

# Calculating Family Expenses Using Service Now

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**Team Size : 4**

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## Problem Statement

In a project of managing family expenses is often challenging due to the lack of a centralization system for tracking income, expenses, and savings. Families typically rely on manual methods such as spreadsheets, paper records, or multiple apps, which can lead to errors, duplication, and difficulty in analysing financial patterns.

## Objective

**Simplify Expense Tracking-** provide a centralization system for recording and categorising all family expenses

**Improve Financial Awareness-offer** real-time dashboards and reports to give clear insights into spending patterns

**Enhance Budget Planning**-support better financial planning by identifying high-spending categories and opportunities to save

**Skills:** Servicenow Development, Workflow&Automation, Scripting in Servicenow, Reporting&Dashboards, Integration Skills

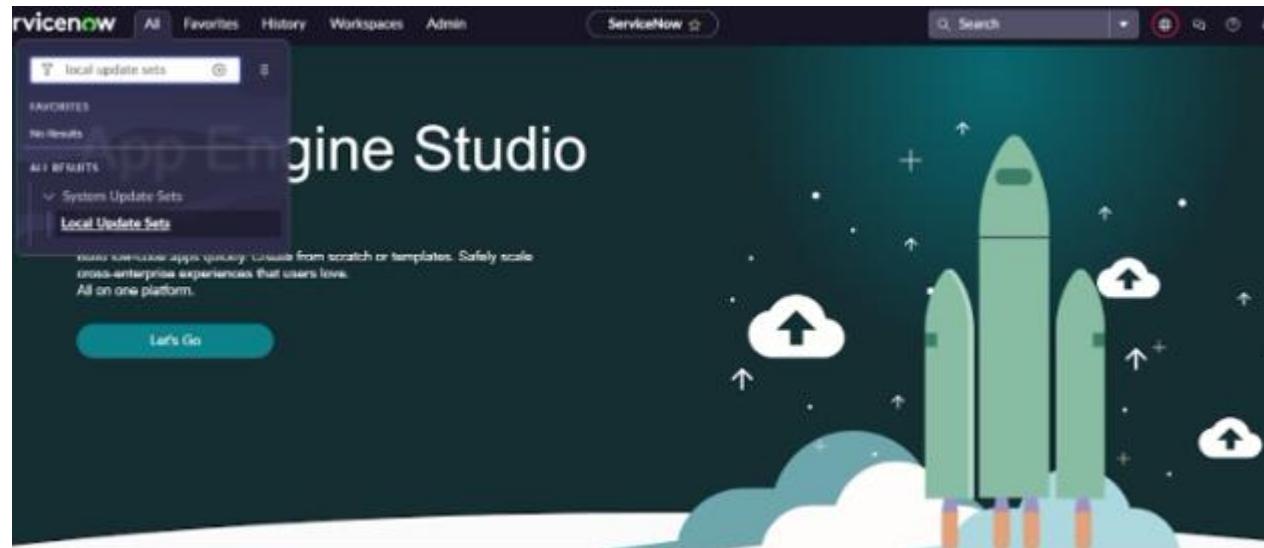
## TASK INITIATION

### Update

#### Activity 1:

1. Open Service now

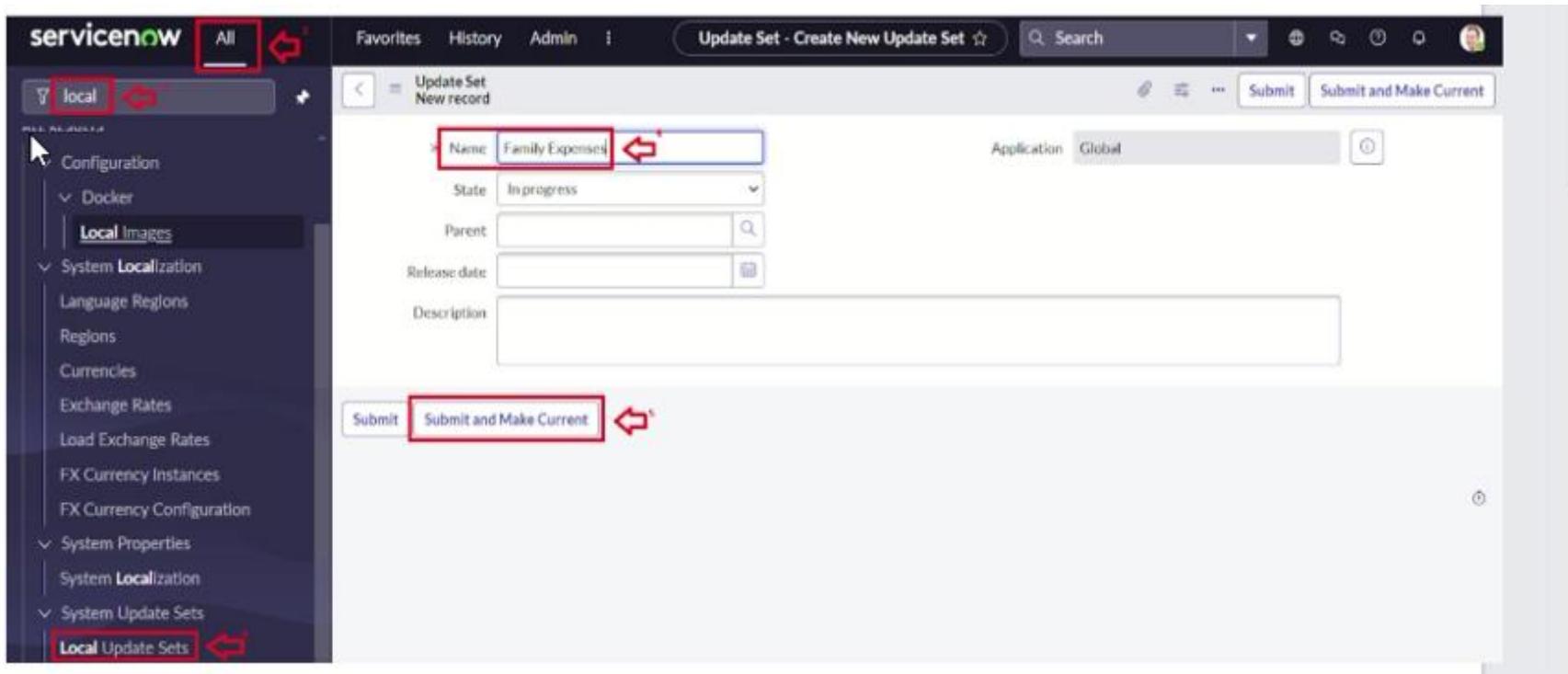
2. Go to All>>search for Local Update Set>Click on New



3. Enter the Details as:

Name: Family Expenses

4. And then click on Submit and make current



## Table

### Activity 2:

1. Open Service now
2. Go to all>search for Tables>Click on New
3. Enter the Details:  
Label:Family Expenses

Name: Auto-Populated

New menu name: Family Expenditure



4. Click on save

Activity 3:

1. Open Service now

2. Near Columns Double-click near insert a new row

Give the details as:

Column label: Number

Type: String

3. Double-click on insert a new row again

Give the details as:

Column label: Date

Type: Date

4.Double click on insert a new row again

Give the details as:

Column label:Amount

Type:Integer

5 .Double click on insert a new row again

Give the details as:

Column label:Expense Details

Type:String

Max length:800

Column label	Type	Reference	Max length	Default value	Display
Number	String				false
Date	Date				false
Amount	Integer				false
Expense Details	String		800		false

6.Click on save

Activity 4:

1.Open Service now

2.Double click on the Number field/Column

3.Go down and double click on Advanced view

4.In Default Value:

Use dynamic default:check the box

Dynamic default value:Get Next Padded Number

5.click on update



6.Go to all>>search for Number Maintenance>>select number maintenance

7.click on new

8.Enter the details:

Table:Family Expenses

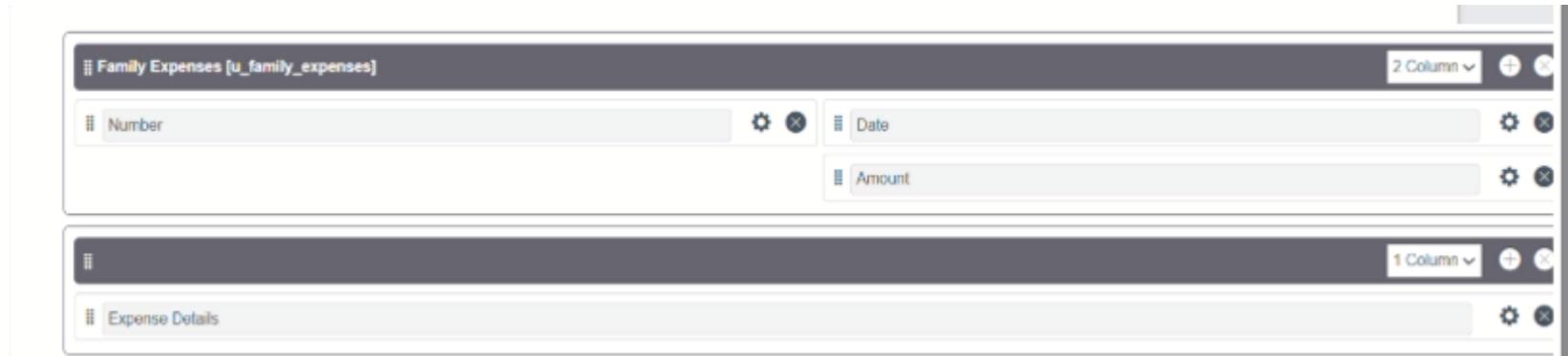
Prefix:MFE

The screenshot shows a configuration interface for a new record. The 'Table' field is set to 'Family Expenses' and the 'Prefix' field is set to 'MFE'. Both 'Table' and 'Prefix' fields are highlighted with red boxes. Other fields shown include 'Number' (1,000), 'Application' (Global), and 'Number of digits' (7). Top right buttons include 'Update' and 'Delete'.

8.Click on Submit

#### Activity 5:

- 1.Open Service now
- 2.Go to all>>search for Family Expenses>>Open family Expenses
- 3.Click on new
- 4.Go to header and click there>>click on configure>>Select Form Design
- 5.Drag Drop the form as requirement



6. Make Number Read-Only Field by Clicking
7. Make Date, Amount Mandatory field by Clicking
8. Click on save

## Table(Daily Expenses)

### Activity 6:

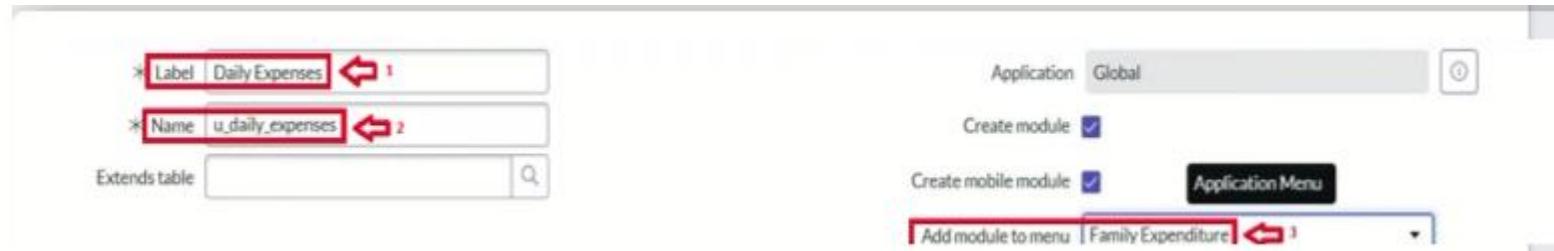
1. Open Service now
2. Go to all>search for Tables>Click on New

3. Enter the Details:

Label: Daily Expenses

Name: Auto-Populated

Add Module to menu : Family Expenditure



4.click on save

#### Activity 7:

1.Open Service now

2.Near Columns Double Click near insert a new row

Give the details as:

Column label:Number

Type:String

3.Double click on insert a new row again

Give the details as:

Column label>Date

Type:Date

4. Double click on insert a new row again

Column label:Amount

Type:Integer

5 .Double click on insert a new row again

Column label:Expense Details

Type:String

Max length:800

6.Double click on insert a new row again

Give the details as:

Column label:Comments

Type:String

Max length:800

6.Click on save

Activity 8:

1.Open Service now

2.Double click on the Number field/Column

3.Go down and double click on Advanced view

4.In Default Value:

Use dynamic default:check the box

Dynamic default value:Get Next Padded Number

5.click on update



6.Go to all>>search for Number Maintenance>>select number maintenance

7.click on new

8.Enter the details:

Table:Daily Expenses

Prefix:MFE

\* Table Daily Expenses

\* Prefix MFE

\* Number 1.000

Application Global

Number of digits 7

Submit

9.click on submit

## Activity 9:

- 1.Open Service now
- 2.Go to all>>search for Daily Expenses>>Open Daily Expenses
- 3.Click on new
- 4.Go to header and click there>>click on configure>>Select Form Design
- 5.Drag Drop the form as requirement

The screenshot shows a form configuration interface. At the top, it says "2 Column" and lists four fields: "Number", "Family Member Name", "Date", and "Expense", each with a gear icon. Below that, it says "1 Column" and lists one field: "Comments", also with a gear icon.

- 6.Make Number Read-Only Field by Clicking
- 7.Make Date,Family Member Name Mandatory field by Clicking
- 8.Click on save

## Relationship

## Activity 10:

- 1.Open Service now

2.Go to all>>search for relationships>>open relationships

3.click on new

4.Enter the details:

Name:Daily Expenses

Applies to table:select Family Expenses

Daily Expenses:select Daily Expenses

5.click save

## Configuring Related List

Activity 11:

1.open Service now

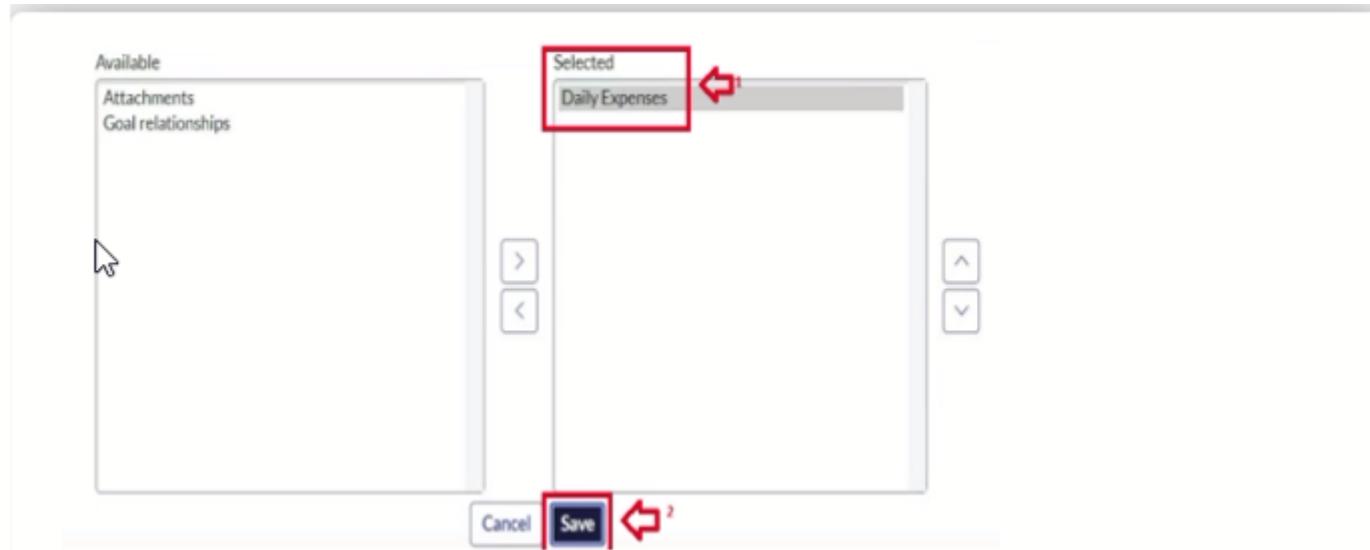
2. .Go to all>>search for Family Expenses>>Open Family Expenses

3.Click on new

4.Go to header and click there>>click on configure>>select Related Lists

5.Add Daily Expenses to selected area

6.click on save



## Business rule

### Activity 12:

1. Open Service Now

2. Go to all>>search for Business Rules

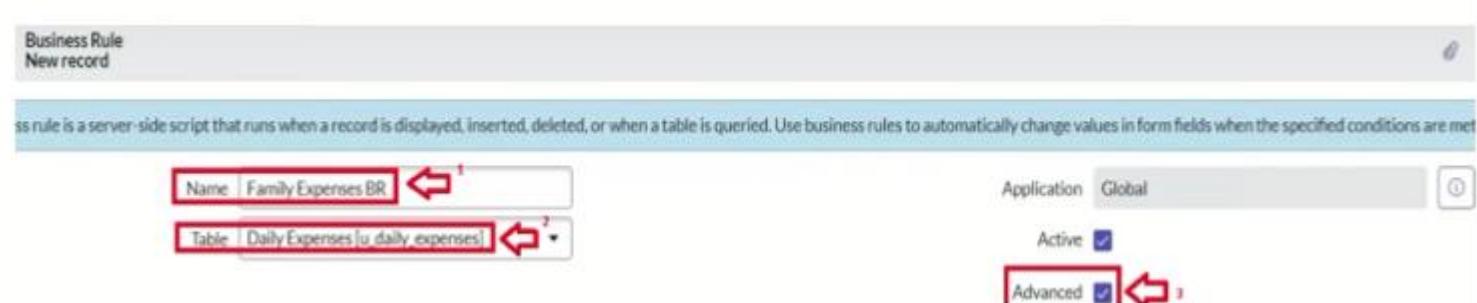
3. Under system definition select business rules then click new

4. Enter the Details:

Name: Family Expenses BR

Table: Select Daily Expenses

Check Advanced



#### 5.In when the run check insert and update

This screenshot shows the 'When to run' configuration section of the business rule. It includes the following elements: a header with 'When to run' (highlighted with a red box and arrow 1), 'Advanced' (button), and 'Insert' (checkbox checked). Below this is a note: 'Specify whether the business rule should run on Insert or Update. Use Filter Conditions to specify under which conditions the rule should run.' Under 'When' is a dropdown set to 'before'. Under 'Order' is a text input field containing '100'. To the right of these are checkboxes for 'Insert' (checked) and 'Update' (checked), both highlighted with a red box and arrow 2. Below these are 'Delete' (unchecked) and 'Query' (unchecked). At the bottom are buttons for 'Filter Conditions' ('Add Filter Condition', 'Add "OR" Clause'), 'Role conditions' (with a pencil icon), and dropdowns for 'choose field', 'oper', and 'value'.

#### 6.In Advance (we write the code)

The screenshot shows a 'Script' editor window with a toolbar at the top containing various icons. The main area displays a script for a rule named 'executeRule'. The script uses GlideRecords to query and update records in the 'u\_family\_expenses' table. It checks if a record exists and updates it if found, or creates a new record if not.

```
1 (function executeRule(current, previous /*null when async*/) {
2
3     var FamilyExpenses = new GlideRecord('u_family_expenses');
4     FamilyExpenses.addQuery('u_date',current.u_date);
5     FamilyExpenses.query();
6     if(FamilyExpenses.next())
7     {
8         FamilyExpenses.u_amount += current.u_expense;
9         FamilyExpenses.u_expense_details += ">" + current.u_comments + ":" + Rs. + current.u_expense + "-";
10        FamilyExpenses.update();
11    }
12    else
13    {
14        var NewFamilyExpenses = new GlideRecord('u_family_expenses');
15        NewFamilyExpenses.u_date = current.u_date;
16        NewFamilyExpenses.u_amount = current.u_expense;
17        NewFamilyExpenses.u_expense_details += ">" + current.u_comments + ":" + Rs. + current.u_expense + "-";
18        NewFamilyExpenses.insert();
19    }
20
21 })(current, previous);
```

7.click on save

## Configure The Relationship

### Activity 13:

1.Open Service now

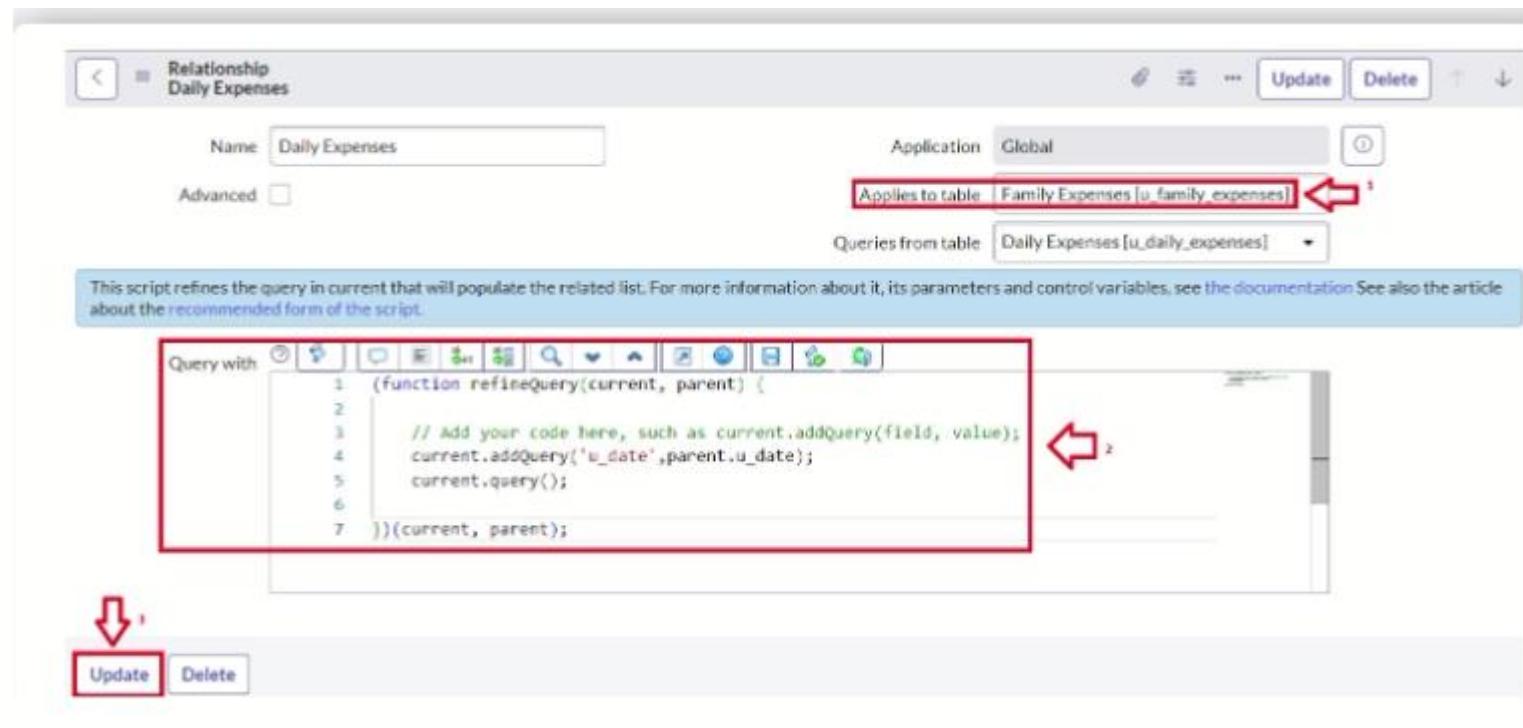
2.Go to all>>search for relationships>>open relationships

### 3.In open Daily Expenses relationship

For Applies to table:select Family Expenses

In Query with:write the below Query

### 4.click on update



## Conclusion

The Family Expense Calculation System developed on Service Now provides a centralized, automated, and user-friendly platform for managing and tracking household expenses. By leveraging ServiceNow's capabilities, users can record, categorize, and analyze expenses in real time, ensuring better financial planning and transparency. The system not only simplifies routine expense tracking but also helps families identify spending patterns, plan budgets effectively, and make informed decisions.

Overall, the project demonstrates how automation and digital platforms like ServiceNow can be effectively utilized to streamline personal finance management, making it accurate, efficient, and accessible.