Calculating Family Expenses Using Service Now

- Setting Up ServiceNow Instance
- Creation Of New Update Set
- Creation Of Table
- Creation Of Table
- Creation Of Table(Daily Expenses)
- Creation Of Relationship
- Configuring Related List On Family Expenses
- Creation Of Business

Calculating Family Expenses Using Service Now

The project aims to develop a comprehensive expense calculation system using ServiceNow. This system will enable users to track and manage family expenses efficiently. It will include features such as expense categorization, budget setting, real-time tracking, and reporting capabilities. Utilizing ServiceNow's robust platform, the project will ensure seamless integration, user-friendly interface, and scalability to accommodate varying family sizes and financial complexities. The end goal is to empower users with the tools they need to make informed financial decisions and promote financial well-being within the family unit.

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

Creation Of Table(Daily
Expenses)

Creation Of Relationship

Configuring Related List

Setting Up ServiceNow Instance
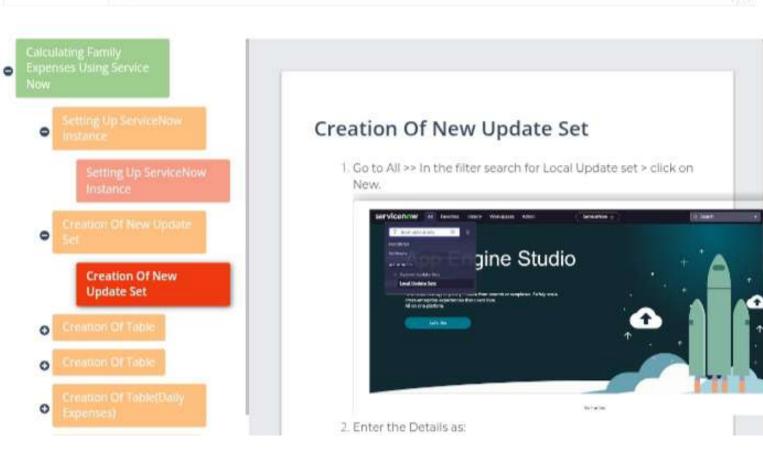
1. Sign up for a developer account on the ServiceNow
   Developer site "https://developer.servicenow.com".
2. Once logged in, navigate to the "Personal Developer
   Instance" section.
3. Click on "Request Instance" to create a new ServiceNow
   instance.
4. Fill out the required information and submit 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.

Calculating Family Expenses Using Service Now

Setting Up ServiceNow Instance

Setting Up ServiceNow Instance

Creation Of New Update Set

Creation Of New Update Set

Creation Of Table

Creation Of Table

Creation Of Table(Daily Expenses)

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:

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:

Creation Of Family Expenses Table

1. Go to All > In the filter search for Tables > click on New.
2. Enter the Details:
   Label : Family Expenses
   Name : Auto-Populated
   New menu name : Family Expenditure

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

Creation Of New Update
Set

Creation Of Table

Creation Of New Update
Set

Creation Of Table

Creation Of Family
Expenses Table

Creation Of
Columns(Fields)

Making Number Field An
Auto-Number

Configure The Form

Creation Of Table(Daily
Expenses)

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
5. Double click on insert a new row again
6. Give the details as:
   Column label : Amount
   Type : Integer
7. Double click on insert a new row again
8. Give the details as:
   Column label : Expense Details
   Type : String
   Max length : 800
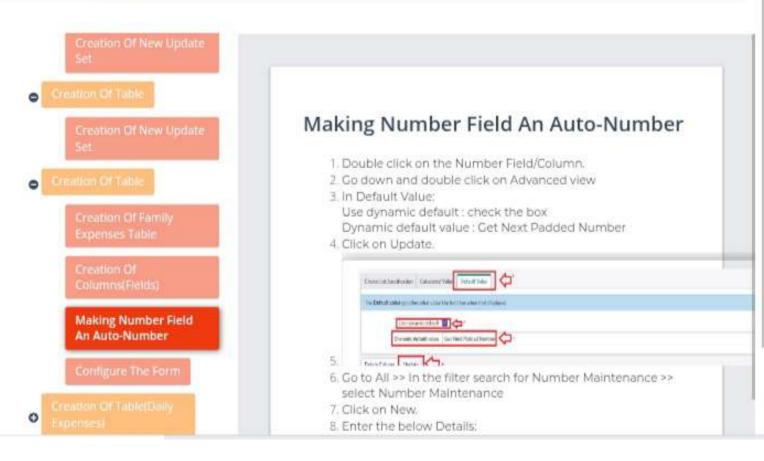
Making Number Field An Auto-Number

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.
6. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance
7. Click on New.
8. Enter the below Details:

Creation Of New Update Set

Creation Of Table

Creation Of New Update Set

Creation Of Table

Creation Of Family Expenses Table

Creation Of Columns(Fields)

Making Number Field An Auto-Number

Configure The Form

Creation Of Table(Daily Expenses)

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

Columns(Fields)

Making Number Field An
Auto-Number

Configure The Form

Creation Of Table(Daily
Expenses)

**Creation Of Daily
Expenses Table**

Creation Of
Columns(Fields)

Making Number Field An
Auto-Number

Configure The Form

Creation Of Relationship

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.

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
5. Double click on insert a new row again
6. Give the details as:
   Column label : Expense
   Type : Integer
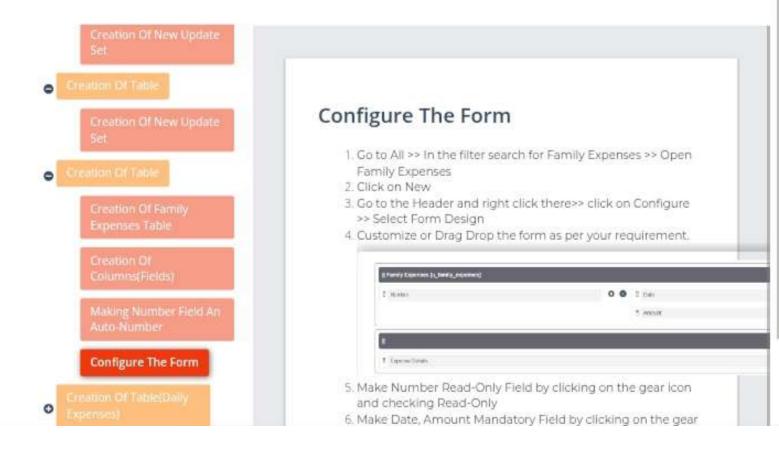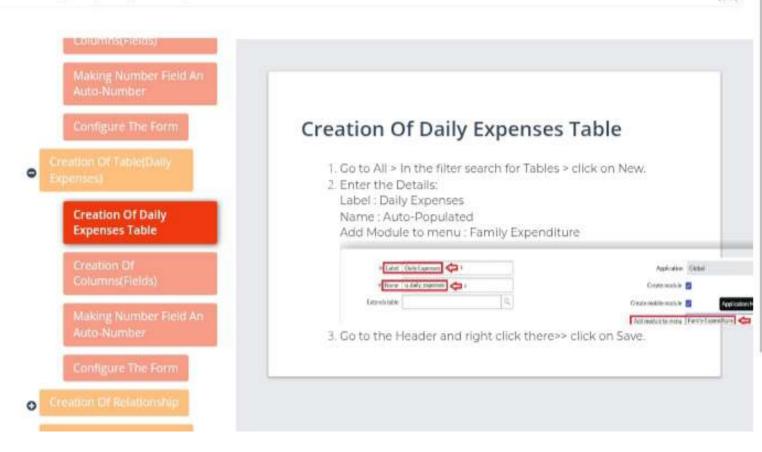7. Double click on insert a new row again
8. Give the details as:
   Column label : Family Member Name
   Type : Reference
   Max length : 800
9. Double click on insert a new row again
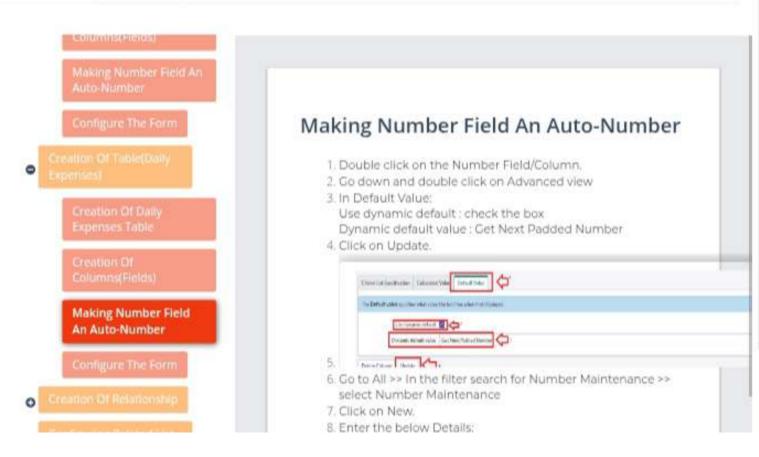
Making Number Field An Auto-Number

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.
6. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance
7. Click on New.
8. Enter the below Details:

Guided Project   Project Workspace

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Columns(Fields)

Making Number Field An
Auto-Number

Configure The Form

Creation Of Table(Daily
Expenses)

Creation Of Daily
Expenses Table

Creation Of
Columns(Fields)

Making Number Field An
Auto-Number

Configure The Form

Creation Of Relationship

Configuring Related List

Configure The Form

1. Go to All >> In the filter search for Daily Expenses >> Open
   Daily 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, Family Member Name Mandatory Field by

Expenses Table

Creation Of
Columns(Fields)

Making Number Field An
Auto-Number

Configure The Form

Creation Of Relationship

**Creation Of
Relationship Between
Family Expenses And
Daily Expenses Tables**

Configuring Related List
On Family Expenses

Creation Of Business
Rules

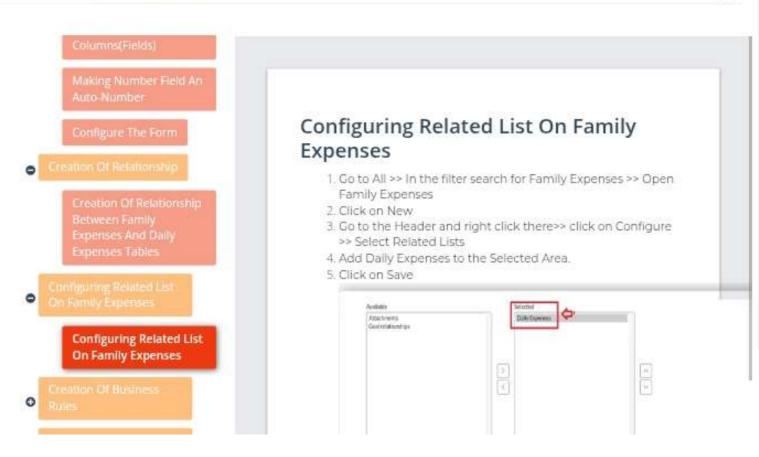# Creation Of Relationship Between Family Expenses And Daily Expenses Tables

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
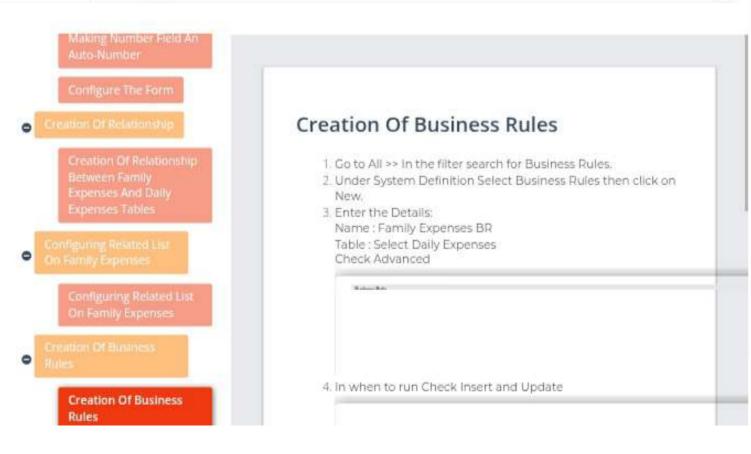4. Click Save.

Columns(Fields)

Making Number Field An Auto-Number

Configure The Form

● Creation Of Relationship

Creation Of Relationship Between Family Expenses And Daily Expenses Tables

● Configuring Related List On Family Expenses

Configuring Related List On Family Expenses

⊕ Creation Of Business Rules

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

Columns(Fields)

Making Number Field An
Auto-Number

Configure The Form

Creation Of Relationship

Creation Of Relationship
Between Family
Expenses And Daily
Expenses Tables

Configuring Related List
On Family Expenses

Configuring Related List
On Family Expenses

Creation Of Business
Rules

Creation Of Business Rules

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
   Check Advanced

4. In when to run Check Insert and Update

Configure The Relationship

1. Go to All >> In the filter search for Relationships >> Open
   Relationships.
2. In that, open Daily Expenses Relationship.
3. For Applies to table : Select Family Expenses.
4. 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);

5. Click on Update.

Conclusion