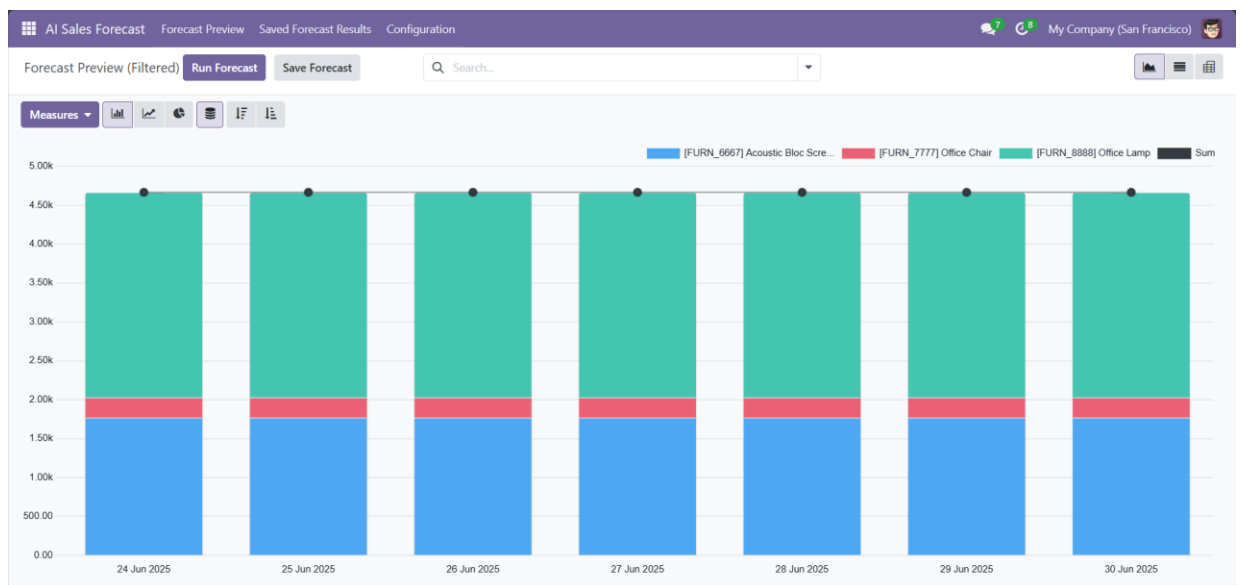


Fig 11: Bar Chart

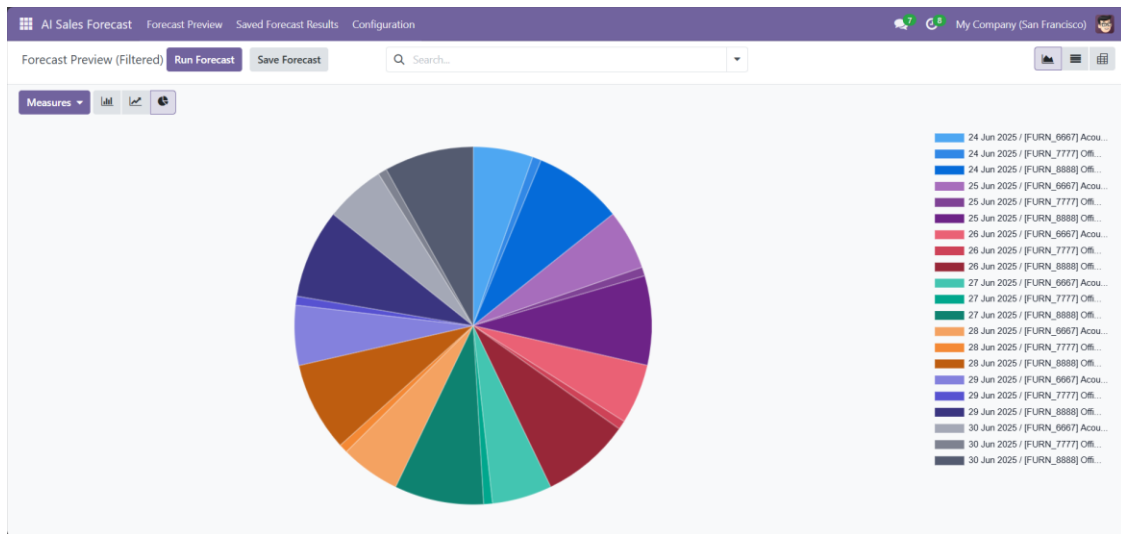


Fig 12: Pie Chart

- Pivot View:**

Break down data by product, customer, or category.

AI Sales Forecast		
Forecast Preview (Filtered)		
Measures		
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

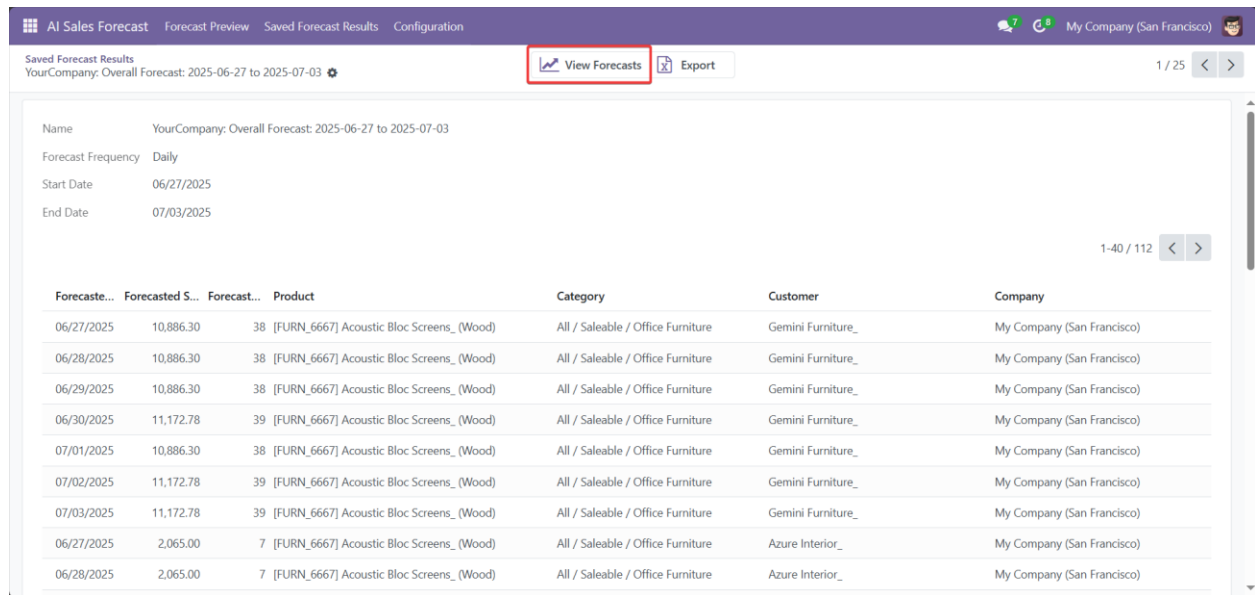
Fig 13: Pivot View

### 3.2.2 Save Forecast

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

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

Fig 14: All Saved Forecasts

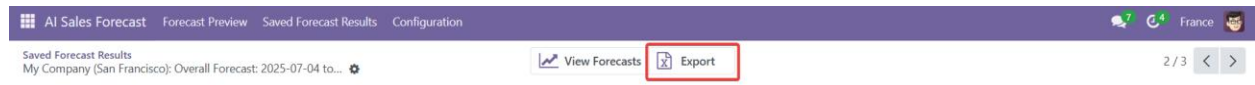


Name	Forecast Frequency	Start Date	End Date	Forecast Date	Forecasted Sales	Forecasted Quantity	Product	Category	Customer	Company
YourCompany: Overall Forecast: 2025-06-27 to 2025-07-03	Daily	06/27/2025	07/03/2025							
06/27/2025	10,886.30	38	[FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / 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)				

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



Name	Forecast Frequency	Start Date	End Date	Forecast Date	Forecasted Sales	Forecasted Quantity	Product	Category	Customer	Company
My Company (San Francisco): Overall Forecast: 2025-07-04 to...										

Fig 16: Export Results feature

### 3.3 Configurations:

Go to: AI Sales Forecast > Configuration > Settings.

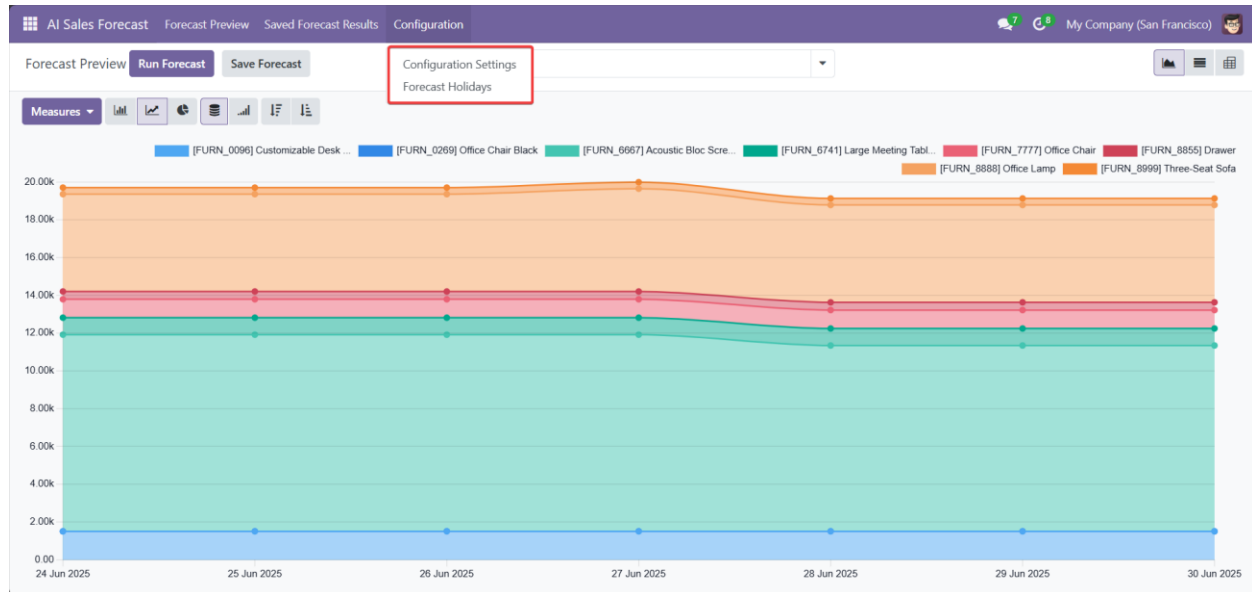
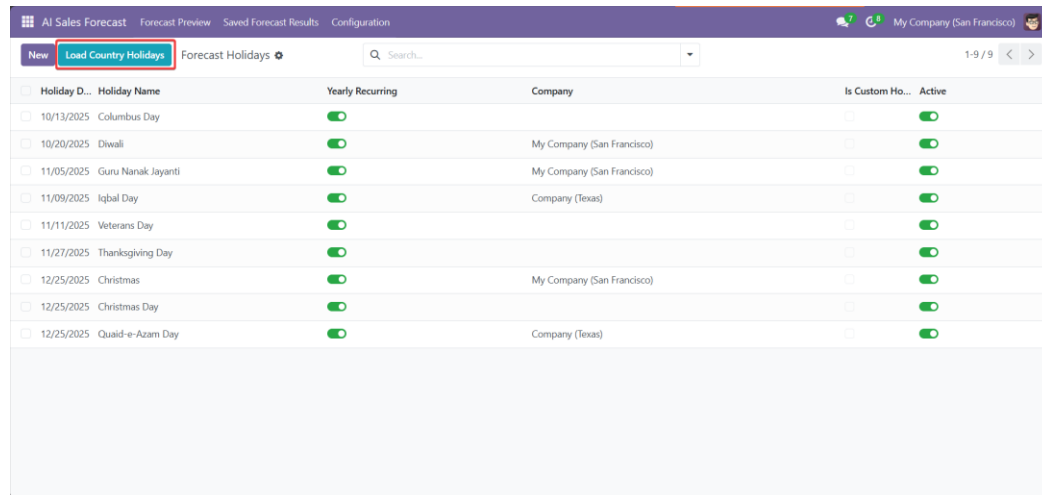


Fig 17: Configurations

#### Adjustable Parameters:

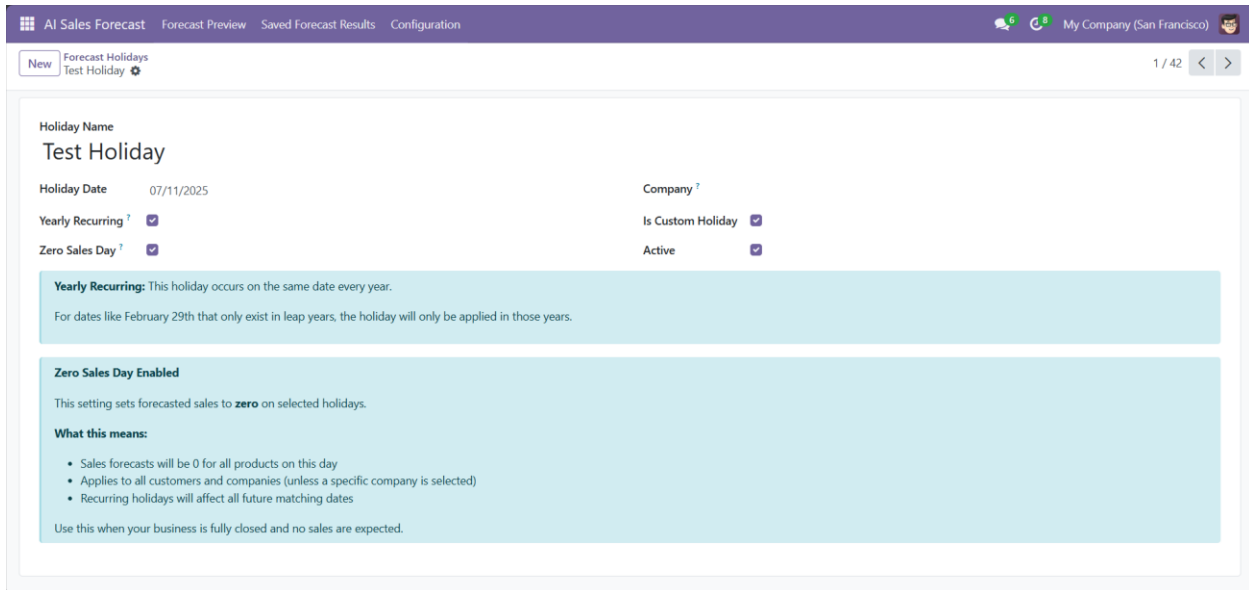
- **Changepoint Prior Scale:**  
Controls how quickly the model adapts to trend changes.
- **Seasonality Prior Scale:**  
Adjusts how strongly the model considers seasonal patterns.
- **Forecast Holidays:**  
Include national holidays or add custom holidays to enhance forecast accuracy.
  - Clicking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



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

*Fig 18: Load Country Holidays*

- 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.



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 page title is 'Forecast Holidays' with a 'New' button and a 'Test Holiday' link. The main form is for 'Test Holiday' and includes the following fields:

- Holiday Name:** Test Holiday
- Holiday Date:** 07/11/2025
- Yearly Recurring:** ☒
- Zero Sales Day:** ☒
- Company:** (empty field with a question mark)
- 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.

*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:

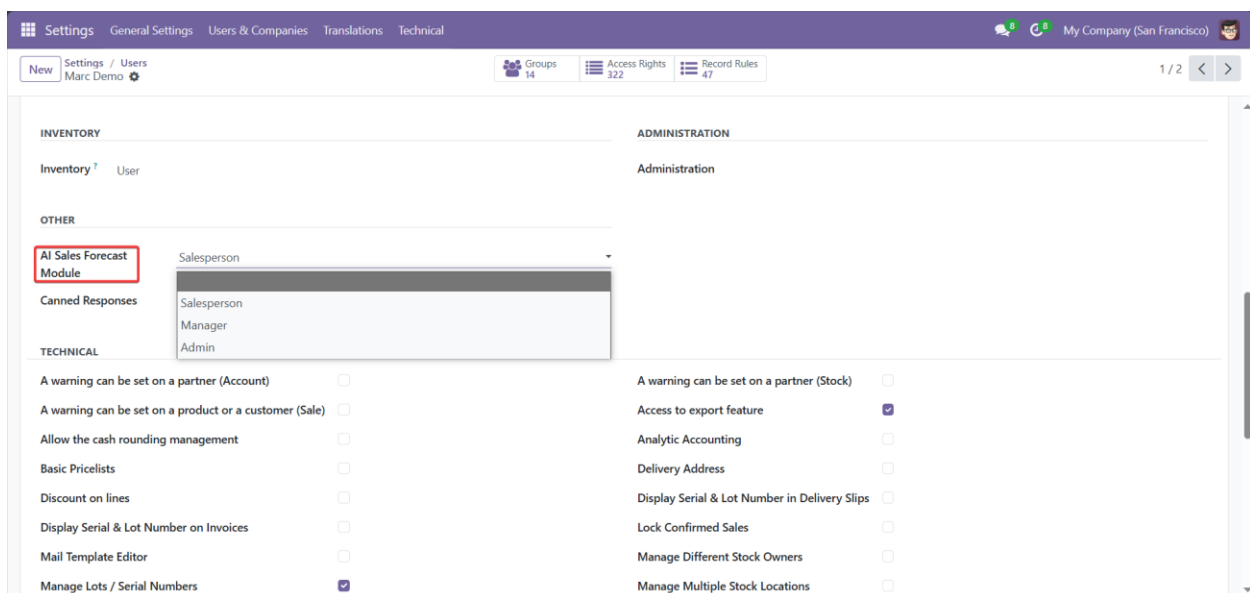
- **Minimum Sales Data:**
  - At least two days of historical sales data is required to generate a forecast.
  - Forecast will not run if data exists for only one day or not at all.
  - The same product must be sold on at least two different dates within the selected date range to generate a valid forecast.
- **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).

- 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



*Fig 20: Access Rights*



## 4. Technical Requirements / Compatibility

- **Technical Requirements:**
  - **Odoo Modules:** base, web, sale
  - **Python Libraries:** prophet, pandas
- **Compatibility**
  - Odoo Community Edition v19.0
  - Odoo Enterprise Edition v19.0

## 5. Changes Log / Release Notes

- Version 1.0.0: December 2025
  - Initial release.

## 6. Support

If you have questions, use our contact form at [webshopextension.com](https://webshopextension.com) or email at [support@webshopextension.com](mailto:support@webshopextension.com).