



# Stock Shortage Calendar User Training

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Use the calendar to identify upcoming stock shortages, inspect their causes and keep the next follow-up with an owner. Start with a warehouse your team knows. Check the current forecast before making an operational decision.

This guide covers the 1.3.1 module series for Odoo 17, 18, 19 and 20, in Community and Enterprise. Follow the labels in your installed version. The worked example uses a training warehouse and sample transactions.

## Prepare your training session

Ask your administrator to install the matching Stock Shortage Calendar package and Inventory. Your account needs Inventory user access. Existing company, warehouse, product and source-document permissions continue to apply.

Practise in a training database. Ask the administrator to prepare the sample stock and confirmed transactions in the exercise below. Keep the same warehouse and UTC date basis throughout the exercise.

The module requires hosting that permits Python modules. Your administrator should check the hosting and supported-version terms before installation.

## Open a calendar review

1. Open **Inventory**, then **Stock Shortage Calendar**.
2. Check the active company in Odoo's company menu.
3. Choose the required **Warehouse**.
4. Enter a product name or reference in **Find products** and click **Search**.
5. Expand **Products** and select the products to review. The calendar selection supports up to 100 active stock-tracked products.
6. Choose a **Horizon** of 7, 14 or 31 days.
7. Click **Refresh calendar**. Check the company, warehouse, units and UTC dates above the results.

A zero quantity is a zero balance. A negative quantity marks a forecast shortage. Use horizontal scrolling to inspect dates beyond the visible columns. Daily balances describe the native forecast at the displayed dates. Customer allocation and availability within a day require a separate operational review.

## Prioritise the shortages

1. Open the **Shortage worklist** below the review controls.
2. Read **First shortage**, **Worst deficit**, **Days below zero** and **First recovery** for the product.

3. Use **Sort shortages** to order by first date, duration or product name.
4. Choose the item that needs a decision. A recovery date reflects the supply and demand currently recorded in Odoo.

| Shortage worklist                                       |               |                 |                |            |            |            |            |            |                  |
|---------------------------------------------------------|---------------|-----------------|----------------|------------|------------|------------|------------|------------|------------------|
| Sort shortages                                          |               |                 |                |            |            |            |            |            |                  |
| First shortage date ▾                                   |               |                 |                |            |            |            |            |            |                  |
| [UAT-WHOLESALE] UAT Wholesale Service Kit               |               |                 |                |            |            |            |            |            | Explain shortage |
| First shortage                                          | Worst deficit | Days below zero | First recovery |            |            |            |            |            |                  |
| 2026-11-01                                              | 2 Units       | 2               | 2026-11-03     |            |            |            |            |            |                  |
| Product                                                 | Unit          | First shortage  | 2026-10-30     | 2026-10-31 | 2026-11-01 | 2026-11-02 | 2026-11-03 | 2026-11-04 | 2026-11-05       |
| [UAT-WHOLESALE] UAT Wholesale Service Kit               | Units         | 2026-11-01      | 10             | 10         | -2         | -2         | 3          | 3          | 3                |
| Daily forecast quantities and first shortage dates, UTC |               |                 |                |            |            |            |            |            |                  |

Fig. 1: The practice item falls to minus two before its receipt arrives. Scroll the calendar horizontally when the remaining dates extend beyond the screen.

## Explain the quantity

1. Click **Explain shortage** on the worklist item.
2. Choose the **Explain date (UTC)**.
3. Check **Opening forecast balance**, **Scheduled receipts**, **Scheduled deliveries** and **Closing forecast balance**.
4. Confirm that opening plus receipts less deliveries equals closing.
5. Read the listed movements. Open a source movement to inspect the native receipt, delivery or movement form, then return to the calendar.
6. Refresh after another user changes an operational record.

Source visibility follows your current access. A truncated movement list shows its limit on screen. The native totals may include movements beyond the visible list, so use the displayed totals when reconciling the balance.

## Save the products you review regularly

1. Select the products for your regular review.
2. Click **Save my watchlist**.
3. Change the selection for another task.
4. Click **Restore my watchlist** when you return, then refresh the calendar.

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The watchlist belongs to your user and active company. Check the warehouse and horizon again after switching work context.

## Compare with a previous review

1. Complete a current calendar review and click **Save review baseline**.
2. When supply or demand changes, click **Refresh calendar**.
3. Expand **Review selected products** under **Changes and follow-up**.
4. Read the change status and number of comparable dates.
5. Inspect the current source movements before contacting another team.

Baselines are private and expire after 90 days. Comparisons use matching UTC dates. Products added later have no saved baseline until you capture one. Increasing the horizon can leave dates outside the earlier saved coverage.

## Assign the next action

1. Expand **Review selected products**.
2. Find the product and click **Manage action**.
3. Choose an **Action owner** who can follow up on the issue.
4. Set **Action due date** and choose **Open**, **In progress** or **Done** in **Action state**.
5. Write the next step in **Internal action note**. For example, record which supplier receipt needs confirmation.
6. Click **Save action**.
7. Reopen **Review selected products** after the refresh. Inspect the saved owner, due date, state and revision.
8. Expand **Action history** to review earlier changes.

Saving a follow-up stores review metadata. Purchasing, receipt scheduling and stock corrections continue through Odoo's native operational controls. Mark an action **Done** when the follow-up is finished, then inspect the current forecast for the stock outcome.

## Use My actions, Overdue and Unassigned

1. Choose **My actions** in **Review queue** to find your active follow-ups.
2. Choose **Overdue** to find active follow-ups whose due date has passed.
3. Complete a warehouse scan and choose **Unassigned** to find observed shortages without an eligible active owner.

### Changes and follow-up

Action saved.

Save review baseline

Baselines are private and expire after 90 days. Changes compare matching UTC dates. Source details follow current permissions.

#### ▼ Review selected products

[UAT-WHOLESALE] UAT Wholesale Service Kit  
Unchanged / 7 comparable dates: 2026-10-30 to 2026-11-05  
Baseline saved: 2026-10-30 19:07:09 UTC  
Forecast shortage remains.  
Owner: Calendar synthetic inventory tester / Due: 2026-10-29 / Follow-up: progress / Revision: 4  
Confirm supplier timing for Wholesale distribution

#### ► Action history

Manage action

Simulate receipt timing

Fig. 2: Reopen the product review after saving to inspect the action and its history.

4. Click **Open product review** on a queue item.
5. Inspect the current forecast, save the intended action and check the queue again.

My actions and Overdue work without a scan. An open action can remain in these queues after its forecast recovers. Unassigned describes the selected scan observations. A completed action or unavailable owner can leave a shortage needing reassignment. The queues can overlap, so adding their counts does not give a distinct shortage total.

## Preview a supplier receipt's timing

1. Expand **Review selected products** and find the product.
2. Click **Simulate receipt timing**.
3. Choose an eligible **Receipt to simulate**.
4. Choose **Simulated arrival date (UTC)** within the current horizon.
5. Click **Preview receipt timing**.
6. Compare the baseline and simulated daily balances, shortage duration and worst deficit.
7. Discuss the result with the person responsible for the receipt.
8. If the timing change is agreed, make the real change in the native receipt form and refresh the calendar.

The preview moves one incoming contribution between UTC dates. Actual receipt dates, stock quantities and dependent move dates remain unchanged. Reload the receipt choices after operational changes. A product with no eligible supplier receipt displays that condition explicitly.

**Receipt timing simulation**

Simulation only. One incoming contribution moves between UTC dates. Operational records and dependent move dates remain unchanged.

[UAT-WHOLESALE] UAT Wholesale Service Kit

Receipt to simulate: UAW/IN/00001 / 2026-11-03 12:00:00 UTC / 5 Units ▼ Simulated arrival date (UTC): 2026-10-31 ▼ [Preview receipt timing](#)

Preview as of 2026-10-30 19:07:11 UTC. Refresh choices after operational changes.

Days below zero: baseline 2, simulated 0. Worst deficit: baseline 2, simulated 0 Units.

| Date (UTC) | Baseline | Simulated | Difference |
|------------|----------|-----------|------------|
| 2026-10-30 | 10       | 10        | 0          |
| 2026-10-31 | 10       | 15        | 5          |
| 2026-11-01 | -2       | 3         | 5          |
| 2026-11-02 | -2       | 3         | 5          |
| 2026-11-03 | 3        | 3         | 0          |
| 2026-11-04 | 3        | 3         | 0          |
| 2026-11-05 | 3        | 3         | 0          |

Baseline and simulated daily quantities

Fig. 3: Preview arrival on day plus one and compare the result with the live calendar.

## Review the whole warehouse

1. Choose the warehouse and horizon.
2. Click **Start warehouse scan**.
3. Inspect the run state, processed count, total and unavailable count.
4. Read the last batch's observation time. Partial coverage remains labelled while work is running or after an interrupted review.
5. Page through the shortage results with **Next items** and **Previous items**.
6. Click **Open product review** for an exception and inspect its current forecast before acting.
7. Use **Cancel scan** when the current run is no longer useful.

A scan covers the readable active stock-tracked catalogue independently of the calendar's 100-product selection. Each batch considers up to 100 candidates. The host scheduler can continue a running scan after the browser closes when that scheduler is enabled. Ask the administrator to check the scheduled actions if background progress stops.

Scan observations expire after 24 hours. Start a fresh scan after the UTC date changes. Observation times matter when another user changes operational records between batches.

## Recover from a problem

**A request fails.** Read the error, keep the company and warehouse visible, and use the available retry or reload control. Recheck the observation time and processed count after recovery.

**Another person saved the action first.** Refresh the review, read the winning action and its history, then enter the intended current change. The stale edit is rejected to protect the saved work.

**The page was closed or the app restarted.** Reopen the same company, warehouse and horizon. Reload the review and check the saved checkpoint. Background continuation requires the host scheduler.

**An item or source is unavailable.** Check the active company and ask the administrator to review access. Avoid substituting another product with a similar name.

**A scan is old or its UTC date changed.** Start a fresh scan and inspect the current product forecast before taking action.

## Complete the practice problem

The training warehouse holds ten units of the practice kit. A confirmed delivery requires twelve units on day plus two. A confirmed supplier receipt brings five units on day plus four. Day zero is the training database's current UTC date.

1. Select the practice kit and a seven-day horizon.
2. Refresh and read the daily quantities against the table below.
3. Explain the first shortage. Identify the outgoing twelve-unit movement.
4. Save a baseline and assign a supplier-timing follow-up to an owner.
5. Give the action a due date before the current UTC date in the training database.
6. Check **My actions** and **Overdue**.
7. Preview the five-unit supplier receipt on day plus one.
8. Confirm that the live calendar still shows the original forecast.
9. Reopen the action history and explain the next operational step to the trainer.

Table 1: Expected practice balances, in units

| UTC day                 | 0  | +1 | +2 | +3 | +4 | +5 | +6 |
|-------------------------|----|----|----|----|----|----|----|
| Live forecast           | 10 | 10 | -2 | -2 | 3  | 3  | 3  |
| Preview, day +1 receipt | 10 | 15 | 3  | 3  | 3  | 3  | 3  |

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## Apply the review to your industry

For **wholesale distribution**, review confirmed customer demand and supplier receipts. The practice kit above uses a confirmed sale and purchase order.

For **discrete manufacturing**, review component demand from confirmed manufacturing orders. The tested example starts with eight components, consumes twelve for three assemblies on day plus two and receives ten on day plus four. Its seven balances are 8, 8, -4, -4, 6, 6 and 6 units.

For **field-service replenishment**, review depot stock before a technician-stock transfer. The tested example starts with twenty kits, transfers twenty-four on day plus two and receives ten on day plus five. Its balances are 20, 20, -4, -4, -4, 6 and 6 units. Technician scheduling and field-service billing are separate processes.

Lot expiry, recall, customer allocation, serialised rental fleets and specialised industry controls require their own process acceptance. Use the module's daily product totals within those limits.

## Reference and support

The instructions above follow the Stock Shortage Calendar screens and scripted practice scenarios. Your administrator should supply the package matching the installed Odoo major version.

For native forecast background, see Odoo's [Forecasted report documentation](#)<sup>1</sup>.

For setup or workflow questions, contact [Solvync](#)<sup>2</sup>. Include the Odoo version, edition, company, warehouse, product reference, UTC date and the message shown on screen. Use a safe training example when sharing screenshots.

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<sup>1</sup> [https://www.odoo.com/documentation/19.0/applications/inventory\\_and\\_mrp/inventory/warehouses\\_storage/reporting/forecast.html](https://www.odoo.com/documentation/19.0/applications/inventory_and_mrp/inventory/warehouses_storage/reporting/forecast.html)

<sup>2</sup> <https://solvync.com/contact/>