

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 Edition**. 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

• Al-Driven Forecasting

Leverages AI for accurate and adaptive sales forecasts.

- Flexible Filtering Options Forecast by:
 - Product
 - Product Category



- o 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

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Screenshot 3: Run Forecast Button in List View Header

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Screenshot 4: Run Forecast Button in Pivot View Header

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Screenshot 5: Generate Forecast

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Input Date From ⁷				
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Product Category				
Customer				
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Run Forecast				



Screenshot 6: Loading Screen

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100.00 Input Date From ⁷				- 1	
Input Date To ?				- 1	
Product Category				- 1	
Customer				- 1	
Company					
Run Forecast Cancel					
21.01		X V			
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3.2.1 View Forecast Results

• Overall Forecast appears when no filters are applied

Screenshot 7: Overall Forecast Preview

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• Filtered Forecast appears when any filter is used

AI Sales Forecast Forecast Preview Saved Forecast Results Configuration Forecast Preview (Filtered) Run Forecast Save Forecast Q Search.. • Measures → 🔐 🗠 📽 🛢 💷 🞼 RN 7777] Office Chair 5.00k 4.50k 4.00k 3.50k 3.00k 2.50k 2.00k 1.50k 1.00k 500.00 0.00 24 Jun 2025 25 Jun 2025 26 Jun 2025 27 Jun 2025 28 Jun 2025 29 Jun 2025 30 Jun 2025

Screenshot 8: Filtered Forecast Preview

View Modes:

• List View: Sales quantity and prices by date

Screenshot 9: List View

Forecaste Fo	recasted S Forecas	t 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
06/40/2025	0.00	0 IFLIDNI 00EEI Denune	All / Calaabla / Office Furniture	Camini Frenitran	Vandamaan



- 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

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recast Preview (Filtered) Run Forecast Save	e Forecast	Search
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
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[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)
 - $\circ \quad \text{Date range} \quad$
 - Frequency
 - Associated records

Screenshot 14: All Saved Forecasts

aved Forecast Results	Q Search	*	1-25 / 25 <
YourCompany: Overall Forecast: 2025-06-27 to 2025-07-03	YourCompany: Overall Forecast: 2025-06-27 to 2025-08-08	YourCompany: Overall Forecast: 2025-07-01 to 2026-01-01	YourCompany: Overall Forecast: 2025-07-01 to 2026-07-01
C Day	C Week	S Month	C Quarter
06/27/2025 to 07/03/2025	06/27/2025 to 08/08/2025		
/ourCompany: Overall Forecast: 2026-01-01 to 2031-01-01	YourCompany: Overall Forecast: 2025-06-27 to 2026-11-08	YourCompany: Overall Forecast: 2026-01-01 to 2027-01-01	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-26
C Year	C Day	C Year	C Day
01/01/2026 to 01/01/2031 ✓View	[™] 06/27/2025 to 11/08/2026 [™] View	^m 01/01/2026 to 01/01/2027 [™] View	[™] 06/27/2025 to 07/26/2025 [™] View
My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-08-08	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-08-08	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-08-08	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-03
C Week	C Week	2 Week	C Day
06/27/2025 to 08/08/2025 ✓View		66/27/2025 to 08/08/2025	[™] 06/27/2025 to 07/03/2025 [™] View
My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-03	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-03	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-03	My Company (San Francisco): Overall Forecast: 2025-06-27 to 2025-07-03
C Day	C Day	C Day	C Day
06/27/2025 to 07/03/2025	m 06/27/2025 to 07/03/2025	m 06/27/2025 to 07/03/2025	[≜] 06/27/2025 to 07/03/2025 [▲] View
Pakistan Company: Filtered Forecast: 2025-06-	Pakistan Company: Overall Forecast: 2026-01-	My Company (San Francisco): Overall	Pakistan Company: Filtered Forecast: 2025-06-
27 to 2025-07-03	01 to 2050-01-01	Forecast: 2026-01-01 to 2050-01-01	28 to 2025-07-27

Screenshot 15: Saved Forecasts Individual View

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ed Forecast Results irCompany: Overall F	Forecast: 2025-0	6-27 to 2025-07-03 🏚	View Forecasts 🔀 Export		1/25 <
Name	YourCompany	: Overall Forecast: 2025-06-27 to 2025-07-03			
Forecast Frequency	Daily				
Start Date	06/27/2025				
End Date	07/03/2025				
					1-40 / 112 < >
Forecaste Fore	ecasted S For	recast Product	Category	Customer	Company
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06/27/2025	10,886.30	38 [FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture	Gemini Furniture_	My Company (San Francisco)
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06/27/2025 06/28/2025 06/29/2025 06/30/2025 07/01/2025 07/02/2025	10,886.30 10,886.30 10,886.30 11,172.78 10,886.30 11,172.78	38 [FURN_6667] Acoustic Bloc Screens_ (Wood) 38 [FURN_6667] Acoustic Bloc Screens_ (Wood) 38 [FURN_6667] Acoustic Bloc Screens_ (Wood) 39 [FURN_6667] Acoustic Bloc Screens_ (Wood) 38 [FURN_6667] Acoustic Bloc Screens_ (Wood) 38 [FURN_6667] Acoustic Bloc Screens_ (Wood) 39 [FURN_6667] Acoustic Bloc Screens_ (Wood) 39 [FURN_6667] Acoustic Bloc Screens_ (Wood)	All / Saleable / Office Furniture All / Saleable / Office Furniture	Gemini Furniture_ Gemini Furniture_ Gemini Furniture_ Gemini Furniture_ Gemini Furniture_	My Company (San Francisco) 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

III AI Sales Forecast Forecast Preview Saved Forecast Results Configuration		🕵 7 🕑 4 France 😽
Saved Forecast Results My Company (San Francisco): Overall Forecast: 2025-07-04 to 🏘	View Forecasts Export	2/3 < >



3.3 Configurations:

Go to: AI Sales Forecast > Configuration > Settings.

Screenshot 17: Configurations

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18.00k	8	8			8	
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2.00k	•	•	•	•	•	
24 Jun 2025	25 Jun 2025	26 Jun 2025	27 Jun 2025	28 Jun 2025	29 Jun 2025	30 Jun 202

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

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Yearly Recurring	Company	Is Custom Ho Active
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- 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

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New Forecast Holidays Test Holiday 🕏		1/42 < >
Holiday Name		
Test Holiday		
Holiday Date 07/11/2025	Company ?	
Yearly Recurring 7	Is Custom Holiday 🛛 🗹	
Zero Sales Day ?	Active 🕑	
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.		
ose uns when your ousiness is runy crosed 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

III Settings General Settings Users & Companies Translations Technical					髨 🛃 My Company (San Franci:	sco) 🧧
New Settings / Users Marc Demo 🏟		Groups 14 H Access Rights 122 47 47			1/2	< >
INVENTORY			ADMINISTRATION			-
Inventory ? User			Administration			
OTHER						
Al Sales Forecast Module		•				
Canned Responses Salesperson Manager						
TECHNICAL						- 1
A warning can be set on a partner (Account)			A warning can be set on a partner (Stock)			- 1
A warning can be set on a product or a customer (Sale)			Access to export feature			- 1
Allow the cash rounding management			Analytic Accounting			
Basic Pricelists			Delivery Address			
Discount on lines			Display Serial & Lot Number in Delivery Slips			
Display Serial & Lot Number on Invoices			Lock Confirmed Sales			
Mail Template Editor			Manage Different Stock Owners			
Manage Lots / Serial Numbers			Manage Multiple Stock Locations			-



4. Technical Requirements / Compatible With:

- Technical Requirements:
 - Odoo base, web, sale
 - Python prophet, pandas
- **Compatibility**: Odoo Community 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 <u>webshopextension.com</u> or email at <u>support@webshopextension.com</u>.