**🧩 1. Executive Summary**

**Goal:** To develop a user-friendly, automated system within ServiceNow that enables families to record, track, and analyze monthly expenses to improve financial visibility and control.

**🚨 2. Problem Recap**

* Families lack a centralized tool to manage shared household expenses.
* Manual tracking methods (e.g., spreadsheets) are error-prone and time-consuming.
* There's no automation or alerting when budgets are exceeded.
* Users need real-time visibility and mobile access.

**✅ 3. Proposed Solution Overview**

**Solution:**  
A lightweight **custom ServiceNow application** to manage family expenses, allowing users to:

* Submit expenses via portal or mobile
* Set and manage monthly budgets
* Receive automated alerts when nearing/exceeding budgets
* Visualize expenses by category, user, and date range
* Generate monthly reports

**⚙️ 4. Solution Components (ServiceNow-Based)**

| **Module** | **Description** |
| --- | --- |
| **Custom Tables** | Expense, Budget, and optionally Report tables to store data |
| **Service Portal** | User interface for expense submission and budget review |
| **Now Mobile App** | Mobile-friendly submission of expenses and budget alerts |
| **Flow Designer** | Automation for alerts, approvals (if needed), and report generation |
| **Notifications** | Email/SMS alerts when budget thresholds are reached |
| **Dashboards & Reports** | Visual insights: pie charts, trend graphs, budget vs. actuals |
| **Roles & ACLs** | Role-based access: Family Admin vs. Family Member |
| **Scheduled Jobs** | Monthly report generation and data cleanup (optional) |

**📊 5. Functional Features**

| **Feature** | **Description** |
| --- | --- |
| **Expense Entry** | Users can log date, amount, category, and notes |
| **Budget Management** | Admin defines monthly limits by category |
| **Auto Alerts** | Alerts sent when expenses approach or exceed budget |
| **Monthly Reports** | Summaries sent to admin or all members |
| **Role Management** | Admin sees everything; members see only their data |
| **Mobile Access** | Easy on-the-go submissions via Now Mobile app |

**🔐 6. Security & Access**

* Role-based access control
* Data protection through ServiceNow ACLs
* Audit trail for changes to budgets and expenses

**📈 7. Benefits**

| **Benefit** | **Impact** |
| --- | --- |
| Centralized tracking | Eliminates multiple tools (e.g., spreadsheets, notes) |
| Real-time insights | Improves decision-making and financial planning |
| Mobile access | Supports daily expense tracking |
| Alerts & automation | Reduces budget overruns and manual checks |
| Scalable | Easily expand to include savings, subscriptions, or shared goals |

**🏗 8. Implementation Plan (High-Level)**

| **Phase** | **Description** |
| --- | --- |
| Phase 1 | Create tables, forms, and basic submission UI |
| Phase 2 | Build dashboards, reports, and budget management |
| Phase 3 | Add alerts and mobile support |
| Phase 4 | Add optional approvals or advanced analytics |

**📄 9. Deliverables**

* Custom scoped app: "Family Expense Tracker"
* Service Portal pages
* Flow Designer logic
* Dashboards and reports
* Mobile-enabled views
* Documentation and user guide

**📝 10. Assumptions & Dependencies**

* Users will have ServiceNow access (via family domain or developer instance)
* Admin will maintain category and budget setup monthly
* Optional: ServiceNow Performance Analytics license (if using advanced reports)