**How to Create a Solution Requirement**

**1. 🎯 Define the Problem Statement**

**Problem:** Families often lack a centralized, automated way to track monthly expenses. Manual tools like spreadsheets are error-prone and hard to maintain.  
**Goal:** Create a simple, user-friendly solution in ServiceNow to enter, track, analyze, and manage family expenses and budgets.

**2. 🧑‍💼 Stakeholders**

| **Role** | **Responsibility** |
| --- | --- |
| Family Admin (e.g., parent) | Enters, monitors, and approves expenses |
| Family Member (e.g., spouse, teen) | Submits new expenses |
| Developer/Admin | Builds workflows, forms, and reports |

**3. 📋 Functional Requirements**

| **#** | **Requirement** | **Description** |
| --- | --- | --- |
| 1 | Expense Submission Form | Users can submit expenses by category (e.g., groceries, rent) with date and amount. |
| 2 | Budget Setup | Admin can set monthly budgets per category. |
| 3 | Dashboard | Users see total expenses, remaining budget, and visual breakdowns. |
| 4 | Alerts | Automatic alerts when a budget threshold (e.g., 90%) is reached. |
| 5 | Monthly Reports | Auto-generated monthly summaries via email or portal. |
| 6 | Approval Workflow (optional) | Large expenses (e.g., over $500) require admin approval. |
| 7 | Mobile Access | Accessible via ServiceNow mobile app for on-the-go input. |
| 8 | Category Management | Admin can add/edit/remove expense categories. |

**4. 🧪 Non-Functional Requirements**

| **Area** | **Requirement** |
| --- | --- |
| Usability | Simple UI for non-technical users |
| Performance | Load dashboard in < 2 seconds |
| Security | Only family users can access their data (role-based) |
| Availability | Accessible 24/7 via mobile and web |
| Maintainability | Configurable without code where possible |

**5. 🏗 Technical Requirements (ServiceNow Specific)**

| **Component** | **Description** |
| --- | --- |
| Custom Table | x\_family\_expense\_tracker\_expense |
| Forms | Expense submission, budget setup |
| Flow Designer | Budget alerts, approval workflows |
| Notifications | Email/SMS alerts when nearing budget |
| Service Portal | Simple interface for non-admin users |
| Reports & Dashboards | Bar/pie charts, budget vs. actual |
| Mobile App Support | Using Now Mobile / custom mobile UI module |
| ACLs (Access Controls) | Role-based permissions (Admin, Member) |

**6. 🛠 Implementation Plan (Optional)**

| **Phase** | **Description** |
| --- | --- |
| Phase 1 | Basic form for expense entry + custom table |
| Phase 2 | Add dashboards, budget setup |
| Phase 3 | Notifications + alerts |
| Phase 4 | Monthly reports + approval flow |
| Phase 5 | Mobile optimization |

**7. 📄 Deliverables**

* **Requirements document (this outline)**
* **Entity-relationship diagram** (tables & fields)
* **Process flow diagrams**
* **UI wireframes or mockups**
* **Test plan** for validation