

Ideation Phase

Brainstorm & Idea Prioritization

Date	02 November 2025
Team ID	NM2025TMID08531
Project Name	Calculating Family Expenses Using Service now
Maximum Marks	4 marks

Calculating Family Expenses using service now:

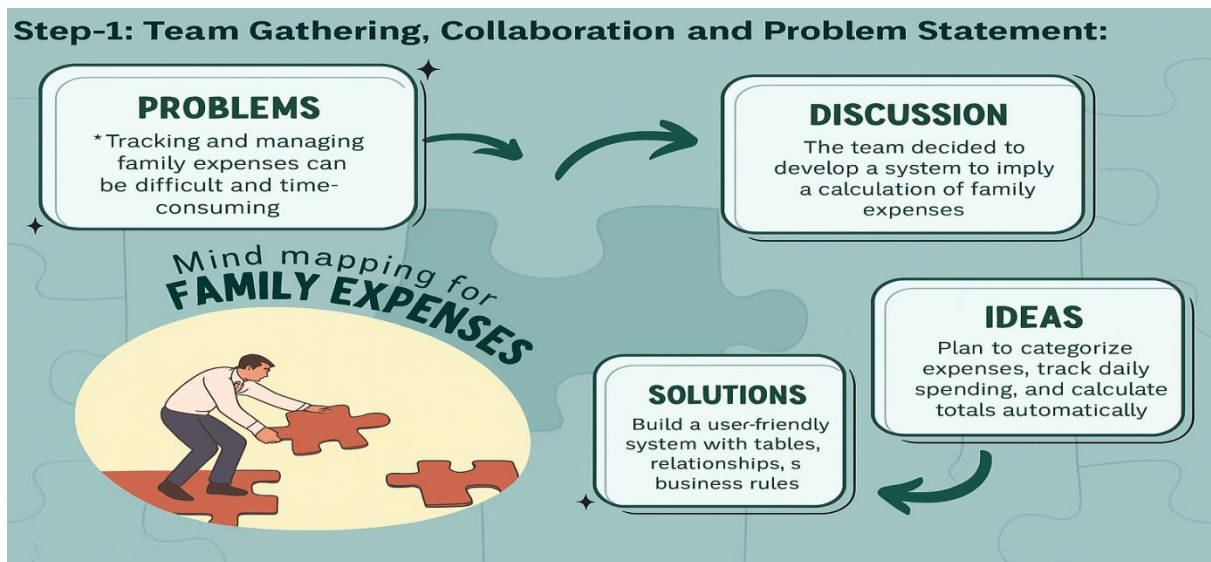
This guided project demonstrates how to create a comprehensive expense calculation and management system for families using **ServiceNow**. The system allows users to categorize expenses, set budgets, track daily spending, and generate real-time reports. By leveraging ServiceNow's platform, this project integrates data tables, relationships, and business rules to automate the aggregation of daily expenses into a family expense summary. The system helps users make informed financial decisions, promoting **financial transparency and well-being** within the family unit.

Step 1: Team Gathering, Collaboration, and Problem Selection

Our team of four collaborated to select a meaningful and practical problem statement related to **personal finance management**. After reviewing multiple ideas, we chose the topic “**Calculating Family Expenses using ServiceNow**”, as it aligns with real-life applications and utilizes ServiceNow's database and automation capabilities.

We discussed the key modules needed:

- Expense categorization
- Daily expense tracking
- Relationship mapping between tables
- Automated total calculation using Business Rules



Step 2: Brainstorming, Idea Listing, and Grouping:

Brainstorming:

Team members shared various ideas to make the system more efficient and user-friendly, such as auto-numbering, mandatory validation, and real-time total updates through business rules.

Idea Listing:

All proposed features were listed for discussion:

1. Family Expenses main table
2. Daily Expenses linked table
3. Automatic number generation (prefix MFE)
4. Auto-updating total and expense details via business rules
5. Relationship and related list configuration
6. Custom form design with mandatory fields and read-only attributes

Grouping:

The ideas were grouped under four main functional modules:

- **Database Design (Tables & Fields)**
- **Automation (Business Rules)**
- **Integration (Relationships)**
- **User Interface (Form Design & Configuration)**

Action Planning:

Each team member was assigned a part of the implementation:

- **Member 1:** Instance setup and Update Set creation
- **Member 2:** Table creation and configuration
- **Member 3:** Relationship and Related List configuration
- **Member 4:** Business Rule development and testing

Step 3: Idea Prioritization :

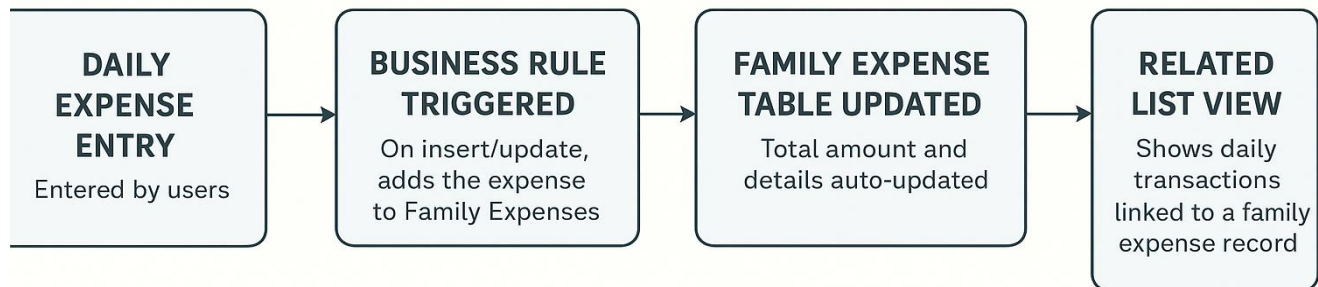
Prioritization Process:

We prioritized our ideas systematically to ensure the project addressed the most valuable and practical goals first. The prioritization process began with evaluating all proposed ideas based on three main criteria — **impact, feasibility, and user experience**. Impact measured how significantly each feature would improve efficiency in managing and tracking family expenses. Feasibility considered the technical complexity and time required for implementation within the ServiceNow platform. User

experience focused on ensuring that the final system would be simple, intuitive, and accessible for all users.

After careful discussion, the team identified the **automatic calculation of total family expenses from daily entries** as the top priority, as it represents the project's core functionality. Next, emphasis was placed on improving **user interface design** to make expense entry and tracking seamless and visually clear. We also prioritized **relationship creation between tables** to ensure smooth data integration, enabling real-time synchronization between Family Expenses and Daily Expenses records. Following these, **report generation and analytics features** were planned to help users visualize spending patterns and make informed financial decisions. By organizing and ranking ideas in this way, the team established a clear, step-by-step implementation path that balanced innovation with practicality, ensuring a complete and user-friendly financial tracking solution.

Implementatiion Flow



Conclusion :

The **Calculating Family Expenses using ServiceNow** project provides a structured and automated approach to managing household finances. With ServiceNow's data model, business logic, and customizable forms, the system offers scalability and clarity for users. This project enhanced our understanding of ServiceNow development workflows, automation scripting, and practical financial management system design.