

# ServiceFlow Analytics

## Operations-to-Cash Performance Intelligence

### User Stories & Acceptance Criteria

Project Name	ServiceFlow Analytics
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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**

<b>Epic</b>	<b>Focus Area</b>	<b>Number of Stories</b>
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
<b>Total</b>		<b>8 User Stories</b>

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#### 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