**Project Overview: Family Expense Calculation in ServiceNow**

**1. Project Title**

**Family Expense Tracker on ServiceNow**

**2. Project Objective**

To build a custom application on the ServiceNow platform that enables users to log, categorize, and analyze family expenses. The system will streamline tracking of monthly spending, generate insights on budget allocation, and support better financial decision-making.

**3. Business Problem / Opportunity**

Families often lack structured tools to monitor and manage household expenses. While there are many apps available, leveraging ServiceNow allows for a centralized, customizable, and secure platform—especially useful in organizations providing employee welfare tools or for developers demonstrating platform extensibility.

**4. Scope**

**In Scope:**

* Custom table to store expense entries
* Form for submitting expense details
* Categorization (e.g., groceries, rent, utilities)
* Monthly/weekly summary reports
* Notifications or alerts for budget limits

**Out of Scope:**

* Integration with banking APIs
* Complex forecasting or AI-based budgeting
* Multi-currency support

**5. Key Features**

* Custom Expense Table (u\_family\_expense)
* Expense Submission Form (via catalog item or table form)
* Scripted calculations for total and category-wise spend
* Dashboard using Performance Analytics or Reporting
* User Roles: Family Members, Admin

**6. Architecture Overview**

* **Frontend**: Service Portal / Catalog Item for user-friendly submission
* **Backend**: Custom Tables, Business Rules, Script Includes
* **Automation**: Scheduled jobs for monthly summary
* **Reporting**: Dashboards or PA Widgets for visualization

**7. Stakeholders**

* **Primary Users**: Family members using the app
* **Developer/Admin**: Responsible for building and maintaining the app
* **Demo Audience**: Trainers, students, or ServiceNow evaluators

**8. Timeline**

| **Phase** | **Duration** | **Tasks** |
| --- | --- | --- |
| Planning | 1 week | Requirements gathering, design |
| Development | 2 weeks | Table creation, UI design, scripting |
| Testing | 1 week | Functional testing, user feedback |
| Deployment | 1 week | Go-live in personal or demo environment |

**9. Risks and Mitigations**

| **Risk** | **Mitigation** |
| --- | --- |
| Platform overkill for simple use | Emphasize demo/training purpose |
| Access complexity for users | Simplify through Service Portal UI |
| Performance for large data sets | Use indexing and limit historical data |

**10. Success Metrics**

* Expense submission accuracy rate
* Reduction in time spent tracking expenses
* Number of insights generated from reports
* User satisfaction with ease of use