

CALCULATING FAMILY EXPENSES USING SERVICE NOW

Team Id: 3CE5E46E74DDAD4B9A24CBE87BFC09BF

Team Members: 4

Team leader : Akshada V

Member 1 : Monesha S

Member 2 : Jeniffer Jaquiline J

Member 3 : Monisha B

Problem Statement : Built a family expense management system in ServiceNow with features for categorization, budgeting, real-time tracking, and reporting to support informed financial decisions.

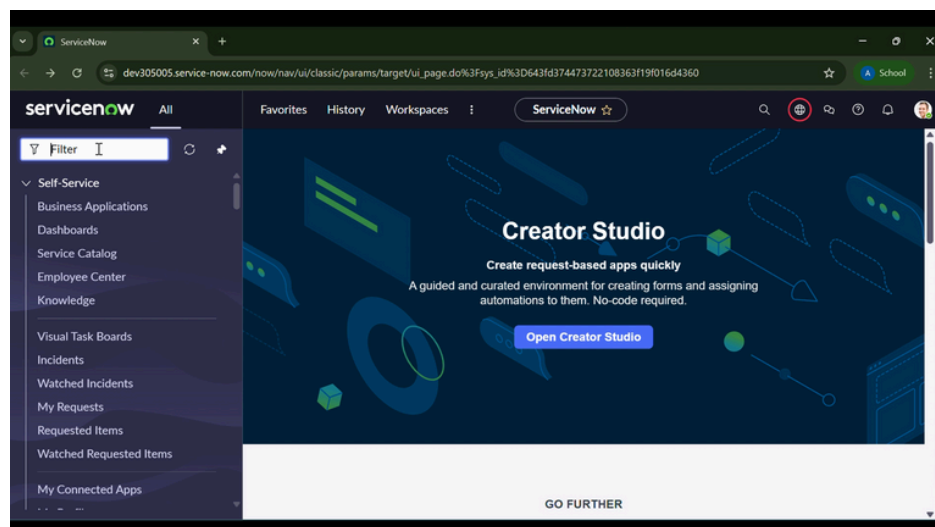
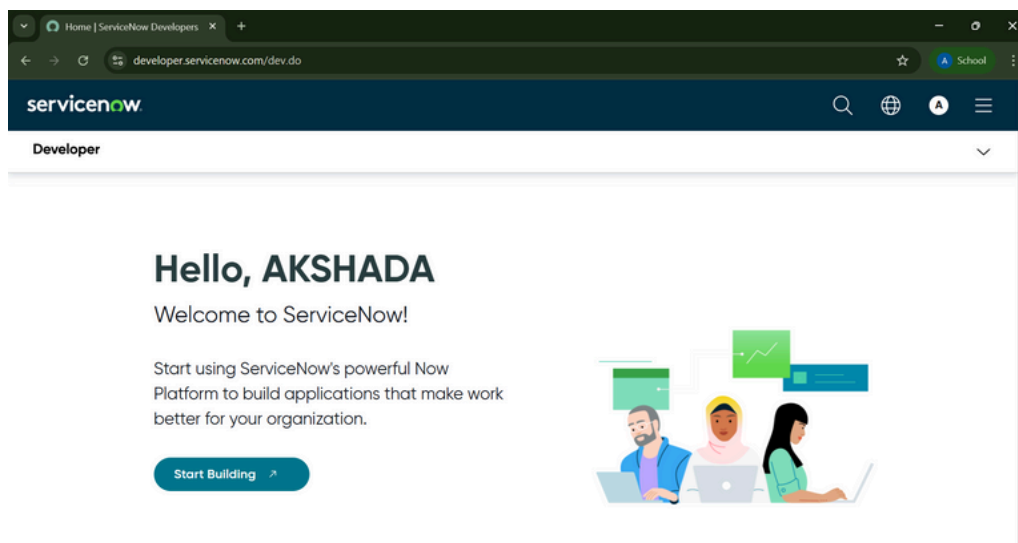
Objective: To design and implement a family expense tracking solution in ServiceNow that enables efficient recording, categorization, and analysis of household expenses.

Skills : IOT, Open Hardware Platforms And Data Structures

TASK INITIATION :

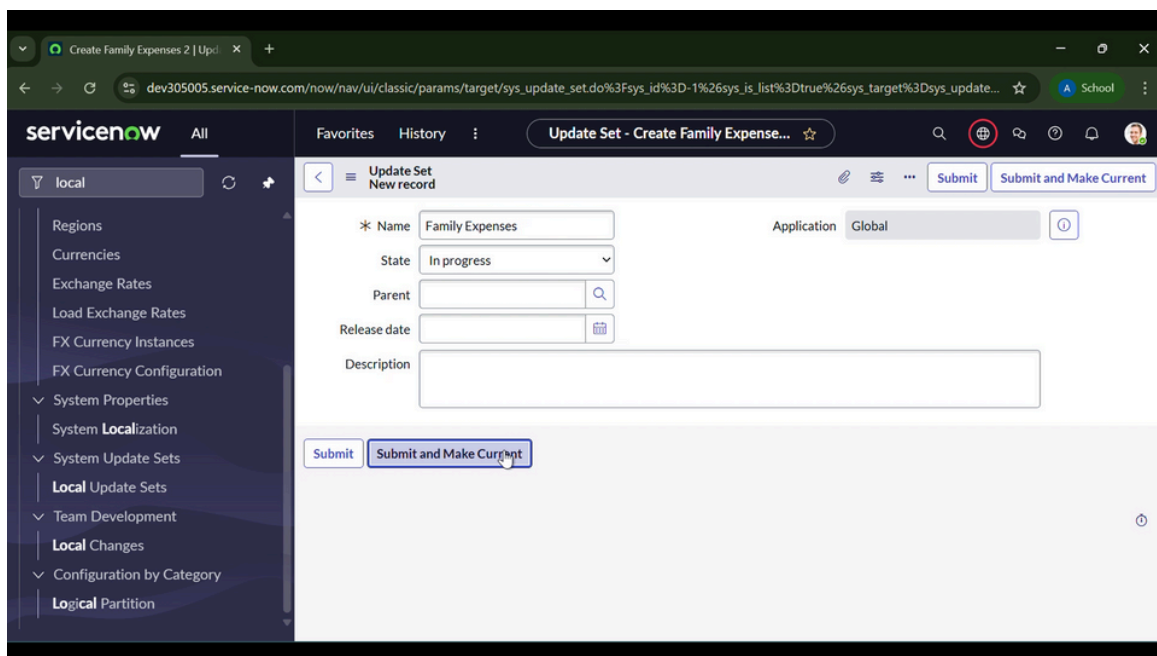
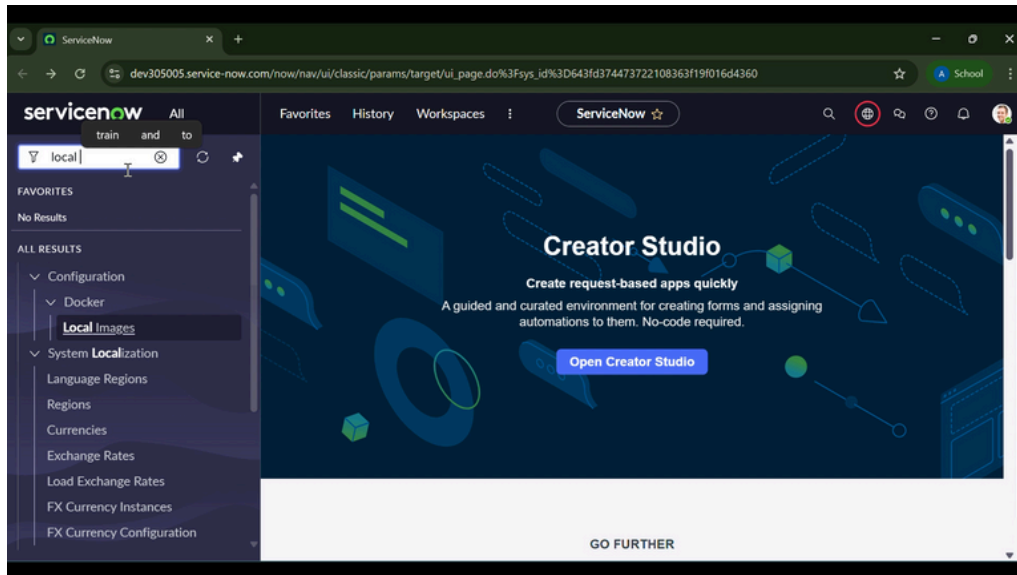
Milestone 1 : Setting up ServiceNow Instance

1. Sign up for a developer account on the ServiceNow Developer site “<https://developer.servicenow.com>”.
2. Once logged in, navigate to the "Personal Developer Instance" section.
3. Click on "Request Instance" to create a new ServiceNow instance.
4. Fill out the required information and submit the request.
5. You'll receive an email with the instance details once it's ready.
6. Log in to your ServiceNow instance using the provided credentials.
7. Now you will navigate to the ServiceNow.



Milestone 2: Creation of New Update Set

1. Go to All >> In the filter search for Local Update set > click on New.
2. Enter the Details as:
3. Name : Family Expenses
4. Then click on Submit and Make current.



Milestone 3: Creation of Table

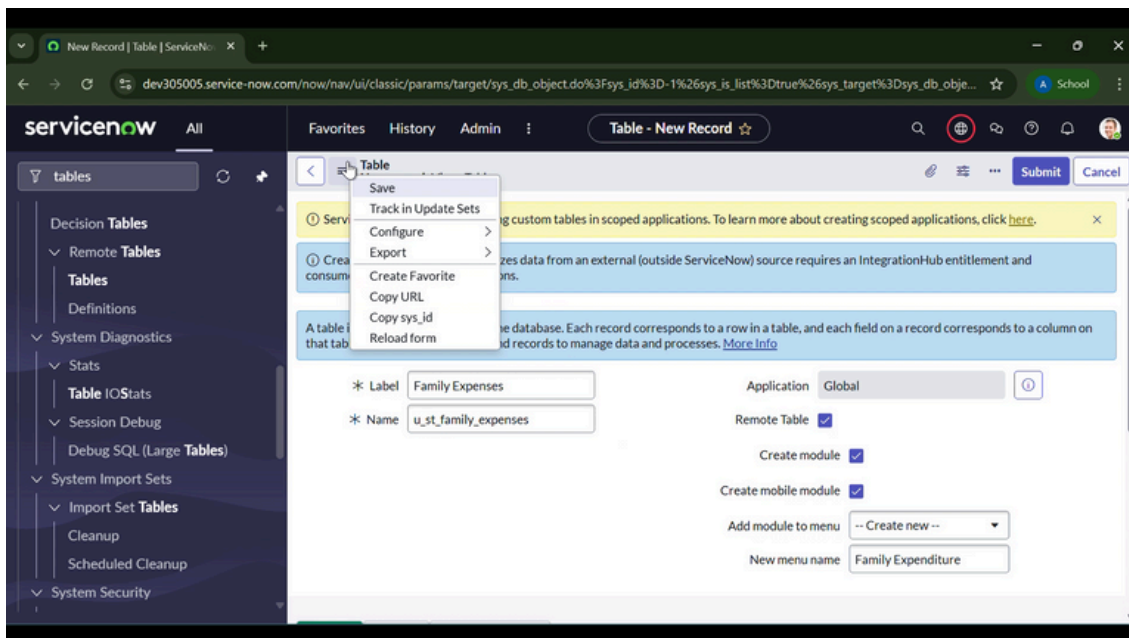
1. Go to All >> In the filter search for Local Update set > click on New.
2. Enter the Details as:
3. Name : Family Expenses
4. Then click on Submit and Make current.

Note : Follows the same step in Milestone 2

Milestone 4: Creation of Table

Creation of Family Expenses Table

1. Go to All > In the filter search for Tables > click on New.
2. Enter the Details:
3. Label : Family Expenses
4. Name : Auto-Populated
5. New menu name : Family Expenditure
6. Go to the Header and right click there>> click on Save.



Creation of Columns (Fields)

1. Near Columns Double click near insert a new row.

2. Give the details as:

Column label : Number

Type : String

3, Double click on insert a new row again

4. Give the details as:

Column label : Date

Type : Date

new row again

Column label : Amount

Type : Integer

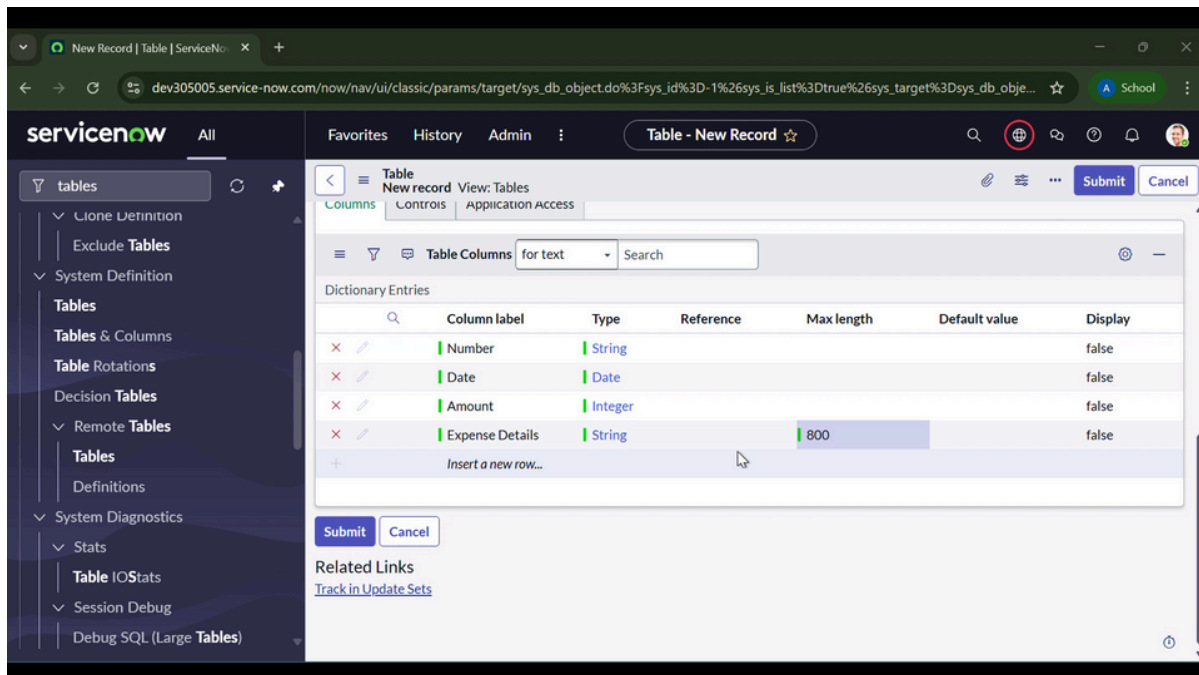
insert a new row again

Column label : Expense Details

Type : String

Max length : 800

5. Go to the Header and right click there>> click on Save.



The screenshot shows the ServiceNow 'Table - New Record' interface. The 'Columns' tab is active, displaying a table of column definitions. The table has columns for Column label, Type, Reference, Max length, Default value, and Display. The following columns are listed:

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

At the bottom of the table, there is a link to 'Insert a new row...'. Below the table, there are 'Submit' and 'Cancel' buttons. The 'Related Links' section shows a link to 'Track in Update Sets'.

Making Number Field an Auto-Number

1. Double click on the Number Field/Column.
2. Go down and double click on Advanced view
3. In Default Value:

Use dynamic default : check the box

Dynamic default value : Get Next Padded Number

4. Click on Update.

5. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance

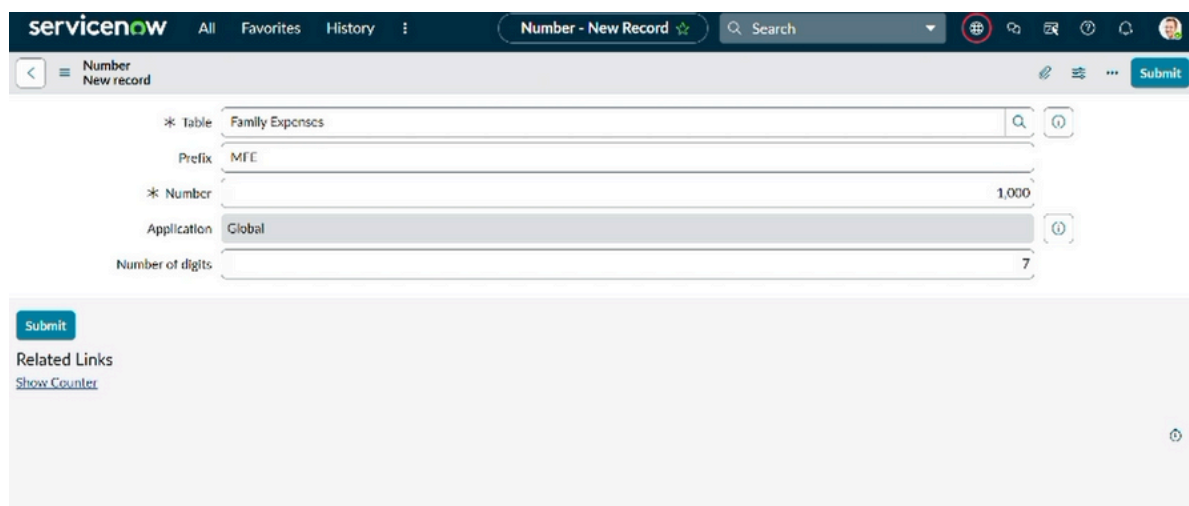
6. Click on New.

7. Enter the below Details:

Table : Family Expenses

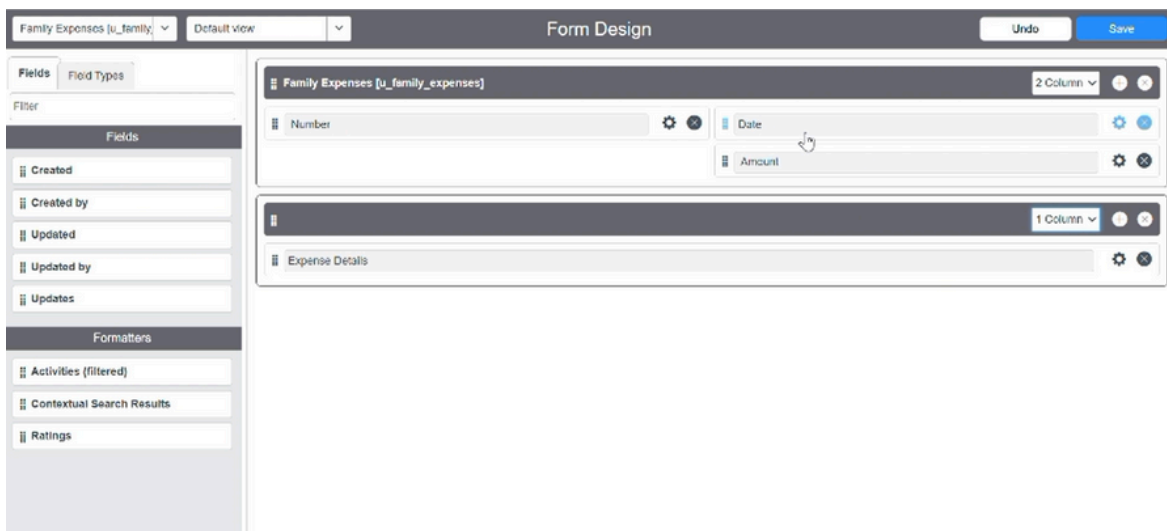
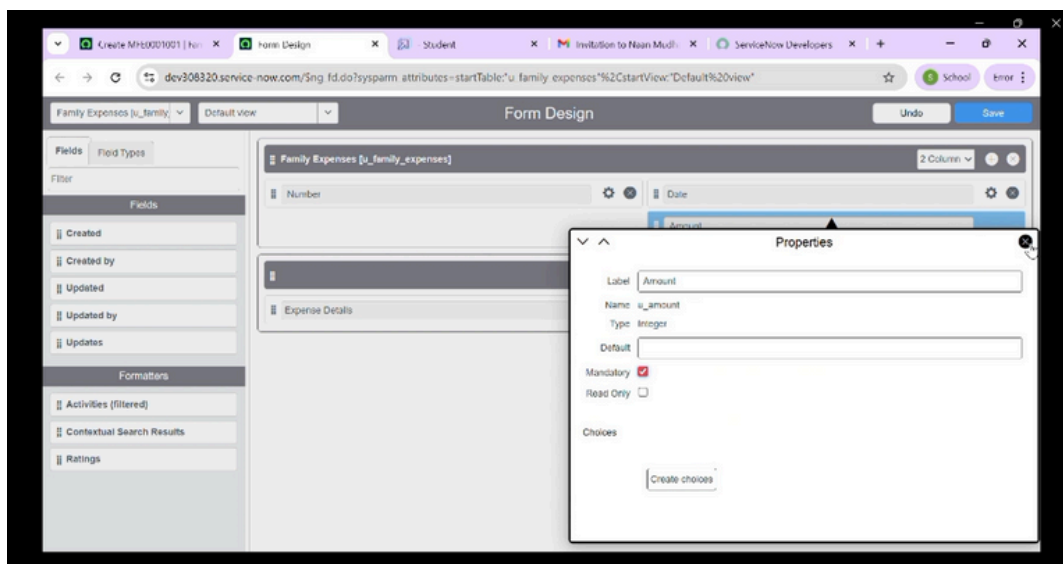
Prefix : MFE

8. Click on Submit.

Configure the Form

1. Go to All >> In the filter search for Family Expenses >> Open Family Expenses
2. Click on New
3. Go to the Header and right click there>> click on Configure >> Select Form Design
4. Customize or Drag Drop the form as per your requirement.
5. Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
6. Make Date, Amount Mandatory Field by clicking on the gear icon and checking Mandatory
7. Click on Save.

Milestone 5: Creation of Table(Daily Expenses)

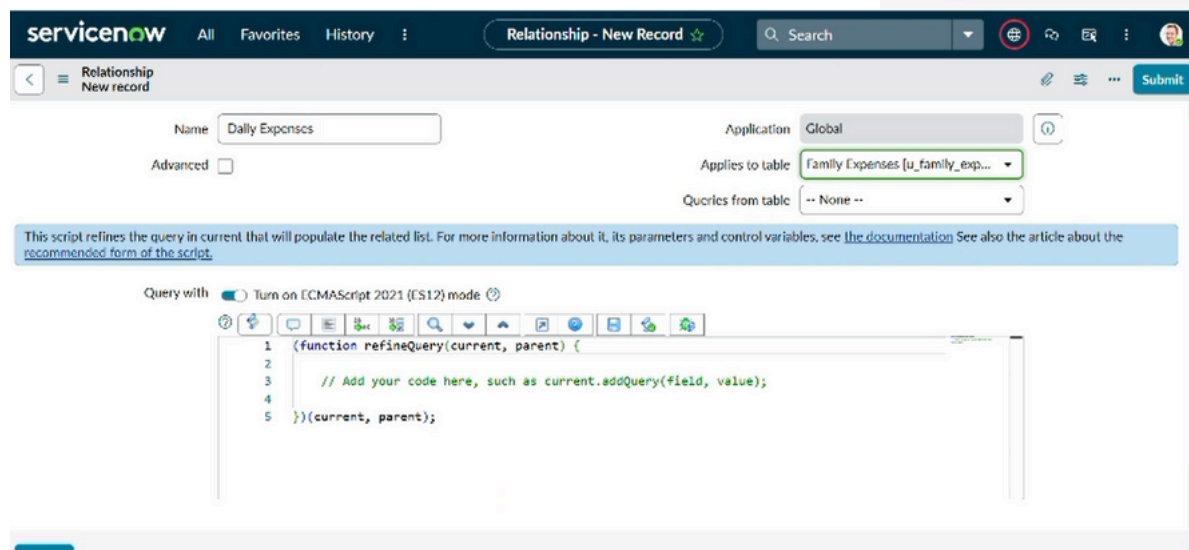
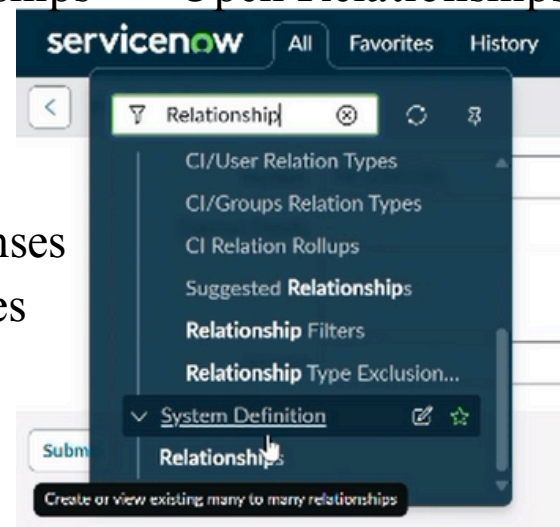
Creation of Daily Expenses Table

1. Go to All > In the filter search for Tables > click on New.
2. Enter the Details:
 Label : Daily Expenses
 Name : Auto-Populated
 Add Module to menu : Family Expenditure
3. Go to the Header and right click there>> click on Save.

Same steps to be followed as in the milestone 3.

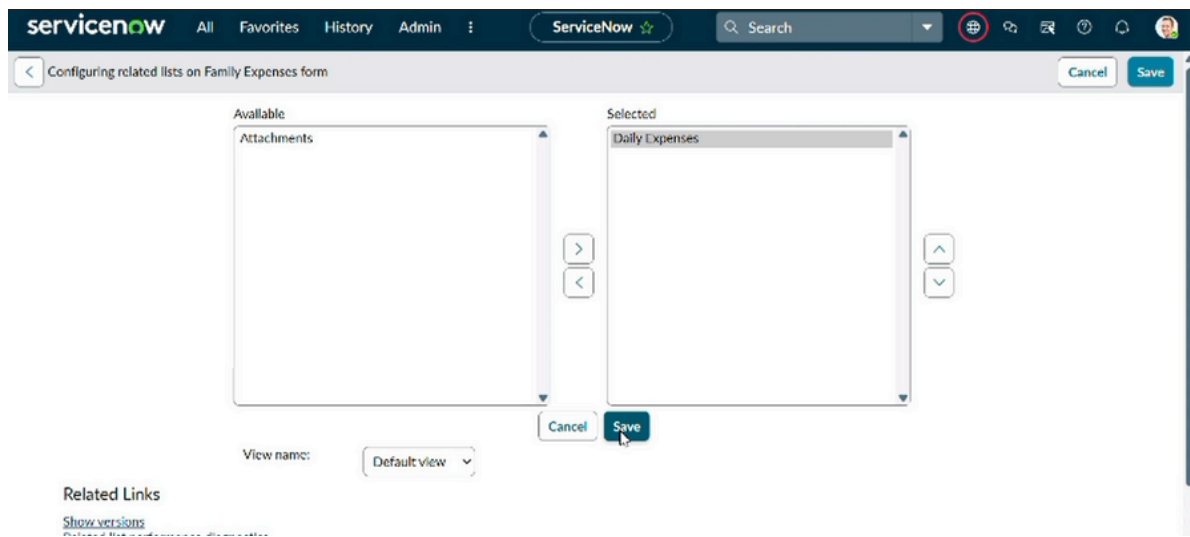
Milestone 6: Creation of Relationship

1. Go to All >> In the filter search for Relationships >> Open Relationships
2. Click on New.
3. Enter the details:
 Name : Daily Expenses
 Applies to table : Select Family Expenses
 Daily Expenses : Select Daily Expenses
4. Click Save.



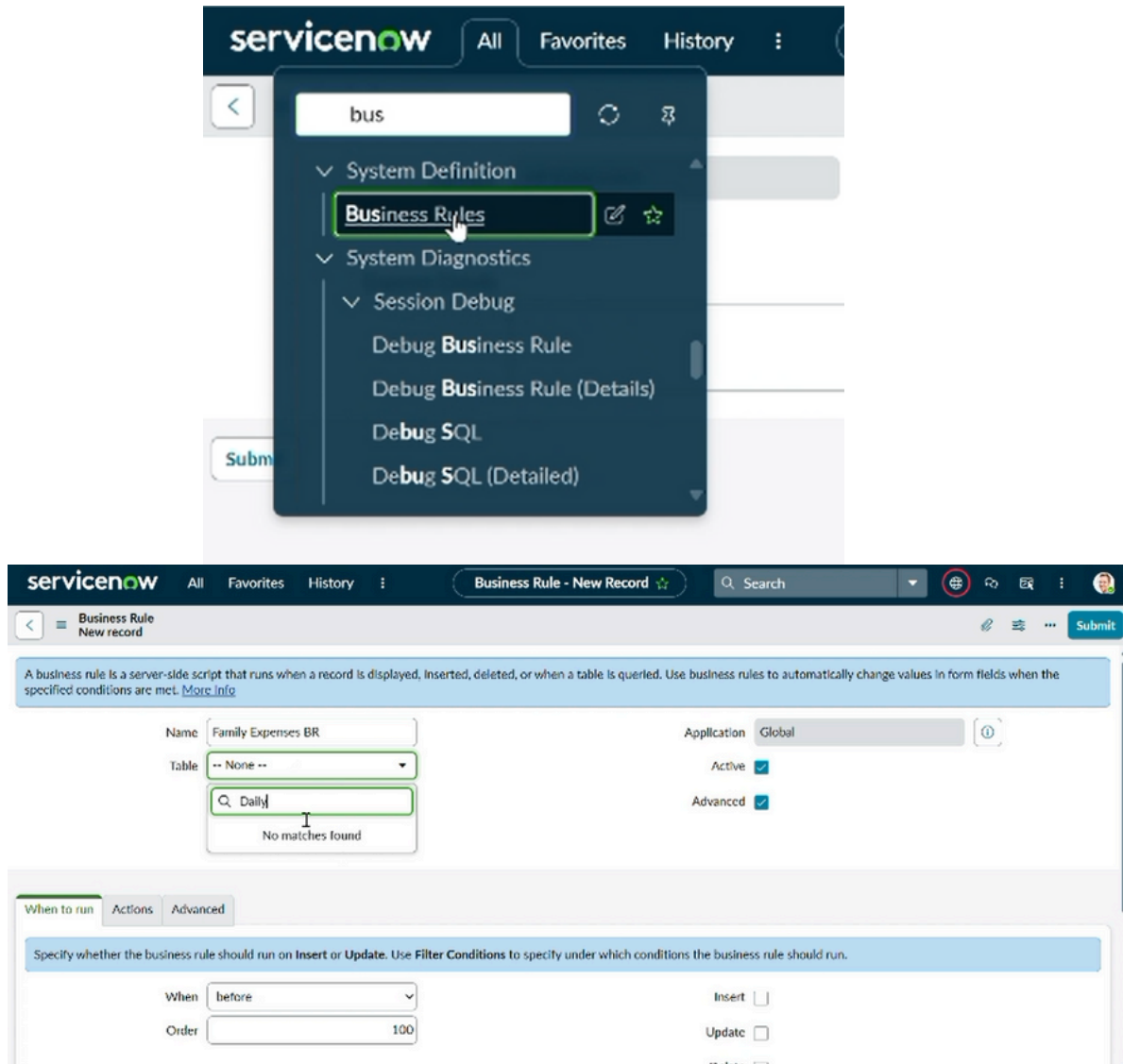
Milestone 7: Configuring Related List on Family Expenses

1. Go to All >> In the filter search for Family Expenses >> Open Family Expenses
2. Click on New
3. Go to the Header and right click there>> click on Configure >> Select Related Lists
4. Add Daily Expenses to the Selected Area.
5. Click on Save.



Milestone 8 : Creation of Business Rules

1. Go to All >> In the filter search for Business Rules.
2. Under System Definition Select Business Rules then click on New.
3. Enter the Details:
Name : Family Expenses BR
Table : Select Daily Expenses
4. Check Advanced
5. In when to run Check Insert and Update



servicenow All Favorites History

bus

- System Definition
 - Business Rules**
- System Diagnostics
 - Session Debug
 - Debug Business Rule
 - Debug Business Rule (Details)
 - Debug SQL
 - Debug SQL (Detailed)

Business Rule - New Record Search

Business Rule New record

A business rule is a server-side script that runs when a record is displayed, inserted, deleted, or when a table is queried. Use business rules to automatically change values in form fields when the specified conditions are met. [More Info](#)

Name: Family Expenses BR

Table: -- None --

Q: Daily

No matches found

Application: Global

Active: ☒

Advanced: ☒

When to run: before

Order: 100

Insert: ☐

Update: ☐

Delete: ☐

Milestone 9 : Configure the Relationship

1. Go to All >> In the filter search for Relationships >> Open Relationships.
2. In that, open Daily Expenses Relationship.
 For Applies to table : Select Family Expenses.
 In Query with : write the below Query.

```
(function refineQuery(current, parent) {
// Add your code here, such as current.addQuery(field, value);
current.addQuery('u_date',parent.u_date);
current.query();
})(current, parent);
```
3. Click on Update.

servicenow All Favorites History Relationship - Daily Expenses Search

Relationship Daily Expenses Run Query Diagnostics Update Delete

Name: Application: Global

Advanced ☐ Applies to table: Family Expenses [u_family_exp...]

Queries from table: -- None --

This script refines the query in current that will populate the related list. For more information about it, its parameters and control variables, see [the documentation](#). See also the article about the recommended form of the script.

Query with ☐ Turn on ECMAScript 2021 (ES12) mode

```

1 (function refineQuery(current, parent) {
2
3
4 // Add your code here, such as current.addQuery(field, value);
5
6 current.addQuery('u_date',parent.u_date);
7
8 current.query();
9
10
11 })(current, parent);
  
```

Conclusion:

Platform Login Credentials - Pr x Student x naanmudhalvan.smartinternz.com/Student/guided_project_workspace/25472

Smart Internz

Home Projects Support

Guided Project Project Workspace

Project Title : Calculating Family Expenses using Service Now
 NM Id : 3CE5E46E74DDAD4B9A24CBE87BFC09BF
 Industry Mentor(s) Name : No Mentor has been assigned

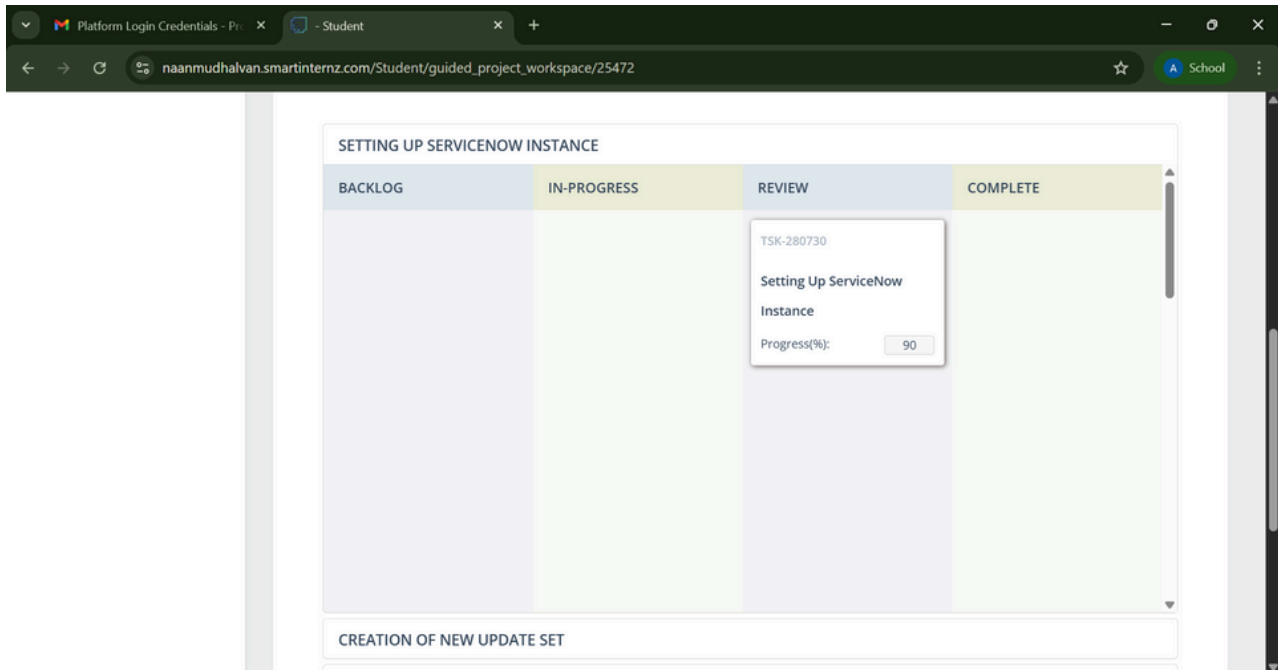
Project Progress: 90.00%

GENERAL INSTRUCTION SHOW

Demo Link View Mentor Comments View Industry Mentor Comments

PROJECT DETAILS TASK & PROGRESS MENTOR REVIEW

19:43 09-09-2025



All the steps are completed successfully and the percentage has been updated.

