

Ideation Phase

Brainstorm & Idea Prioritization

Date	02 November 2025
Team ID	NM2025TMID03181
Project Name	Calculating Family Expenses using ServiceNow
Maximum Marks	4 Marks

Calculating Family Expenses using ServiceNow:

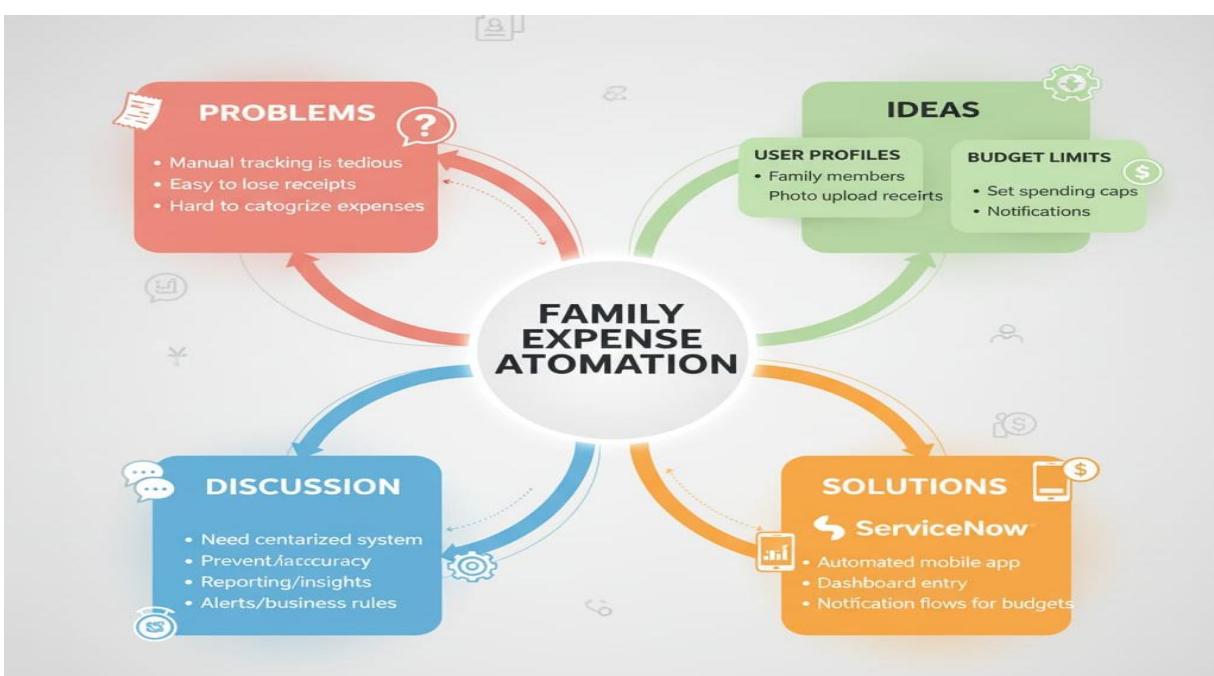
This guided project demonstrates how to automate and manage family expense calculations using **ServiceNow**. It enables users to record daily or monthly expenses, categorize them (e.g., groceries, utilities, entertainment), and generate analytical reports. The workflow uses forms, tables, and business rules in ServiceNow to store and calculate expenses automatically.

A catalog item or custom application will be developed where users can input expense details. A workflow calculates totals, compares them against monthly budgets, and sends notifications when spending exceeds set limits. This solution helps families manage their budgets efficiently and visualize their spending patterns using dashboards and reports.

The project includes a test scenario to validate the accuracy of calculations and ensure that all transactions are securely stored in the ServiceNow instance.

Step 1: Team Gathering, Collaboration, and Selecting the Problem Statement:

Team members collaborated to identify common daily challenges. Managing and tracking family expenses emerged as a key issue. The idea was to create a ServiceNow-based automated system that simplifies recording and monitoring of family spending.



Step 2: Brainstorm, Idea Listing, and Grouping

Brainstorm: Each team member proposed ideas on how to use ServiceNow features to handle expense tracking, such as using catalog forms, flow designers, reports, and notifications.

Idea Listing:

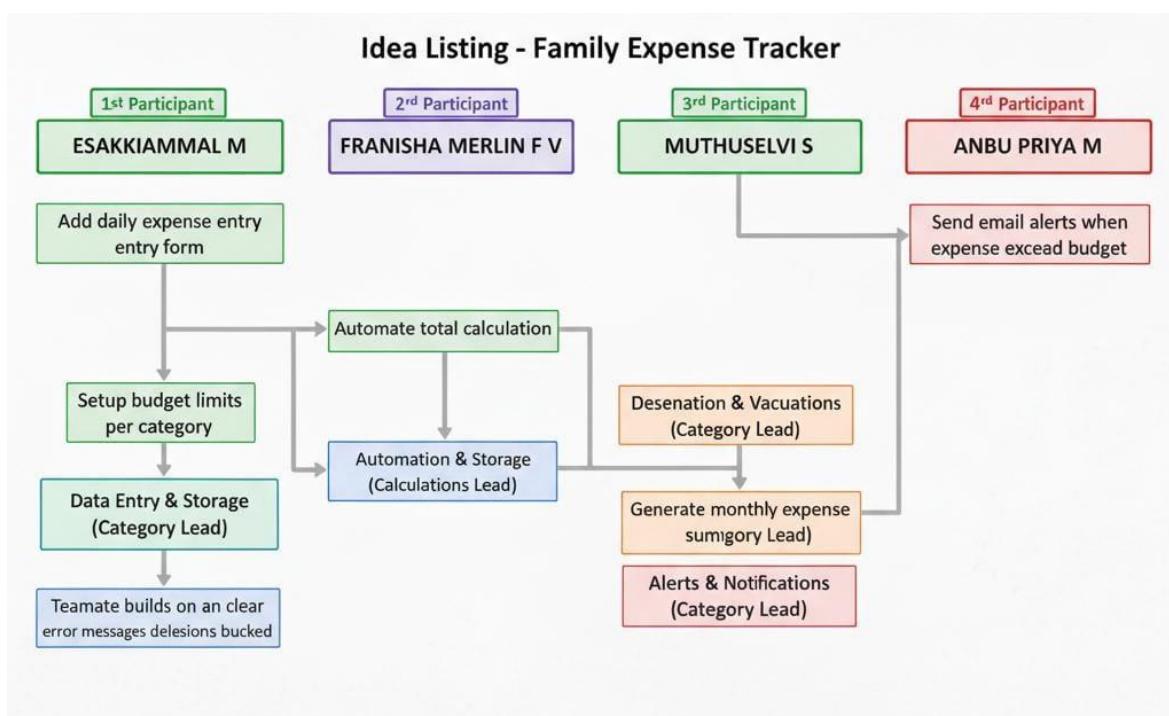
- Add daily expense entry form
- Set up budget limits per category
- Automate total expense calculation
- Generate monthly expense summary reports
- Send email alerts when expenses exceed budget

Grouping:

Ideas were grouped into four categories:

1. Data Entry & Storage
2. Automation & Calculations
3. Reports & Visualization
4. Alerts & Notifications

Action Planning: Each category was assigned to a team member for development. Timelines were set for module completion and integration.



Step 3: Idea Prioritization

The main focus was on creating an automated calculation and reporting system using ServiceNow Flow Designer and Business Rules. By prioritizing automation, the system minimizes human error and ensures accuracy.

Next priorities include:

- Integrating real-time notifications
- Generating dashboards with monthly comparisons
- Providing export options for reports (CSV/PDF)

This project demonstrates how ServiceNow can be repurposed beyond IT service

management — for real-world, everyday applications like family financial tracking. It emphasizes automation, transparency, and effective financial planning.

