

ServiceFlow Analytics

Operations-to-Cash Performance Intelligence

User Stories & Acceptance Criteria

Project Name	ServiceFlow Analytics
Document Type	User Stories & Acceptance Criteria
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1. Overview

This document defines user stories for the ServiceFlow Analytics initiative.

The stories translate business needs into actionable reporting and analytics requirements.

Scope note:

These user stories support analytics, reporting, and decision-making.

They do **not** represent application development or system integration stories.

2. Epic Structure

To keep the scope realistic and professional, user stories are grouped into **four Epics**, aligned with dashboard pages and business goals:

- **Epic 1:** Executive Visibility & Financial Health
- **Epic 2:** Operational Performance & Execution
- **Epic 3:** Finance, Collections & Cost Control
- **Epic 4:** Reconciliation & Exception Management

Epic 1: Executive Visibility & Financial Health

US-01: Executive Financial

As a CFO

I **want** a single executive summary view of operational-to-cash performance

So that I can quickly assess financial health without manual reports.

Acceptance Criteria

- Displays top-level KPIs:
 - Total Jobs
 - Completed Jobs
 - Completed but Not Invoiced Jobs
 - Unbilled Revenue Exposure
 - Days Sales Outstanding (DSO)
- KPIs update based on Region and Service Type filters
- Values are consistent across all dashboard page

US-02: Revenue Risk Visibility

As a CFO

I want visibility into unbilled and overdue exposure

So that I can proactively manage cash flow risk.

Acceptance Criteria

- Shows total unbilled revenue amount
 - Shows overdue invoice count and outstanding amount
 - Highlights largest aging bucket (e.g., 90+ days)
 - Data is explainable and traceable to invoice/job records
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Epic 2: Operational Performance & Execution

US-03: Job Execution Monitoring

As an Operations Manager

I want visibility into job status and completion trends

So that I can monitor execution performance by region and service type.

Acceptance Criteria

- Displays job status distribution (Scheduled, In Progress, Completed)
- Shows completed jobs trend over time
- Supports filtering by Region and Service Type
- Job counts reconcile with underlying job records

US-04: Job Cycle Time Analysis

As an Operations Manager

I want to track job cycle time performance

So that I can identify execution delays and bottlenecks.

Acceptance Criteria

- Calculates average job cycle time (Scheduled → Completed)
 - Displays cycle time comparison by region
 - Excludes cancelled and in-progress jobs
 - Supports drill-down to job-level details
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Epic 3: Finance, Collections & Cost Control

US-05: Receivables & Collections Monitoring

As a Finance Manager

I want to monitor collections performance and overdue invoices

So that I can prioritize follow-ups and manage cash flow.

Acceptance Criteria

- Displays:
 - Average DSO
 - Outstanding amount
 - Overdue invoice count
- Shows AR aging buckets
- Allows invoice-level drilldown
- Uses consistent invoice and payment logic

US-06: Job Cost Variance Visibility

As a Finance Manager

I want to identify jobs with cost overruns

So that margin leakage can be addressed early.

Acceptance Criteria

- Calculates cost variance at job level
- Shows count of jobs with cost overruns

- Highlights highest variance jobs
 - Excludes jobs with missing or zero estimated cost
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Epic 4: Reconciliation & Exception Management

US-07: Completed but Not Invoiced Detection

As a Finance Analyst

I want automated identification of completed jobs that are not invoiced

So that I don't manually reconcile across systems.

Acceptance Criteria

- Identifies jobs with status = Completed and no linked invoice
- Shows number of pending days since completion
- Supports filtering by region and service type
- Results reconcile with job and invoice tables

US-08: End-to-End Reconciliation Support

As a Finance Analyst

I want to validate job-to-invoice-to-payment relationships

So that discrepancies can be investigated quickly.

Acceptance Criteria

- Jobs, invoices, and payments can be traced via IDs
 - Invoice-to-payment linkage is visible
 - Missing or mismatched records can be identified
 - Data supports audit-style validation
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3. User Stories Summary

Epic	Focus Area	Number of Stories
Epic 1	Executive Visibility	2
Epic 2	Operational Performance	2

Epic	Focus Area	Number of Stories
Epic 3	Finance & Cost Control	2
Epic 4	Reconciliation & Exceptions	2
Total		8 User Stories

4. Notes on Scope Discipline

- Stories are **analytics-focused**, not development-heavy
- No Agile ceremonies, sprint planning, or velocity metrics
- Acceptance criteria are measurable and testable
- Stories map directly to dashboards and KPIs already built