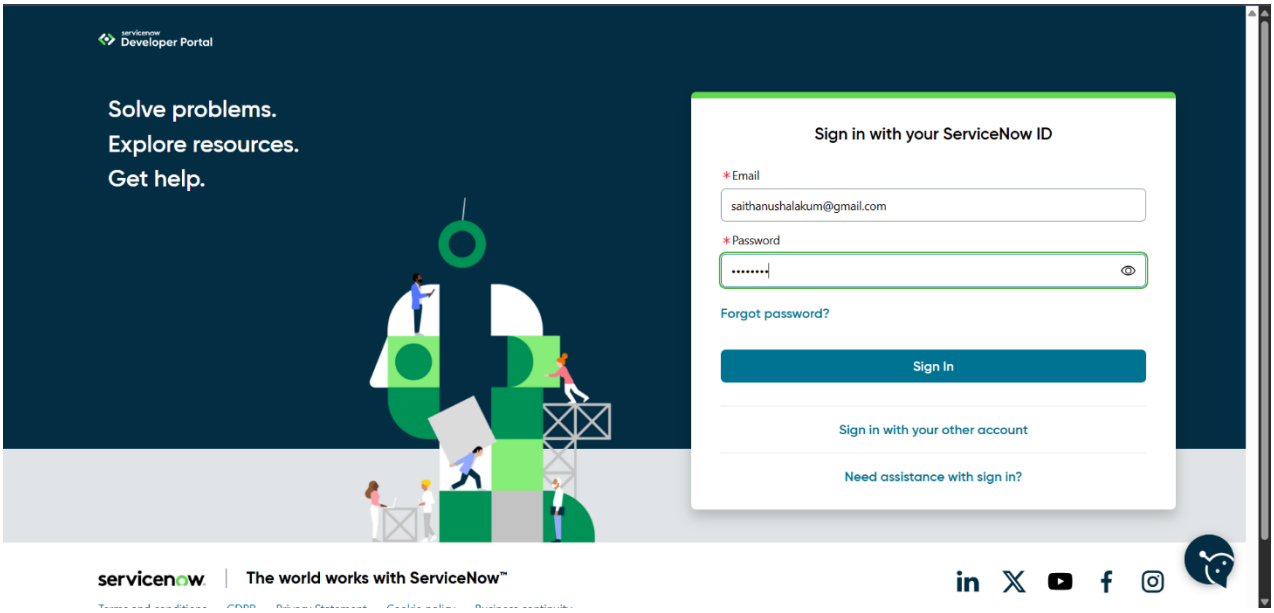
Calculating Family Expenses Using ServiceNow

TEAM ID	LTVIP2025TMID31080
PROJECT NAME	CALCULATING FAMILY EXPENSES USING SERVICENOW
FACULTY MENTOR(S) NAME	

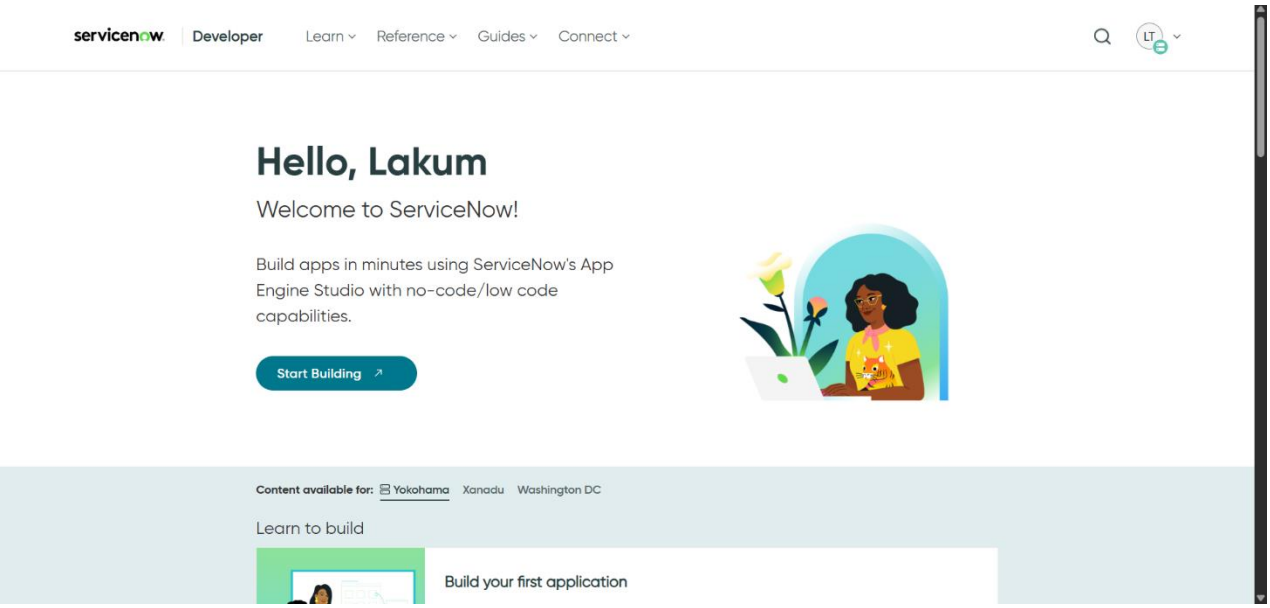
STEP-1: Setting Up ServiceNow Instance

- Sign In to the Developer Account



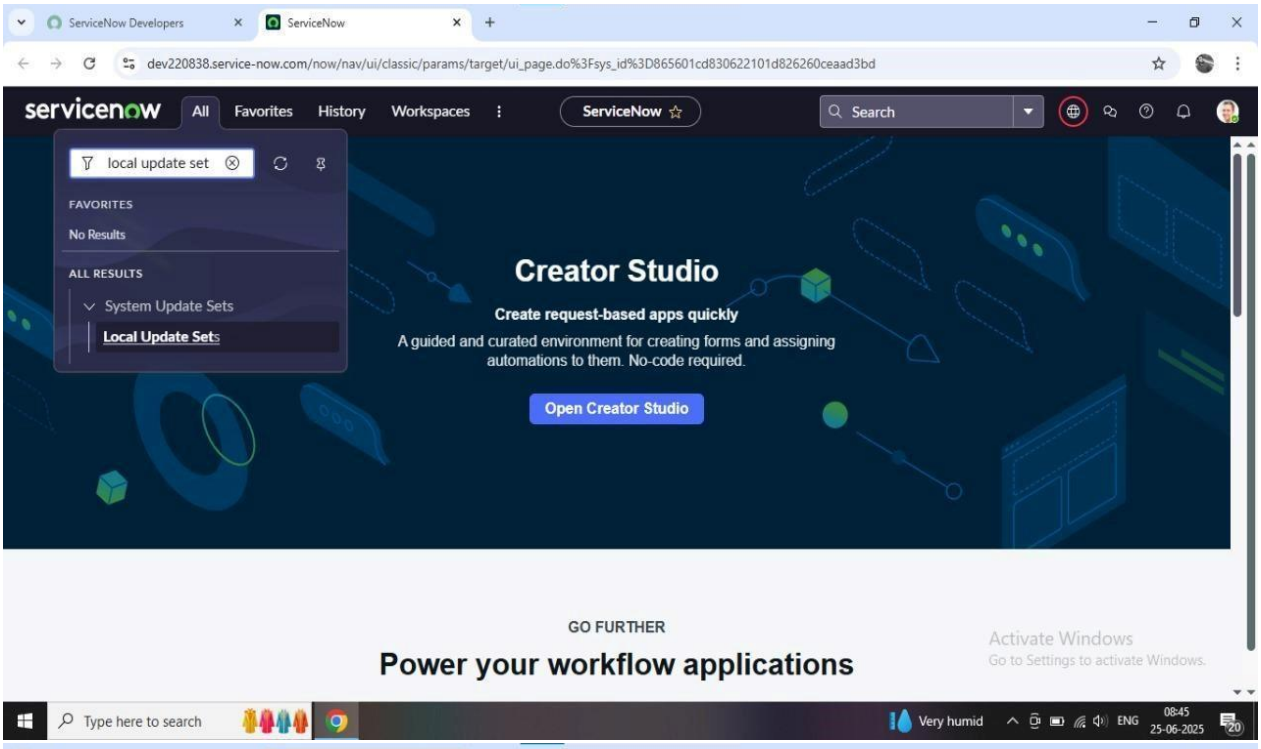
- **Request a Personal Developer Instance (PDI)**
  1. Click on the profile icon at the top-right corner.
  2. Select “Manage Instance” or go directly to the link.
  3. Click “Request Instance”.
  4. Choose the latest version (default selection is recommended).
  5. Click “Request” again.

- **Access your Instance**
  6. You'll get an instance URL like: https://devXXXX.service-now.com
  7. Click "Open Instance" to launch it.
  8. Your admin credentials (username & password) will be shown-copy and save them securely.
- Log in to Your Instance



Step-2: Creation of New Update Set

Key Objective: Track, group, and manage configuration changes or customization made in a ServiceNow instance, so they can be migrated or deployed to another instance (like from development to test or production) in a controlled and organized way.


ServiceNow Developers
ServiceNow
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servicenow
All
Favorites
History
Workspaces
ServiceNow
Search
local update set
FAVORITES
No Results
ALL RESULTS
System Update Sets
Local Update Sets
Creator Studio
Create request-based apps quickly
A guided and curated environment for creating forms and assigning automations to them. No-code required.
Open Creator Studio
GO FURTHER
Power your workflow applications
Activate Windows
Go to Settings to activate Windows.
Type here to search
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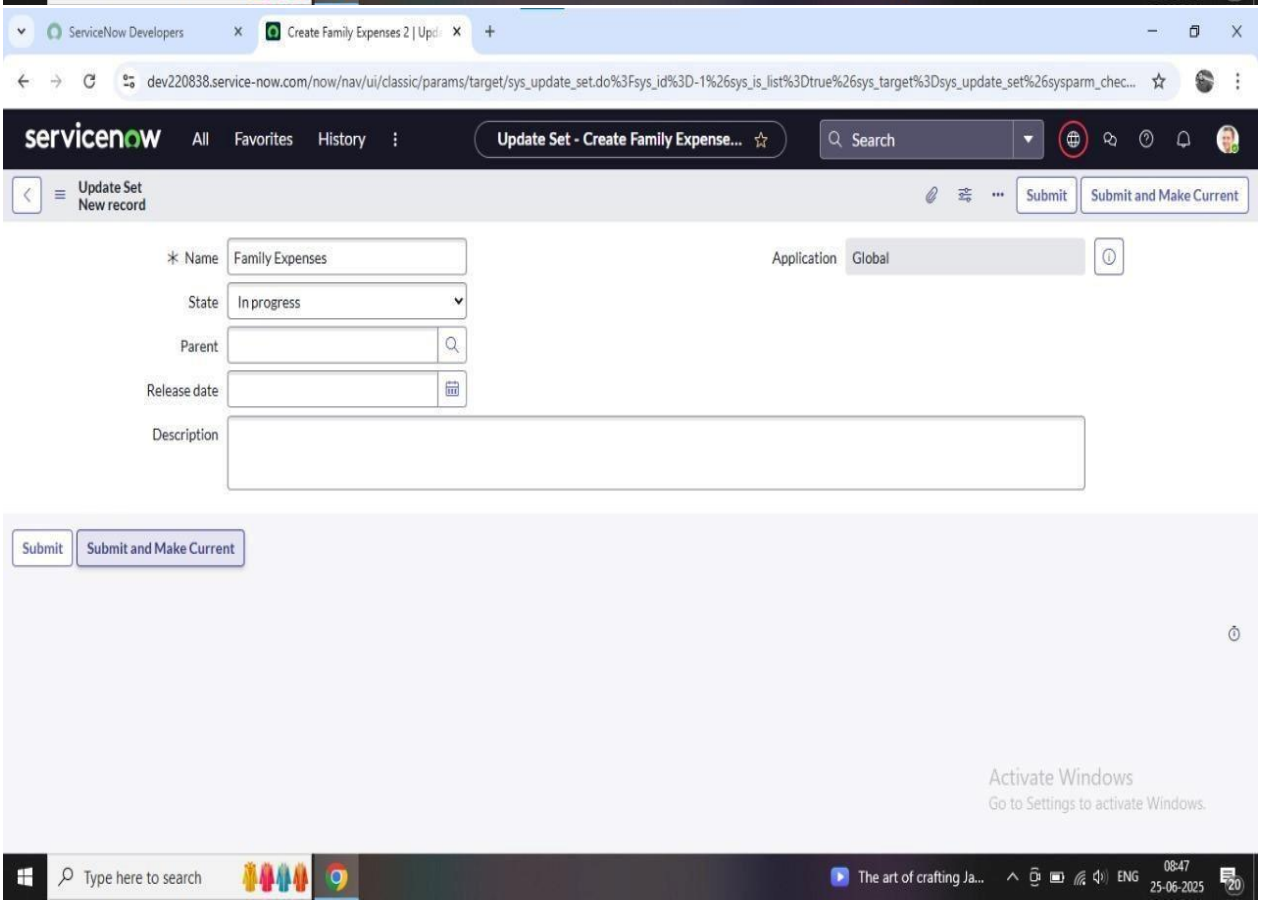
25-06-2025


ServiceNow Developers
Create Family Expenses 2 | Upd
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servicenow
All
Favorites
History
Update Set - Create Family Expense...
Search
Update Set
New record
Submit
Submit and Make Current
* Name
Family Expenses
Application
Global
State
In progress
Parent
Release date
Description
Submit
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Activate Windows
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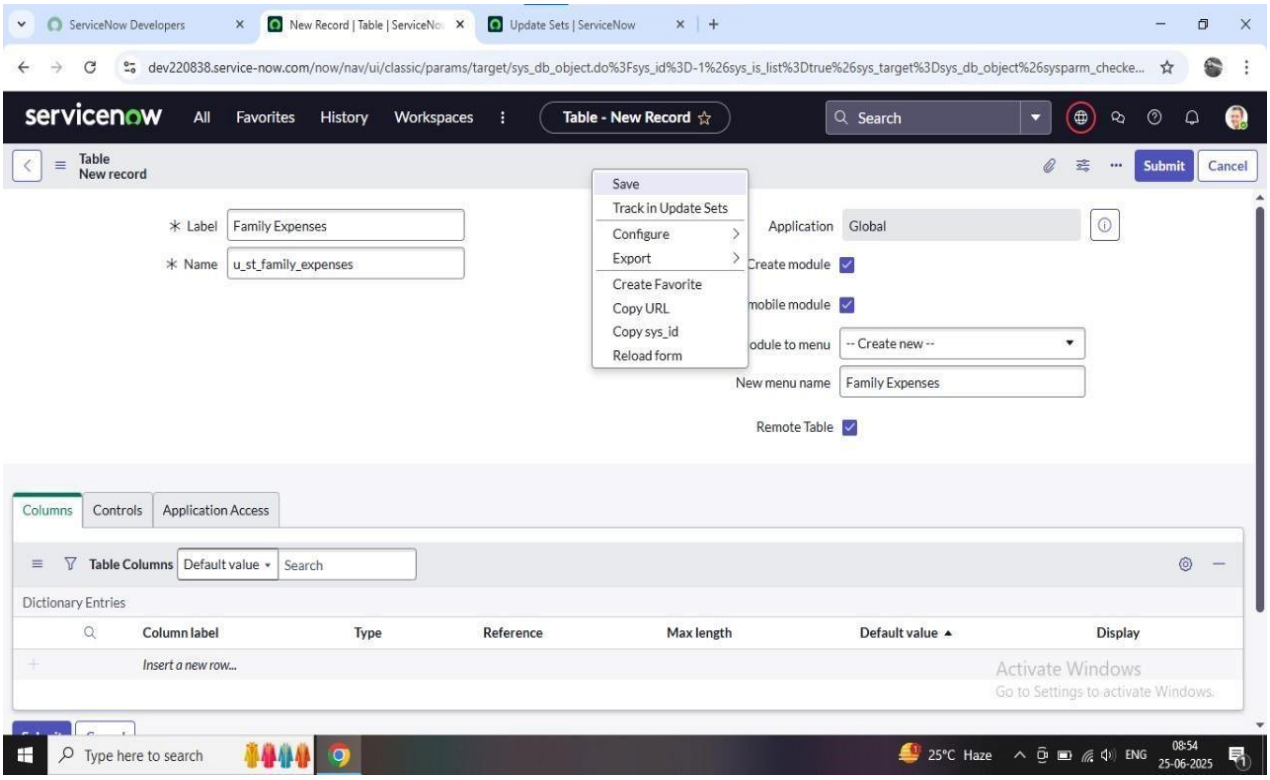
Step-3: Creation of Table:

- **Creation of Family Expenses Table:**

  Key Objective:

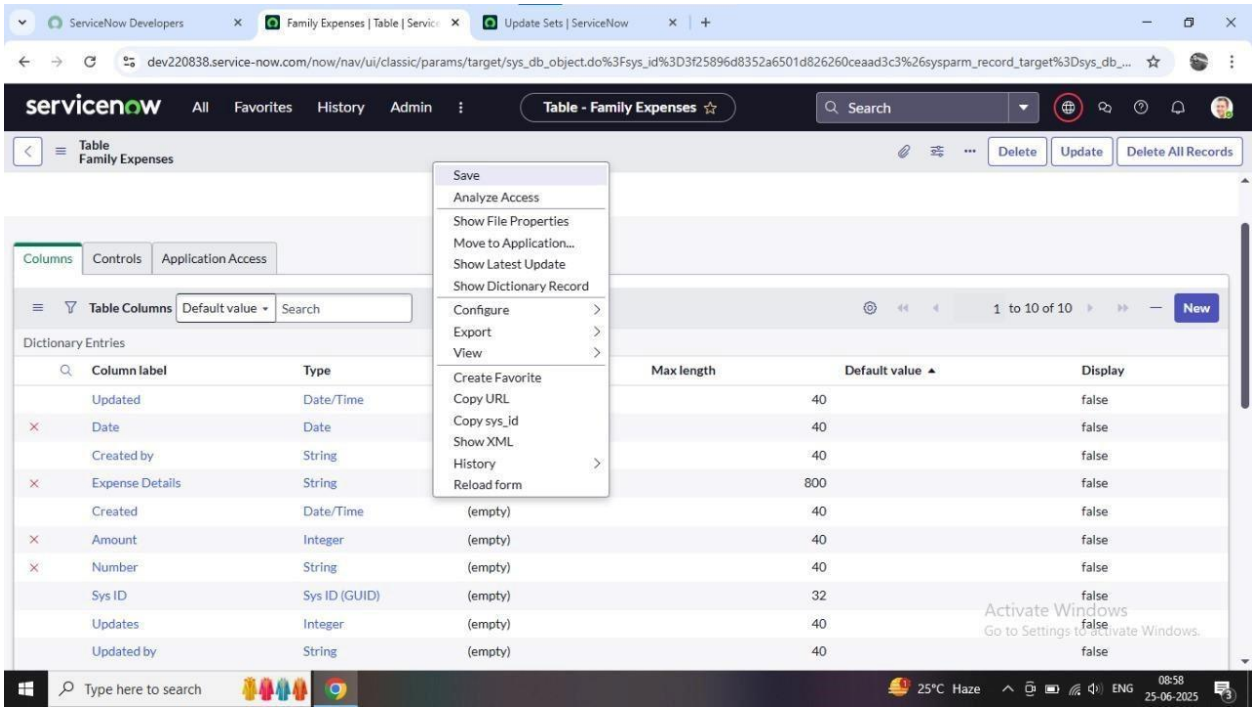
  1. To record individual expenses (e.g., food, bills, travel) for each family member.
  2. To categorize and organize expenses by type, date, or person.
  3. To enable calculation of total and individual spending using scripts or reports.
  4. To provide a digital system for managing household finances within the ServiceNow platform



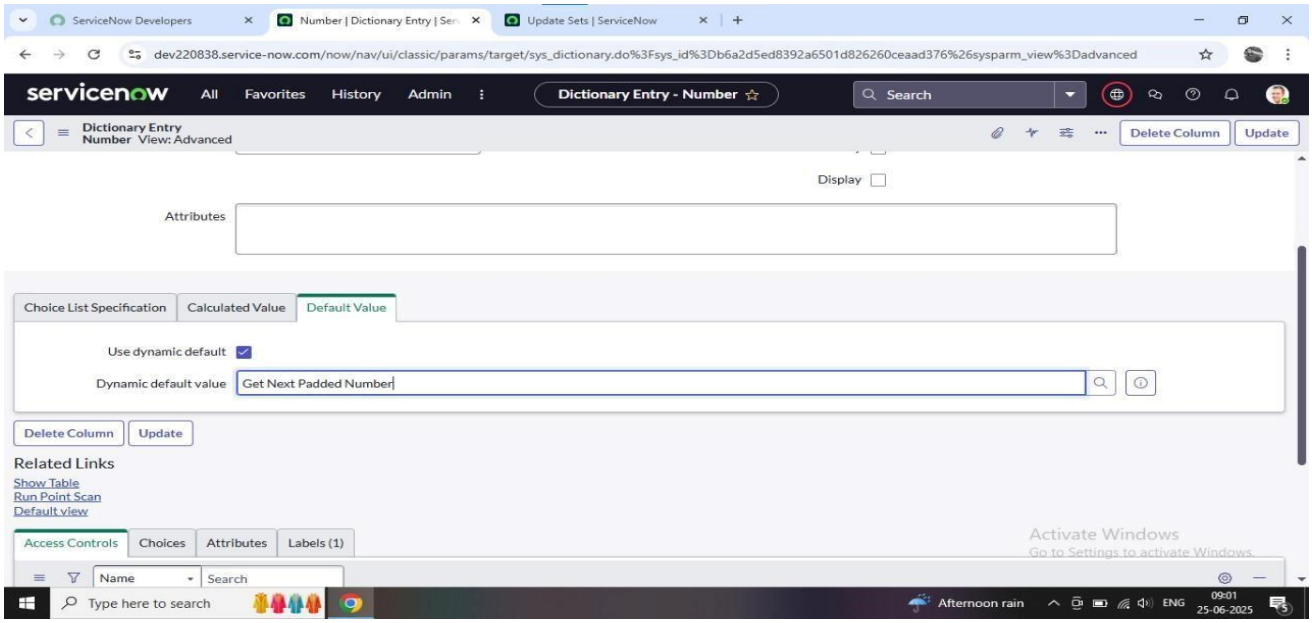
- **Creation of Columns (Fields):**

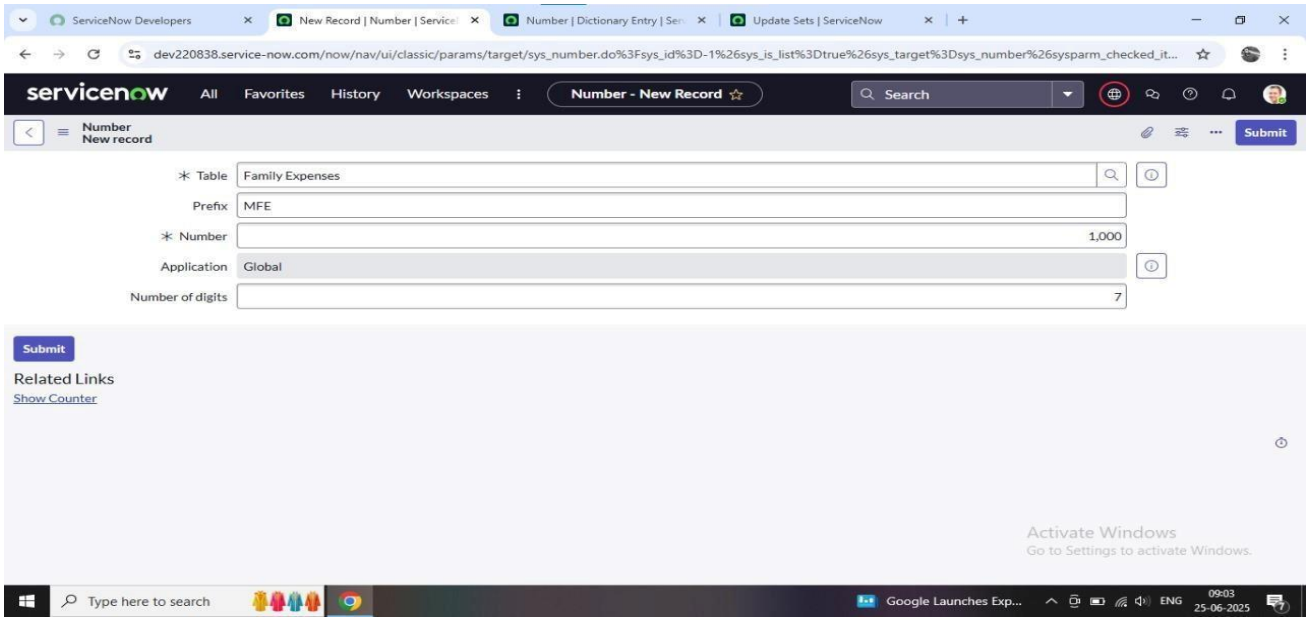
Key Objective: Creating column fields in the Family Expenses table serves the purpose of capturing detailed and organized data for each expense entry. These fields ensure that the data is structured, easy to query, and meaningful for analysis.

- **Making Number Field An Auto-Number:**



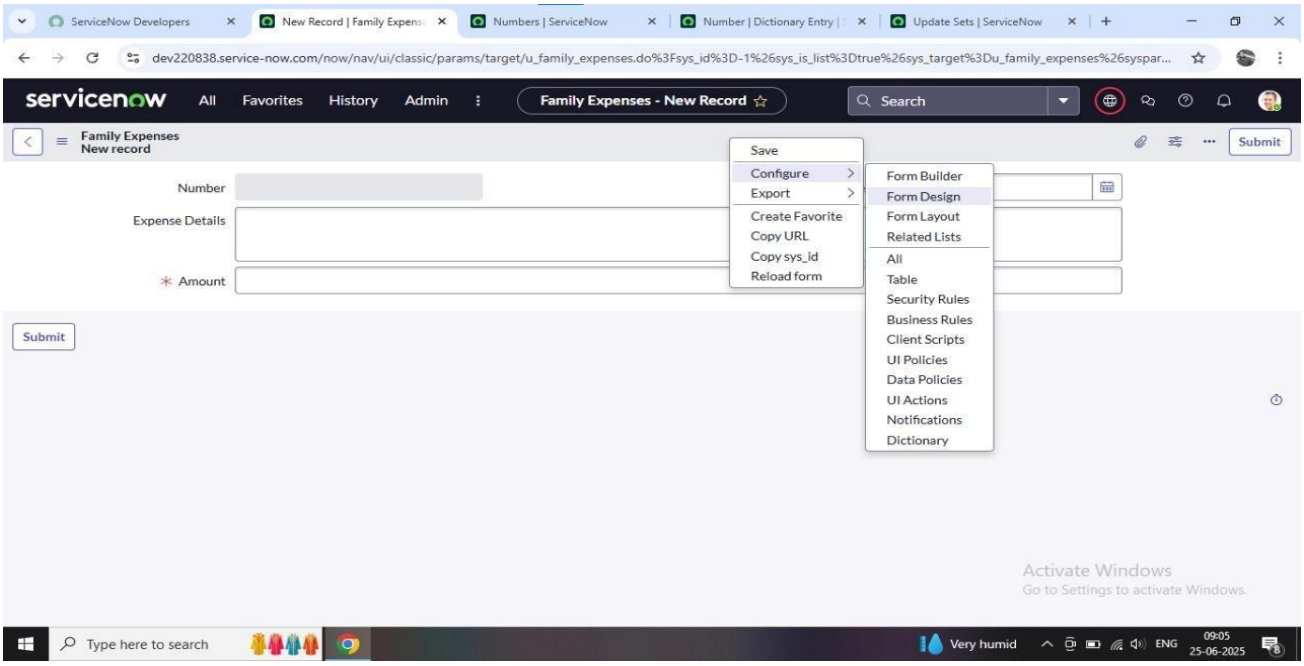
Key Objective: Automatically generate a unique, sequential identifier for each expense record, ensuring easy tracking, reference, and organization of entries without manual input.

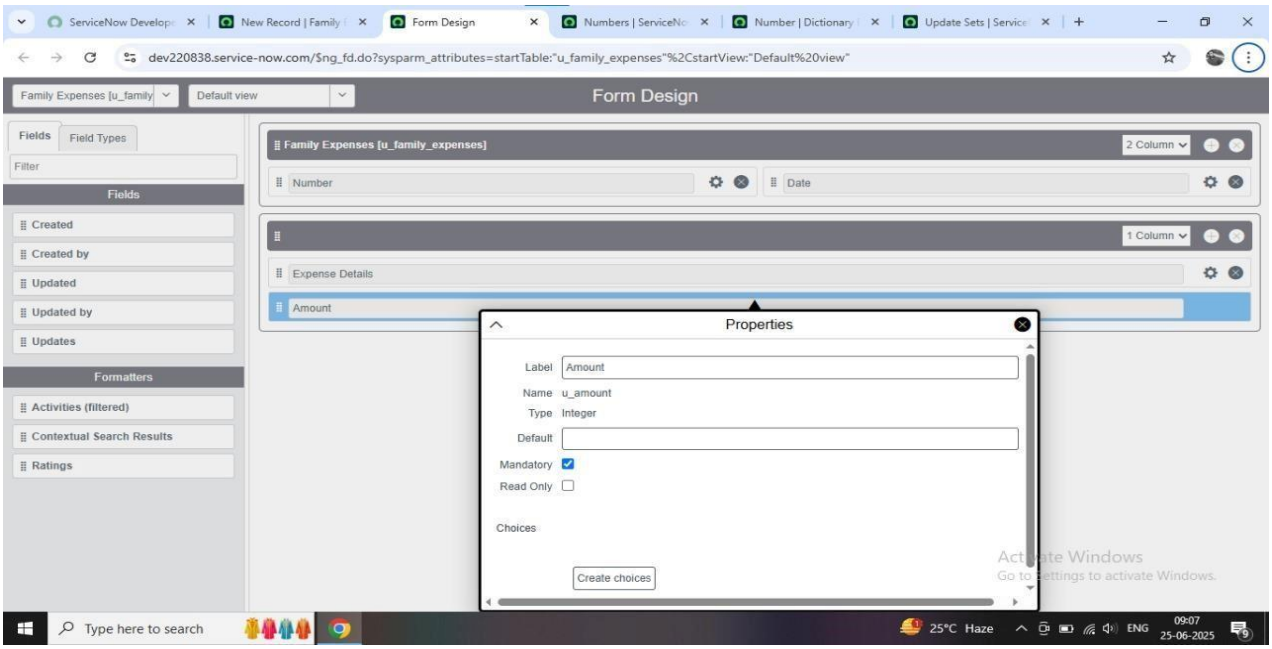




- **Configure The Form:**

  Key Objective: Customize the user interface to display only the relevant fields in a clear, organized, and user-friendly layout-making it easier to enter, view and manage expense records efficiently.

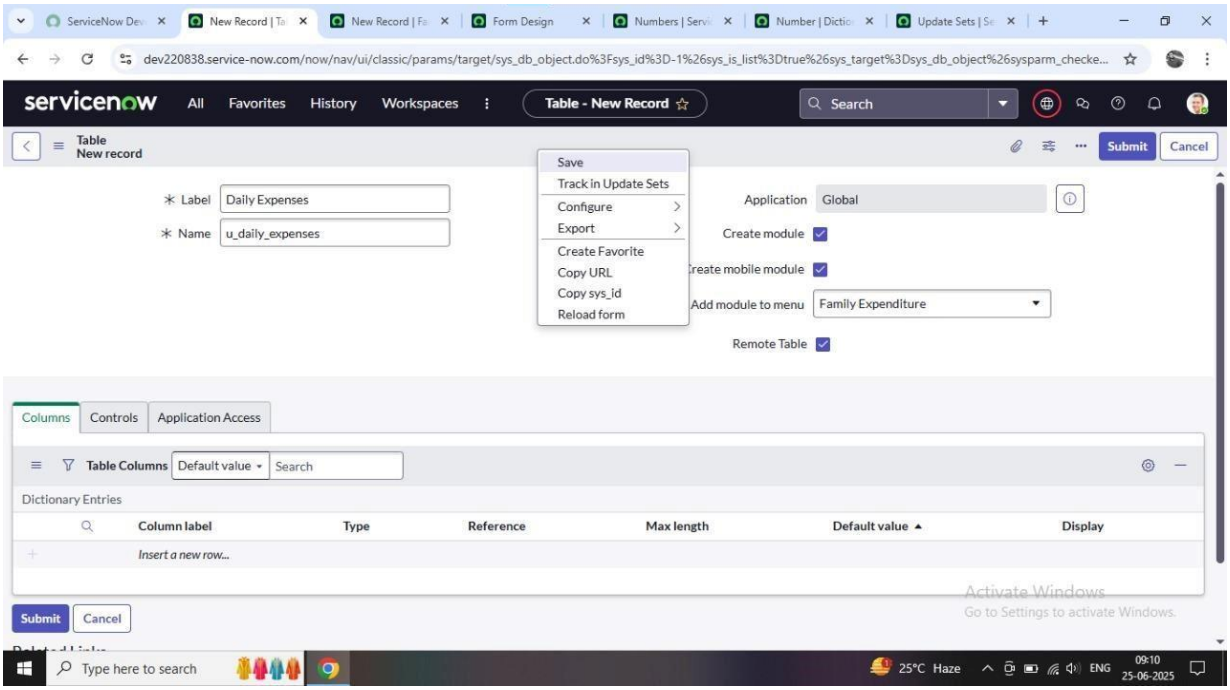




Step-4: Creation of Table (Daily Expenses)

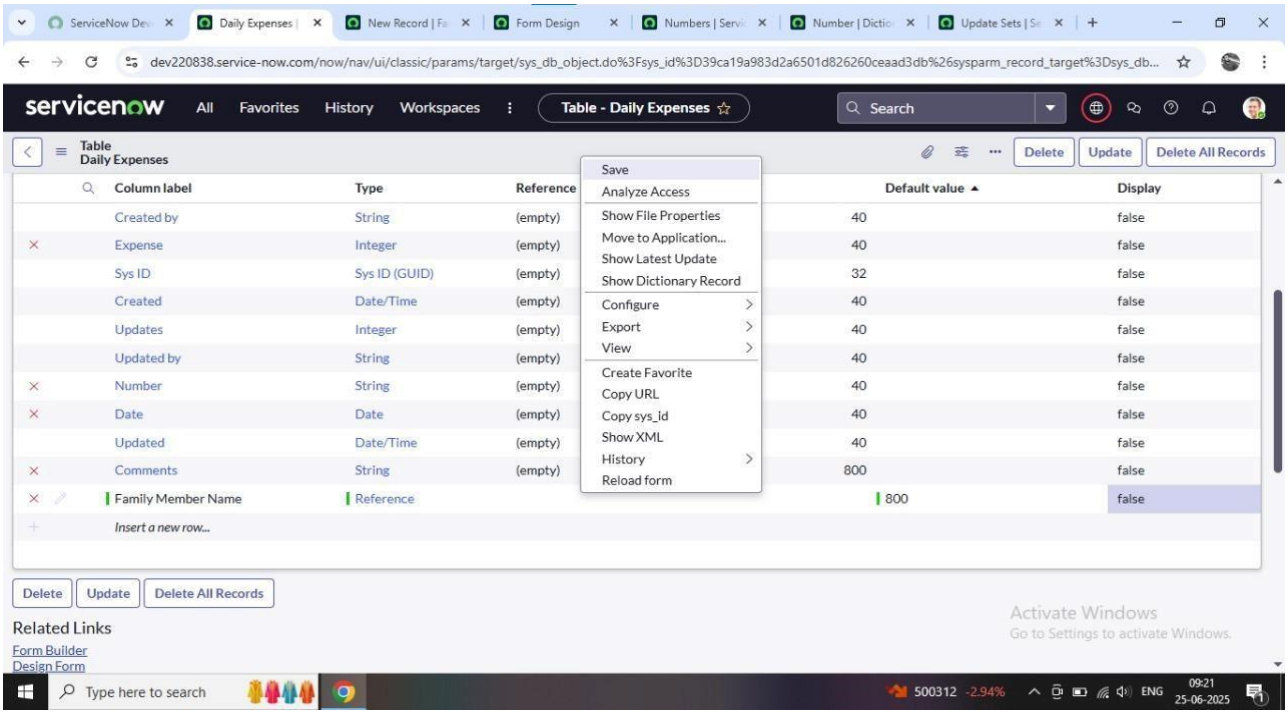
- **Creation of Daily Expenses Table:**

  Key Objective: Record and manage everyday spending data in a structured format, enabling users to track daily financial activity, monitor patterns, and generate useful reports for budgeting or analysis.



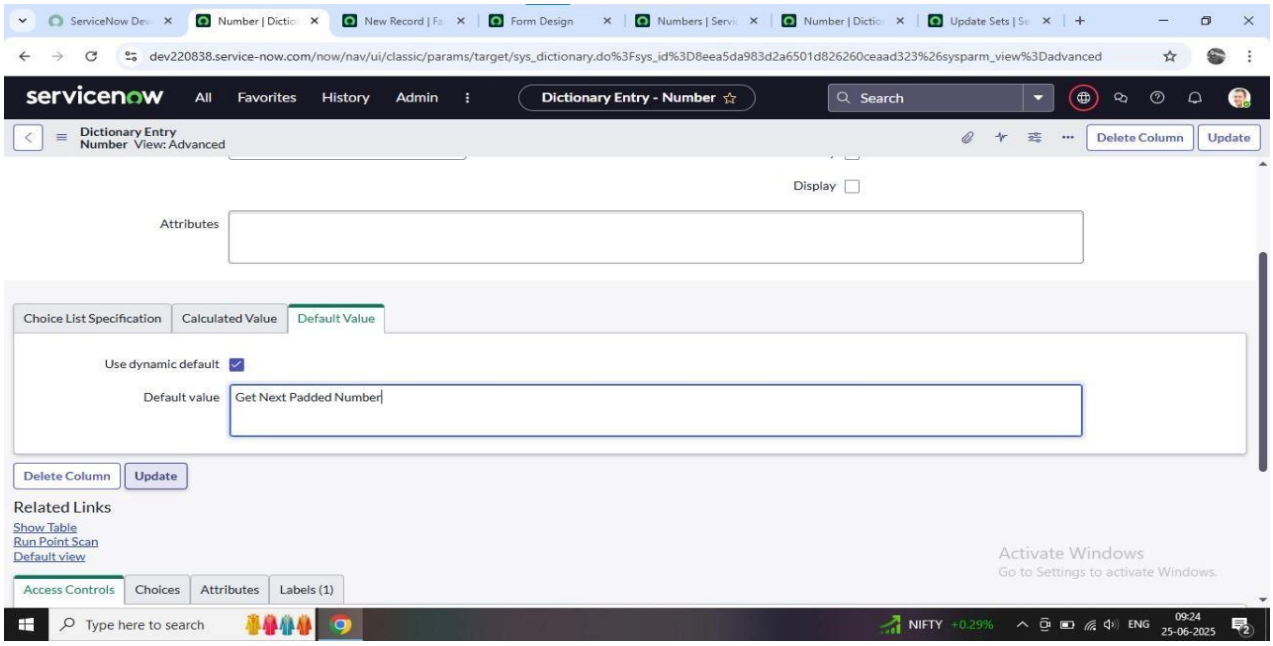
- **Creation of Column (Fields):**

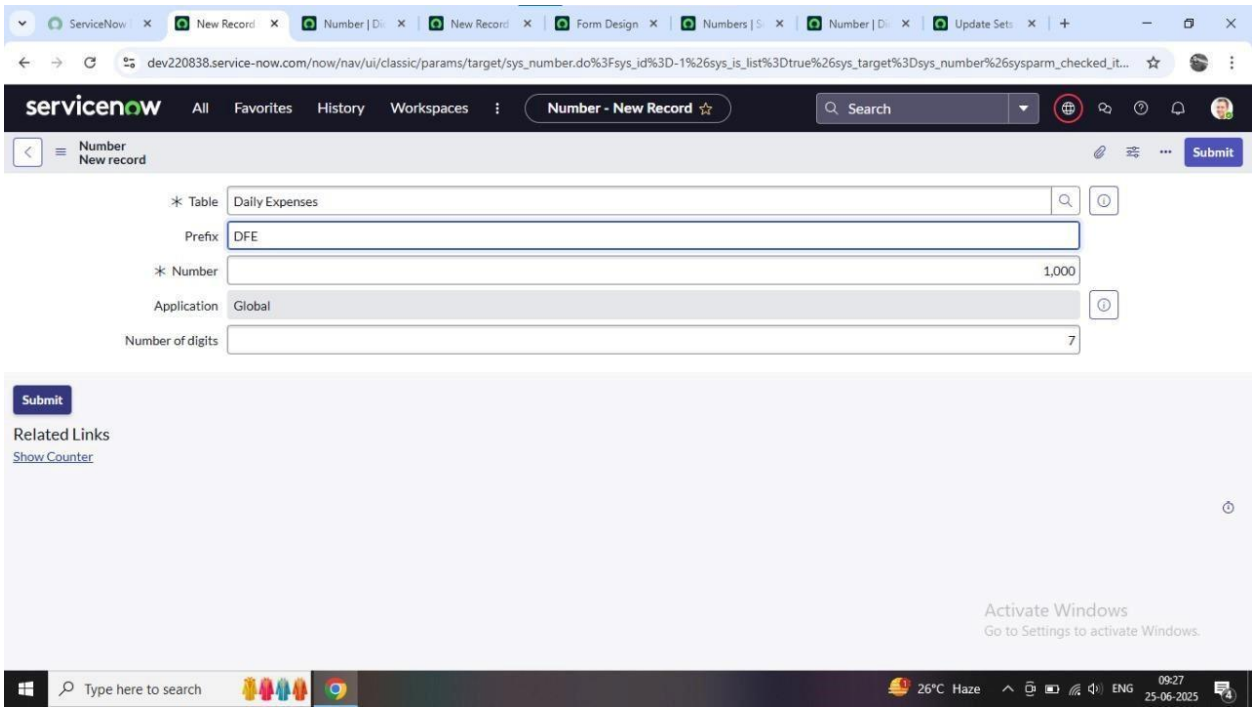
Key Objective: Structure and organize daily financial data in a way that supports accurate entry, easy tracking, and efficient reporting of daily spending activities.



- **Making Number Field An Auto-Number:**

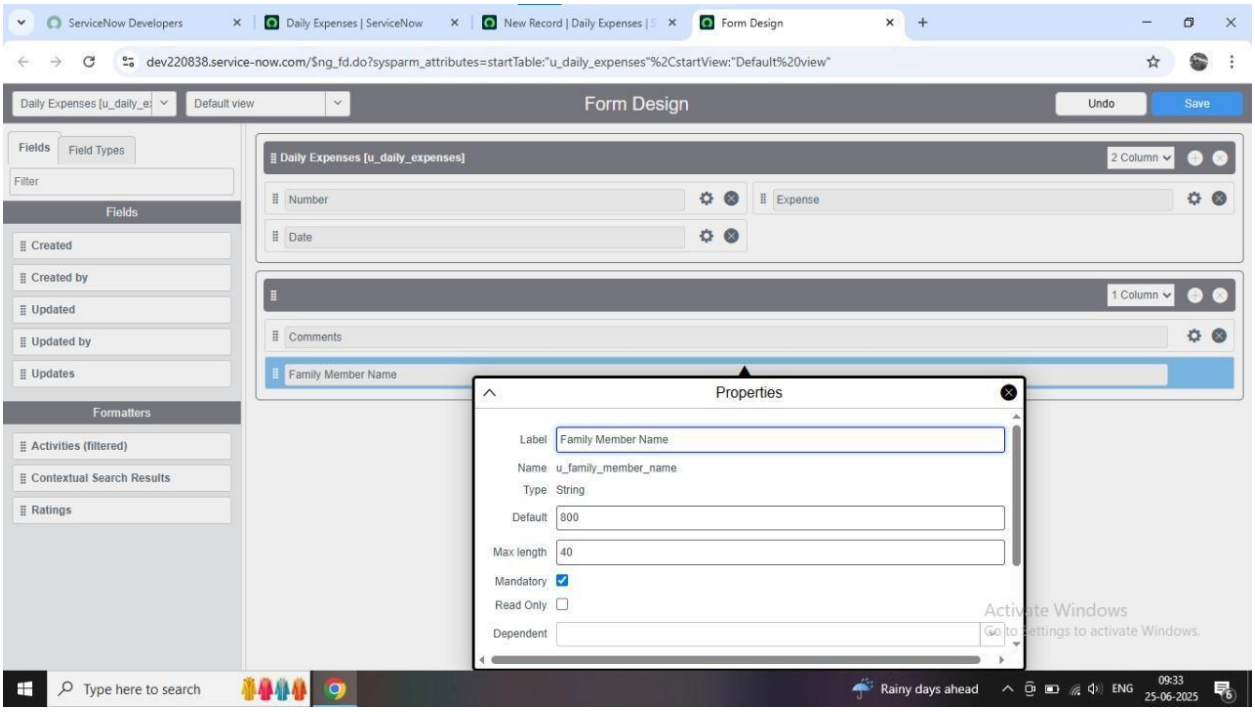
Key Objective: Automatically generate a unique and sequential identifier for each daily expense record, ensuring easy tracking, organization, and reference of individual entries without manual effort.





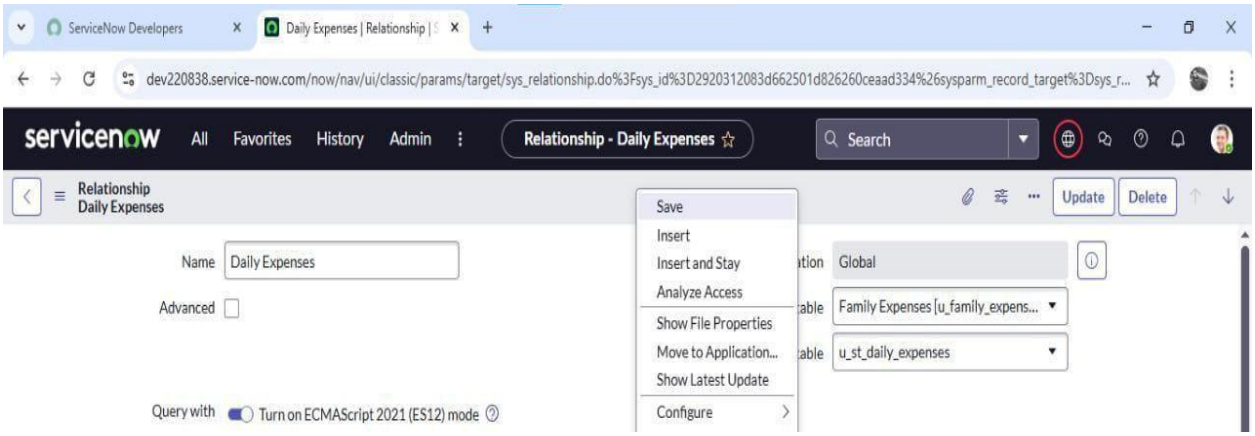
- **Configure the Form:**

Key Objective: Design a user-friendly, well-organized interface that makes it easy to input, view, and manage daily expense records accurately and efficiently.



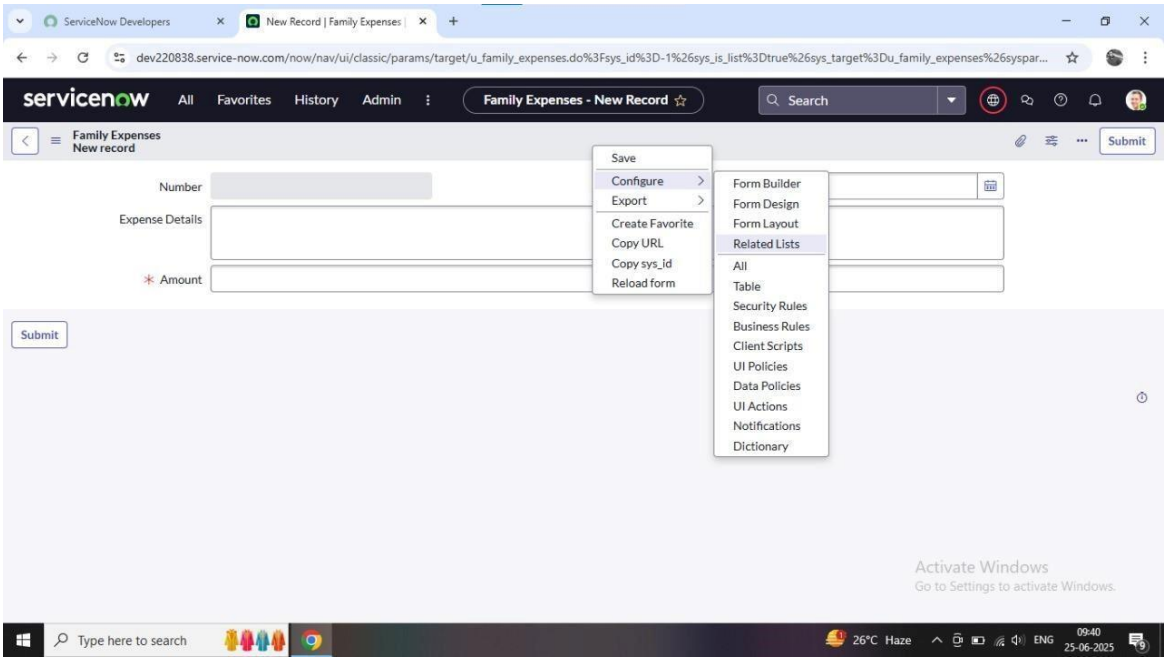
Step-5: Creation of Relationship Between Family Expenses and Daily Expenses Tables

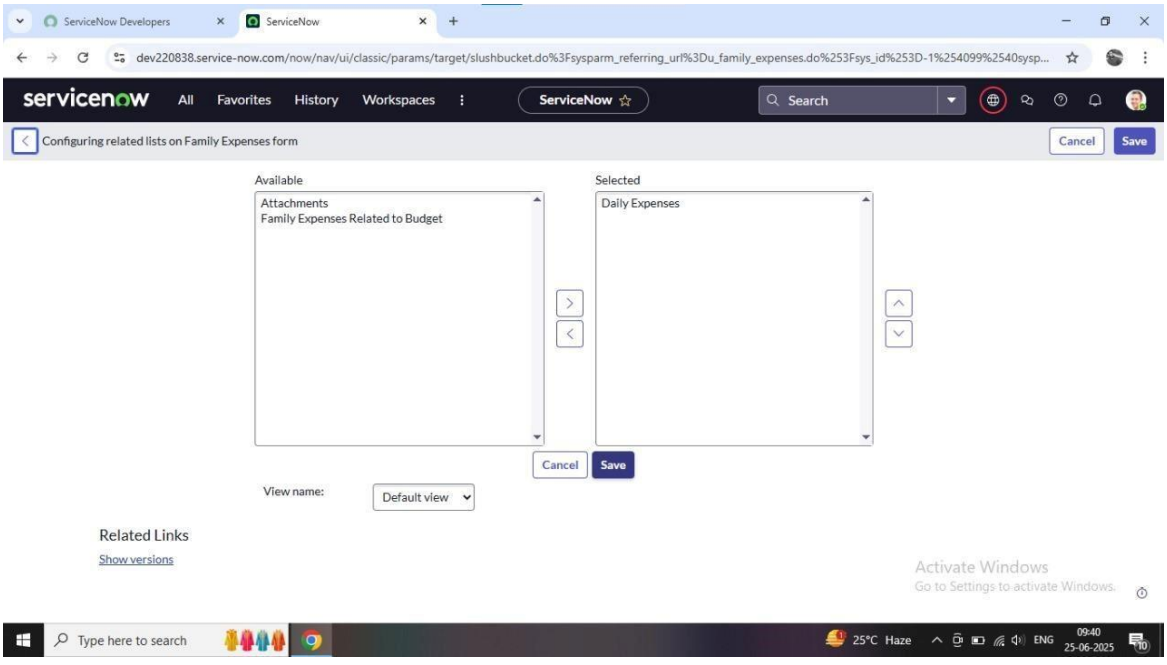
Key Objective: Establish a logical link between each daily expense and the corresponding family member, allowing for better data organization, tracking, and reporting of expenses by individual or household.



Step-6: Configuring Related List on Family Expenses:

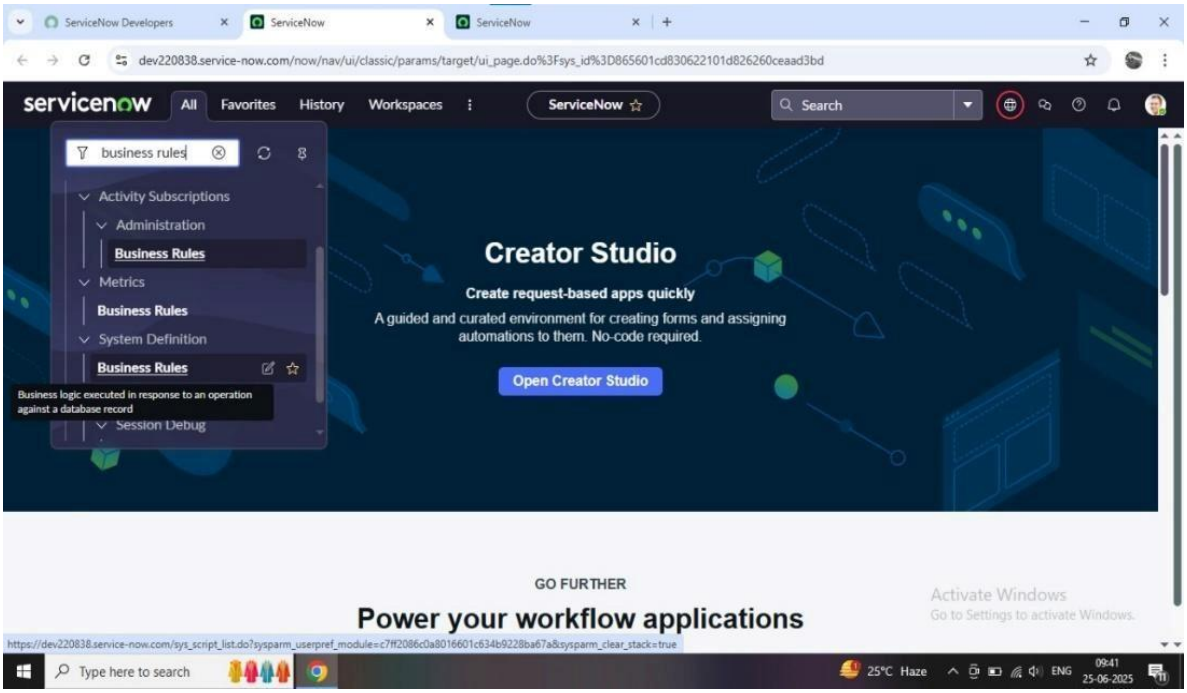
Key Objective: Display all related Daily Expenses record for each family member directly within their family expenses form, enabling users to view and manage associated expense entries in one place.

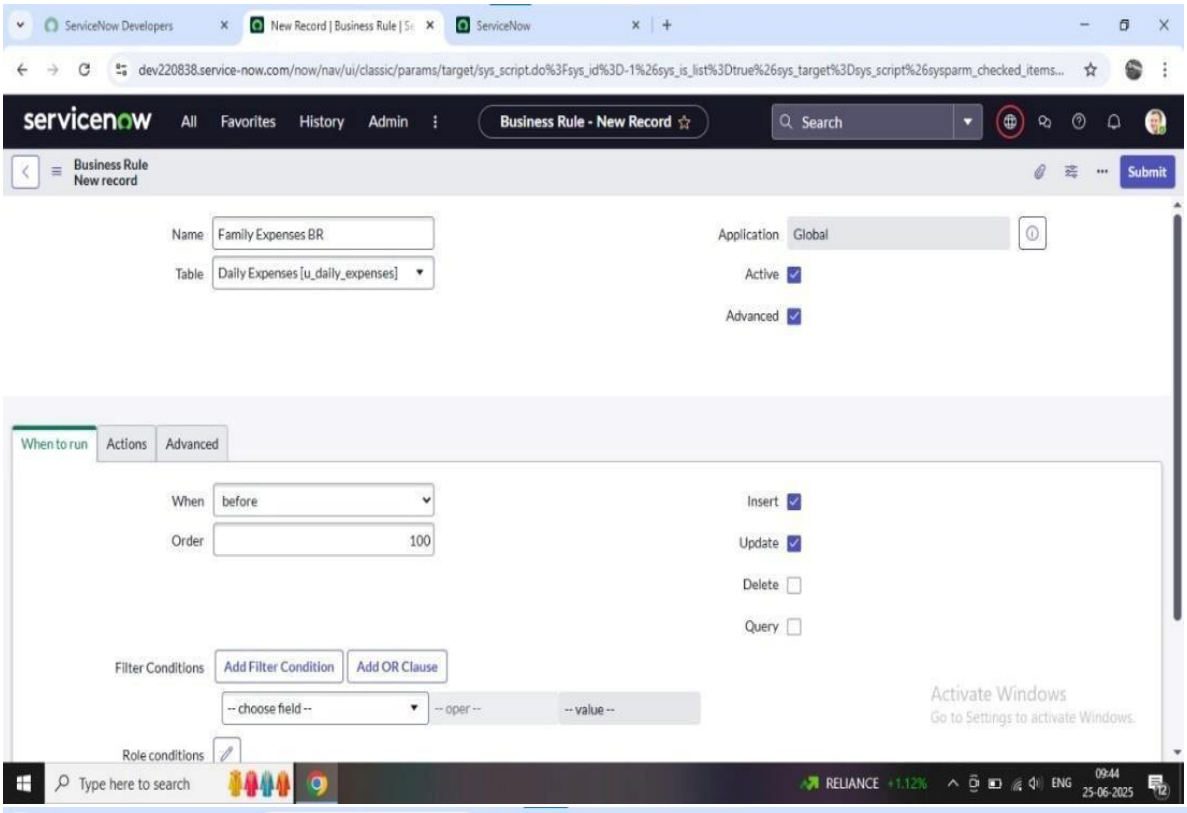


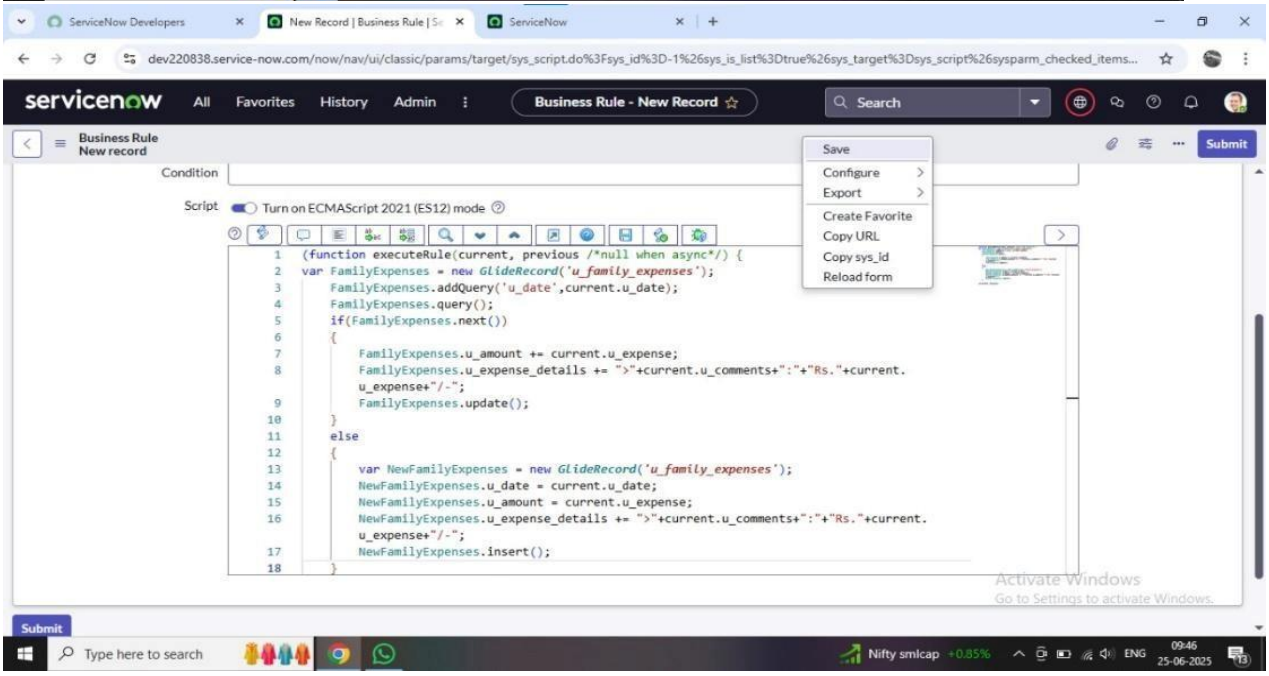


Step-7: Creation of Business Rules:

Key Objective: Automate backend logic and enforce business processes by executing custom scripts when records are created, updated, deleted, or queried ensuring data consistency, validation, and process automation.

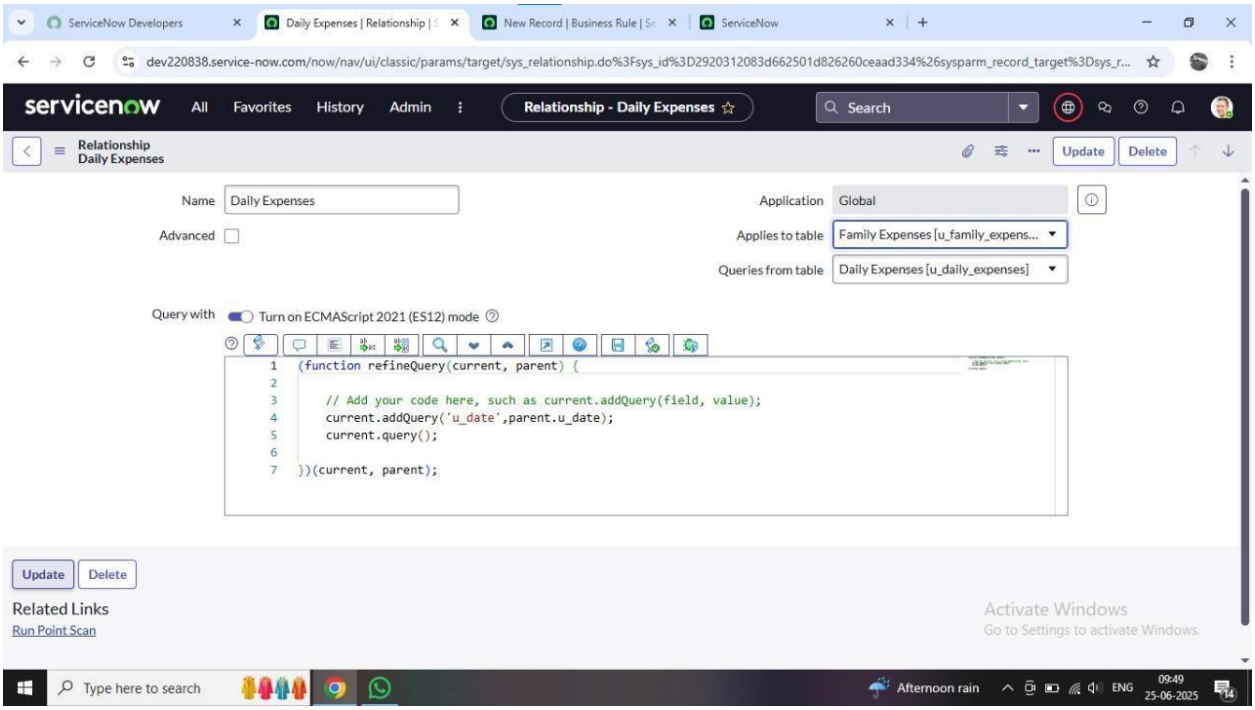




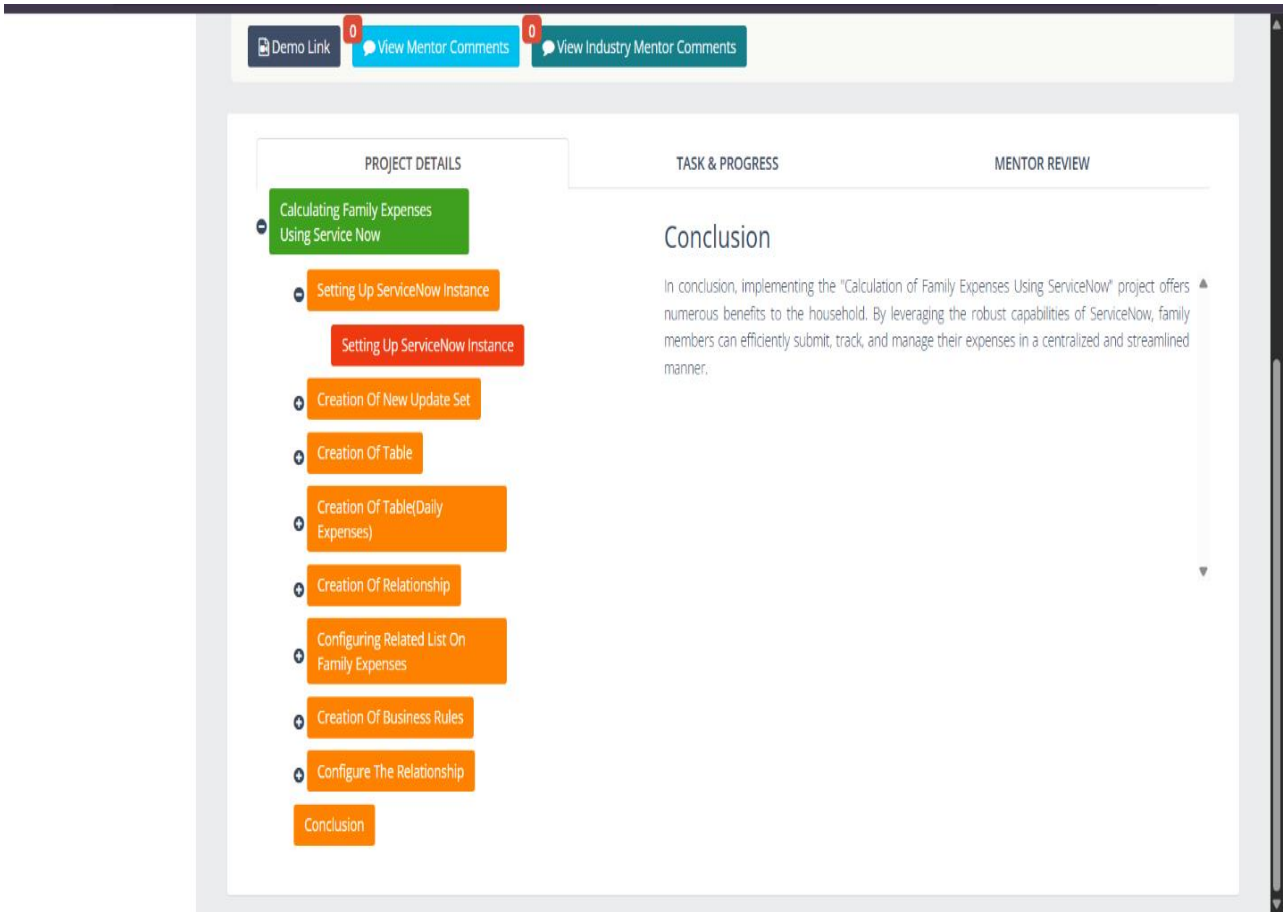


Step-8: Configure the Relationship:

Key Objective: Logically connect two related tables so data can be linked, referenced, and accessed easily supporting better data structure, consistency, and reporting.



Step-9: Conclusion:


Demo Link
0
View Mentor Comments
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View Industry Mentor Comments
PROJECT DETAILS
TASK & PROGRESS
MENTOR REVIEW
Calculating Family Expenses Using Service Now
Setting Up ServiceNow Instance
Setting Up ServiceNow Instance
Creation Of New Update Set
Creation Of Table
Creation Of Table(Daily Expenses)
Creation Of Relationship
Configuring Related List On Family Expenses
Creation Of Business Rules
Configure The Relationship
Conclusion
Conclusion
In conclusion, implementing the "Calculation of Family Expenses Using ServiceNow" project offers numerous benefits to the household. By leveraging the robust capabilities of ServiceNow, family members can efficiently submit, track, and manage their expenses in a centralized and streamlined manner.