**Project Title: Calculating Family Expenses using ServiceNow**

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**1. Project Overview**

**Objective**

The main objective of this project is to develop a ServiceNow application that enables users to input, categorize, and analyze their family expenses in a structured and automated manner. This system will allow better budgeting, tracking, and visualization of expenses within the ServiceNow platform.

**2. Problem Statement**

Many families struggle to maintain consistent records of their monthly expenses, leading to poor financial planning and unexpected shortfalls. Existing financial tools may be too complex or disconnected from enterprise platforms. By using ServiceNow's powerful workflow and data tracking capabilities, this application provides an integrated and customizable solution to manage family expenses effectively.

**3. Scope of the Project**

**In Scope:**

* Design and development of a custom ServiceNow application.
* Creation of a user interface for adding expenses.
* Categorization of expenses (e.g., groceries, rent, utilities, education).
* Monthly and yearly summary reports.
* Integration with notifications (email/SMS) for alerts.
* Role-based access for different family members.

**Out of Scope:**

* Integration with external banks or payment gateways.
* Advanced investment or tax planning features.

**4. Tools and Technologies**

* **Platform:** ServiceNow (App Engine Studio / Custom App)
* **Language:** JavaScript, GlideRecord, ServiceNow Scripting
* **Database:** ServiceNow Tables
* **UI:** ServiceNow Forms and Dashboards
* **Notifications:** ServiceNow Notification Module

**5. Features and Functionalities**

| **Feature** | **Description** |
| --- | --- |
| **Expense Entry Form** | Input form to add new expenses with fields like date, category, amount, and description. |
| **Category Management** | Admins can add/edit/delete expense categories. |
| **User Roles** | Different roles such as Parent (Admin), Child (View only). |
| **Dashboard** | Graphical representation of monthly/annual expenses. |
| **Reports** | Generate detailed reports filtered by date, category, or user. |
| **Alerts** | Email/SMS alert if the total monthly expense exceeds a defined threshold. |

**6. Project Architecture**

**Data Tables:**

* u\_family\_expenses: Stores each expense entry.
* u\_categories: Stores expense categories.
* u\_users: Custom user table (optional if not using standard users).

**Workflows/Flows:**

* Approval flow (if needed) for high-value expenses.
* Scheduled flow for monthly report generation and alerts.

**7. User Roles and Permissions**

| **Role** | **Permissions** |
| --- | --- |
| **Admin (Parent)** | Full access to add/edit/delete expenses, manage categories, and view reports. |
| **User (Child)** | Can view and submit expenses, but cannot delete or modify categories. |

**8. Implementation Plan**

| **Phase** | **Tasks** | **Timeline** |
| --- | --- | --- |
| **1. Requirement Gathering** | Identify fields, categories, and user types | Week 1 |
| **2. Design** | Table design, form layout, flow diagrams | Week 2 |
| **3. Development** | Build tables, forms, flows, notifications | Week 3–4 |
| **4. Testing** | Unit and UAT testing | Week 5 |
| **5. Deployment** | Move to production environment | Week 6 |
| **6. Review** | Final report and presentation | Week 7 |

**9. Sample Screenshots (Optional)**

Include sample screenshots/mockups of:

* Expense entry form
* Category management form
* Dashboard with pie charts and bar graphs
* Report download option

**10. Benefits of the Application**

* Centralized view of family expenses.
* Easy to use and customizable for different households.
* Alerts and reports for better financial planning.
* Role-based control increases accountability and discipline in spending.

**11. Future Enhancements**

* Mobile version for easier access.
* Integration with bank APIs for automated tracking.
* AI-based suggestions for saving opportunities.
* Expense sharing and budgeting between multiple families.

**12. Conclusion**

This project showcases how ServiceNow, traditionally used for enterprise service management, can be repurposed to solve everyday personal problems like expense tracking. It demonstrates the platform’s flexibility, low-code capabilities, and powerful automation tools.