



Easy AI Agent

User Manual — a step-by-step guide for beginners



For Odoo 18 Community

Module version 18.0.1.2.0

Manual edition 1.6 — September 2026

This manual explains, one small step at a time, how to use and set up the **AI Agent** in Odoo. You do not need any technical knowledge to follow **Part A**. **Part B** is for the person who installs and configures Odoo in your company (the *administrator*).

About the pictures. The screenshots in this manual were taken from a test database that contains Odoo's own demonstration data (companies such as *Gemini Furniture*). Your screens show your own records, but the buttons and menus are the same.

What is new in manual edition 1.6

- **Documents with their lines.** With the right role, one message creates a sales order *and* its order lines: "Create a sale order for Azure Interior with 3 Desk Organizer and 5 Desk Pad" (section 9). Administrators allow this with **Allowed Line Fields** (Step 7).
- **A change request is never answered with a search result any more.** If the AI cannot turn your message into a change, the agent says so instead of showing unrelated records.

What is new in manual edition 1.5

- **Create and update records from the chat.** Users with an *AI Agent Role* can ask the agent to add a contact or fix a field. The agent shows the change and **nothing is saved until you press Confirm** (section 9). Administrators set up roles in Step 7.
- **New report "Record Changes"** lists every prepared change and its outcome (section 19).
- While you wait, the chat now first shows **Thinking & working...**, and it always scrolls to the newest message.

What is new in module version 18.0.1.2.0

- **Counts, totals, rankings and lists are correct and fast with Ollama.** The AI only prepares the search; Odoo runs it and writes the numbers (section 4).
- **Every such answer shows a "How I searched" line**, so you can see how your question was understood.
- **New provider setting "Structured Questions"** (*Query plan, Tool calling, Retrieval only*), see section 13.1.
- **Questions about record types the agent cannot read** get a clear "I don't have access to ..." message instead of a guess.
- **New icons:** a robot with a speech bubble in the top bar and in the chat header.

Already using an older version of **Easy AI Agent**? Follow [Upgrading the module](#) (Step 1).

Easy AI Agent and Easy AI Assistant. *Easy AI Agent* (technical name `easy_ai_agent`) is a copy of the *Easy AI Assistant* module under a different name; the app and menus are called **AI Agent**. The two modules **cannot be installed in the same database**: Odoo refuses to install Easy AI Agent while Easy AI Assistant is installed. To switch a database from Easy AI Assistant (nothing is carried over), an administrator must:

1. Write down your providers (names, URLs, models) and knowledge sources (models and fields).
2. Ask IT for a **database backup**.
3. Go to **Apps**, search **Easy AI Assistant** (remove the *Apps* filter if nothing is found), open it and click **Uninstall**.
4. **IT step, only if the Easy AI Assistant files had already been removed from the server:** run the file `doc/cleanup_easy_ai_assistant.sql` (included in this module) on the database. It removes the old data and an old *Ask AI about this record* menu item.
5. Search **Easy AI Agent** and click **Activate**.
6. Follow [Part B](#) to set it up again.

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Part A — Using the agent

1. What is the AI Agent?

The AI Agent is a **chat window inside Odoo**. You type a question in normal language, for example:

- *"What is the email address of Gemini Furniture?"*
- *"Which sales orders does Gemini Furniture have?"*
- *"How many quotations do we have?"*
- *"Who is our top customer this year?"*

and the agent answers **using only the data stored in your Odoo database**.

If your administrator gave you an **AI Agent Role**, you can also ask it to **create or update records**, for example *"Change the phone of Gemini Furniture to +32 470 12 34 56"*. See [section 9](#).

Four things are important to know:

The agent...	What it means for you
only answers questions about your Odoo data	If you ask <i>"What is the capital of France?"</i> it declines to answer.
shows where each answer comes from	Under every answer you see buttons (<i>Sources</i>) that open the records it used.
only sees what you are allowed to see	If you cannot open a record in Odoo, the agent cannot use it for you either.
changes nothing without your OK	Without an AI Agent Role it only reads. With a role it can <i>prepare</i> a new record or a change, but nothing is saved until you press Confirm . It never deletes records and never confirms, cancels or validates documents.

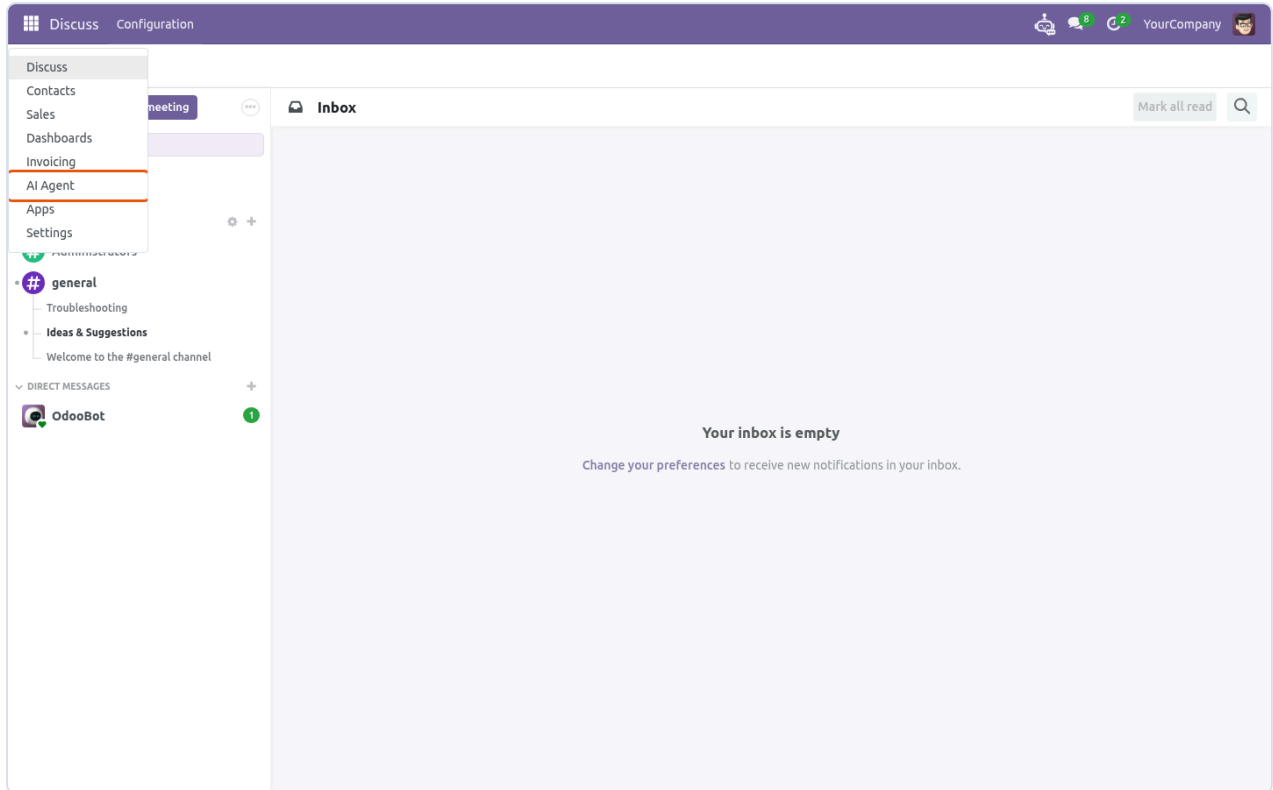
Remember: an AI can make mistakes. For anything important, click the source buttons and check the real record.

2. Opening the agent

You can open the agent in **two ways**.

Way 1 — From the main menu (full screen)

1. Click the **apps icon** (the small grid of squares at the top left of the purple bar). A list of your apps opens.
2. Click **AI Agent** in that list.

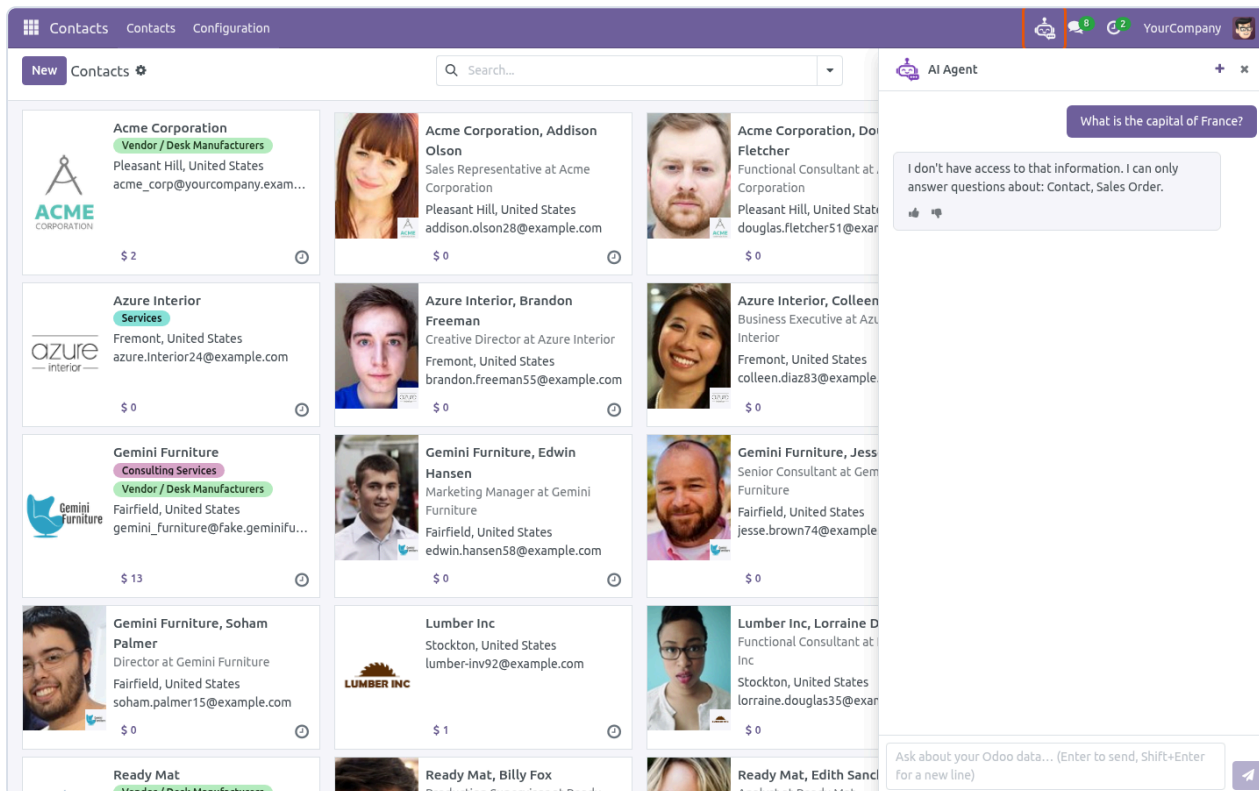


The apps list with AI Agent

3. The menu **Chat** opens automatically. You now see the full-screen chat.

Way 2 — From anywhere (side panel)

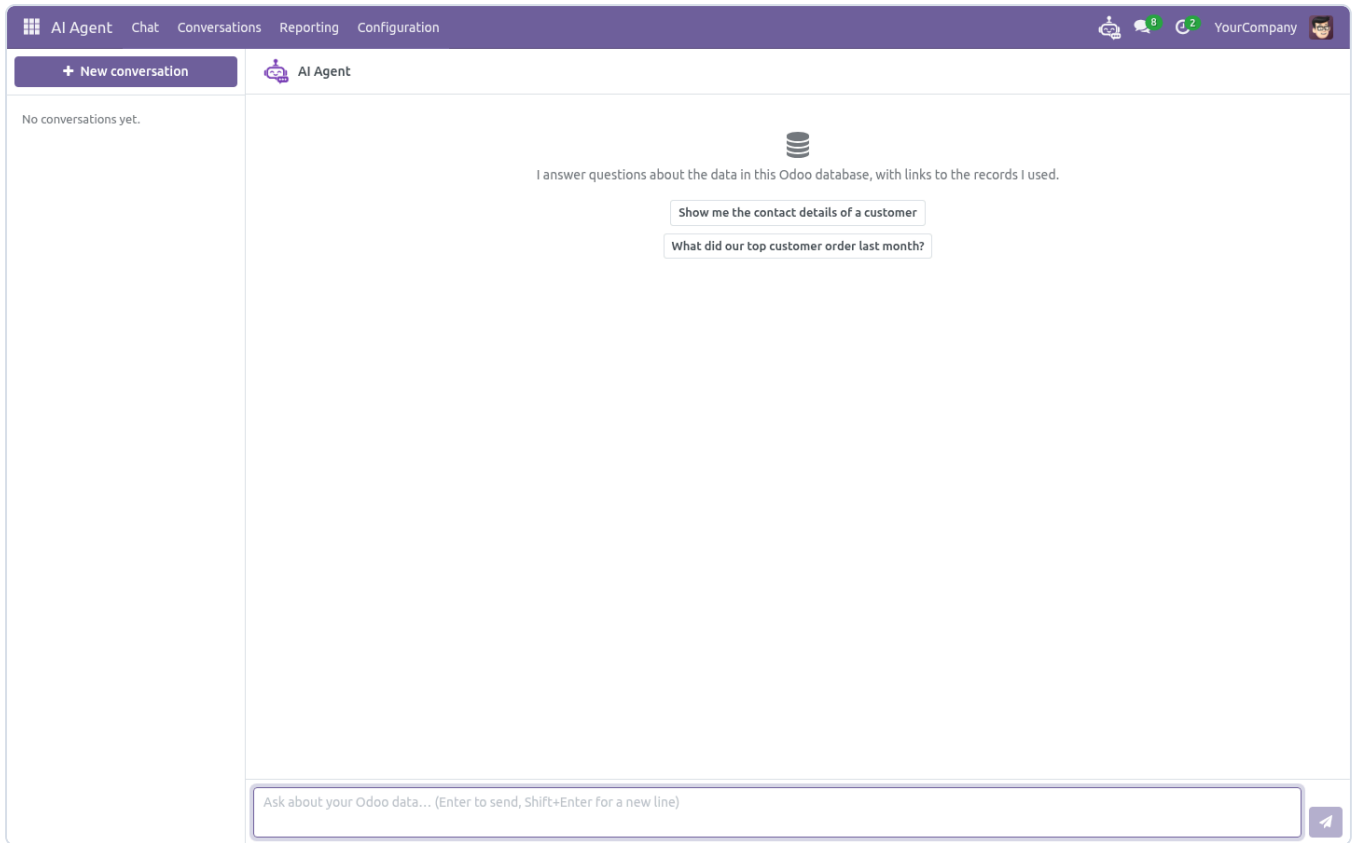
1. Look at the **top-right bar** of Odoo, next to your name and the other small icons.
2. Click the **white robot icon with a small speech bubble** (near the chat and activity icons). A chat panel slides in on the right side.
3. The panel's title bar shows the same robot next to **AI Agent**. The **+** button starts a new conversation.
4. To close the panel, click the **×** at the top of the panel, or click the robot icon again.



The side panel opened from the top bar. The question about France is declined.

I don't see the AI Agent app or the icon. Your user does not have access yet. Ask your administrator to follow [Step 1](#).

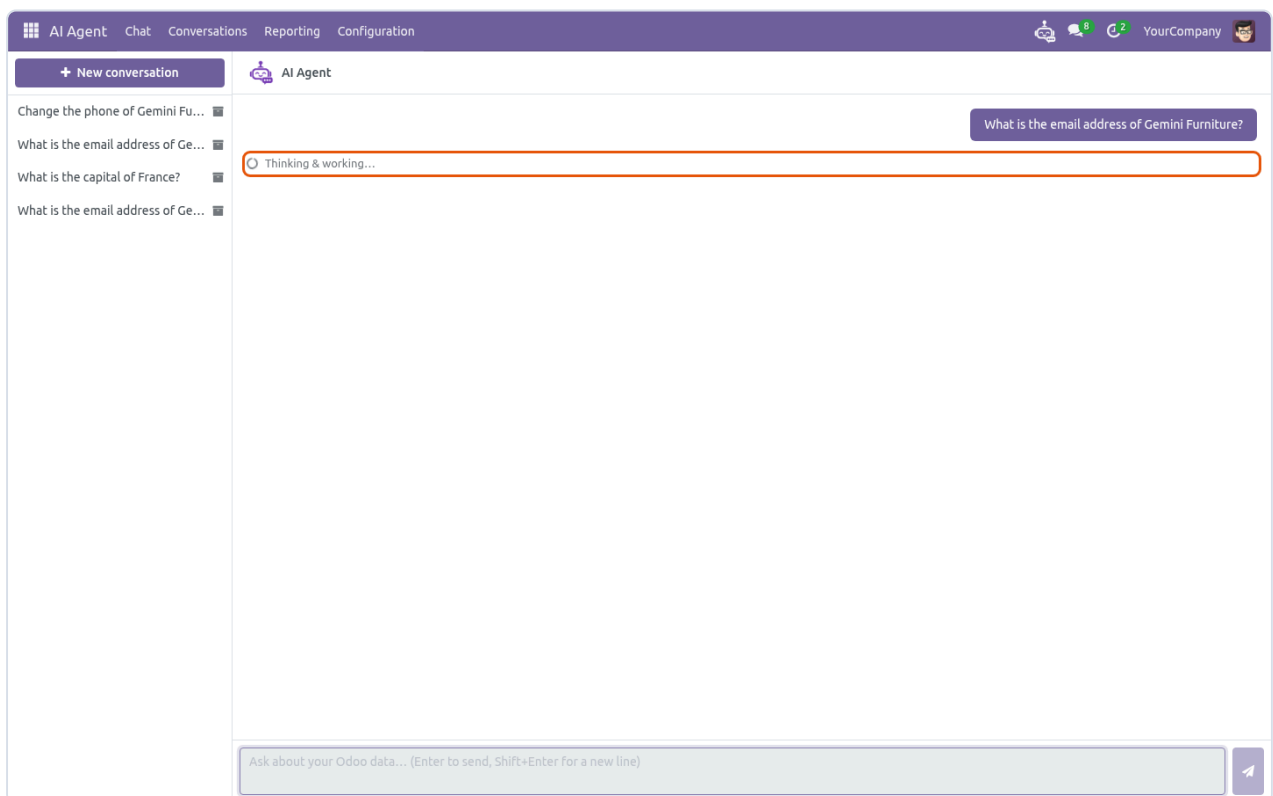
3. Asking your first question



The chat screen before the first question

1. Open the agent (see [section 2](#)).
2. If this is your first time, you see a short explanation and a few **example questions**. You can click an example to copy it into the text box.
3. Click in the text box at the bottom that says "Ask about your Odoo data... (Enter to send, Shift+Enter for a new line)".
4. Type your question, for example: **What is the email address of Gemini Furniture?**
5. Press **Enter** on your keyboard, or click the **paper-plane button** on the right.
 - Want a second line in your question? Press **Shift + Enter**.
6. Wait for the answer. While you wait, a small message shows what the agent is doing:

Message	Meaning
<i>Thinking & working...</i>	It has received your question and is getting started: it checks whether you asked for a change and looks for matching records in your database.
<i>Asking model...</i>	It is asking the AI to prepare a search, or to write the answer.
<i>Querying Odoo data...</i>	Odoo is counting, totalling or listing records for your question.
<i>Composing answer...</i>	The answer is almost ready.



The agent is working on the question

How long does it take? It depends on your AI provider and your computer. Cloud services usually answer in a few seconds. On a test laptop without a graphics card (Ollama, model llama3.2:3b) answers took **about 6 to 21 seconds**. The first question after the AI was unloaded can take a few seconds longer. Please be patient and do not send the same question again.

4. Understanding the answer

The screenshot shows the AI Agent interface with a purple header bar containing navigation links: AI Agent, Chat, Conversations, Reporting, and Configuration. On the right of the header are icons for a robot, a speech bubble with '8', a green checkmark with '2', and a user profile labeled 'YourCompany'.

Below the header is a purple button labeled '+ New conversation' and a tab labeled 'AI Agent'. The main chat area has a purple input field with the text 'What is the email address of Ge...'. The AI's response is displayed in a light purple box. It contains a table with contact information for Gemini Furniture, a summary of the search, and a list of sources. Below this, another purple input field asks 'Which sales orders does Gemini Furniture have?'. The AI's response to this is another table showing sales orders for Gemini Furniture.

#	Name	Created on	City	Company Name Entity	Country	Email	Phone
[1]	Gemini Furniture	2026-09-15 21:17	Fairfield	Gemini Furniture	United States	gemini_furniture@fake.geminifurniture.com	(941)-284-4

1 Contact found.
How I searched: Name contains Gemini Furniture; sorted by Created on (highest/latest first).

Sources
 [1] Contact: Gemini Furniture

#	Order Reference	Order Date	Status	Total	Untaxed Amount	Customer	Salesperson
[1]	S00016	2026-09-15 21:18	Sales Order	\$ 1,186.50	\$ 1,186.50	Gemini Furniture	Marc Demo
[2]	S00004	2026-09-15 21:18	Sales Order	\$ 2,240.00	\$ 2,240.00	Gemini Furniture	Mitchell Admin
[3]	S00007	2026-09-15 21:18	Sales Order	\$ 1,706.00	\$ 1,706.00	Gemini Furniture	Mitchell Admin
[4]	S00013	2026-09-15 21:18	Sales Order	\$ 415.50	\$ 415.50	Gemini Furniture	Marc Demo
[5]	S00014	2026-09-15 21:18	Sales Order	\$ 1,582.00	\$ 1,582.00	Gemini Furniture	Marc Demo
[6]	S00010	2026-09-15 21:18	Sales Order	\$ 751.00	\$ 751.00	Gemini Furniture	Marc Demo
[7]	S00012	2026-09-15 21:18	Sales Order	\$ 556.00	\$ 556.00	Gemini Furniture	Marc Demo
[8]	S00008	2026-09-15 21:18	Sales Order	\$ 462.00	\$ 462.00	Gemini Furniture	Marc Demo

Ask about your Odoo data... (Enter to send, Shift+Enter for a new line)

An answer with its sources

An answer has up to four parts:

1. **The answer text.** It may contain lists, bold text or small tables.
2. **Small numbers in brackets such as [1] or [2].** These are *citations*: they point to the record the sentence came from.
3. **The Sources buttons** under the answer. Each button is a record the agent read:
 - A button with **coloured text** (purple in the standard theme) was cited in the answer.
 - A button with **grey text** was read but not cited.
 - **Click a button** to open that record in Odoo and check the information yourself.
4. **Two thumbs** (👍👎) to rate the answer — see [section 7](#).

Answers with a table and "How I searched"

Questions about **counts, totals, rankings and lists** (for example *"How many quotations do we have?"*, *"Show the highest sales order"*, *"Top 3 customers last month"*) are answered differently:

1. The AI turns your question into a database search.
2. Odoo runs the search **with your access rights** and writes the result itself: a table with record links ([1], [2]...), a count or a total.
3. Under the result, a line in italics shows **How I searched**, for example *"Status is one of Quotation or Quotation Sent; sorted by Order Date"*.

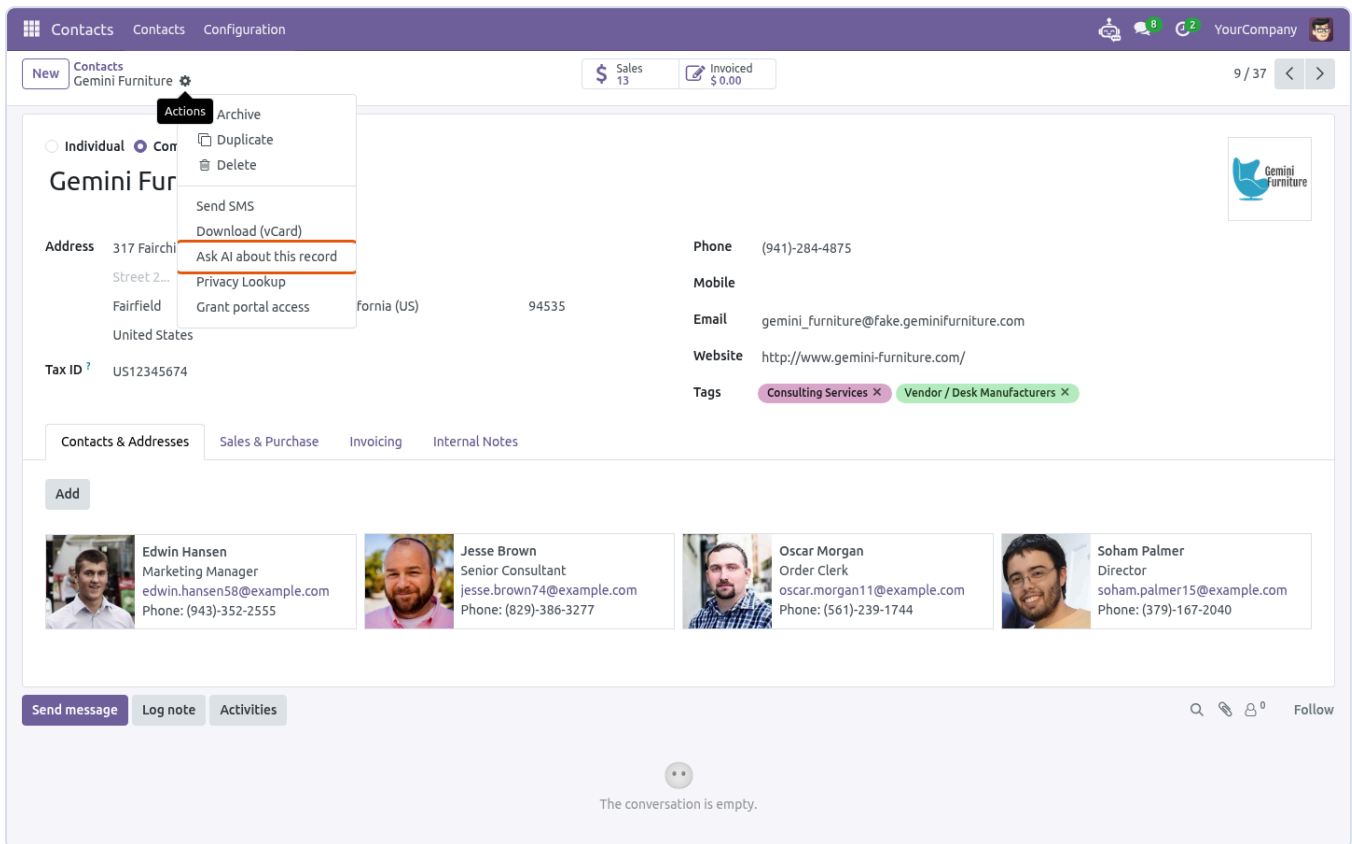
Always read the "How I searched" line. The numbers in the table always come straight from Odoo. But if the AI understood your question differently (for example it sorted by date instead of amount), the line shows it. Simply rephrase your question with clearer words.

Special answers you may see

You see this message	What it means	What to do
<i>"I can only answer questions about the data in this Odoo database..." — or the AI says the same thing in its own words</i>	Your question does not look like a question about your Odoo data.	Rephrase it using words from Odoo, for example <i>customer</i> , <i>invoice</i> , <i>sales order</i> , <i>product</i> .
<i>"I couldn't find anything in this database about that."</i>	No record you can access matched the question.	Check spelling of names, try other words, or ask your administrator whether that kind of record is included (see section 15).
<i>"I don't have access to Point of Sale Orders. I can only answer questions about: ..."</i>	You asked about a kind of record the agent is not allowed to read.	Ask your administrator to add it as a knowledge source (see section 15).
<i>"The answer contained numbers that do not appear in the records I found, so it was withheld..."</i>	The AI wrote a number that is not in your data, so the agent hid it rather than show a possibly wrong number.	Ask a counting or total question more directly (" <i>Total amount of confirmed sales orders this month</i> "), or open the source records.
<i>"I could not run a database query for this question (...)"</i>	The search the AI prepared was not valid, for example an unknown status. The reason in brackets tells you what was wrong.	Rephrase using the words Odoo shows, for example a status name from the list in the message.
<i>"The generated answer could not be verified against the records found, so it was withheld..."</i>	A safety check was not sure the answer was correct, so it was hidden.	Look at the source buttons, or rephrase the question.
<i>"I prepared the change below. Nothing is saved until you press Confirm."</i>	You asked for a new record or a change.	Check the change card and press Confirm or Discard — see section 9 .
<i>"I could not prepare this change: ..."</i>	The change is not possible. The reason is written after the colon, for example your role does not allow that field, or the record was not found.	See section 9 and Troubleshooting .
<i>"Your daily AI token limit has been reached."</i>	You used your daily amount of AI.	Try again tomorrow or ask your administrator.
A red message with ⚠ (for example <i>"Timeout after 300s..."</i>)	Something went wrong while talking to the AI service. Your question is saved.	Try again in a moment. If it keeps happening, tell your administrator.

5. Asking about one specific record

When you are looking at a record (for example a contact or a sales order) you can ask the agent about **that record**.



The Actions menu with "Ask AI about this record"

1. Open the record, for example a contact.
2. Click the **gear icon (⚙️ Actions)** at the top of the form.
3. Click **Ask AI about this record**.
4. The chat opens with a blue line *"Asking about: "*.
5. Type your question, for example **Summarise this customer**, and press **Enter**.
6. To stop focusing on this record, click **clear** on the blue line.

This menu item only appears for kinds of records the agent is allowed to read (your administrator chooses them).

6. Working with conversations

Every chat is saved as a **conversation**, so you can come back to it later.

In the full-screen chat, the list on the **left** shows your conversations:

- **Continue an old conversation:** click its name in the left list. The agent remembers the previous questions of that conversation.
- **Start fresh:** click **+ New conversation** at the top of the list (in the side panel: the + icon at the top). Start a new conversation whenever you change topic — answers get better.
- **Hide a conversation:** click the **archive box icon** next to its name.

You can also see all your conversations as a list in the menu **AI Agent > Conversations**.

Privacy: other users cannot see your conversations. Only AI Agent *Administrators* can read them (for example to improve the setup).

7. Rating answers

Your ratings help the administrator improve the agent.

1. Under an answer, click 👍 if it was helpful, or 👎 if it was not.
2. If you click 👎, a small box appears: *"What was wrong? (optional)"*.
3. Type a short explanation (for example *"The total is wrong, it should be 4"*).
4. Click **Send**. A green message *"Thank you for your feedback."* confirms it.

8. Tips for good questions

Do

-  **Use names exactly as they are in Odoo:** *Gemini Furniture, S00014, INV/2026/0042*.
-  **Ask one thing at a time:** *"What is the phone number of Gemini Furniture?"*
-  **Use Odoo words:** customer, contact, sales order, quotation, invoice, product.
-  **Start a new conversation** when you change topic.
-  **Check important answers** by clicking the source buttons.

Avoid

-  Questions about the outside world (*weather, news, general knowledge*) — they are refused.
-  Requests to delete records or to confirm, cancel or validate documents (*"Confirm order S00014"*) — the agent cannot do that. Creating and updating records works only with an AI Agent Role ([section 9](#)).
-  Very long, multi-part questions.

Good to know

- **Counts, totals, rankings and lists** ("How many...", "total...", "highest...", "top customer...") are answered by a real database search: check the *How I searched* line under the answer.
 - **Use the words from Odoo** for statuses and periods: *quotation, confirmed, cancelled, today, last month, this year*.
 - **One step at a time.** "*Who is our top customer last month?*" works. For "*What did our top customer order?*", first ask for the top customer, then "*List sales orders of*".
 - **Questions about the text of notes or documents** are answered from the most similar records (6 by default), so long lists there may be incomplete.
 - **The agent answers in the language of your question.**
-

9. Creating and updating records

With an **AI Agent Role** you can ask the agent to **add a record** or **change fields of a record**. The agent never saves on its own: it shows you the change first, and **you decide**.

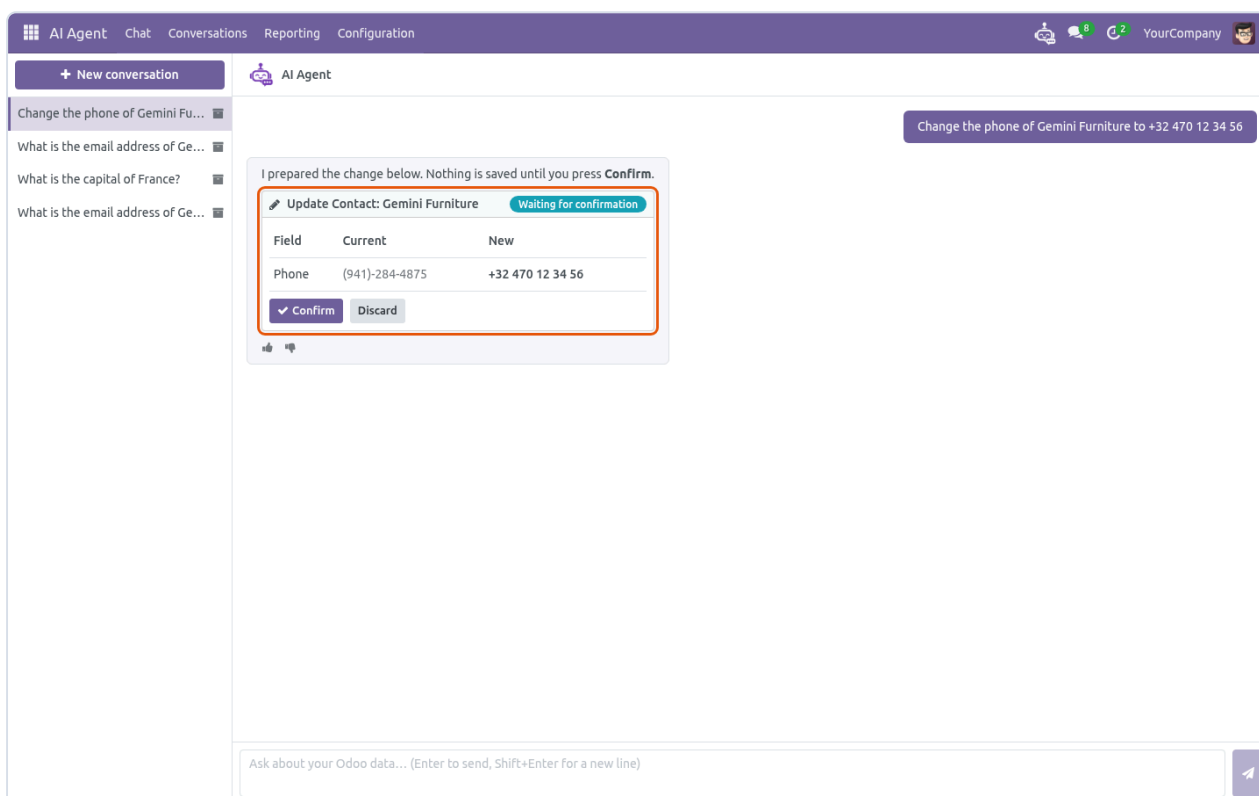
No role? Then this section does not apply to you. The agent treats your message as a question and changes nothing. Ask your administrator if you need a role ([Step 7](#)).

How to ask for a change

1. Open the agent (see [section 2](#)).
2. **Start your message with an action word**, followed by what and how:
 - **"Create** a contact Nora Peeters, email *nora.peeters@example.com*, city *Leuven*"
 - **"Change** the phone of Gemini Furniture to +32 470 12 34 56"
 - **"Set** the customer reference of S00002 to PO-2026-114"

Words that work: **create, add, register, update, change, modify, edit, set, rename, assign, mark** (also after *please* or *can you*).

3. Press **Enter**. After a few seconds a **change card** appears:

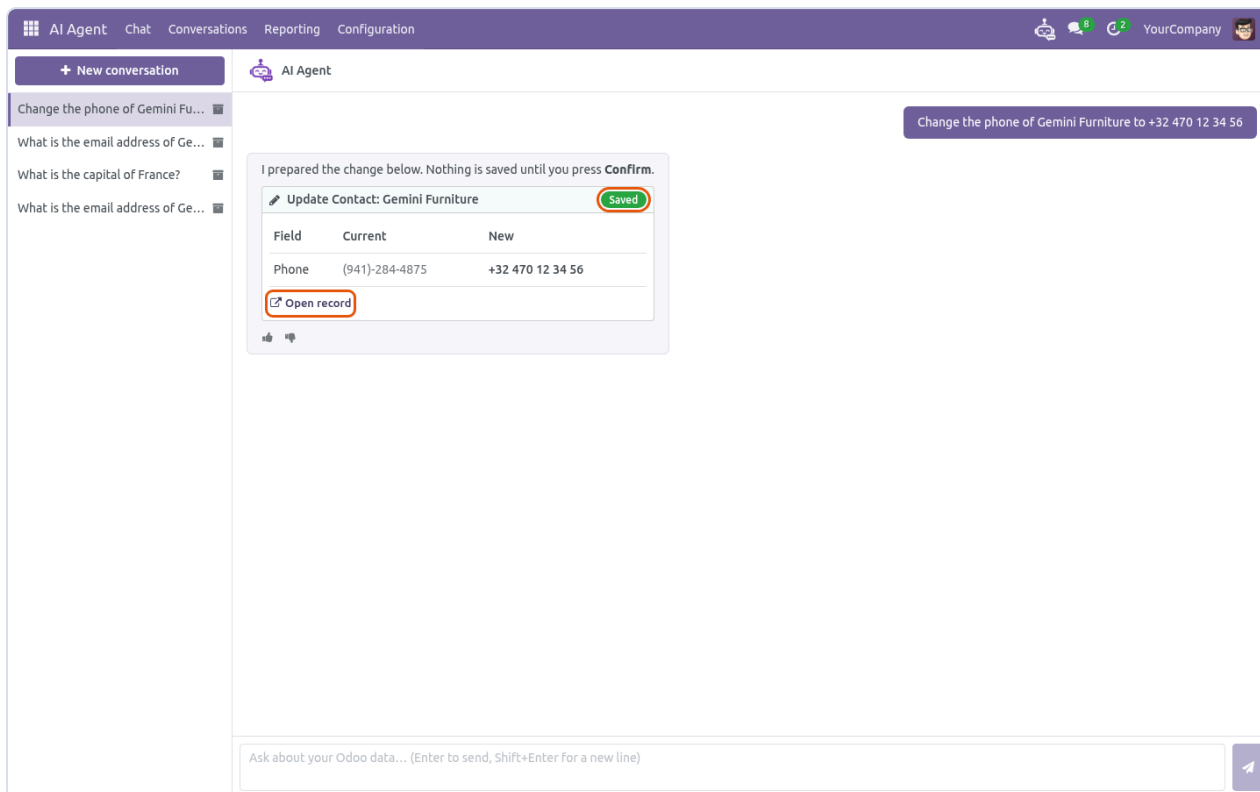


A prepared change waiting for confirmation

Part of the card	Meaning
Title, for example Update Contact: Gemini Furniture	What will be changed. <i>Create Contact</i> means a new record.
Blue badge Waiting for confirmation	Nothing is saved yet.
Field / Current / New	Each field that will change, its value now and the new value. New records only show <i>New</i> .

4. **Read the card carefully.** Is it the right record? The right field? The right value?
 - All correct → click **Confirm**.
 - Something is wrong → click **Discard**, then ask again with clearer words.

5. After **Confirm** the badge turns green: **Saved**. Click **Open record** to see the record.



The change is saved

Documents with lines (order lines, invoice lines)

If your role allows it, you can create a document **with its lines in one message**:

"Create a sale order for Azure Interior with 3 Desk Organizer and 5 Desk Pad"

- Name the **products exactly as they are in Odoo** and give a quantity for each.
- The change card shows **one row per line**, for example *Order Lines 1 → Product: Desk Organizer, Quantity: 3.*
- **Prices, taxes and totals are calculated by Odoo** after you press Confirm, exactly as when you type the order yourself. The agent only sets the fields your role allows (usually product and quantity).
- You can also **add lines to an existing draft document**: "*Add 2 Desk Pad to S00002*". Lines are always **added**; the agent never changes or deletes lines that are already there.
- A product the agent cannot find is reported ("*No Product named '...' was found*") and **nothing is prepared**; check the spelling and ask again.
- At most **20 lines** per message.

The screenshot shows the AI Agent interface with a sidebar on the left containing conversation history. The main area displays a 'Create Sales Order' change card. The card has a title bar 'Create Sales Order' with a 'Waiting for confirmation' status. Below the title bar is a table with two columns: 'Field' and 'New'. The table contains two rows of order lines. At the bottom of the card are 'Confirm' and 'Discard' buttons. A message above the card states: 'I prepared the change below. Nothing is saved until you press **Confirm**.'

Field	New
Customer	Azure Interior
Order Lines 1	Product: [FURN_0001] Desk Organizer, Quantity: 3.0
Order Lines 2	Product: [FURN_0002] Desk Pad, Quantity: 5.0

Buttons: Confirm, Discard

Message: I prepared the change below. Nothing is saved until you press **Confirm**.

Input field at the bottom: Ask about your Odoo data... (Enter to send, Shift+Enter for a new line)

A change card for a sales order with two order lines

What the badge can show

Badge	Meaning
Waiting for confirmation	The change is prepared. Press Confirm or Discard.
Saved	You confirmed and Odoo saved the change.
Discarded	You pressed Discard. Nothing was saved.
Failed	Odoo refused to save it. The red message on the card says why, for example a required field is missing. Nothing was saved.
Expired	You pressed Confirm too late (after 60 minutes by default). Nothing was saved. Ask again.

Good to know

- **Only the fields your role allows** can be set, and only on the kinds of records your role allows. If you ask for something else, the agent answers *"I could not prepare this change: ..."* and lists what you may set.
- **Your normal Odoo rights still apply.** If you cannot edit a record in Odoo yourself, the agent cannot change it for you either. The change is saved **under your name**.
- **Use the exact record name** as it is in Odoo (*Gemini Furniture, S00002*). If several records match, the agent asks you to be more specific.
- **Give every value in your message.** The agent does not invent values; values it cannot find in your message are left out.
- **One record per message** gives the best results.
- **Want to change the record you are looking at?** Use *Ask AI about this record* ([section 5](#)), then write for example *"Set the city of this contact to Namur"*.
- **Not possible from the chat:** deleting records; confirming, cancelling or validating documents; changing or removing lines that are already on a document.
- **Always check the card.** A small AI can mix up similar fields (for example *Phone* and *Mobile*). The card shows exactly what will be saved.

Part B — Setting up the agent

This part is for the **administrator**. Follow the steps in order. Each step tells you **where to click** and **what to type**.

10. Before you start: a checklist

Tick every line before you continue:

✓	Requirement	Why
☐	Odoo 18 Community , installed on your own server (not Odoo Online).	The module needs to install things in the database and, for Ollama, talk to a program on the server.
☐	The Easy AI Agent module is installed (<i>Apps › search "Easy AI Agent" › Activate</i>).	—
☐	You are logged in as an administrator (<i>Settings</i> menu visible).	Only administrators can configure the module.
☐	You have chosen an AI provider and have what it needs (see Step 2).	The agent needs an AI service.
☐	Optional but recommended: the pgvector PostgreSQL extension is installed by whoever manages your database server.	Makes searching fast on big databases. Without it, see section 14 .
☐	Optional: the Odoo module Attachments List and Document Indexation (<code>attachment_indexation</code>) is installed.	Needed so the agent can read text inside PDF, Word and Excel attachments.

11. Step 1 — Give people access

There are three roles:

Role (where to find it)	Can do
AI Agent › User	Use the chat, see their own conversations.
AI Agent › Administrator	Everything a User can do, plus configure providers and knowledge sources, re-index, and read all conversations.
AI Agent Audit › Auditor	Only read the audit log and the usage report. Nothing else.

The main administrator (*Administrator* user) receives the Administrator role automatically.

These three access roles decide who may **use** the agent. Who may **create or update records** through the agent is decided separately, by **AI Agent Roles** (Step 7).

To give a colleague access:

1. Go to **Settings > Users & Companies > Users**.
2. Click the user's name.
3. Open the **Access Rights** tab (you may need to scroll down).
4. Find the line **AI Agent** and choose **User** (or **Administrator**).
5. For an auditor, find **AI Agent Audit** and choose **Auditor**.
6. Click **Save** (the cloud icon at the top).

The screenshot shows the 'Access Rights' tab for the user 'Mitchell Admin'. The interface includes a header with 'Settings', 'General Settings', and 'Users & Companies'. Below the header, there's a 'New' button and a search bar. The main content area is divided into sections: 'SALES', 'ACCOUNTING', 'PRODUCTIVITY', 'ADMINISTRATION', and 'OTHER'. Each section contains a list of roles and their corresponding permissions. For example, under 'SALES', 'Sales' is assigned 'Administrator'. Under 'ACCOUNTING', 'Invoicing' is assigned 'Administrator' and 'Bank' is assigned 'Validate bank account'. Under 'PRODUCTIVITY', 'Dashboard' is assigned 'Admin'. Under 'ADMINISTRATION', 'Administration' is assigned 'Settings'. Under 'OTHER', 'Canned Responses' is assigned 'Canned Response Administrator', 'AI Agent' is assigned 'Administrator', and 'AI Agent Audit' is assigned 'Auditor'. The 'AI Agent' and 'AI Agent Audit' roles are highlighted with a red box.

Section	Role	Permission
SALES	Sales	Administrator
ACCOUNTING	Invoicing	Administrator
	Bank	Validate bank account
PRODUCTIVITY	Dashboard	Admin
ADMINISTRATION	Administration	Settings
OTHER	Canned Responses	Canned Response Administrator
	AI Agent	Administrator
	AI Agent Audit	Auditor

Access rights on the user form

7. Ask the user to **reload the page** (press F5) so the new menu appears.

12. Step 2 — Choose where the AI runs

The agent needs an **AI provider** — the service that writes the answers. You can choose one of three. Read the table and pick the line that fits your company.

	Ollama (local)	OpenAI (ChatGPT)	Anthropic (Claude)
Where does your data go?	Stays on your own server	Sent to OpenAI over the internet	Sent to Anthropic over the internet
Cost	Free software; needs a strong computer	Pay per use	Pay per use
Answer quality	Depends on the model; small models make more mistakes	Good	Good
Speed	Slow on a normal computer without a graphics card	Fast	Fast
What you need	Ollama installed on the server + downloaded models	An OpenAI API key	An Anthropic API key + a second provider for <i>embeddings</i> (see note)

Note about Anthropic: Anthropic does not offer *embeddings* (the part that finds matching records). If you use Claude to write answers, you **also** need Ollama or OpenAI configured as the *embedding provider*.

Tip: Many companies start with **Ollama** to try the agent without sending data outside, then decide.

13. Step 3 — Add a provider

Open **AI Agent** › **Configuration** › **Providers**. You see the list of providers.

	Name	Provider	Chat Model	Chat Model (installed)	Default Chat Provider	Default Embedding Provider	Allowed for ...	Last Test State
☐	Ollama - Local	Ollama (local)	llama3.2:3b		☒	☒	☒	Success

The providers list

The form **changes depending on the provider you pick**: it only shows the fields that provider needs. Follow the part for your choice: [12.1 Ollama](#), [12.2 OpenAI](#) or [12.3 Anthropic](#).

13.1 Ollama (local)

A. Prepare Ollama on the server (ask your IT person if you are not comfortable with a terminal)

1. Install Ollama from <https://ollama.com> on the same server as Odoo (or a server Odoo can reach).
2. Open a terminal on that server and download two models:
 - a model that **writes answers**, for example: `ollama pull llama3.2:3b`
 - a model that **finds matching records** (embeddings), for example: `ollama pull nomic-embed-text`
3. Check that it works: open <http://localhost:11434> in a browser on that server — it should say *"Ollama is running"*.

B. Add the provider in Odoo

1. In **AI Agent > Configuration > Providers**, click **New**.
2. **Name:** type a name you will recognise, for example `Ollama - Local`.
3. **Provider:** click **Ollama (local)**. The form changes. **Base URL** is filled with `http://localhost:11434` and **Timeout (s)** with `300`.

The screenshot shows the 'Providers' configuration page in the AI Agent interface. The 'Name' field is set to 'Ollama - Local'. Under the 'PROVIDER' section, 'Ollama (local)' is selected with a radio button, highlighted by a red rectangle. The 'CONNECTION' section shows 'Base URL' as 'http://localhost:11434' and 'Timeout (s)' as '300'. The 'MODELS' section shows 'Chat Model (installed)' and 'Embedding Model (installed)' with a note: 'The models installed on this server are loaded when you save.' The 'GENERATION' section has several settings: 'Send Temperature' (checked), 'Temperature' (0.20), 'Max Output Tokens' (0), 'Context Window' (4,096), 'Context Window (num_ctx)' (0), 'Keep-alive' (30m), 'Streaming' (checked), and 'Structured Questions' (Query plan (recommended for local models)).

A new provider with Ollama selected

4. If Ollama runs on another server, change **Base URL** (for example `http://192.168.1.20:11434`).
5. Click **Save** (cloud icon). Odoo now **loads the list of models** from your Ollama server automatically.
6. Check the **Models** section:
 - **Chat Model (installed):** choose the model that writes answers (for example `llama3.2:3b`).
 - **Embedding Model (installed):** choose the embedding model (for example `nomic-embed-text:latest`).
 - If there is only one model of a kind, it is already selected for you.
7. Tick **Default Chat Provider** and **Default Embedding Provider**.
8. In **Generation**, check the recommended settings (they are the defaults for Ollama):
 - **Keep-alive** shows `30m`: the AI stays loaded for 30 minutes between questions.
 - **Structured Questions** shows **Query plan (recommended for local models)**: counts, totals, rankings and lists are searched in Odoo and the numbers are written by Odoo, not by the AI.

9. Click **Test Connection** at the top. A green message "OK (... ms): Ollama ..." means it works.

10. Click **Save**.

The screenshot shows the 'Configuration' tab of the AI Agent interface. The 'Providers' section on the left lists 'Ollama - Local' as the selected provider. The 'MODELS' section on the right shows the 'Chat Model (installed)' as 'llama3.2:3b' and the 'Embedding Model (installed)' as 'nomic-embed-text:latest'. The 'GENERATION' section on the right includes settings for 'Send Temperature' (checked), 'Temperature' (0.20), 'Max Output Tokens' (0), 'Context Window' (4,096), 'Context Window (num_ctx)' (0), 'Keep-alive' (30m), 'Streaming' (checked), and 'Structured Questions' (Query plan (recommended for local models)). The 'DATA GOVERNANCE' section shows 'Allowed for Cloud-Restricted Data' as checked. The 'LAST CONNECTION TEST' section shows a 'Success' status with a 'Last Test Date' of '00/15/2026 21:18:57'.

A saved Ollama provider with models selected

The model lists are empty? A yellow box "No models loaded from this server yet" explains why. Check the Base URL, make sure Ollama is running and has models (`ollama list`), then click **Refresh Models**. See also [Troubleshooting](#).

Structured Questions — the three choices

- **Query plan** (Ollama only, recommended): the AI only prepares the search; Odoo runs it and writes the result. Reliable and fast even with small local models.
- **Tool calling**: the AI asks Odoo itself, in several steps. Best with capable cloud models (OpenAI, Claude). With small local models it is slow and often fails.
- **Retrieval only**: answers come only from the most similar records. Counts, totals and rankings can be wrong.

13.2 OpenAI (ChatGPT)

A. Get an API key

1. Sign in at <https://platform.openai.com> with your company account.
2. Create an **API key** and copy it (it starts with `sk-`). Keep it secret.

B. Add the provider in Odoo

1. In **AI Agent > Configuration > Providers**, click **New**.
2. **Name:** for example `OpenAI - Production`.
3. **Provider:** click **OpenAI (ChatGPT)**.

The screenshot shows the Odoo AI Agent Configuration Providers page. The top navigation bar includes 'AI Agent', 'Chat', 'Conversations', 'Reporting', and 'Configuration'. The 'Providers' tab is active, showing a 'New' button and a list of providers. The 'OpenAI - Production' provider is selected. The configuration form is divided into several sections: 'PROVIDER' with radio buttons for 'OpenAI (ChatGPT)', 'Anthropic (Claude)', and 'Ollama (local)'; 'CONNECTION' with fields for 'Base URL' (https://api.openai.com/v1), 'API Key' (with a placeholder 'Paste your API key, or env:VARIABLE_NAME'), 'Organization ID', 'Project ID', 'System Message Role' (system), and 'Timeout (s)' (60); 'MODELS' with fields for 'Chat Model', 'Pick Chat Model', 'Embedding Model', and 'Pick Embedding Model'; and 'GENERATION' with checkboxes for 'Send Temperature', 'Streaming', and 'Structured Questions', and input fields for 'Temperature' (0.20), 'Max Output Tokens' (0), and 'Context Window' (32,000).

A new provider with OpenAI selected

4. **API Key:** paste your key. After saving, the field shows *"Stored — type to replace"*; the key is never shown again.
5. **Organization ID / Project ID:** leave empty unless your OpenAI account uses them.
6. **Chat Model:** type the model name, or choose one in **Pick Chat Model**.
7. **Embedding Model:** type the embedding model name (for example `text-embedding-3-small`), or choose one in **Pick Embedding Model**.
8. Tick **Default Chat Provider** (and **Default Embedding Provider** if OpenAI should also find the records).
9. (Optional) In **Pricing**, enter the prices from your OpenAI contract so the usage report can estimate cost. Odoo does not know vendor prices.
10. Click **Save**, then **Test Connection**.

Model names change over time. Click **Refresh Models** to load the names your API key can use.

13.3 Anthropic (Claude)

1. Get an **API key** at <https://console.anthropic.com>.
2. Make sure you already have an **Ollama** or **OpenAI** provider marked **Default Embedding Provider** (Anthropic cannot do this part).
3. In **AI Agent > Configuration > Providers**, click **New**.
4. **Name:** for example `Claude - Production`. **Provider:** click **Anthropic (Claude)**.

The screenshot shows the 'Providers' configuration page in the 'AI Agent' section. The 'Name' field is set to 'Claude - Production'. A note states: 'Anthropic receives the system prompt as a top-level parameter and requires a maximum output token limit. It has no embeddings endpoint: pick an embedding provider below.' The 'PROVIDER' section has 'Anthropic (Claude)' selected. The 'CONNECTION' section shows 'Base URL' as 'https://api.anthropic.com', 'API Key' as a placeholder, 'API Version' as '2023-06-01', and 'Timeout (s)' as '120'. The 'MODELS' section has 'Chat Model' and 'Pick Chat Model' fields. The 'GENERATION' section has 'Send Temperature' unchecked, 'Max Output Tokens' as '1,024', 'Context Window' as '32,000', 'Streaming' checked, and 'Structured Questions' as 'Tool calling'. The 'DATA GOVERNANCE' and 'PRICING' sections are empty.

A new provider with Anthropic selected

5. **API Key:** paste your key.
6. **API Version:** keep the value filled in (`2023-06-01`).
7. **Chat Model:** type a model name, or choose one in **Pick Chat Model**.
8. **Max Output Tokens:** keep `1024` or increase it for longer answers. This field is **required** for Anthropic.
9. Tick **Default Chat Provider**.
10. **Embedding Provider:** choose your Ollama or OpenAI provider.
11. Leave **Send Temperature** unticked (newer Claude models do not use it).
12. Click **Save**, then **Test Connection**.

13.4 Keeping API keys out of the database (recommended for IT)

Instead of pasting the key, you can type a **reference**:

- `env:OPENAI_API_KEY` — the key is read from the server's environment variable `OPENAI_API_KEY`;
- `config:openai_api_key` — the key is read from the Odoo configuration file.

This way the key is not stored in the database or in its backups.

14. Step 4 — Check the settings

Open **AI Agent > Configuration > Settings**. The settings are grouped in blocks.

The AI Agent settings

Block "Providers"

1. **Default providers:** check that the chat and embedding providers are the ones you want.
2. **Vector backend:** shows how records are searched:
 - `pgvector ...` — best, nothing to do;
 - `numpy fallback (small corpora only)` — works for small databases;
 - `none — keyword search only` — the agent only matches exact words.
3. **numpy fallback:** if the backend says **none**, tick this box. It is fine for small companies (up to tens of thousands of text pieces). For large databases, ask IT to install *pgvector*.
4. Click **Save** at the top.

Other blocks — the default values are a sensible start. You can come back later:

Setting	In simple words	Default
Top-K and over-fetch	How many pieces of records are given to the AI per question	6
Scoring	How similar a record must be to count as a match (see Troubleshooting before changing it)	0.30
Chunking defaults	Size of the text pieces records are cut into	800 / 120
Conversation and tools	History Turns: how many earlier questions are remembered. Tool Rounds: how many times the AI may ask Odoo per question (only with <i>Tool calling</i>). Tool Row Limit: the most records one search may return	6 / 3 / 200
Grounding verifier	Double-checks each answer with a second AI call (slower, more expensive)	Off
PII scrubbing	Hides e-mails, phone numbers and bank numbers before sending to a cloud AI	Off
Store full prompts	Saves the complete text sent to the AI in the audit log	Off
Record changes	How many minutes a prepared change waits for Confirm before it expires (0 = never expires)	60
Daily token cap per user	Maximum AI use per person per day (0 = no limit)	200,000
Retention (days)	After how many days conversations and audit entries are deleted (0 = keep)	365 / 365

15. Step 5 — Choose what the agent can read (Knowledge Sources)

A **knowledge source** tells the agent *which kind of records* it may read, and *which fields*.

Open **AI Agent** › **Configuration** › **Knowledge Sources**.

New Knowledge Sources				
Q Search...				
1-2 / 2				
☐	Name	Model Name	Trigger Mode	Coverage (%) Active
☐	Contact	res.partner	On change (every minute)	100 % ☒
☐	Sales Order	sale.order	On change (every minute)	100 % ☒

The knowledge sources list

When the module is installed, sources are created automatically for common Odoo apps that are **already installed** (Contacts, Products, Sales, Purchase, Invoices, CRM, Project, Inventory). *Employees* is created **switched off**, because HR data is sensitive.

An app is missing from the list? If you installed an app (for example *Sales*) **after** the AI Agent, add its source yourself — see below.

To add a knowledge source

1. Click **New**.
2. **Name:** for example `Sales Orders`.
3. **Model:** start typing and choose the kind of record, for example **Sales Order**.
4. **Trigger mode** — when changes are picked up:
 - **On change (every minute)** — recommended;
 - **Nightly** — once per night (for very large data);
 - **Manual** — only when you click *Index Now*.
5. **Allow Structured Queries** — lets the agent search, count, total and rank this kind of record (see **Structured Questions** on the provider). Keep it ticked.
6. **Index attachments:** tick it if the agent should also read files attached to these records.
7. Open the **Records & Fields** tab:
 - **Domain** (*optional*): limit which records are read, for example exclude cancelled orders.
 - **Indexed Fields:** add the fields the agent may read, for example *Order Reference, Customer, Order Date, Status, Total, Order Lines*. For counting and ranking questions the agent also uses the record's key fields automatically (status, amounts, date, customer, salesperson), even if you did not list them.
 - **Restricted Fields:** add fields that must **never be sent to a cloud AI** (for example *internal notes* or *margins*). They are replaced by **[REDACTED]** for OpenAI/Claude, but used normally with a local Ollama.
8. Click **Save**. The records are queued and read within about a minute.

The screenshot shows the 'AI Agent' configuration interface. At the top, there's a navigation bar with 'AI Agent', 'Chat', 'Conversations', 'Reporting', and 'Configuration'. Below this, a 'New' button and 'Knowledge Sources' are visible. The main content area is titled 'Sales Order' and has a 'Coverage' of 100.0%. There are two tabs: 'Index Now' and 'Re-index / Purge...'. The form fields are as follows:

- Name:** Sales Order
- Model:** Sales Order
- Trigger Mode:** On change (every minute)
- Priority:** 0.00
- Index Attachments:** ☐
- Allow Structured Queries:** ☒
- Chunk Size:** 0
- Chunk Overlap:** 0

Below the form, there are two tabs: 'Records & Fields' and 'Index Status'. Under 'Records & Fields', there's a 'Domain' section with a rule 'Match all of the following rules: Status != Cancelled'. It shows '20 record(s)' and an 'Edit Domain' button. Below this is the 'INDEXED FIELDS' section, which lists various fields like 'Total (Sales Order)', 'Customer Reference (Sales Order)', 'Currency (Sales Order)', 'Order Date (Sales Order)', 'Order Reference (Sales Order)', 'Terms and conditions (Sales Order)', 'Order Lines (Sales Order)', 'Customer (Sales Order)', 'Status (Sales Order)', and 'Salesperson (Sales Order)'. At the bottom, there's a 'RESTRICTED FIELDS' section with a note 'NEVER SENT TO CLOUD PROVIDERS NOT ALLOWED FOR RESTRICTED DATA' and an empty input field.

A knowledge source form

Fields you cannot add: fields that Odoo protects with user groups (for example salary fields) are never read by the agent. The form shows a blue note if you selected one.

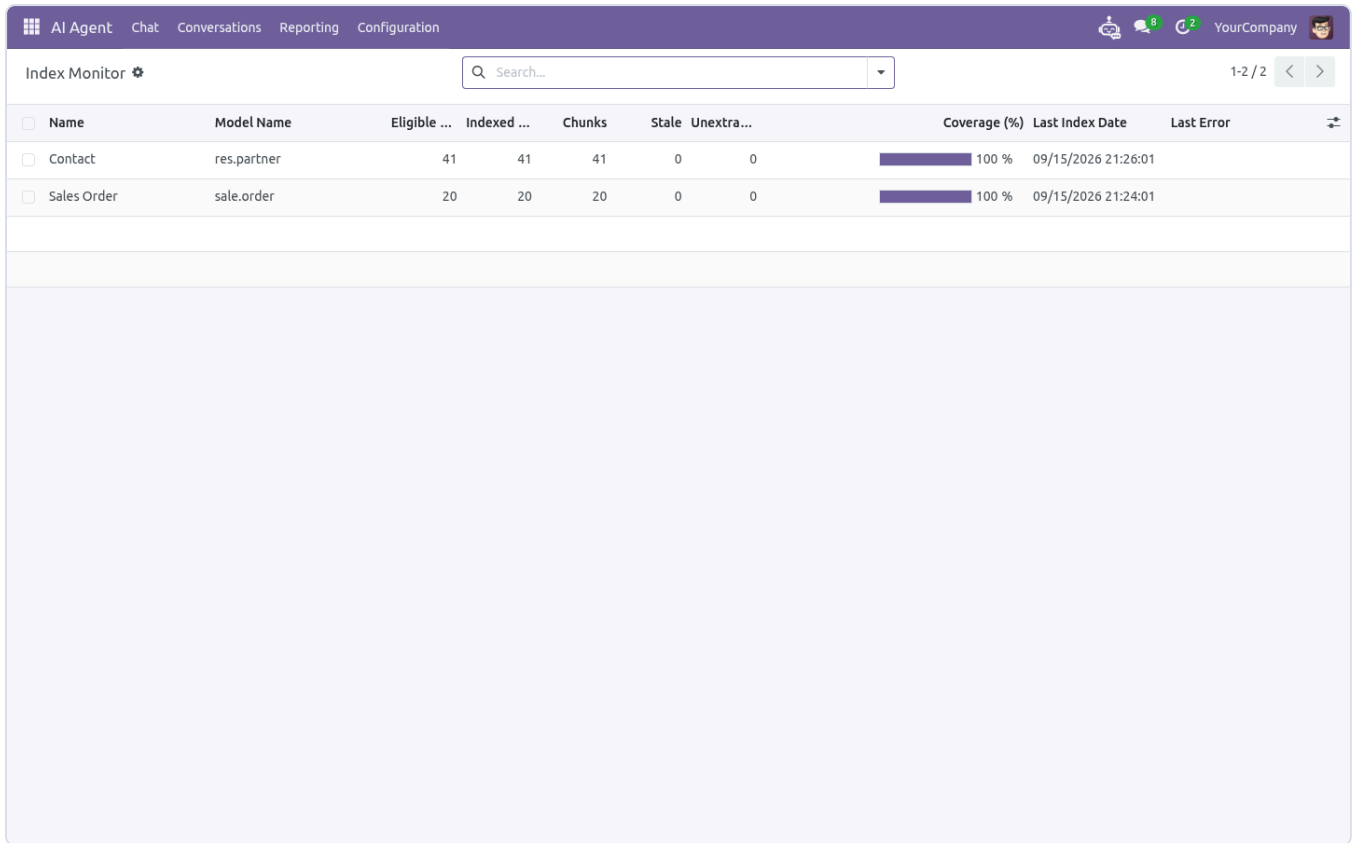
Security reminder: adding a source does **not** give anyone extra rights. Each user still only gets answers from records they can open themselves.

16. Step 6 — Build and watch the index

Before the agent can answer, it must **read and prepare** the records. This is called **indexing**. It runs automatically in the background every minute.

Watch progress

Open **AI Agent > Configuration > Index Monitor**.



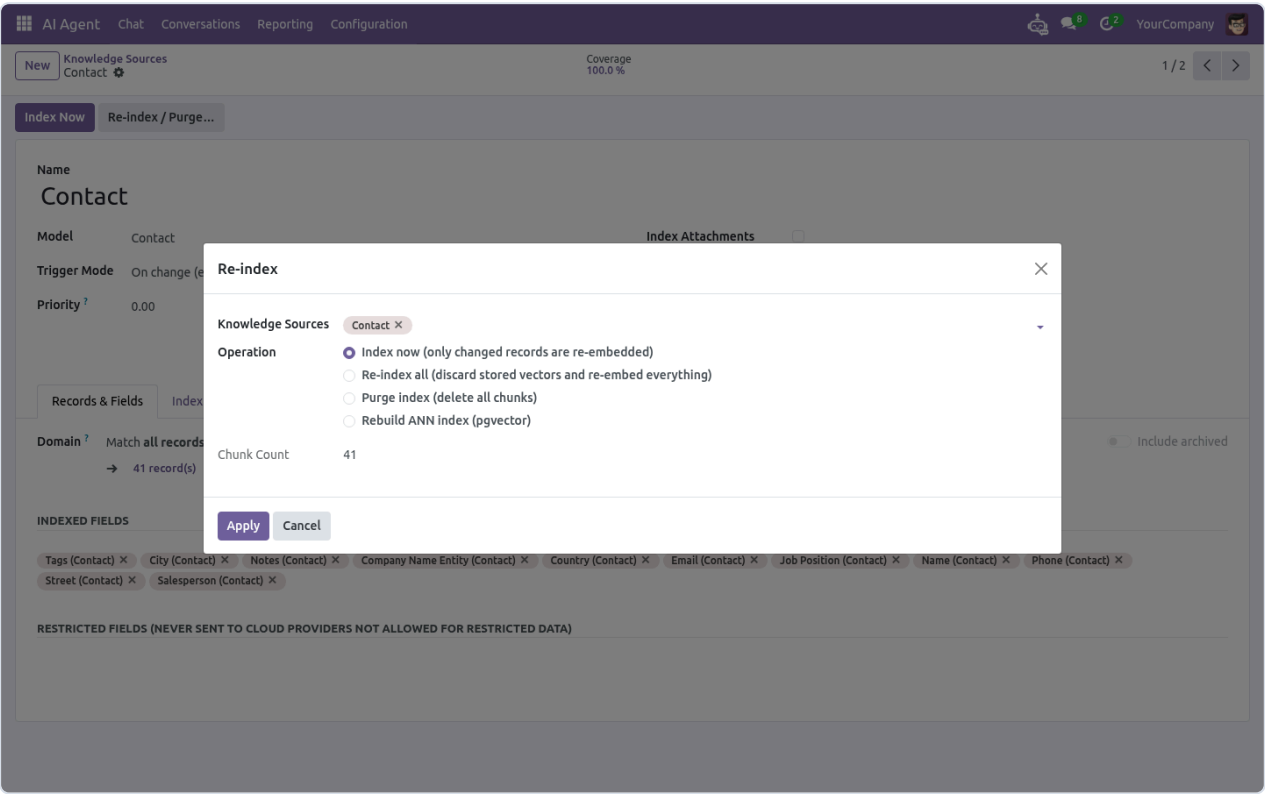
The index monitor

Column	Meaning
Eligible Records	How many records match the source
Indexed Records	How many have been read
Chunks	Number of text pieces stored
Stale	Pieces still waiting to be prepared — should go down to 0
Coverage (%)	Progress; 100 % means ready
Last Error	If something went wrong, the reason is here (the line turns red)

Refresh the page (F5) to see progress. The first indexing can take from seconds to hours, depending on how many records you have and how fast your AI provider is.

Buttons

- **Index Now** — reads the selected sources again right away (only changed records are reprocessed).
- **Re-index / Purge...** — opens a window with more options:



The re-index window

Option	When to use it
Index now (only changed records are re-embedded)	Normal refresh. Safe.
Re-index all (discard stored vectors and re-embed everything)	After big changes. Slow and, with cloud providers, costs money.
Purge index (delete all chunks)	Remove everything for this source. The agent forgets these records until you index again.
Rebuild ANN index (pgvector)	Only with pgvector, after very large imports. Run outside working hours.

Changing the embedding model later — all prepared data must be rebuilt, because different models are not compatible. Odoo stops you and asks you to use the **Change Embedding Model** button on the provider, which explains the impact and starts the rebuild.

17. Step 7 — Let people change records (AI Agent Roles)

Skip this step if the agent should only answer questions. Without a role, nobody can create or update records through the agent.

An **AI Agent Role** says **who** may ask the agent for changes, on **which kind of records**, **which operations** (create, update) and **which fields**.

Open **AI Agent > Configuration > Roles** and click **New**.

AI AgentChatConversationsReportingConfiguration

New AI Agent RolesSales Team

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NameSales Team

GroupsSales / User: Own Documents OnlyDescriptionSalespeople may add contacts, fix contact details and update quotations from the chat.

Users

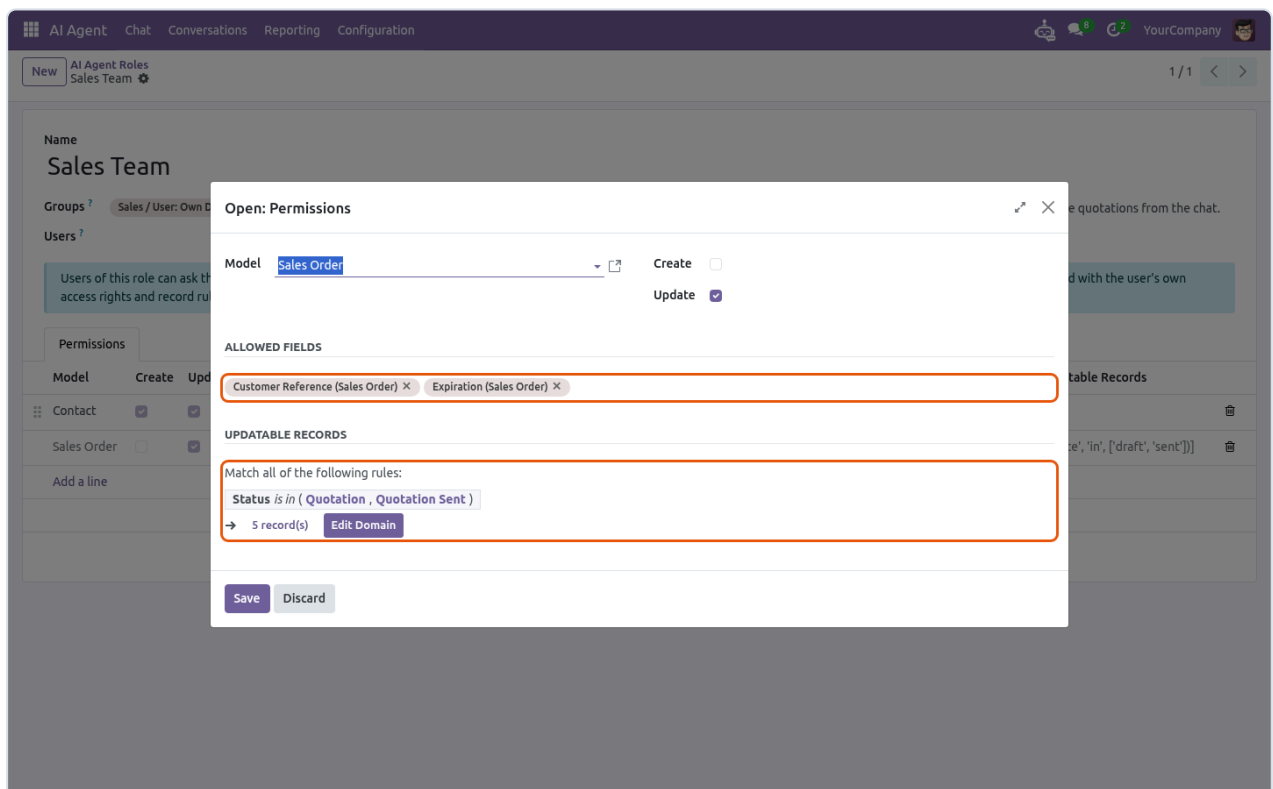
Users of this role can ask the agent to create or update the records below. The agent only prepares the change: the user reviews it in the chat and presses Confirm. The change is saved with the user's own access rights and record rules, so a role never grants more than the user already has.

Permissions

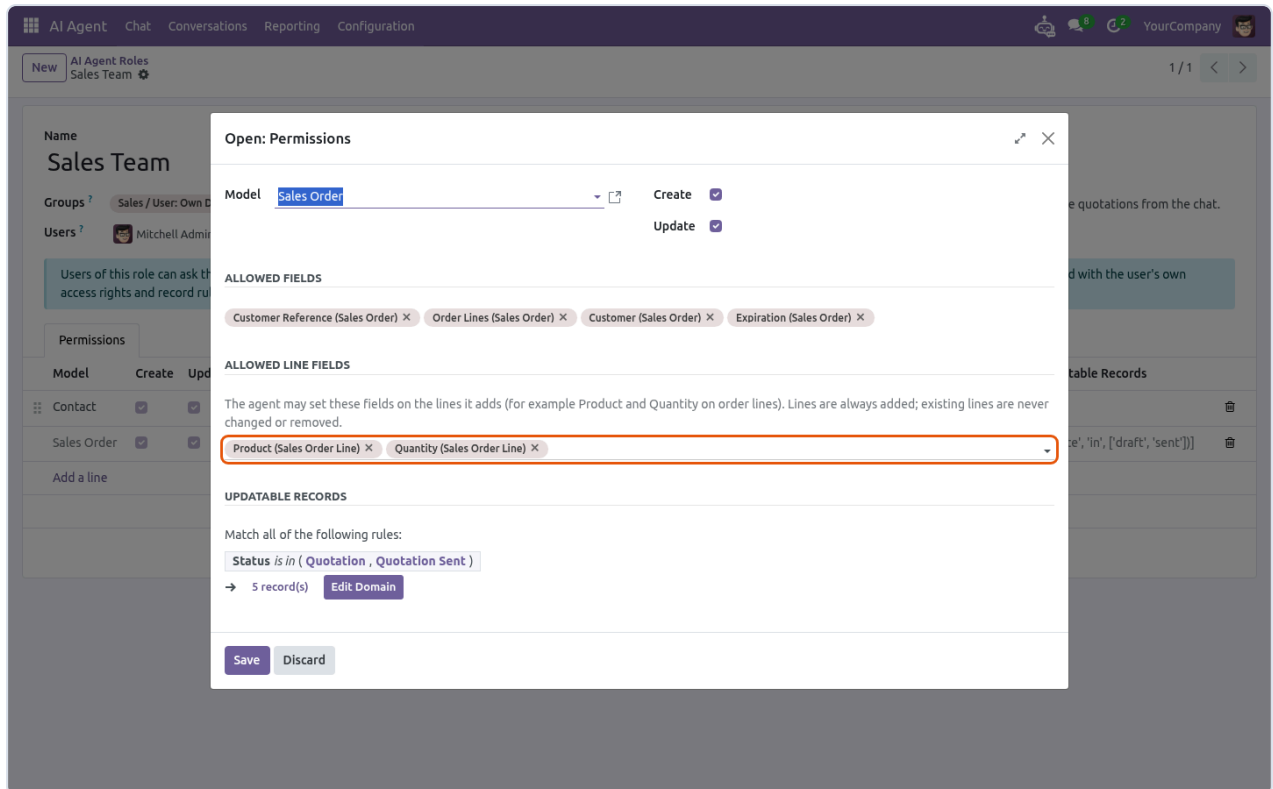
Model	Create	Update	Allowed Fields	Updatable Records
Contact	☒	☒	Tags (Contact)City (Contact)Email (Contact)Job Position (Contact)Mobile (Contact)Name (Contact)Phone (Contact)	
Sales Order	☐	☒	Customer Reference (Sales Order)Expiration (Sales Order)	['state', 'in', ['draft', 'sent']]
Add a line				

A role with two permission lines

1. **Name:** for example `Sales Team`.
2. **Groups:** choose the Odoo groups whose members get this role, for example **Sales / User: Own Documents Only**. Members of these groups get the role automatically.
3. **Users (optional):** add single users who should get the role without being in one of the groups.
4. **Description (optional):** a short note, for example what the role is for.
5. In the **Permissions** tab, click **Add a line** for each kind of record:
 - **Model:** for example **Contact**.
 - **Create:** tick it to allow new records.
 - **Update:** tick it to allow changing existing records.
 - **Allowed Fields:** add the fields the agent may fill in, for example *Name, Email, Phone, City*.
 - **Updatable Records (only with Update):** click **Edit Domain** to limit which records may be changed, for example only quotations (*Status is in Quotation, Quotation Sent*). Leave it empty to allow all records the user can edit.
 - **Allowed Line Fields (only when a lines field such as Order Lines is in Allowed Fields):** the fields the agent may set on each line, for example *Product* and *Quantity*. Leave price fields out unless you want the agent to set prices: Odoo calculates them from the product and the customer's pricelist.



A permission line for Sales Orders: two fields, only quotations



Allowed Line Fields: Product and Quantity on order lines

6. Click **Save** in the line window, then **Save** on the role.

7. Users of the role must **reload the page** (F5).

A role never gives extra rights. Every change is saved with the user's own access rights. If a salesperson cannot edit a contact in Odoo, the role does not change that.

Rules Odoo checks for you

- **Allowed Fields** only lists fields that people can edit in Odoo. Read-only, calculated and linked fields cannot be chosen.
- **Lines fields** (for example *Order Lines*) can be chosen, and then **Allowed Line Fields** must say which fields of a line the agent may set. Without that, Odoo refuses to save the permission. Lines are only ever **added**.
- **Technical and security records cannot be added** (users, groups, settings, the AI Agent's own records). Odoo shows an error if you try.
- **Creating needs all required fields.** For example, a sales order cannot be created without a *Customer*. If the required fields are not in **Allowed Fields**, users get *"Missing required field(s): ..."*.
- **One line per model** in a role. Use a second role if different groups need different fields.

Check how long a change may wait: AI Agent › Configuration › Settings › Record changes (60 minutes by default).

18. Step 8 — Test everything

1. Open **AI Agent › Chat**.
2. Ask a simple question about a record you know, for example **What is the email address of ?**
3. Check that:
 - an answer appears;
 - the **Sources** buttons open the right record;
 - a question such as **What is the capital of France?** is refused.
4. Log in as a normal user (with **AI Agent › User**) and repeat the test.
5. **If you created a role:** log in as a member of the role and ask **Change the phone of to .** Check the change card, click **Confirm**, then **Open record** and check the phone number. Change it back the same way.
6. Collect 10–20 real questions from your colleagues and try them. Adjust knowledge sources (fields) if answers miss information.



The agent is ready. Tell your colleagues to read **Part A** of this manual.

Part C — Keeping an eye on things

19. Conversations, usage and cost, audit log, record changes

Conversations

AI Agent > Conversations — as an Administrator you see everyone's conversations. Click one to read all questions and answers.

AI AgentChatConversationsReportingConfiguration

1-2 / 2

☐ Last Activity	Name	User	Provider	Message...	Total To...
☐	09/15/2026 21:31:04	What is the capital of France?	Mitchell Admin	Ollama - Local	2931
☐	09/15/2026 21:29:46	What is the email address of Gemini Furniture?	Mitchell Admin	Ollama - Local	41,911

2,842

All conversations

Answer feedback

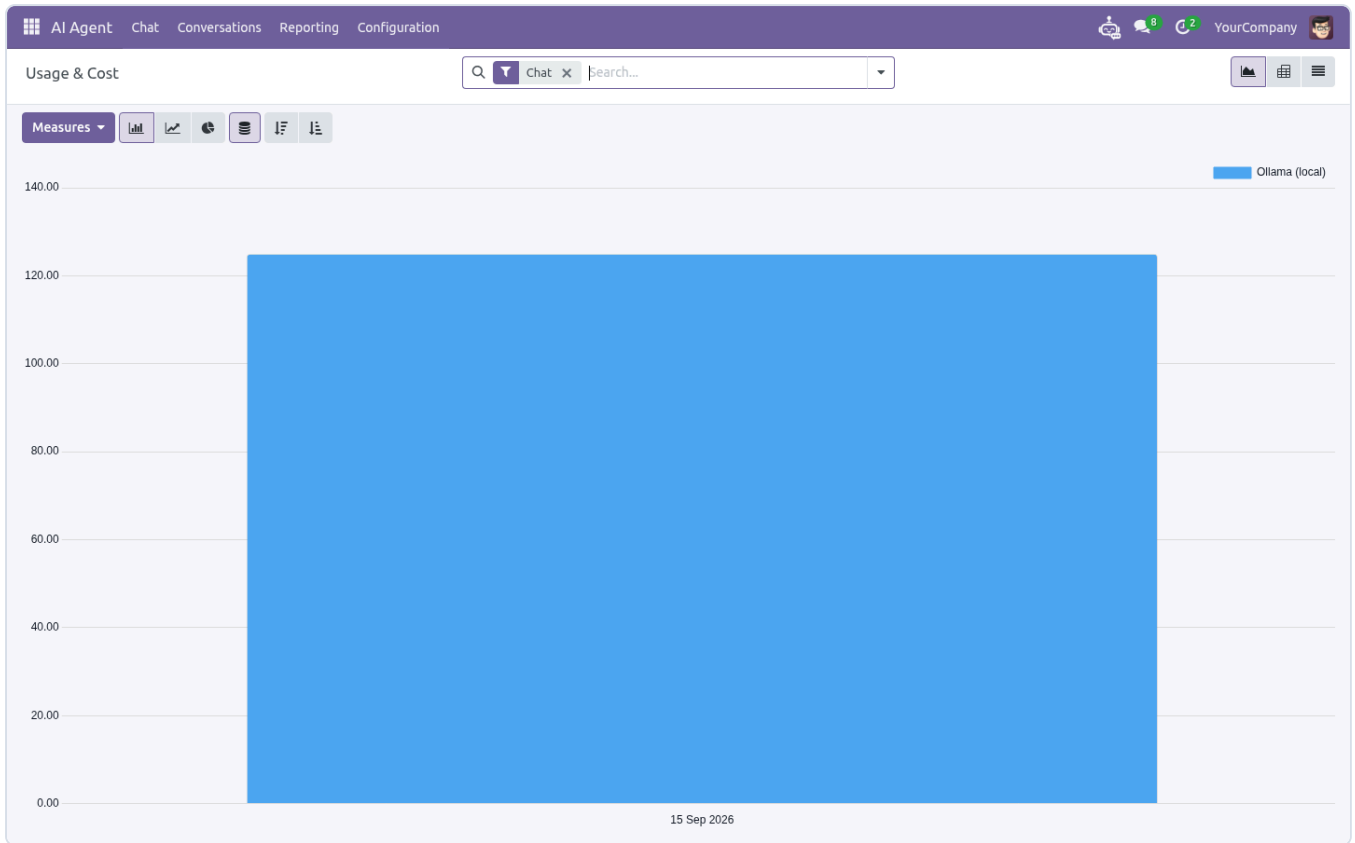
AI Agent > Reporting > Answer Feedback lists every 👍/👎 rating with the user's comment. Use it to find questions the agent handles badly.

Usage & Cost

AI Agent > Reporting > Usage & Cost shows how much the AI is used, as a chart, a pivot table or a list:

- **Calls, Tokens In / Tokens Out** (amount of text sent and received),
- **Estimated Cost** (only if you entered prices on the provider),
- **Avg Latency (ms)** (how long the AI took).

Use the **filters** (*External, Chat, Embedding, Date*) and **Group By** (*Provider, User, Day*).



Usage and cost report

Audit Log

AI Agent > Reporting > Audit Log records **every call to an AI provider** and every question the agent refused. Nobody can edit or delete these lines (old lines are removed automatically after the retention period).

AI Agent Chat Conversations Reporting Configuration										
Audit Log										
Q Search...										
1-9 / 9										
Created on	User	Call Type	Provider Type	Model Name	Is External	Status	Blocked Reason	Token In	Token Out	Latency ...
09/15/2026 21:31:04	Mitchell Admin	Chat	Ollama (local)	llama3.2:3b		Done		900	31	4,154
09/15/2026 21:31:04	Mitchell Admin	Embedding	Ollama (local)	nomic-embed-text:latest		Done		0	0	62
09/15/2026 21:29:46	Mitchell Admin	Chat	Ollama (local)	llama3.2:3b		Done		915	49	13,857
09/15/2026 21:29:46	Mitchell Admin	Embedding	Ollama (local)	nomic-embed-text:latest		Done		0	0	40
09/15/2026 21:29:07	Mitchell Admin	Chat	Ollama (local)	llama3.2:3b		Done		902	45	16,686
09/15/2026 21:29:07	Mitchell Admin	Embedding	Ollama (local)	nomic-embed-text:latest		Done		0	0	50
09/15/2026 21:19:51	OdooBot	Embedding	Ollama (local)	nomic-embed-text:latest		Done		0	0	4,187
09/15/2026 21:19:05	OdooBot	Embedding	Ollama (local)	nomic-embed-text:latest		Done		0	0	1,555
09/15/2026 21:19:03	OdooBot	Embedding	Ollama (local)	nomic-embed-text:latest		Done		0	0	5,438
								2,717	125	

The audit log

Useful for auditors:

- Filter **Sent to External Provider** — shows everything that left your server. With only Ollama configured, this list stays **empty**.
- Filter **Blocked** — questions refused by the agent, with the reason (*out_of_domain, empty_context, token_cap, ...*).
- Filter **Errors** — failed calls to the AI provider.

Record Changes

AI Agent > Reporting > Record Changes lists every change the agent prepared: who asked, what, under which role, and the outcome (*Saved, Discarded, Failed, Expired* or still *Waiting*). Nobody can edit or delete these lines.

AI Agent

Chat

Conversations

Reporting

Configuration

8

2

YourCompany

Record Changes

Q

Search...

1-1 / 1

<

>

☐	Prepared On	User	Name	Operation	Document Type	Role	State	Decided On	
☐	09/16/2026 00:34:17	Mitchell Admin	Update Contact: Gemini Furniture	Update	Contact	Sales Team	Saved	09/16/2026 00:34:45	

Record changes prepared by the agent

- Open a line to see each field with its old and new value, and click **Open Record** to go to the record.
- Use the filters **Saved, Waiting, Failed, Created, Updated** and **Group By** *User, Model* or *Status*.
- Administrators and auditors see everyone's changes. Lines older than the audit log retention are removed automatically.

Part D — Help

20. Making answers faster (local AI)

With **Ollama on an ordinary computer** (no graphics card), most of the waiting time is the AI **reading** the question and the records sent with it. The less text it has to read, the faster the answer.

What we measured on a laptop with an Intel Core i5 (4 cores, no graphics card), model `llama3.2:3b`, the same questions each time:

Setup	"What is the email address of Gemini Furniture?"	"Which sales orders does Gemini Furniture have?"
Module 18.0.1.0.0, Structured Queries on	63 seconds	70 seconds
Module 18.0.1.0.0, Structured Queries off	22 seconds	42 seconds
Module 18.0.1.1.0 (default settings)	11 seconds	17-21 seconds
Module 18.0.1.2.0 (default settings)	8 seconds (table with the contact)	9 seconds (table with all orders)
The same question asked again	about 2 seconds	—

Your computer will be faster or slower, but the steps below help on every computer.

Step 1 — Upgrade the module

1. Go to **Apps** and search **Easy AI Agent** (if nothing is found, remove the *Apps* filter in the search bar).
2. Open the module and click **Upgrade**.
3. Wait **one or two minutes**. The agent automatically re-reads your records in a shorter form (check **Configuration > Index Monitor**: *Stale* goes back to **0**).

Step 2 — Check the provider settings

Open **AI Agent > Configuration > Providers** and click your Ollama provider.

Field	Fast setting	Why
Structured Questions	Query plan	Counts, totals and rankings need one short AI call, and Odoo writes the result. <i>Tool calling</i> is two to three times slower on a laptop and less reliable with small models. This is the default for Ollama.
Keep-alive	30m (default) or -1	Keeps the AI loaded in memory. Without it, Ollama unloads the AI after 5 minutes idle and the next question waits about 5 seconds to load it again. -1 keeps it loaded until Ollama restarts, but uses memory all the time (about 2.5 GB for llama3.2:3b).
Max Output Tokens	for example 300	Stops very long answers. On the measured laptop the AI wrote about 7-11 tokens (small pieces of words) per second. 0 means no limit.

Click **Save**.

Opening the chat loads the AI in the background. If it was not loaded, the first question can start straight away while the AI finishes loading.

Step 3 — Send fewer records per question

1. Open **AI Agent > Configuration > Settings**.
2. In **Retrieval > Top-K and over-fetch**, lower **Top-K Chunks** from 6 to 3 or 4.
3. Click **Save**.

Fewer records means less reading, but the agent also has fewer records to choose from. Try it with your usual questions.

Step 4 — Index only useful fields

In **Configuration > Knowledge Sources**, open each source and remove **Indexed Fields** that nobody asks about, especially long texts such as *Terms and conditions* or long notes. Click **Save**; the records are re-read automatically.

Step 5 — Good habits

- **Start a new conversation** when you change topic: earlier questions and answers are sent along with every new question in the same conversation.
- **Ask short, precise questions.**

What else makes a big difference

- **A computer with a graphics card (GPU)** that Ollama can use is usually much faster than a CPU.
- **A smaller model** (fewer "B" parameters) answers faster but makes more mistakes; a larger model is slower but more accurate. Test with your own questions before switching.
- **Cloud providers** (OpenAI, Anthropic) answer in seconds, but your data leaves your server.

21. Troubleshooting: problems and solutions

Problem	Likely cause	Solution
I don't see the AI Agent app.	No access.	Administrator: give the AI Agent > User role (Step 1), then reload the page.
"No default chat provider is configured"	No provider is marked as default.	Tick Default Chat Provider on a provider, or set it in <i>Settings > Default providers</i> .
Ollama provider: model lists are empty / <i>"No models loaded from this server yet"</i> .	Ollama not running, wrong Base URL, or no models downloaded.	1) On the server run <code>ollama list</code> — if empty, run <code>ollama pull llama3.2:3b</code> and <code>ollama pull nomic-embed-text</code> . 2) Check Base URL . 3) Click Test Connection , then Refresh Models .
Test Connection fails with <i>"Network error"</i> .	Odoo cannot reach the AI service.	Check the Base URL, the server's firewall and internet access (for OpenAI/Anthropic). If Odoo runs in Docker, <code>localhost</code> means the container itself — use the host's address.
Test Connection fails with <i>"error 401"</i> .	Wrong or expired API key.	Paste a new key in API Key and save.
Answers are very slow (Ollama).	The AI reads a lot of text on a computer without a graphics card.	Follow Making answers faster.
Answer: "Timeout after ...s" .	The AI is too slow (common with Ollama on a CPU).	Follow Making answers faster. If needed, increase Timeout (s) on the provider (for example 600).
Answer: "I couldn't find anything in this database about that."	No matching record, the record type is not a knowledge source, or indexing is not finished.	Check spelling. Check the Index Monitor (Coverage 100 %, Stale 0). Add the missing source or fields.
Answer: "I can only answer questions about the data in this Odoo database..." for a real business question.	The question contains no words that match your Odoo data.	Use record names or Odoo words (<i>customer, invoice, order</i>).
A small local model gives strange answers , for example text that looks like code (<code>{ "name": "odoo_search_read" ...}</code>) or <i>"I will use the correct field"</i> .	Small models are weak at <i>tool calling</i> .	On the provider, set Structured Questions to Query plan .
Counts, totals or rankings are wrong , or say <i>\$0.00</i> .	The provider uses <i>Retrieval only</i> or <i>Tool calling</i> with a small	Set Structured Questions to Query plan (Ollama) and upgrade the module to 18.0.1.2.0. Read the <i>How I searched</i>

Problem	Likely cause	Solution
	model, or the question was understood differently.	line and rephrase if it is not what you meant.
A long list in the answer is incomplete .	Only the most relevant records are read (6 by default).	Use Odoo's normal list view with filters for complete lists, or raise Top-K in Settings.
Index Monitor: Coverage stays at 0 %, Last Error says <i>"pgvector is not available and the numpy fallback is disabled"</i> .	No vector storage available.	Settings: tick numpy fallback (small databases) or ask IT to install pgvector .
Index Monitor: Stale does not go down.	The embedding provider fails or is slow.	Read Last Error . Test the embedding provider with Test Connection . Check Configuration › Index Queue for records in error and click Retry .
Attachments are not used; Unextractable is high.	Odoo cannot read text from these files (scanned PDFs, images) or the indexation module is missing.	Install Attachments List and Document Indexation . Scanned documents (pictures of text) are not supported.
Error when changing the embedding model: <i>"Changing the embedding model invalidates every stored vector..."</i>	Protection against mixing incompatible data.	Click Change Embedding Model on the provider and confirm. Everything is rebuilt automatically.
<i>"Your daily AI token limit has been reached."</i>	The daily limit per user was reached.	Wait until tomorrow, or raise Daily token cap per user in Settings (0 = no limit).
Off-topic questions reach the AI, or answers list sources that have nothing to do with the question .	The Similarity Threshold is too low for your embedding model. Some embedding models (for example <i>nomic-embed-text</i>) give even unrelated text a fairly high similarity score.	In Settings › Retrieval › Similarity Threshold , raise the value in small steps (for example by 0.05) and test again with your real questions after each change. If it is too high, the agent starts answering <i>"I couldn't find anything..."</i> to good questions.
I asked for a change but got a normal answer (or <i>"I can only answer questions..."</i>).	You have no AI Agent Role, or the message does not start with an action word.	Start with <i>Create, Add, Change, Update</i> or <i>Set</i> (section 9). Ask your administrator whether you have a role.
<i>"I could not prepare this change: Your AI agent role does not allow ..."</i>	The model, the operation or a field is not in your role.	Ask only for the fields listed in the message, or ask your administrator to extend the role (Step 7).
<i>"I could not prepare this change: I could not turn your message into a change."</i>	The AI did not produce a usable change (small local models sometimes fail on long or mixed messages).	Keep the message to one record: <i>"Create a sale order for Azure Interior with 3 Desk Organizer"</i> .

Problem	Likely cause	Solution
I asked to create a sales order with products and got a search result ("No Sales Order found") instead of a change card.	Fixed: such a message made the model write an over-long answer that was cut off, after which the message was treated as a question.	Upgrade the module, and ask your administrator to allow <i>Order Lines</i> with <i>Product</i> and <i>Quantity</i> in your role (Step 7).
<i>"I could not prepare this change: No Product named '...' was found."</i>	The product name in your message does not match a product in Odoo.	Use the name exactly as in Odoo, or its internal reference.
The change card shows the customer but no order lines .	Your role does not allow the <i>Order Lines</i> field, so products and quantities are ignored.	Ask your administrator to add <i>Order Lines</i> and its <i>Allowed Line Fields</i> to your role.
<i>"... was not found, is not accessible, or your AI agent role does not allow updating it."</i>	The record name is wrong, you cannot open that record, or the role only allows some records (for example only quotations).	Use the exact name from Odoo. Check the record's status.
<i>"Several ... records match ..."</i>	More than one record has a similar name.	Use the full name or the reference, for example <i>S00002</i> .
<i>"Missing required field(s): ..."</i>	A new record needs these fields.	Give them in your message. If they are not in the role's Allowed Fields , ask your administrator.
The change card shows the wrong field or value .	The AI misunderstood the message.	Click Discard and ask again using the field name shown in Odoo, for example <i>"Set the Mobile of ..."</i> .
The badge shows Failed .	Odoo refused to save, for example because of a rule of the app. The red text says why.	Fix the cause (or ask again with correct values). Nothing was saved.
<i>"This change is no longer waiting for confirmation."</i>	The change was already confirmed, discarded or expired (for example clicked twice).	Nothing to do. Reload the conversation to see its current badge.
The answer text keeps appearing only at the end, not word by word.	Normal for some setups (streaming disabled or a proxy buffering updates).	Nothing to do; the answer is complete.

22. Frequently asked questions

Can the agent change or delete my data? It **never deletes** anything and never confirms, cancels or validates documents. Without an AI Agent Role it only reads. With a role it can **prepare** new records and changes to the fields the role allows, and **nothing is saved until you press Confirm**. Every change is listed in *Reporting › Record Changes*.

Can someone else confirm a change I asked for? No. Only the person who asked can press Confirm or Discard, and the change is saved with that person's own rights.

Could text inside a record trick the agent into changing something? Record text can contain anything, so this cannot be ruled out completely. That is why every change needs your **Confirm**, is limited to your role, and is shown field by field before it is saved.

Can a colleague see my data through the agent? No. Every answer is built only from records the person asking is allowed to open in Odoo.

Does my data leave the company? With **Ollama** — no, everything stays on your server. With **OpenAI** or **Anthropic** — yes, the relevant parts of records are sent to that company to write the answer. Fields marked as **Restricted Fields** are hidden (*[REDACTED]*) before sending. Auditors can check everything that was sent in the **Audit Log** (*Sent to External Provider*).

Why does it say "I couldn't find anything" when I know the record exists? Either you do not have access to that record, its type is not a knowledge source, the field you ask about is not in **Indexed Fields**, or indexing has not finished. See Troubleshooting.

Can it read my PDF attachments? Yes, if **Index attachments** is ticked on the knowledge source and Odoo's *Attachments List and Document Indexation* module is installed. Scanned documents (images) cannot be read.

Can I ask in another language? Yes. The agent answers in the language of your question. The quality depends on the AI model. For counts, totals and rankings, Odoo also recognises English words such as *today*, *last month*, *highest*, *top customer* or *quotation* to correct small mistakes of the AI; in other languages this extra help is not available, so check the *How I searched* line.

Why did "What did our top customer order last month?" only tell me the customer? The agent answers **one step per question**. Ask *"Who is our top customer last month?"*, then *"List sales orders of last month"*.

Are the numbers in a table answer reliable? Yes. With *Query plan*, the numbers come directly from Odoo, not from the AI. What can differ is how the question was understood — the *How I searched* line tells you (for example which status or period was used).

How much does it cost? Ollama is free (you pay for the hardware). OpenAI and Anthropic charge per use; see **Reporting › Usage & Cost** after entering prices on the provider.

23. Glossary: words used in this manual

Word	Simple explanation
AI model	The "brain" that writes answers, for example <i>llama3.2</i> or a ChatGPT or Claude model.
Provider	The service that runs the AI model: Ollama, OpenAI or Anthropic.
API key	A secret password that lets Odoo use a cloud AI service.
Ollama	Free software that runs AI models on your own computer or server.
Embedding	A way to turn text into numbers so the agent can find records with a similar meaning.
Embedding model	The AI model used only for finding matching records (for example <i>nomic-embed-text</i>).
Knowledge source	A setting that tells the agent which kind of records and fields it may read.
Indexing	Reading records and preparing them so the agent can search them quickly.
Chunk	A small piece of text cut from a record or attachment.
Coverage	The percentage of records that have been indexed.
Source / citation	The record an answer came from; shown as a button and as [1], [2]...
Restricted field	A field that is never sent to a cloud AI (replaced by [REDACTED]).
Structured Questions	The provider setting that decides how counts, totals, rankings and lists are answered: <i>Query plan</i> , <i>Tool calling</i> or <i>Retrieval only</i> .
Query plan	The AI writes a short search description; Odoo runs it with your access rights and writes the numbers itself. Recommended for Ollama.
Tool calling	The AI asks Odoo to search, count or total records, possibly several times. Best with cloud models.
How I searched	The line in italics under a table answer that shows the filters and sorting Odoo used.
Token	A small piece of text (about 4 letters). AI use and cost are measured in tokens.
pgvector	An add-on for the PostgreSQL database that makes searching fast.
Audit log	A permanent list of everything sent to AI providers.
AI Agent Role	A setting that allows a group of users to create or update certain records through the agent, limited to chosen fields.
Change card	The box in the chat that shows a prepared change (Field / Current / New) with the Confirm and Discard buttons.
Record Changes	The report listing every change the agent prepared, and whether it was saved.

End of the manual.