

Calculating Family Expenses Using Service Now

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Team Members: 4

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Problem Statement:

Families often struggle to track and manage their monthly expenses due to scattered data sources, manual record-keeping, and lack of real-time insights. This leads to overspending, missed savings opportunities, and financial stress. There is a need for a centralized, automated, and user-friendly system to monitor, categorize, and analyze family expenses.

Objective:

1. **Centralize Expense Tracking:** Create a single platform to log all family expenses.
2. **Automate Categorization:** Use workflows to automatically classify expenses (e.g., groceries, utilities, education).
3. **Enable Real-Time Reporting:** Provide dashboards and reports for monthly, quarterly, and yearly expense summaries.
4. **Set Budget Thresholds:** Alert users when spending exceeds predefined limits.
5. **Improve Financial Awareness:** Help families make informed decisions through data-driven insights.

Skills:

- ServiceNow Development
- JavaScript & Glide Scripting
- UI/UX Design
- Data Analysis

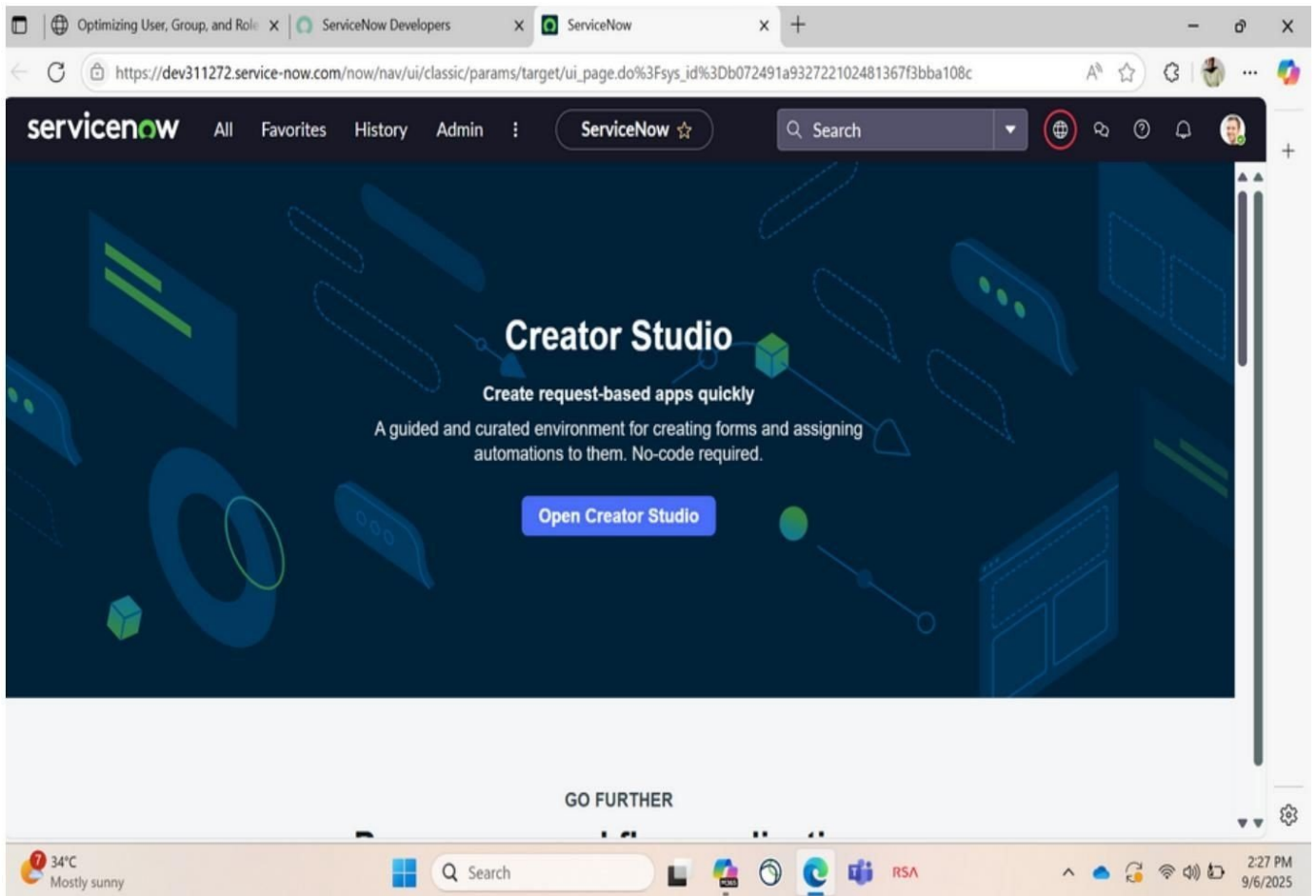
TASK INITIATION

Milestone 1: Setting Up Service Now Instance

Activity 1: Sign Up to the Instance

1. Open a new browser tab.

2. Go to <https://developer.servicenow.com>.
3. Log in to your account.
4. Navigate to "Personal Developer Instance".
5. Click on "Request Instance".
6. Once the instance is ready, click "Open Instance".



Milestone 2: New Update Set

Activity 1: Creation of New Update Set

1. Click on "All" in the Application Navigator.
2. Search for "Local Update Set" in the filter navigator.
3. Select "Local Update Set" under the System Update Sets module.
4. Click on "New" to create a new update set.
5. Fill in the details as follows:

6. Name: Family Expenses
7. Click "Submit".
8. After submission, click "Make Current" to activate the update set.

The screenshot shows a web browser window with the ServiceNow interface. The browser tabs include 'Optimizing User, Group, and Role', 'ServiceNow Developers', and 'Create Family Expenses 2 | Update...'. The address bar shows a URL from dev311272.service-now.com. The ServiceNow header includes the logo, 'All Favorites', and a search bar. The main header indicates 'Update Set - Create Family Expense...'. Below this, there's a breadcrumb 'Update Set' and 'New record'. The form fields are:

- * Name: Family Expenses
- State: In progress
- Application: Global
- Parent: (empty)
- Release date: (empty)
- Description: (empty)

 At the bottom of the form, there are two buttons: 'Submit' and 'Submit and Make Current'. The Windows taskbar at the bottom shows the date as 9/6/2025 and time as 2:54 PM.

Milestone 3: Creation Of Table

Activity 1: Creation of Family Expenses Table

1. Go to "All" in the Application Navigator.
2. In the filter navigator, search for "Tables".
3. Select "Tables" under the System Definition module.
4. Click on "New" to create a new table.
5. Enter the following details:
6. Label: Family Expenses
7. Name: (Auto-populated based on the label)

8. New Menu Name: Family Expenditure
9. Go to the header, right-click, and then click "Save".

ServiceNow recommends creating custom tables in scoped applications. To learn more about creating scoped applications, click [here](#).

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

* Label: Family Expenses
* Name: u_family_expenses
Extends table:

Application: Global
Create module: ☒
Create mobile module: ☒
Add module to menu: -- Create new --
New menu name: Family Expenditure
Remote Table: ☐

Columns Controls Application Access

Table Columns for text Search

Activity 2: Creation Of Column (Fields)

1. Scroll to the "Columns" section of the table form.
2. Double-click near "Insert a new row" to add a new field.
 - Column Label: Number
 - Type: String
3. Double-click again near "Insert a new row" to add another field.
 - Column Label: Date
 - Type: Date
4. Double-click again near "Insert a new row" to add another field.
 - Column Label: Amount
 - Type: Integer
5. Double-click again near "Insert a new row" to add another field.

Column Label: Expenses Details

- Type: String
- Max Length: 800

The screenshot shows the ServiceNow 'Table - New Record' interface. The 'Columns' tab is selected, displaying a table of dictionary entries. The entry 'Expenses Detial' is highlighted, showing a String type with a max length of 800. The 'New menu name' is 'Family Expenditure' and 'Remote Table' is unchecked.

Column label	Type	Reference	Max length	Default value	Display
Number	String				false
Date	Date				false
Amount	Integer				false
Expenses Detial	String		800		false
Insert a new row...					

Activity 3: Making Number Field An Auto-Number

1. Double-click near "Insert a new row" to add a new field.

- Column Label: Family Member Name
- Type: Reference
- Max Length: 800

2. Double-click near "Insert a new row" to add a new field.

- Column Label: Comments
- Type: String
- Max Length: 800

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

ServiceNow

Table - New Record

Dictionary Entries

	Column label	Type	Reference	Max length	Default value	Display
X	Number	String				false
X	Date	Date				false
X	Amount	Integer				false
X	Expenses Detial	String		800		false
X	Family Member Name	Reference		800		false
X	Comments	String		800		false
+	Insert a new row...					

Submit Cancel

Related Links

[Track in Update Sets](#)

34°C Sunny

Search

RSA

4:27 PM 9/6/2025

Activity 4: Configure The Figure

1. Go to "All" in the Application Navigator.
2. In the filter navigator, search for "Daily Expenses".
3. Open the "Daily Expenses" module.
4. Click on "New" to open a new record form.
5. Go to the form header, right-click, then click on "Configure" → "Form Design".
6. Customize the form layout by dragging and dropping the required fields.

7. Set the following field properties:
8. Make "Number" a Read-Only field.
9. Make "Date" and "Family Member" Mandatory fields.
10. Click "Save" to apply the changes.

The screenshot displays the ServiceNow Form Design interface for the 'Daily Expenses' form. The interface is divided into a sidebar and a main form area. The sidebar on the left contains two sections: 'Fields' and 'Formatters'. The 'Fields' section lists standard fields: 'Created', 'Created by', 'Updated', 'Updated by', and 'Updates'. The 'Formatters' section lists 'Activities (filtered)', 'Contextual Search Results', and 'Ratings'. The main form area is titled 'Form Design' and shows a 'Daily Expenses [u_daily_expenses]' form. The form is configured with a '2 Column' layout. It contains three fields: 'Number', 'Expenses', and 'Date'. The 'Number' field is marked as 'Read-Only'. The 'Date' field is marked as 'Mandatory'. The 'Expenses' field is also marked as 'Mandatory'. The form is currently in 'Default view' mode. The browser address bar shows the URL: 'https://dev311272.service-now.com/\$ng_fd.do?sysparm_attributes=startTable:"u_daily_expenses"%2CstartView:"Default%20View"'. The Windows taskbar at the bottom shows the date and time as '4:49 PM 9/6/2025'.

Milestone 4: Creation Of Relationship

Activity 1: Creation Of Relationship Family Expenses and Daily Expenses Tables

1. Go to: All >>
2. Use the filter to search for "Relationships"
3. Open the Relationships section
4. Enter the following details:
5. Name: Daily Expenses

6. Applies to Table: Family Expenses
7. Daily Expenses: Select Family Expenses from the dropdown
8. Click on Save

Relationship - New Record

Name: Daily Expenses

Application: Global

Applies to table: -- None --

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     // Add your code here, such as current.addQuery(field, value);
4
5 })(current, parent);

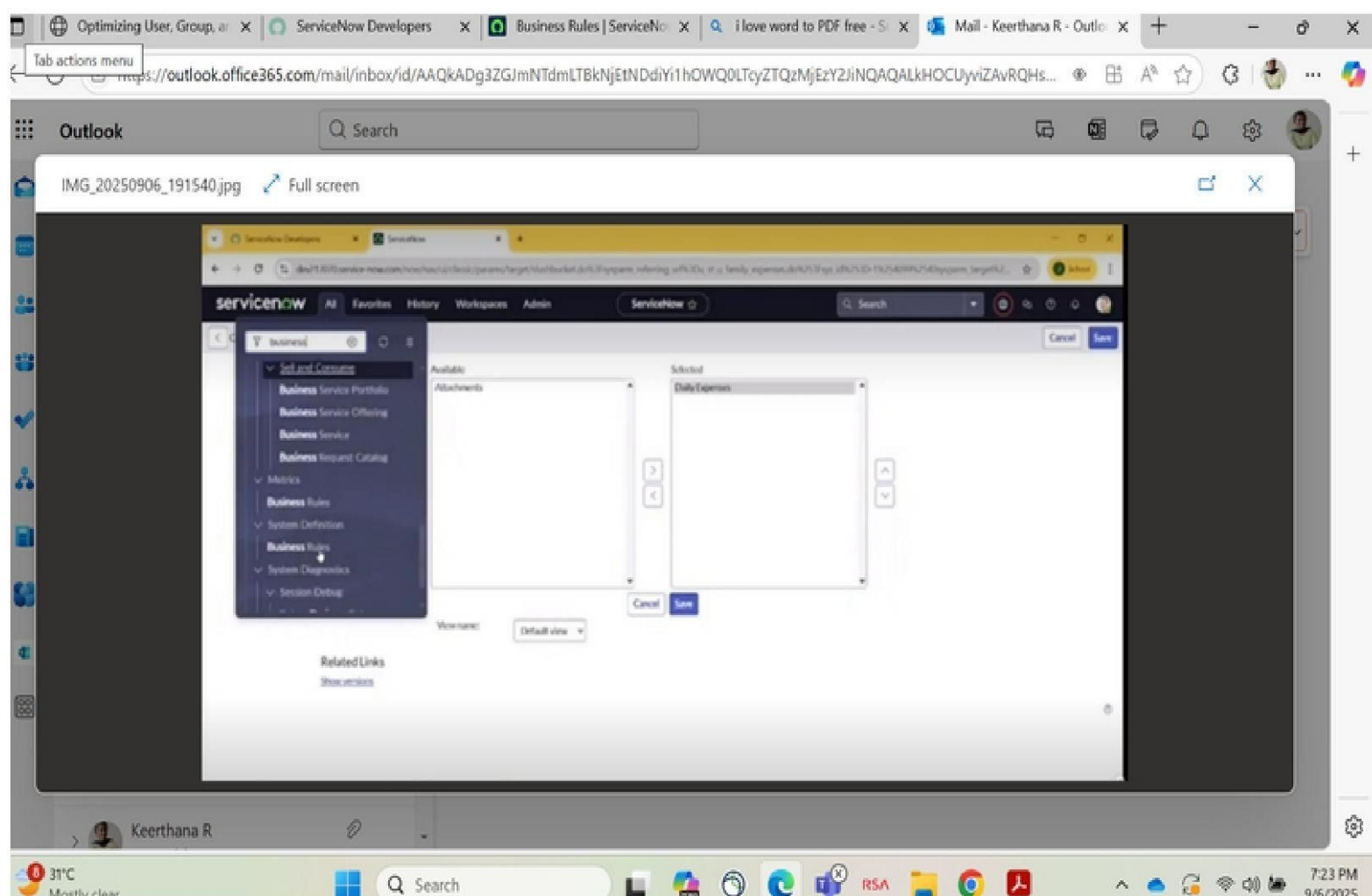
```

Submit

Milestone 5: Configuring Related List on Family Expenses

Activity 1: Configuring Related List on Family Expenses

1. Go to: All >>
2. In the filter, search for "Family Expenses"
3. Open the Family Expenses record
4. Click on New
5. Go to the header, right-click on it
6. Select Configure >> Related Lists
7. Add Daily Expenses to the Selected Area
8. Click on Save

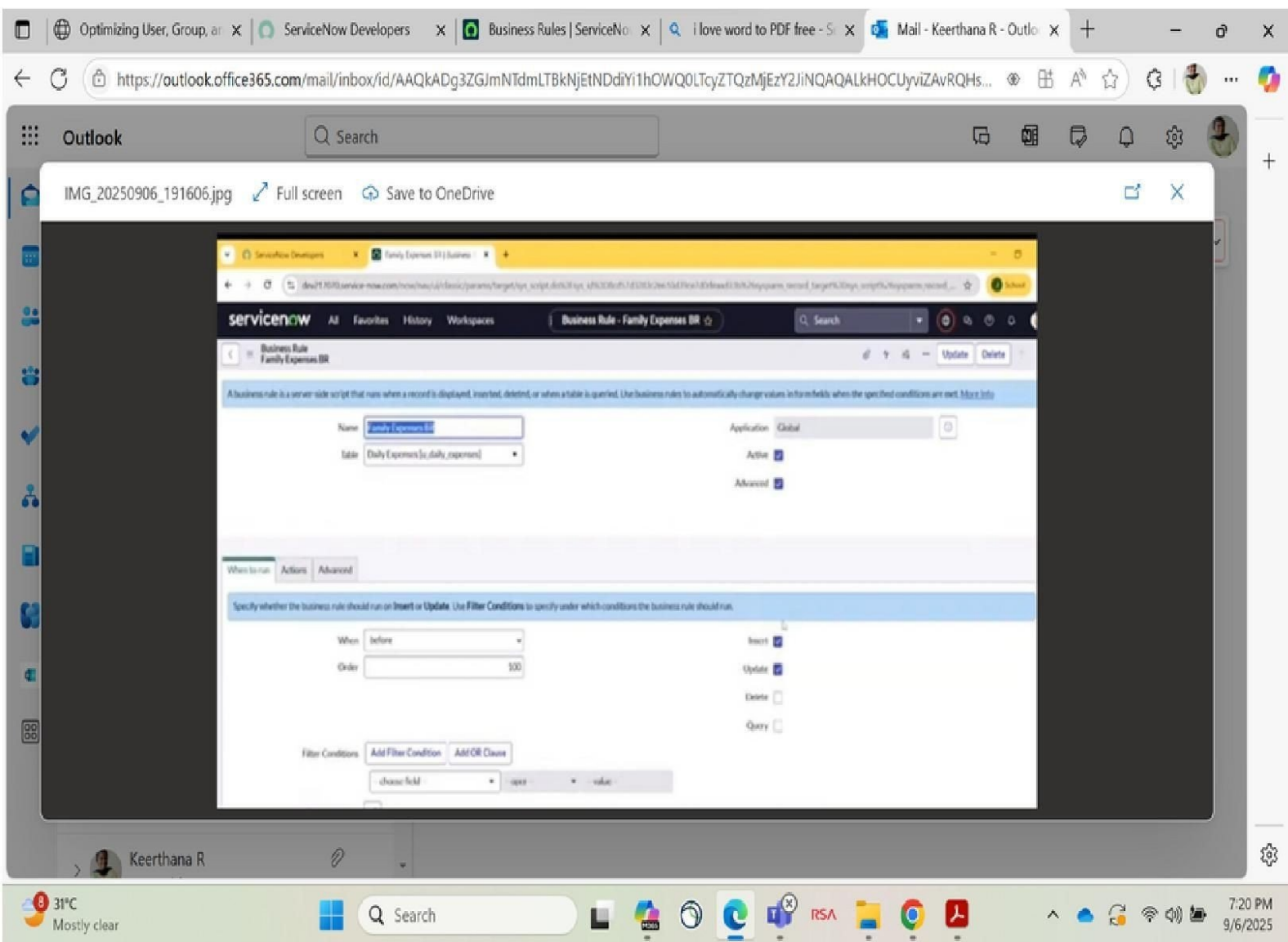


Milestone 6: Creation Of Business Rules

Activity 1: Creation Of Business Rules

1. Go to All >>
2. In the filter, search for "Business Rules"
3. Under System Definition, select Business Rules, then click on New
4. Enter the following details:
5. Name: Family Expenses BR
6. Table: Select Daily Expenses

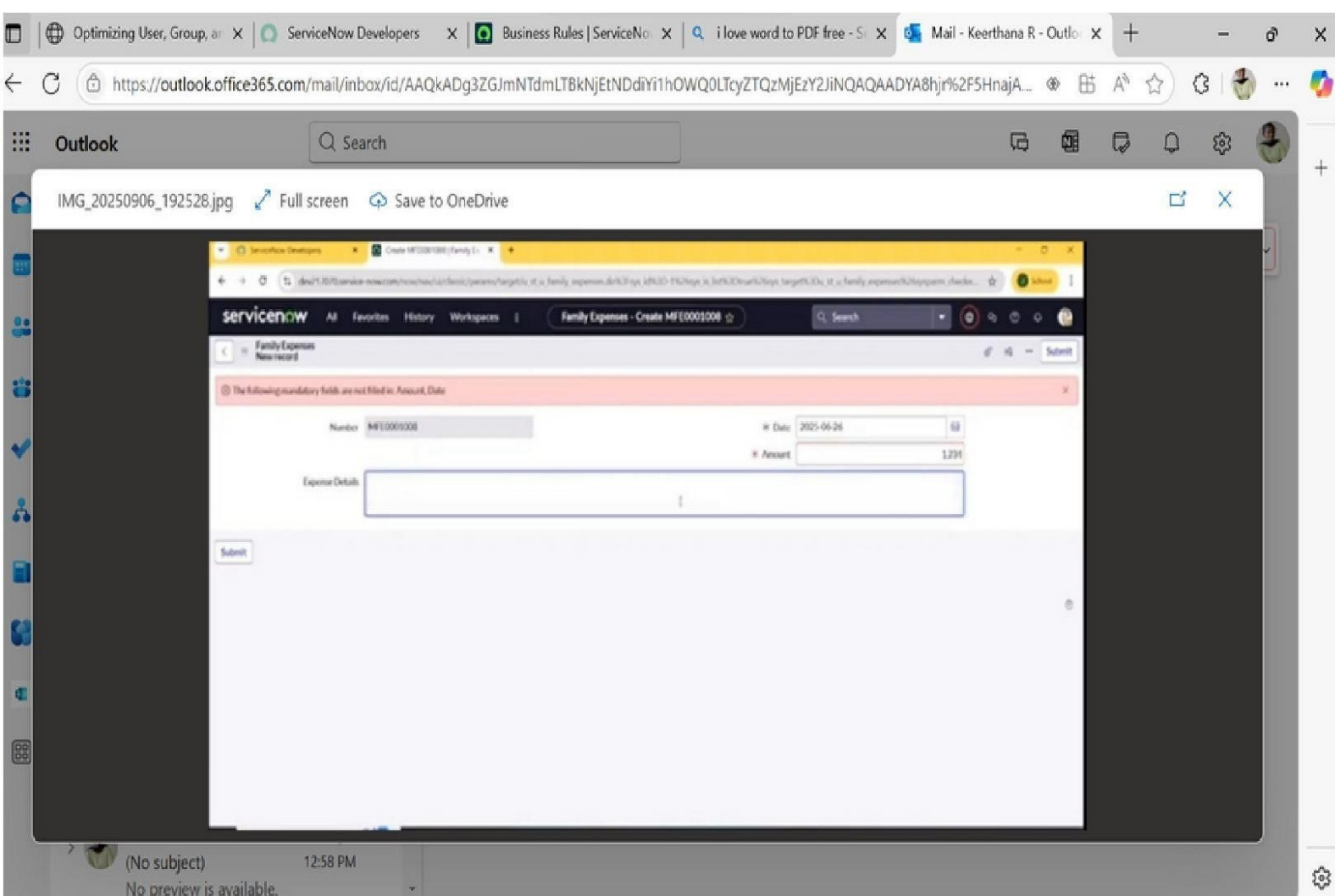
7. Check the Advanced option
8. Under When to Run, check both Insert and Update
9. Click on Save



Milestone 7: Configure The Relationships

Activity 1: Configure The Relationships

1. Go to ALL>> in the filter search for relationships >>open Relationships
2. In that, open daily expensive Relationships
3. For applies to table: select family expenses
4. In query with write the below query
5. Click on update



Conclusion:

The project “Calculating Family Expenses Using ServiceNow” successfully demonstrates how a powerful ITSM platform like ServiceNow can be adapted beyond traditional IT workflows to manage and track personal or household financial data. By leveraging features such as custom tables, relationships, and business rules, we created a structured and automated system to record, relate, and monitor daily expenses under a centralized Family Expenses module.

This approach not only improves data visibility and accuracy but also enables real-time tracking, reporting, and scalability for future enhancements like notifications, dashboards, or integrations with external financial tools. Overall, this project highlights the flexibility of ServiceNow in solving real-world problems beyond enterprise IT, making it a valuable tool for both professional and personal process automation.