



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**

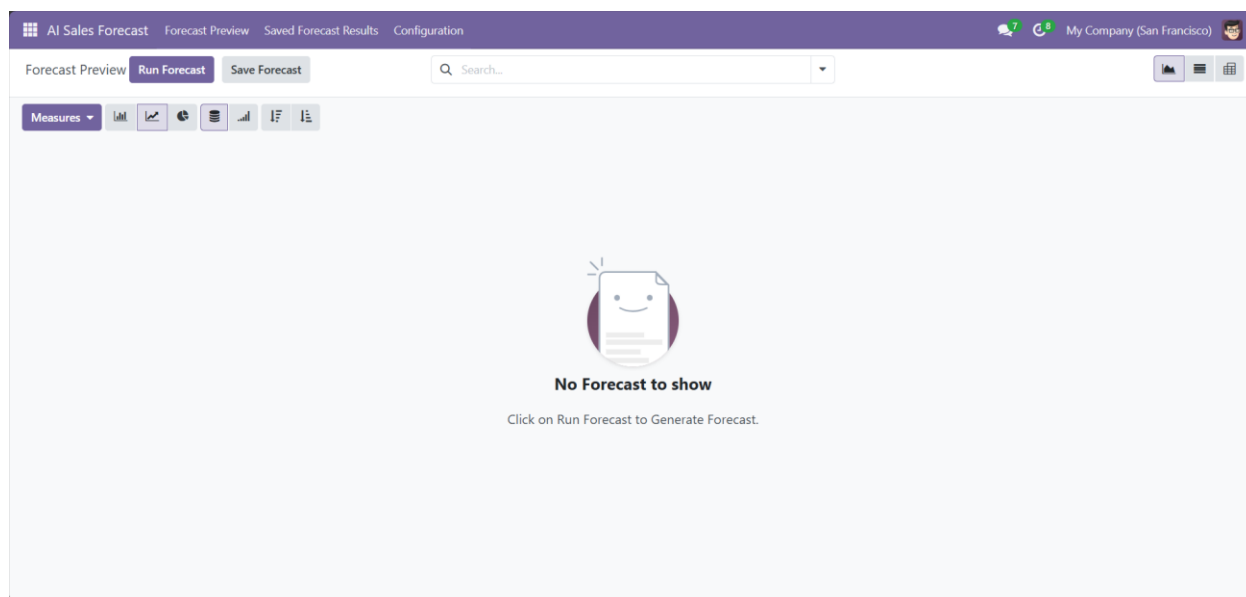
Store results for later comparison, reuse, or auditing, with support for exporting saved data for external analysis or record-keeping.

3. Working

3.1 Navigate to the Module

Go to AI Sales Forecast in the Odoo menu.

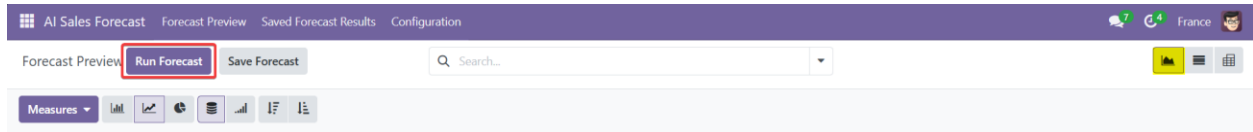
Screenshot 1: Landing Page



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**.

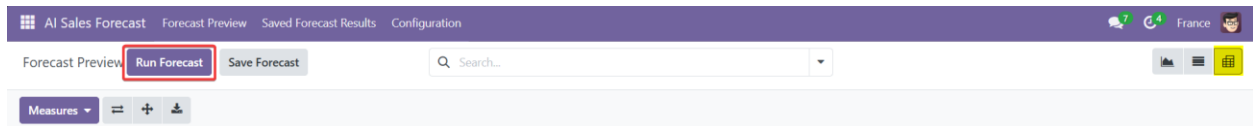
Screenshot 2: Run Forecast Button in Graph View Header



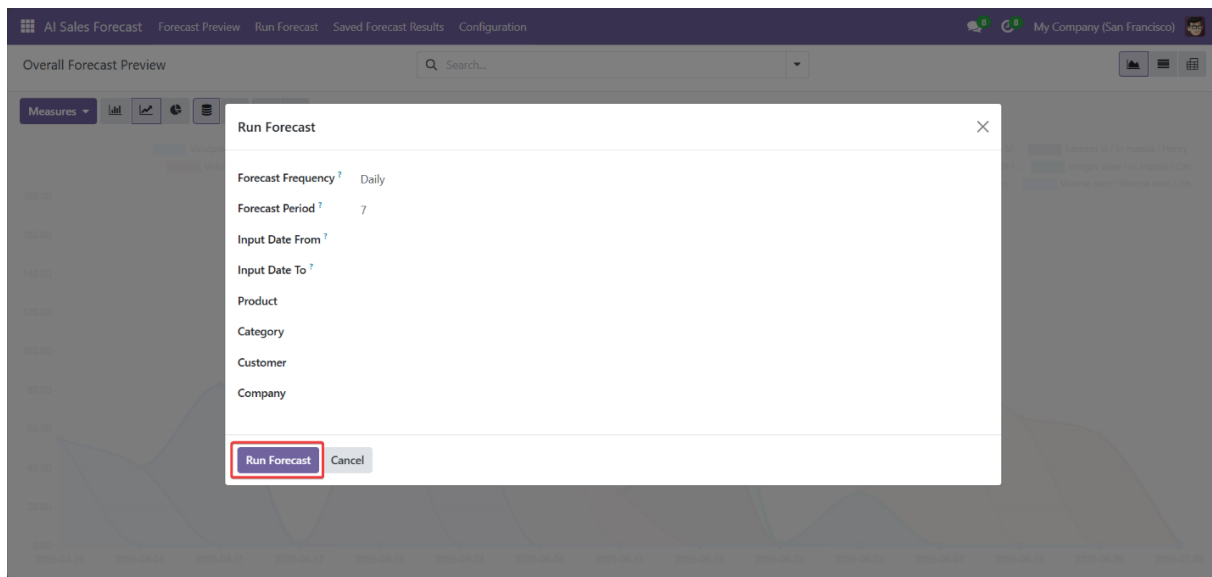
Screenshot 3: Run Forecast Button in List View Header



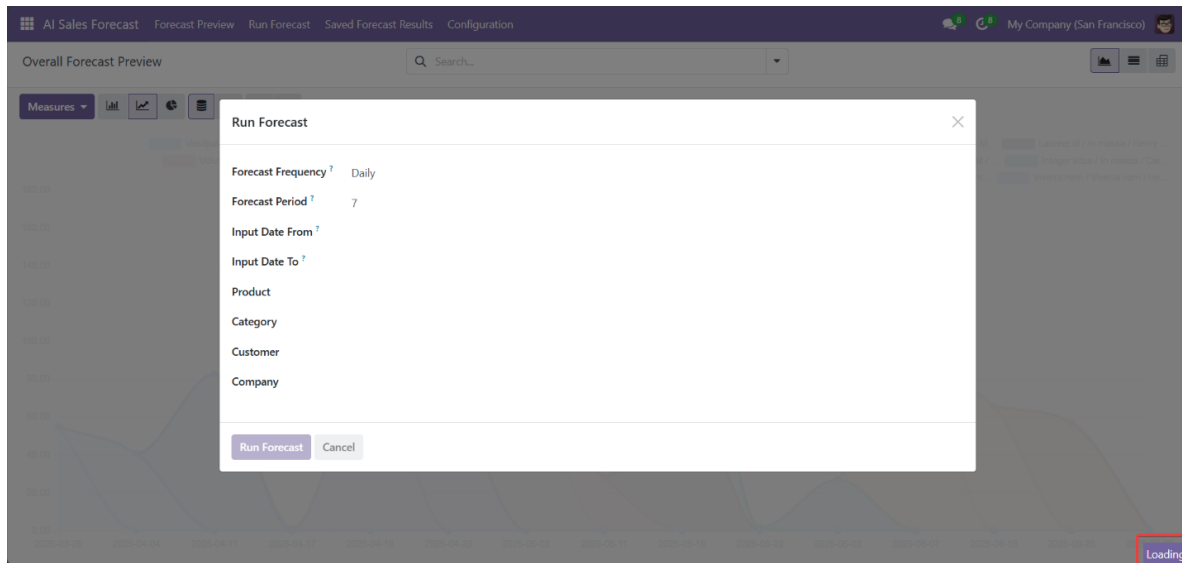
Screenshot 4: Run Forecast Button in Pivot View Header



Screenshot 5: Generate Forecast



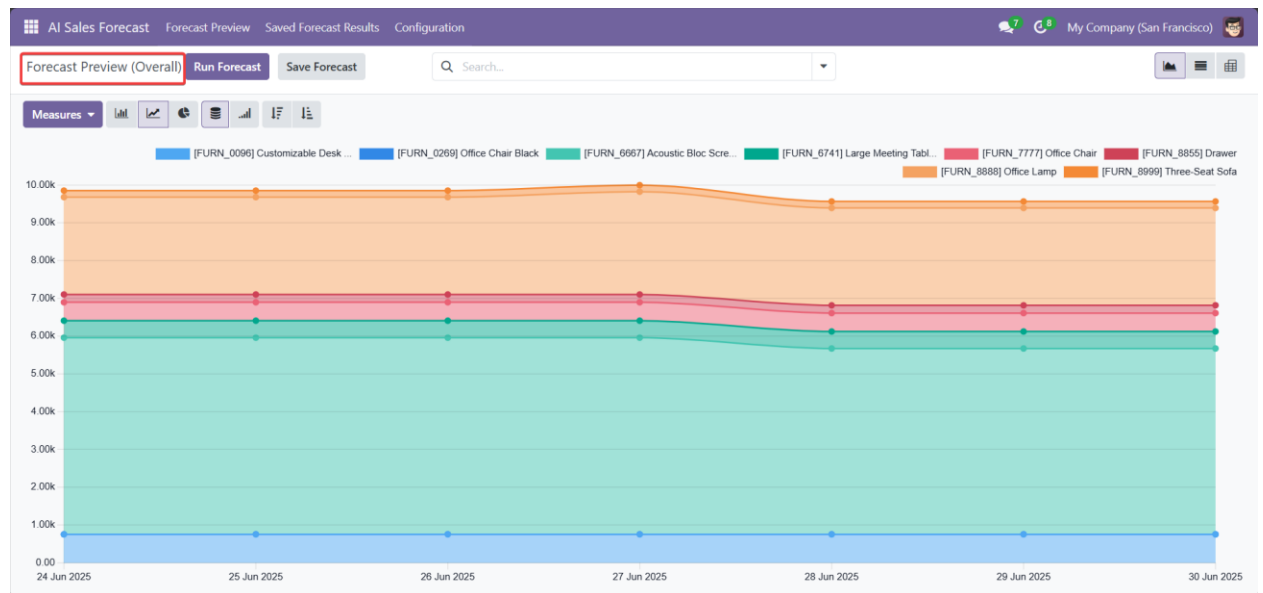
Screenshot 6: Loading Screen



3.2.1 View Forecast Results

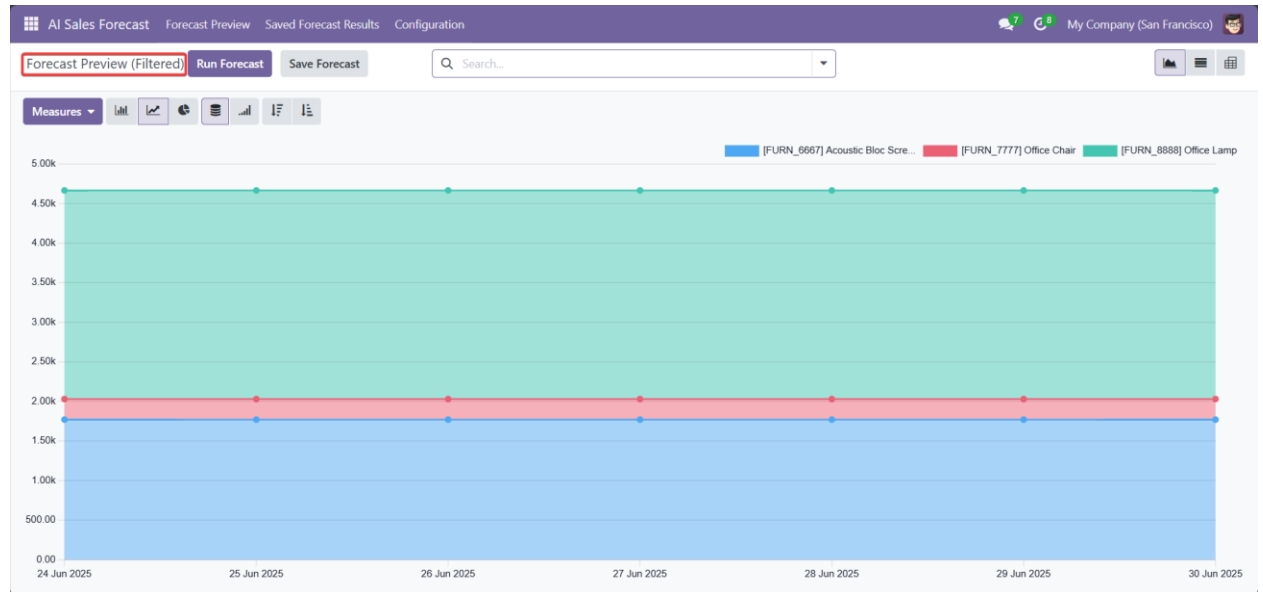
- Overall Forecast appears when no filters are applied

Screenshot 7: Overall Forecast Preview



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

Screenshot 8: Filtered Forecast Preview



View Modes:

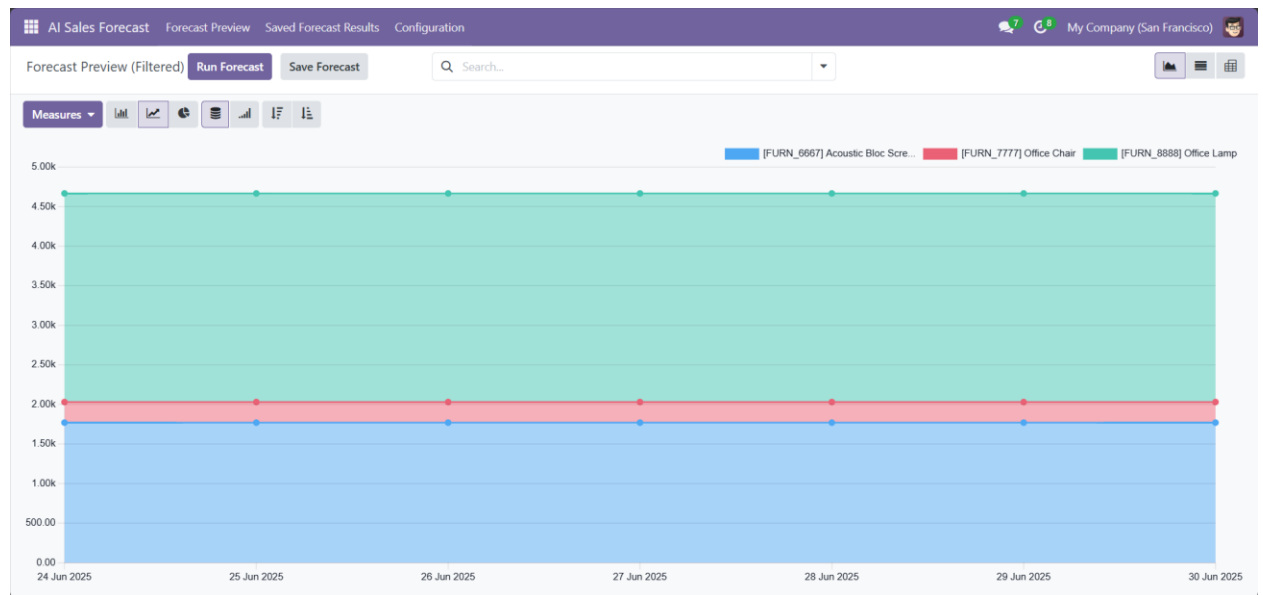
- **List View:** Sales quantity and prices by date

Screenshot 9: List View

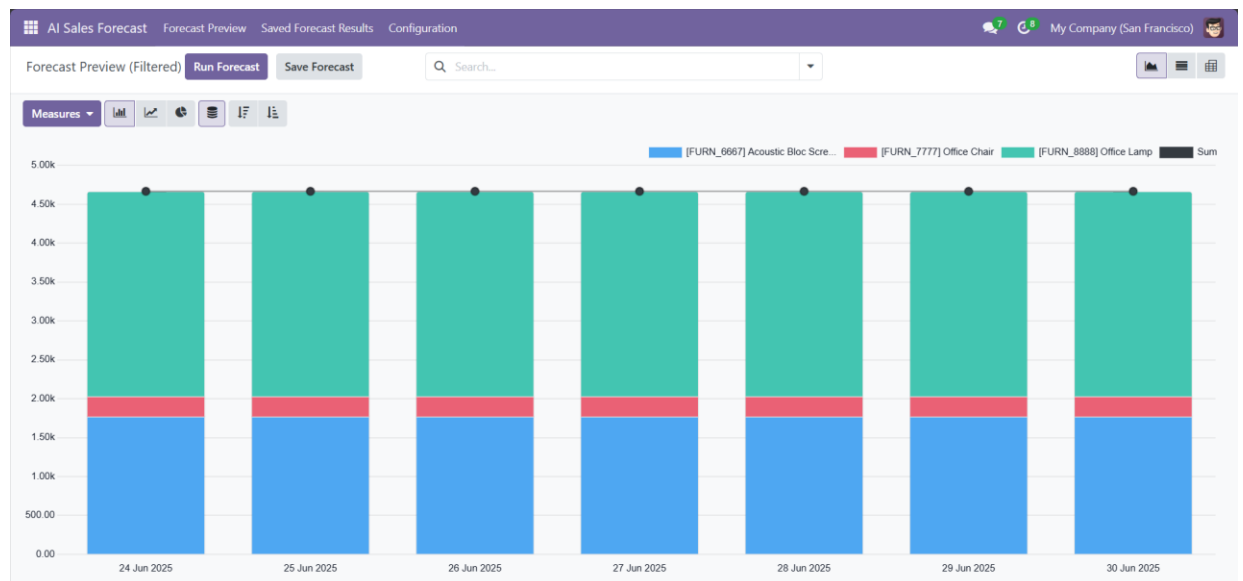
<input type="checkbox"/> Forecaste...	Forecasted S...	Forecast...	Product	Product Category	Customer	Company
<input type="checkbox"/> 06/18/2025	262.97	2	[FURN_0269] Office Chair Black	All / Saleable / Office Furniture	Gemini Furniture	YourCompany
<input type="checkbox"/> 06/19/2025	262.98	2	[FURN_0269] 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

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

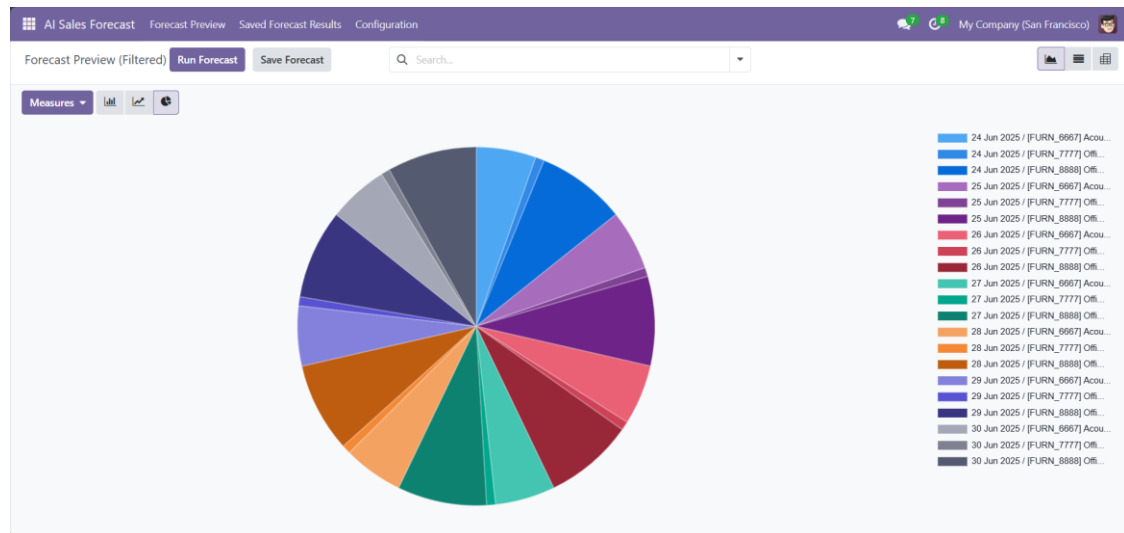
Screenshot 10: Line Chart



Screenshot 11: Bar Chart

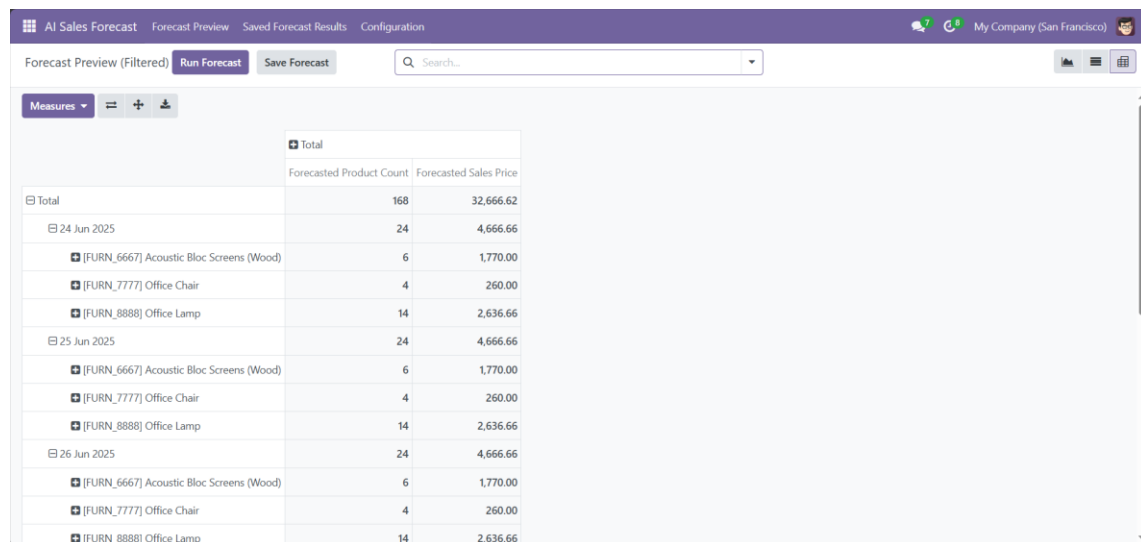


Screenshot 12: Pie Chart



- 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

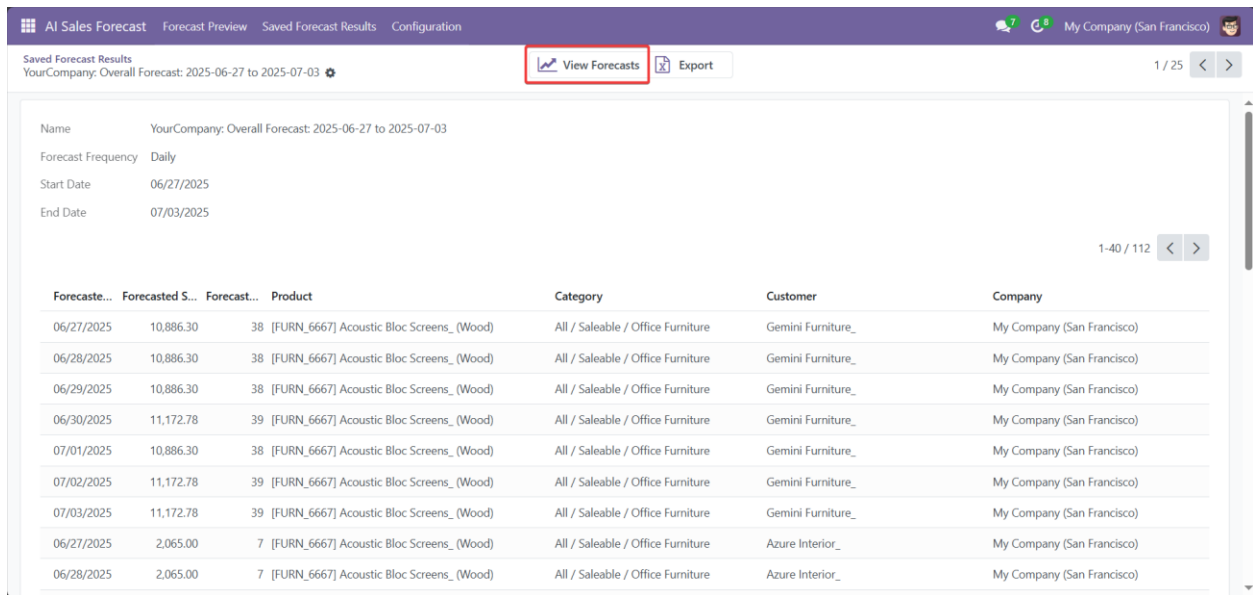
3.2.2 Save Forecast

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 <input type="text" value="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>

Screenshot 15: Saved Forecasts Individual View



AI Sales Forecast Forecast Preview Saved Forecast Results Configuration

Saved Forecast Results
YourCompany: Overall Forecast: 2025-06-27 to 2025-07-03

View Forecasts Export

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Name YourCompany: Overall Forecast: 2025-06-27 to 2025-07-03

Forecast Frequency Daily

Start Date 06/27/2025

End Date 07/03/2025

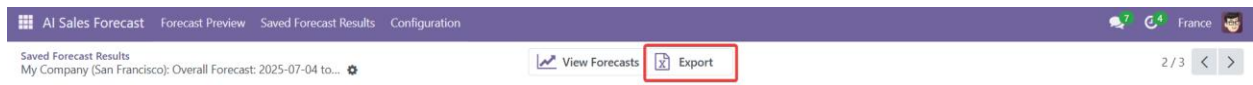
1-40 / 112

Forecaste...	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



AI Sales Forecast Forecast Preview Saved Forecast Results Configuration

Saved Forecast Results
My Company (San Francisco): Overall Forecast: 2025-07-04 to...

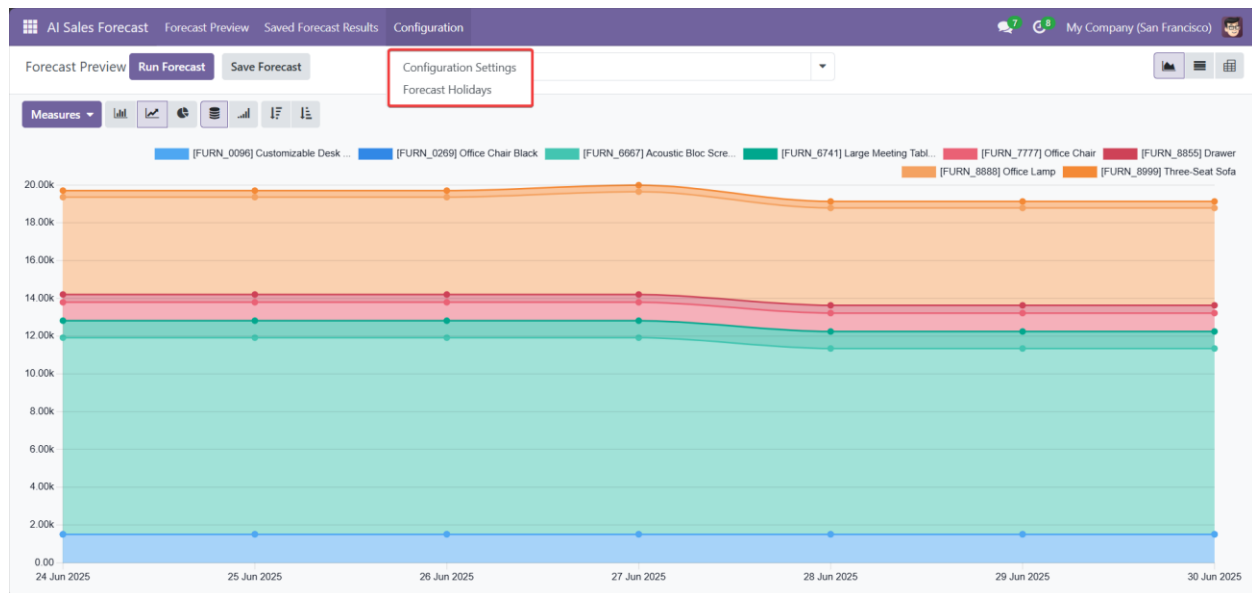
View Forecasts Export

2 / 3

3.3 Configurations:

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

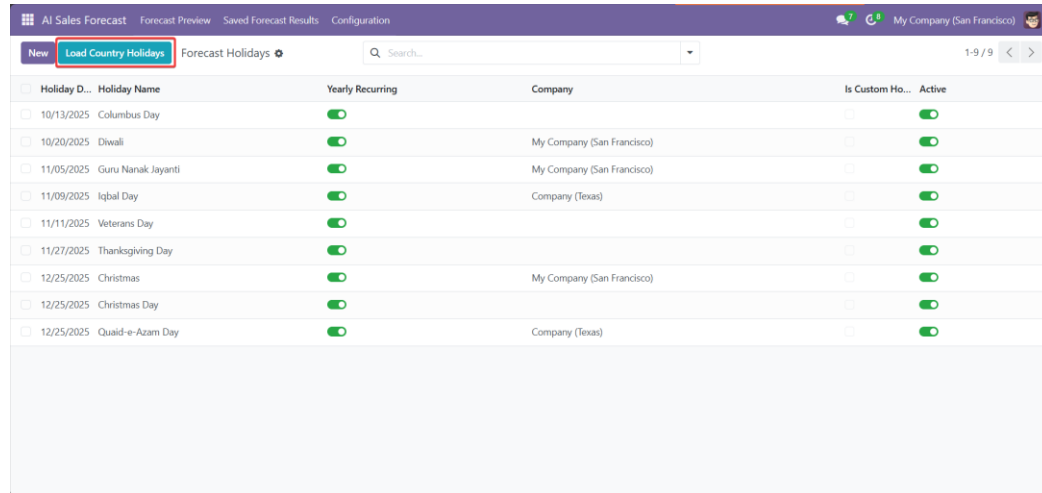
Screenshot 17: Configurations



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.

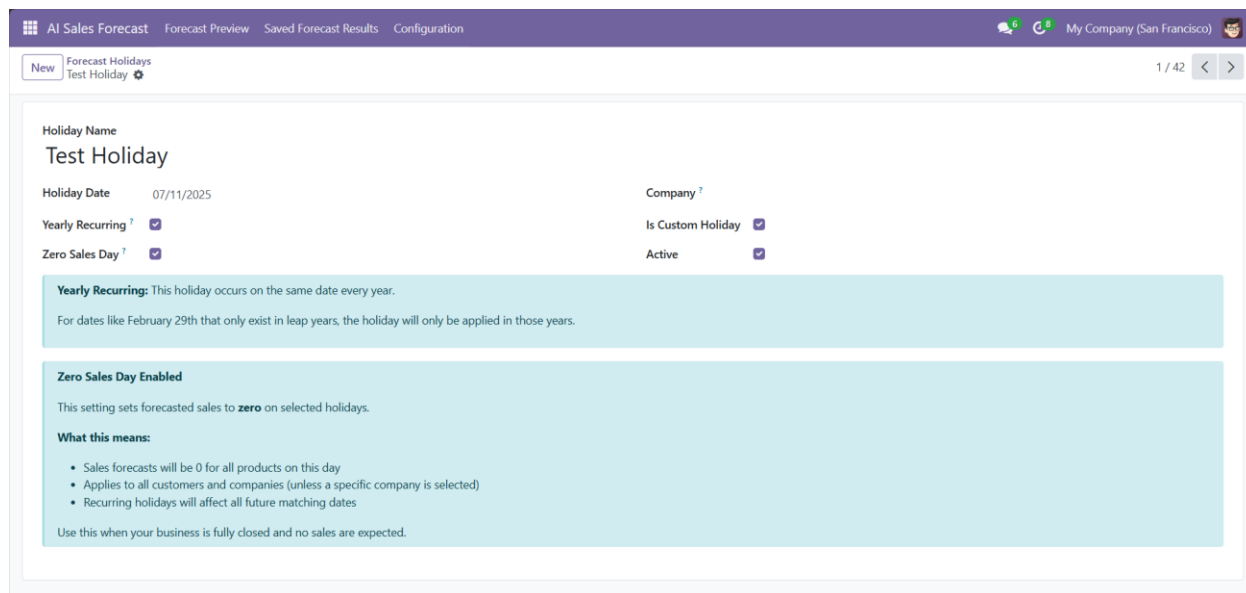
Screenshot 18: Load Country Holidays



Holiday D...	Holiday Name	Yearly Recurring	Company	Is Custom Ho...	Active
10/13/2025	Columbus Day	<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"/>

- 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 page title is 'Forecast Holidays' with a 'New' button and a 'Test Holiday' link. The main form contains 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:**

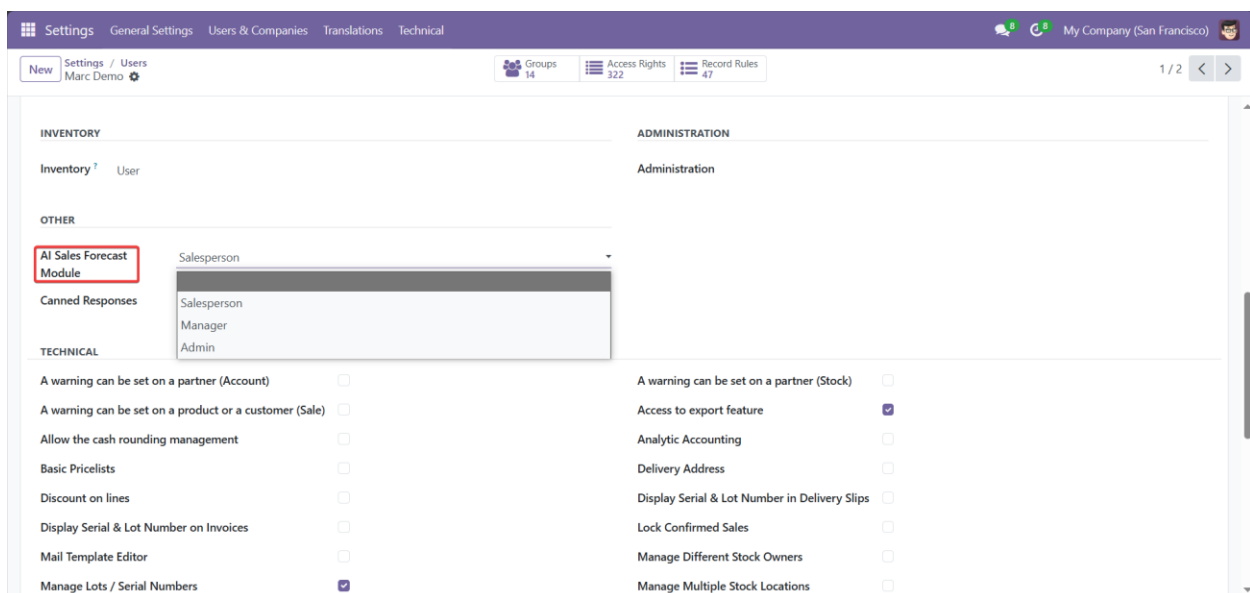
- Daily, Weekly, Monthly, and Yearly forecasts depending on the available data and configuration.

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 & Compatibility

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

5. Changes Log / Release Notes

- Version 1.0.1: December 2025
 - User experience improvements and performance optimizations.
- 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.