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:

  o Product

  o Product Category

- o Customer

- o Company

- o Input Date Range (From & To): Sales Orders considered for forecasting

- o Forecast Date Range (Start & End): Forecasted Sales Period

- **Default Time Range: Used when no Input Date Range is specified**

  - o Daily: 60 days

  - o Weekly: 12 weeks

  - o Monthly: 12 months

  - o Quarterly: 24 months

  - o 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
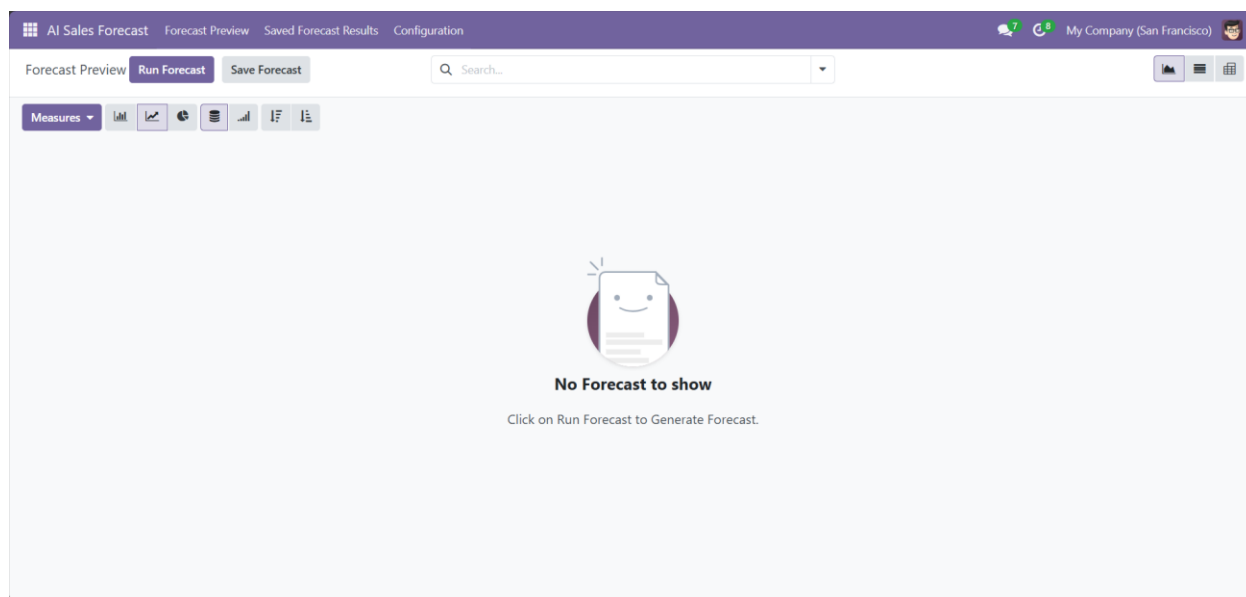
3.2 Generating Forecast

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.
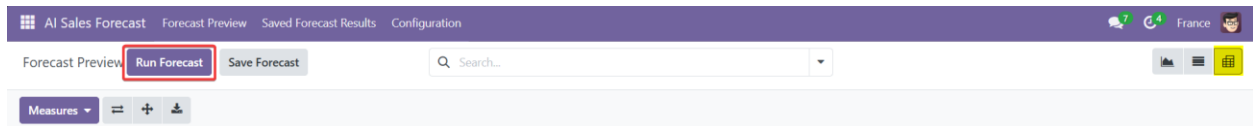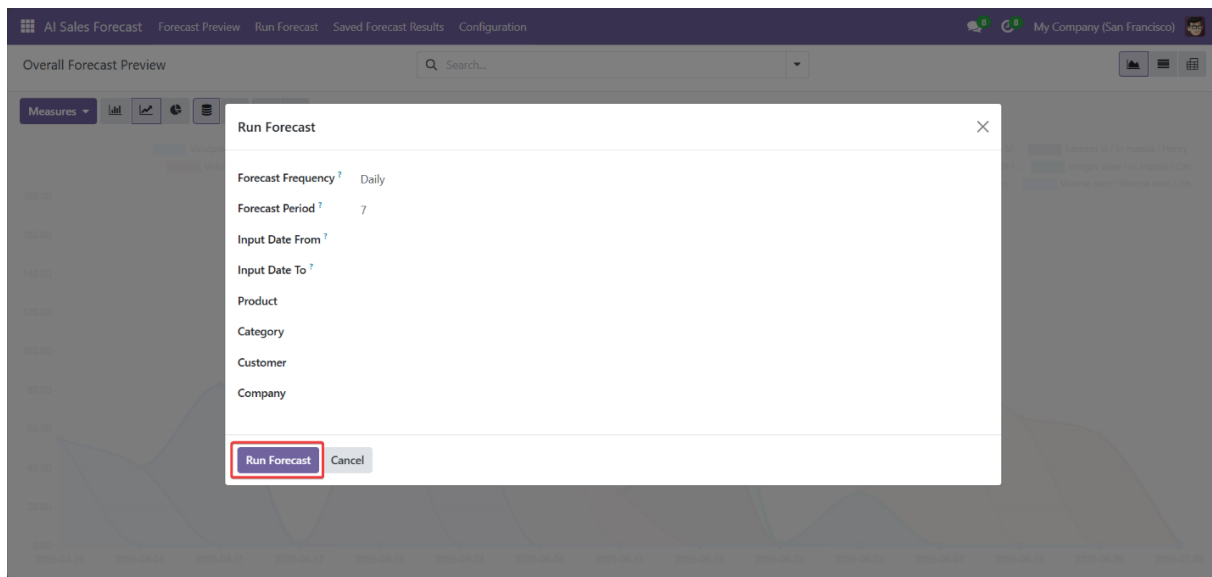5. Click **Run Forecast.**

Screenshot 2: Run Forecast Button in Graph View Header
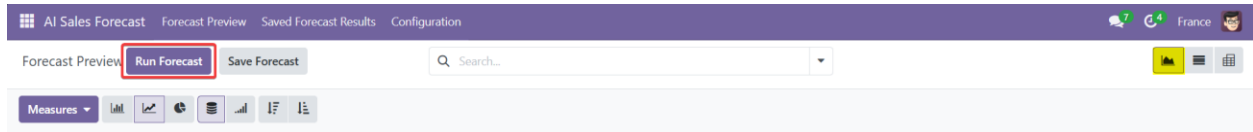
Screenshot 3: Run Forecast Button in List View Header

Screenshot 4: Run Forecast Button in Pivot View Header

Screenshot 5: Generate Forecast

Screenshot 6: Loading Screen
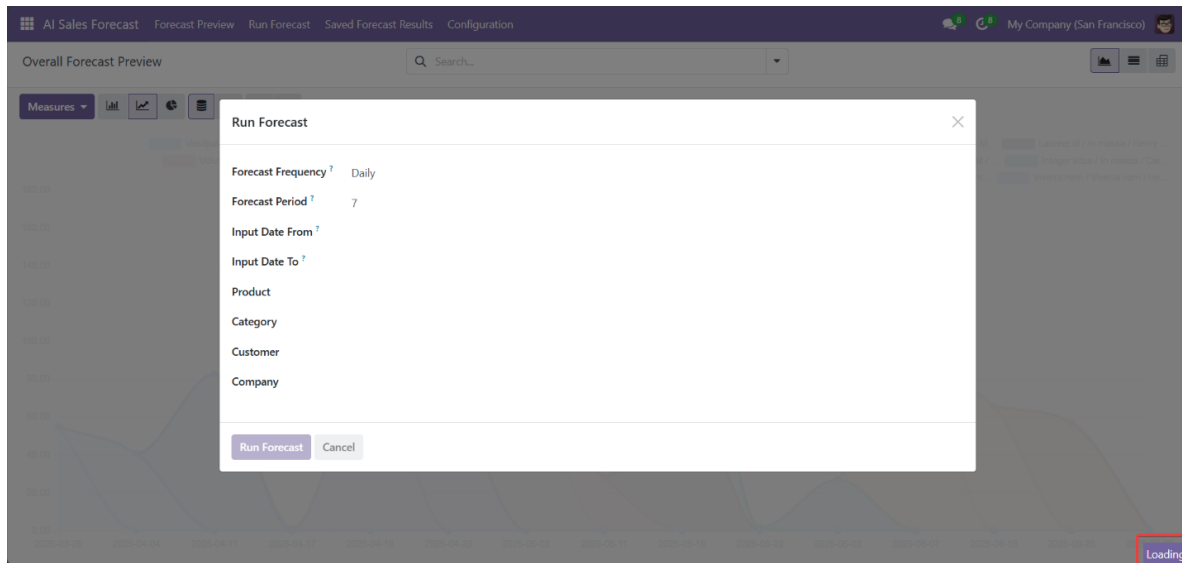
3.2.1 View Forecast Results

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

Screenshot 7: Overall Forecast Preview
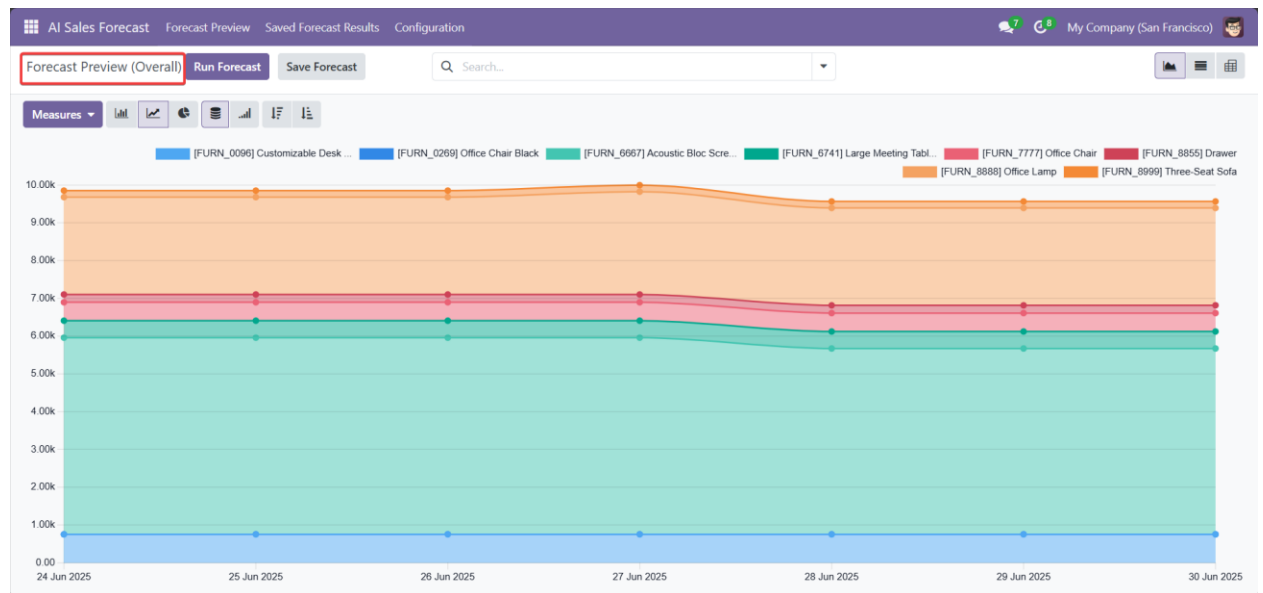
- **Filtered Forecast** appears when any filter is used

Screenshot 8: Filtered Forecast Preview
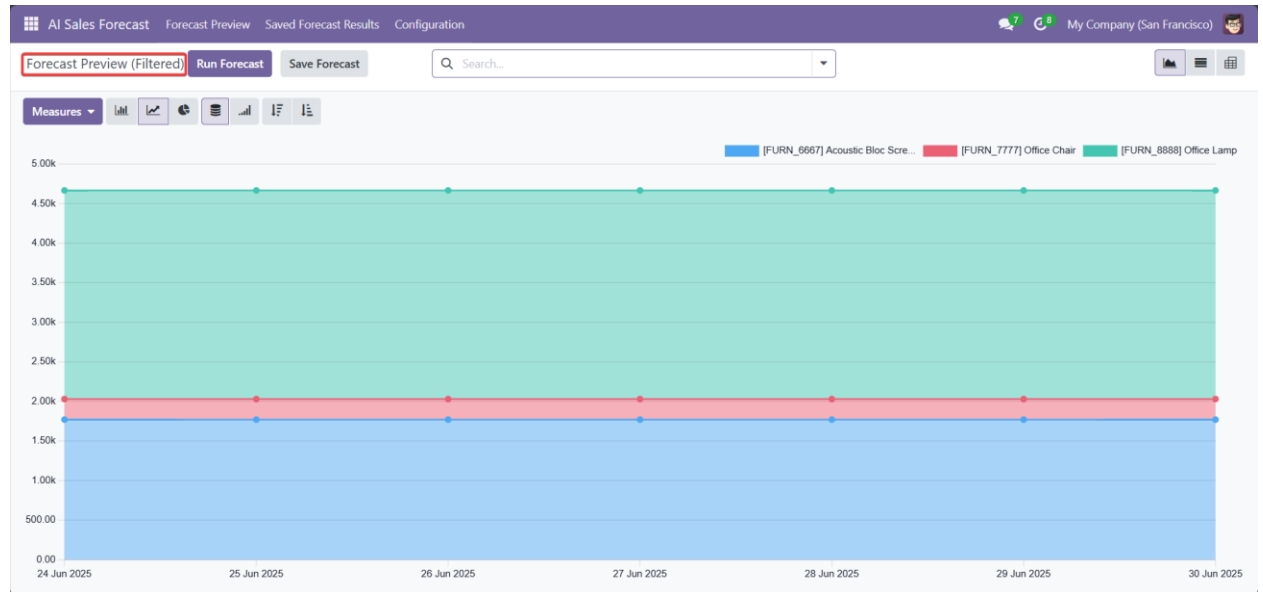
View Modes:

- **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
06/18/2025	0.00	0	[FURN_8855] Drawer	All / Saleable / Office Furniture	Gemini Furniture	YourCompany

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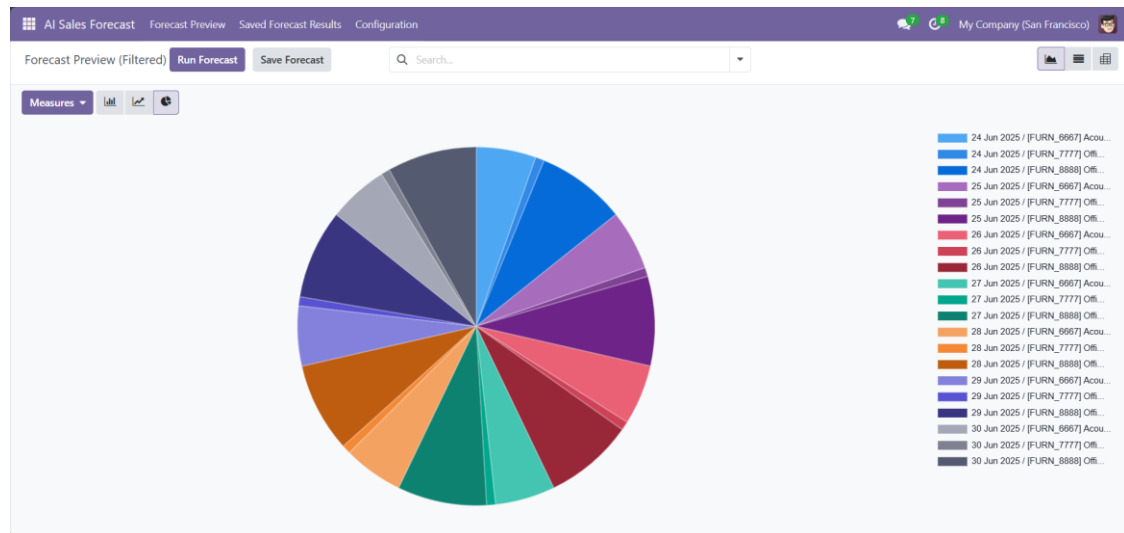 - Line Charts
  - Bar Charts
  - Pie Charts

Screenshot 10: Line Chart
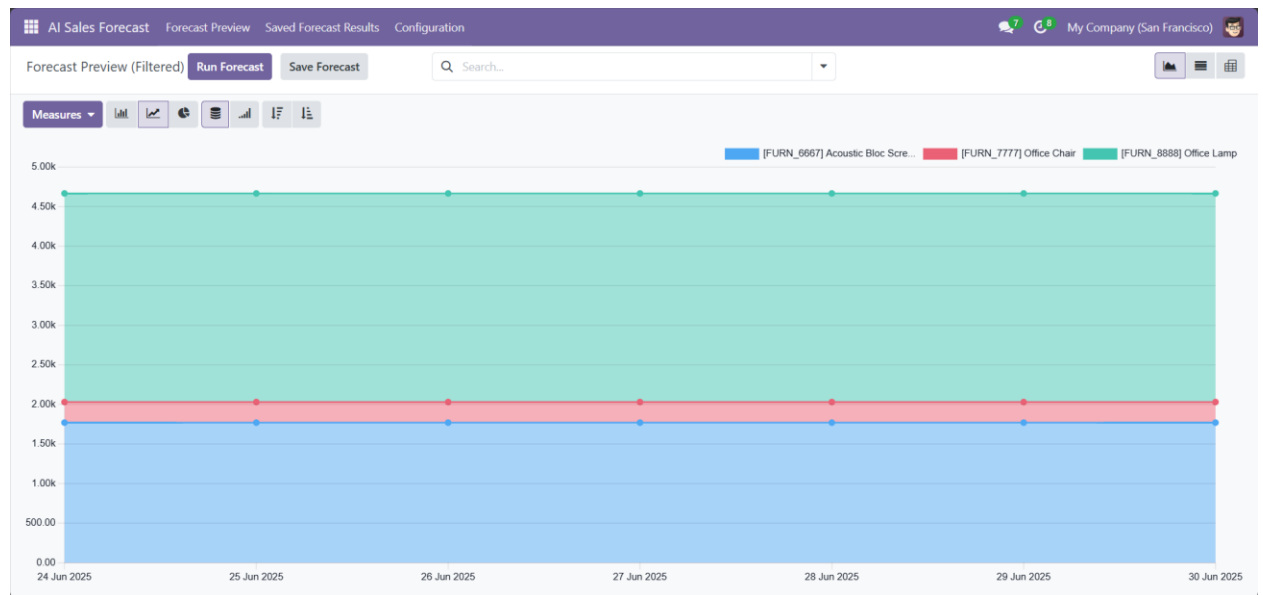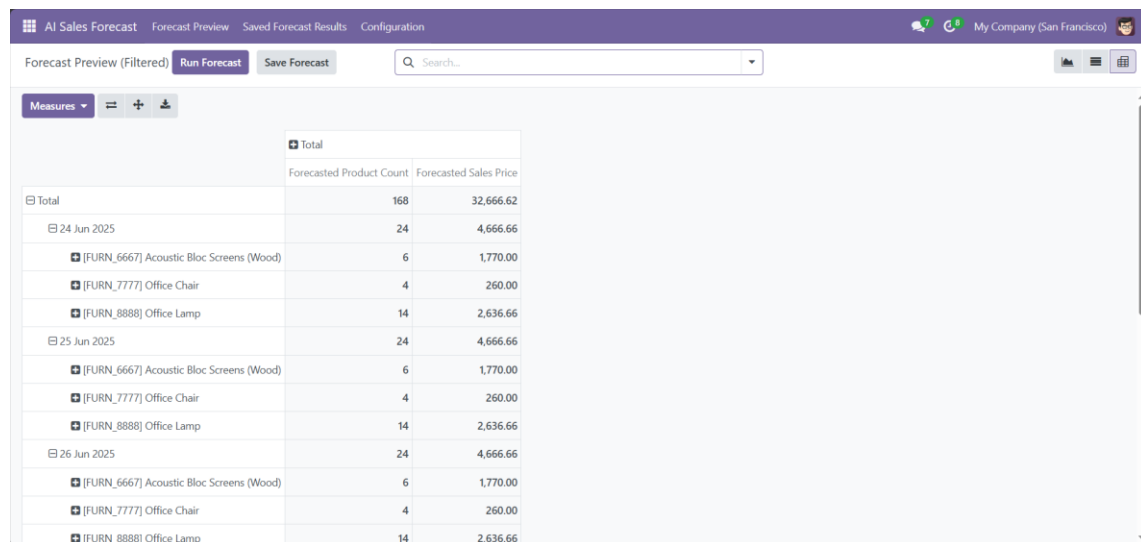

Screenshot 11: Bar Chart
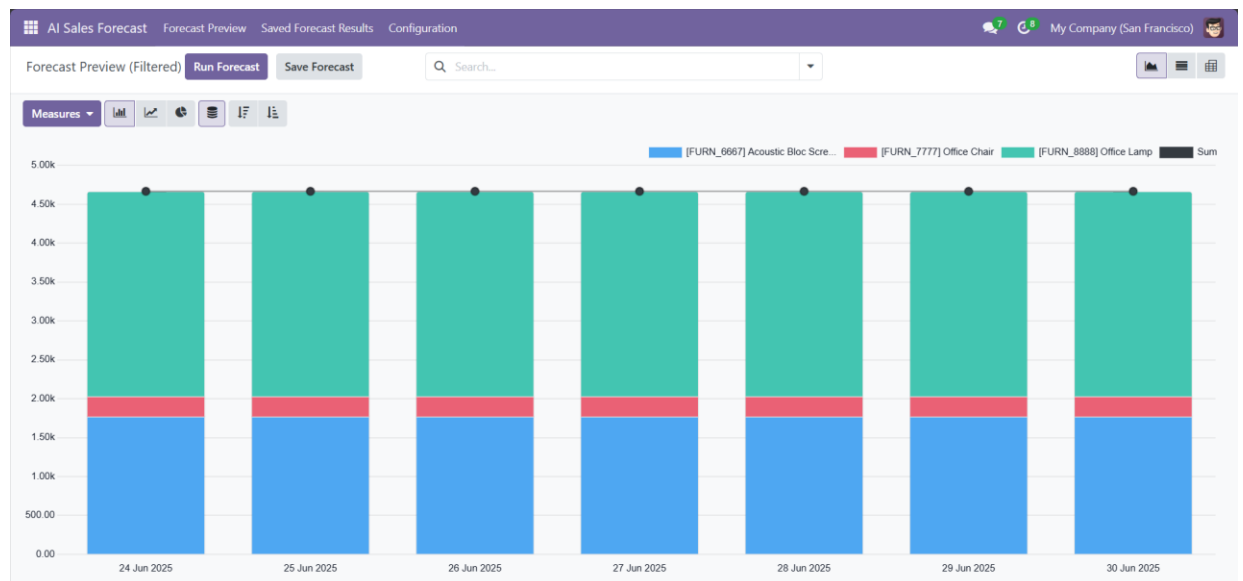
Screenshot 12: Pie Chart

- **Pivot View:**

  Break down data by product, customer, or category.

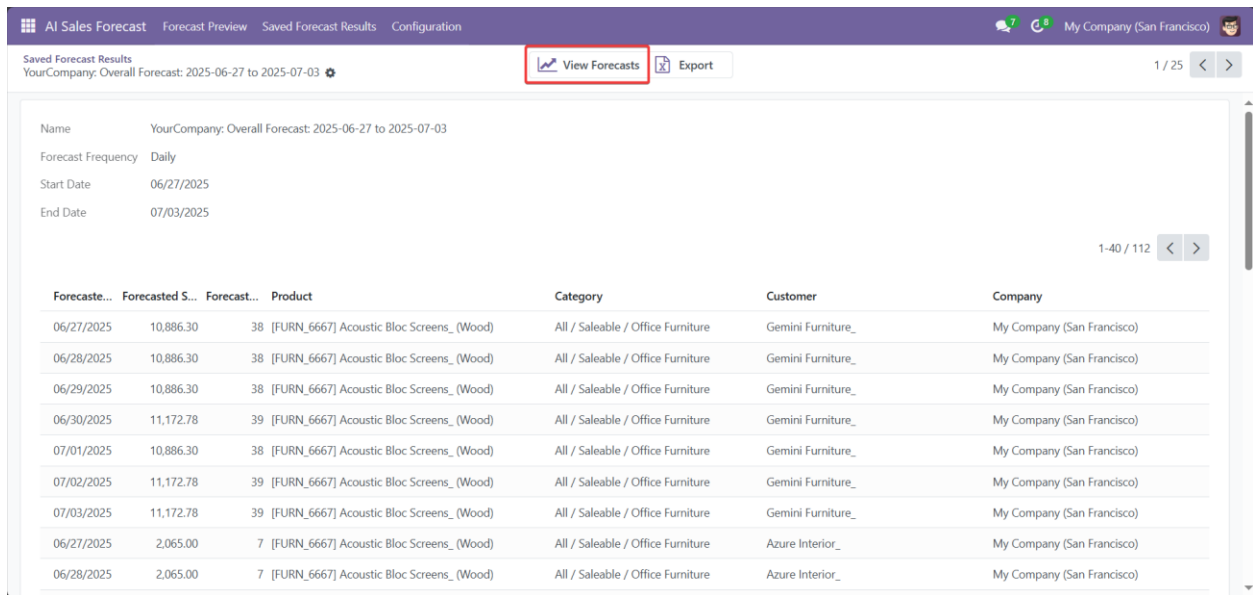*Screenshot 13: Pivot View*

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

Screenshot 14: All Saved Forecasts

Screenshot 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

Screenshot 16: Export Results feature
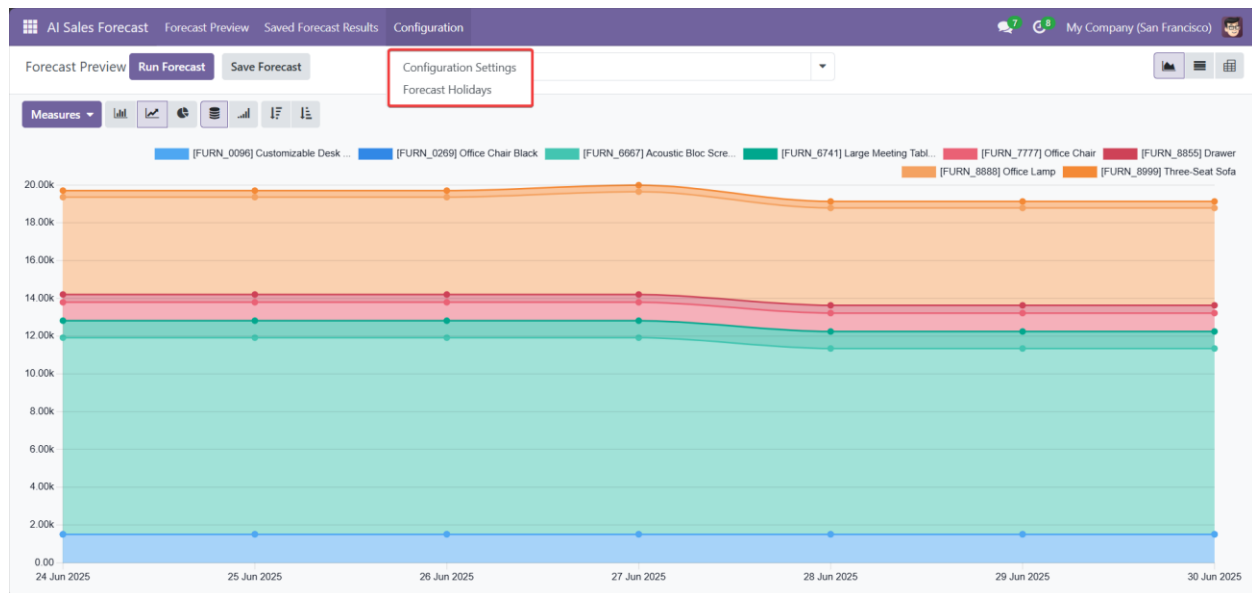
3.3 Configurations:

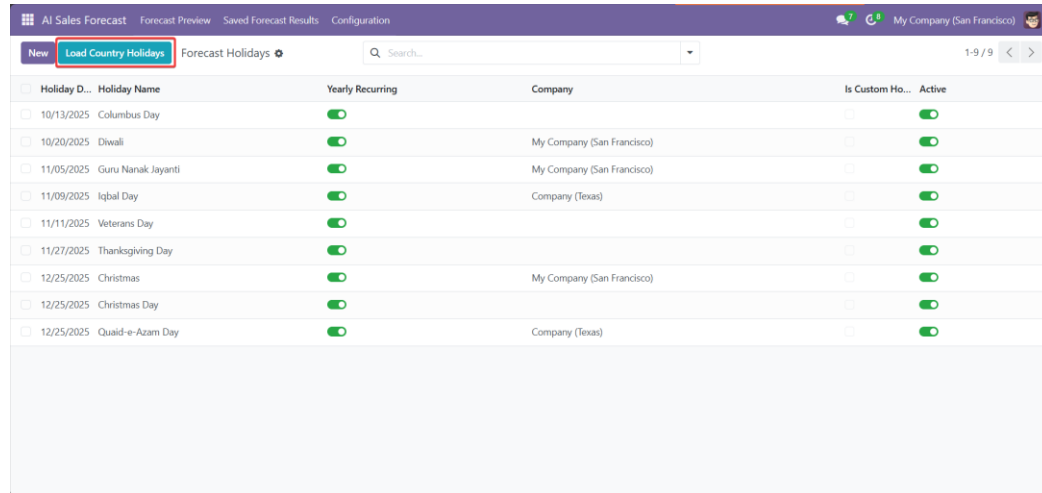Go to: **AI Sales Forecast > Configuration > Settings.**

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.
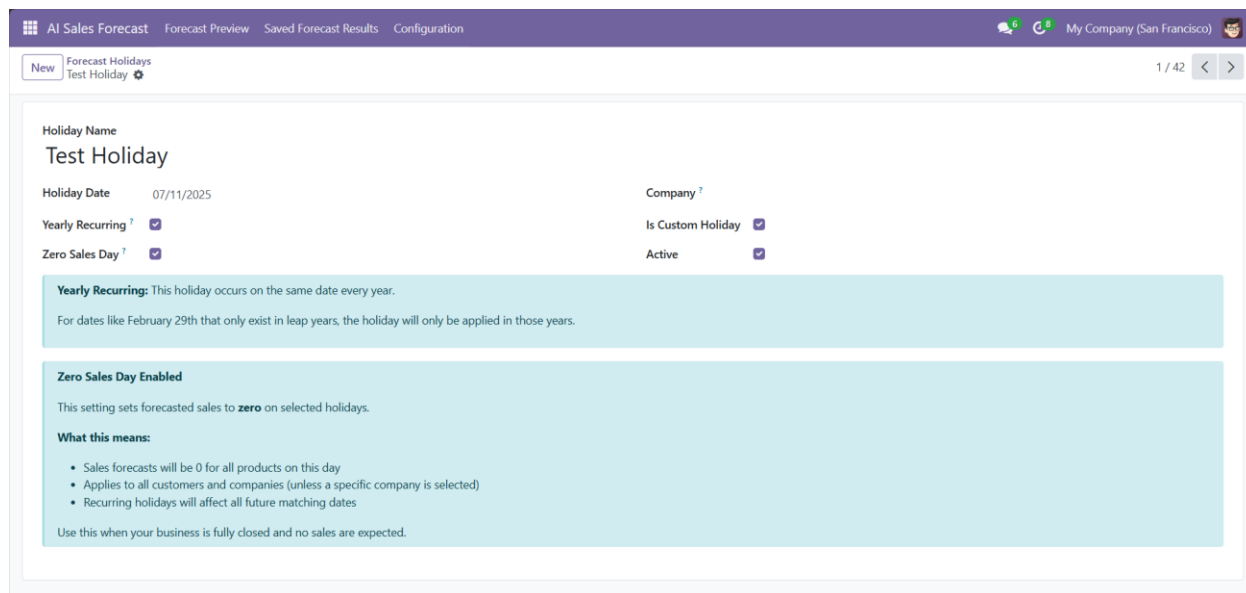
Screenshot 18: Load Country Holidays

- 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.

Screenshot 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:**
  - 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

Screenshot 20: Access Rights
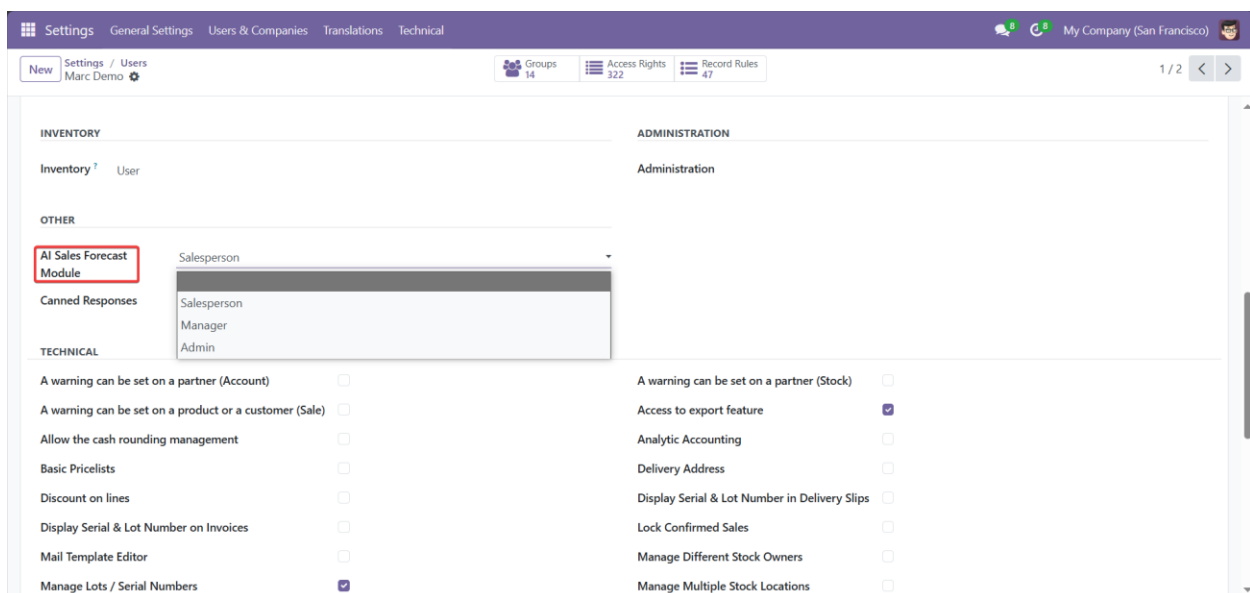
4. Technical Requirements & Compatibility

- **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.