# Cohort & Retention

User Guide · Odoo 18.0 & 19.0

Customer & revenue cohorts, retention curves and lifetime-value estimates

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# 1. Overview
Cohort & Retention Analytics ==========

Turn your posted sales invoices into customer cohorts and retention curves without exporting to a spreadsheet.

What it does ---------- * Builds monthly acquisition cohorts from each customer's first posted invoice. * Computes a retention matrix: for every cohort, the share of customers still active in month 0,1,2,...,N. * Revenue-retention view: recurring revenue retained per cohort over time. * Average LTV estimate per cohort (cumulative revenue / cohort size) and a blended churn-rate based LTV projection. * Snapshot model so heavy aggregations are computed once and stored, with a drill-down per cohort/period cell.

Built entirely on Community accounting data (account.move). No Enterprise spreadsheet/BI dependency.

# 2. Installation
Open Apps, click Update Apps List, search for “Cohort & Retention” (technical name **gb_cohort_retention_analytics**) and press Install. The module supports Odoo 18.0 and 19.0, Community and Enterprise.

# 3. Menus & Navigation
After install the following menus become available:

- Cohorts
- Analyses
- Build Cohorts
- Retention Matrix

# 4. Feature & Data-Model Reference
The app implements the following records and engines:

| Model | Purpose |
|---|---|
| gb.cohort.cell | Cohort / Period Cell |
| gb.cohort.analysis | Cohort & Retention Analysis |
| gb.cohort.build.wizard | Quick-build a Cohort Analysis |

# 5. Typical Workflow
1. Open the app's Configuration menu and set up the master data / policies it needs.
2. Create the main operational record from its primary menu.
3. Use the action buttons on the form (e.g. Confirm / Compute / Post / Generate) to run the engine.
4. Review the results in the list, pivot and report views; export or post where applicable.

# 6. Support
Email **support@pokutsoft.com** or visit **https://pokutsoft.com**. Please include your Odoo version (18.0 / 19.0) and the module technical name.