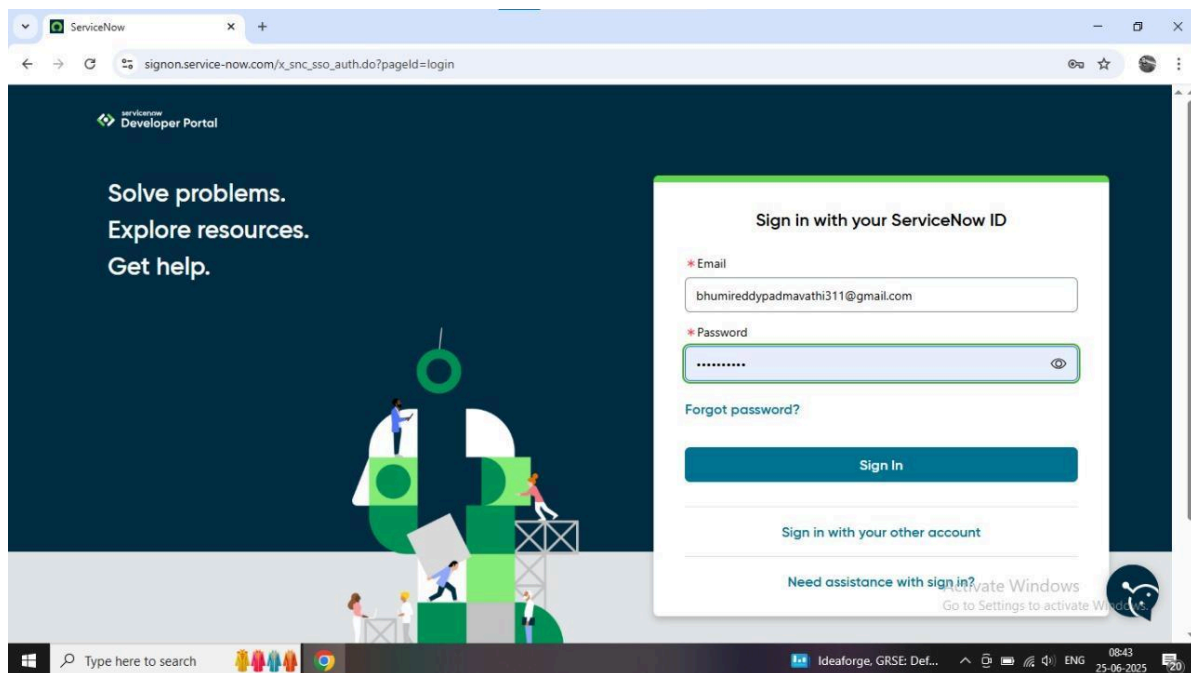


Calculating Family Expenses Using ServiceNow

TEAM ID	LTVIP2025TMID59207
PROJECT NAME	CALCULATING FAMILY EXPENSES USING SERVICENOW
FACULTY MENTOR(S) NAME	Ganesh M

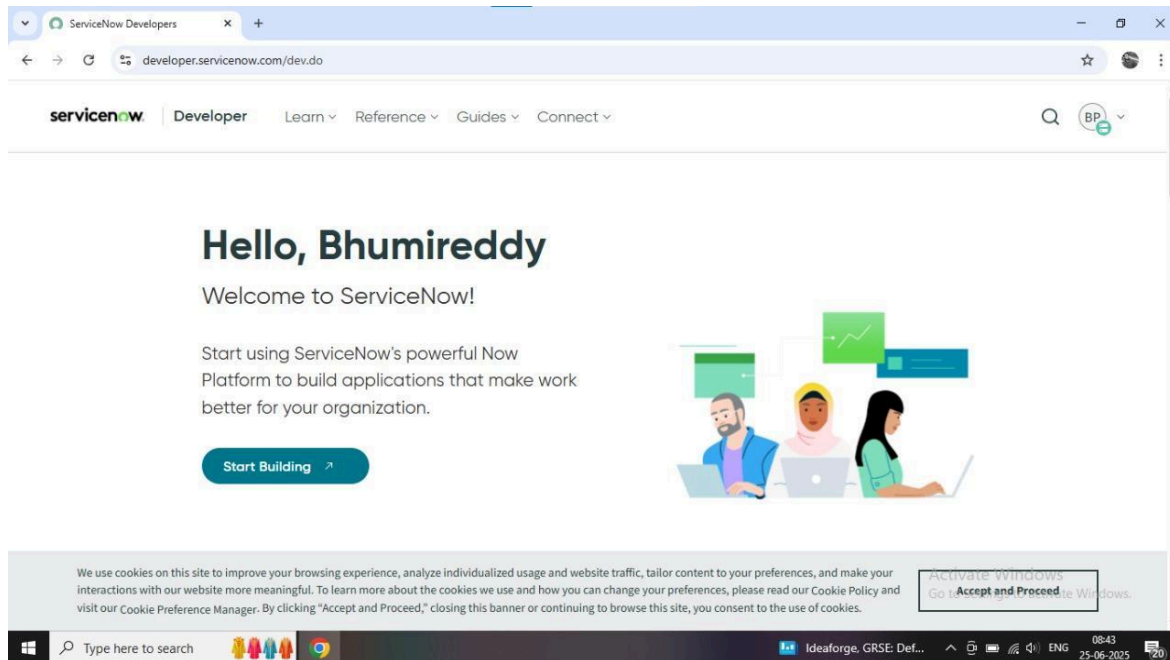
STEP-1: Setting Up ServiceNow Instance

- Sign In to the Developer Account



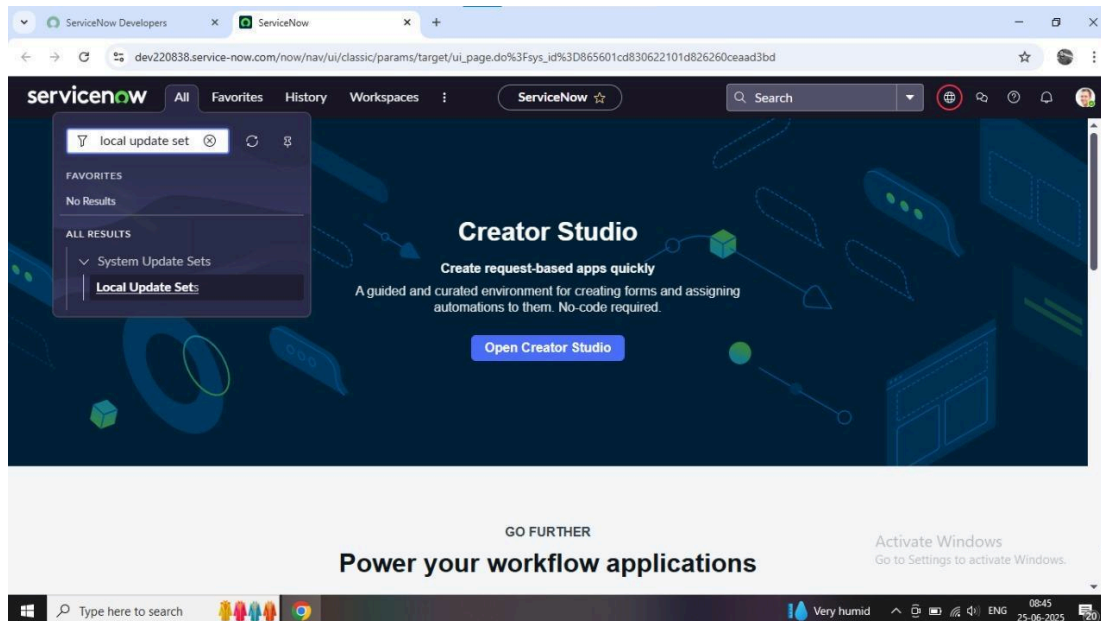
- **Request a Personal Developer Instance(PDI)**
 1. Click on the profile icon at the top-right corner.
 2. Select "Manage Instance" or go directly to the link.
 3. Click "Request Instance".
 4. Choose the latest version(default selection is recommended).
 5. Click "Request" again.
- **Access your Instance**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



The screenshot shows a ServiceNow web interface for creating a new record in the 'Family Expenses' table. The browser address bar shows a URL from 'dev220838.service-now.com'. The page header includes the ServiceNow logo and navigation tabs like 'All', 'Favorites', and 'History'. The main form area contains the following fields:

- Name:** A text field containing 'Family Expenses'.
- State:** A dropdown menu currently set to 'In progress'.
- Parent:** A text field with a search icon.
- Release date:** A date picker field.
- Description:** A large text area for additional details.
- Application:** A dropdown menu set to 'Global'.

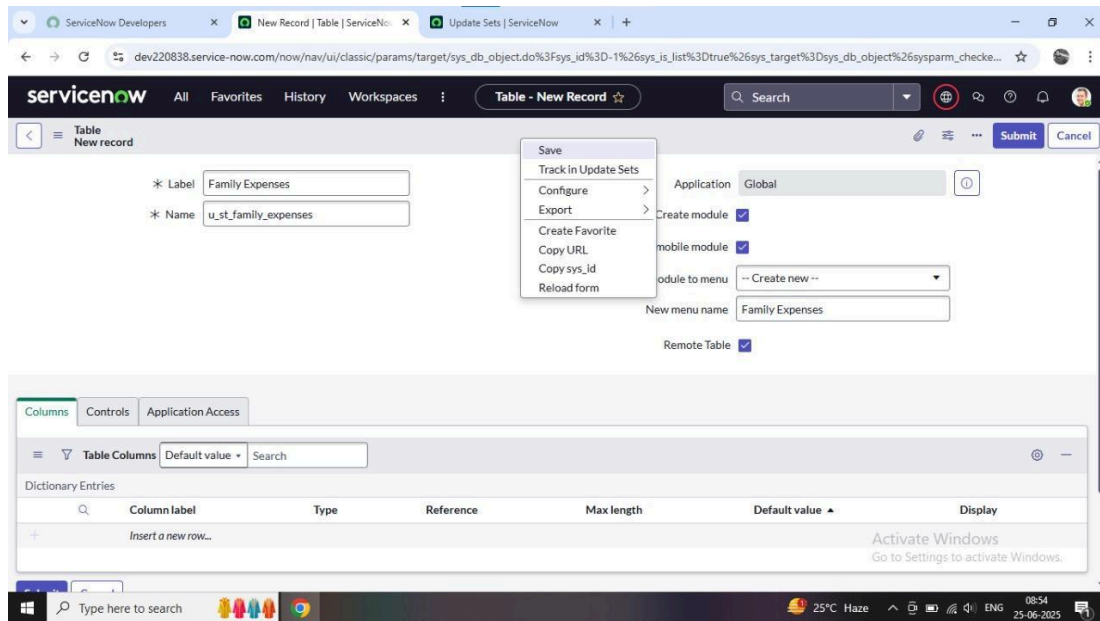
At the bottom of the form, there are two buttons: 'Submit' and 'Submit and Make Current'. The Windows taskbar at the bottom shows the time as 08:47 on 25-06-2025.

Step-3: Creation of Table:

- **Creation of Family Expenses Table:**

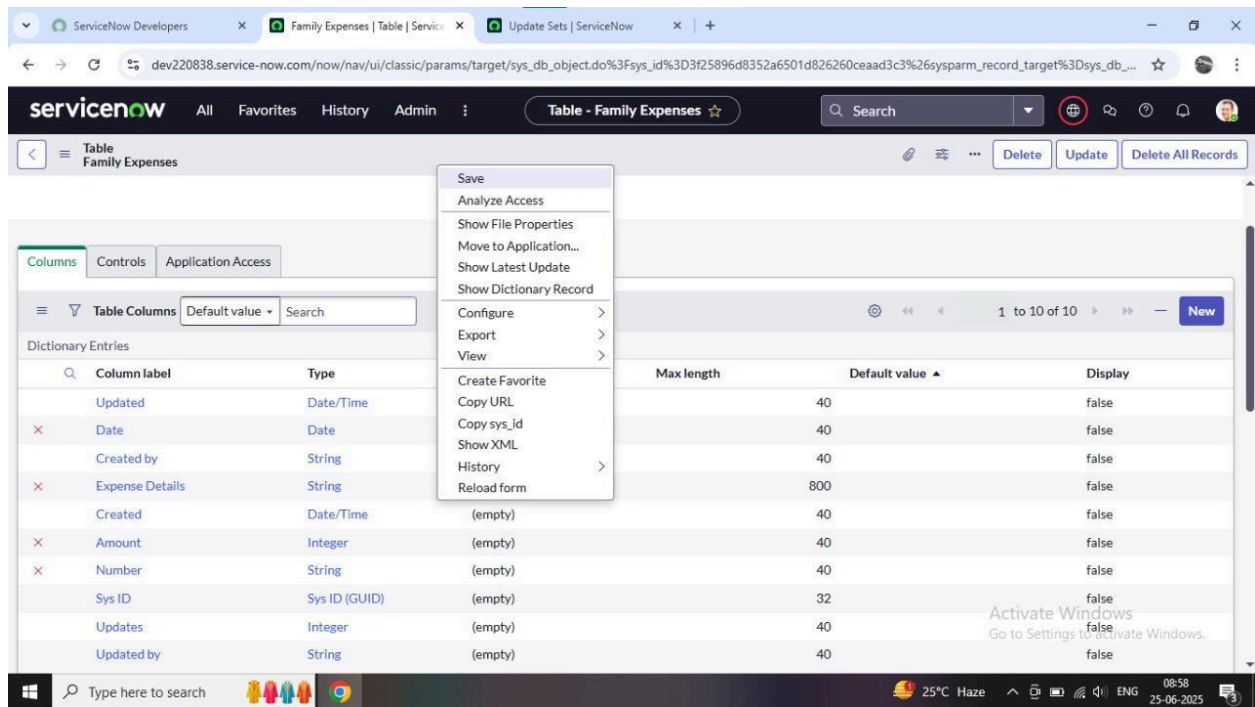
Key Objective:

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.



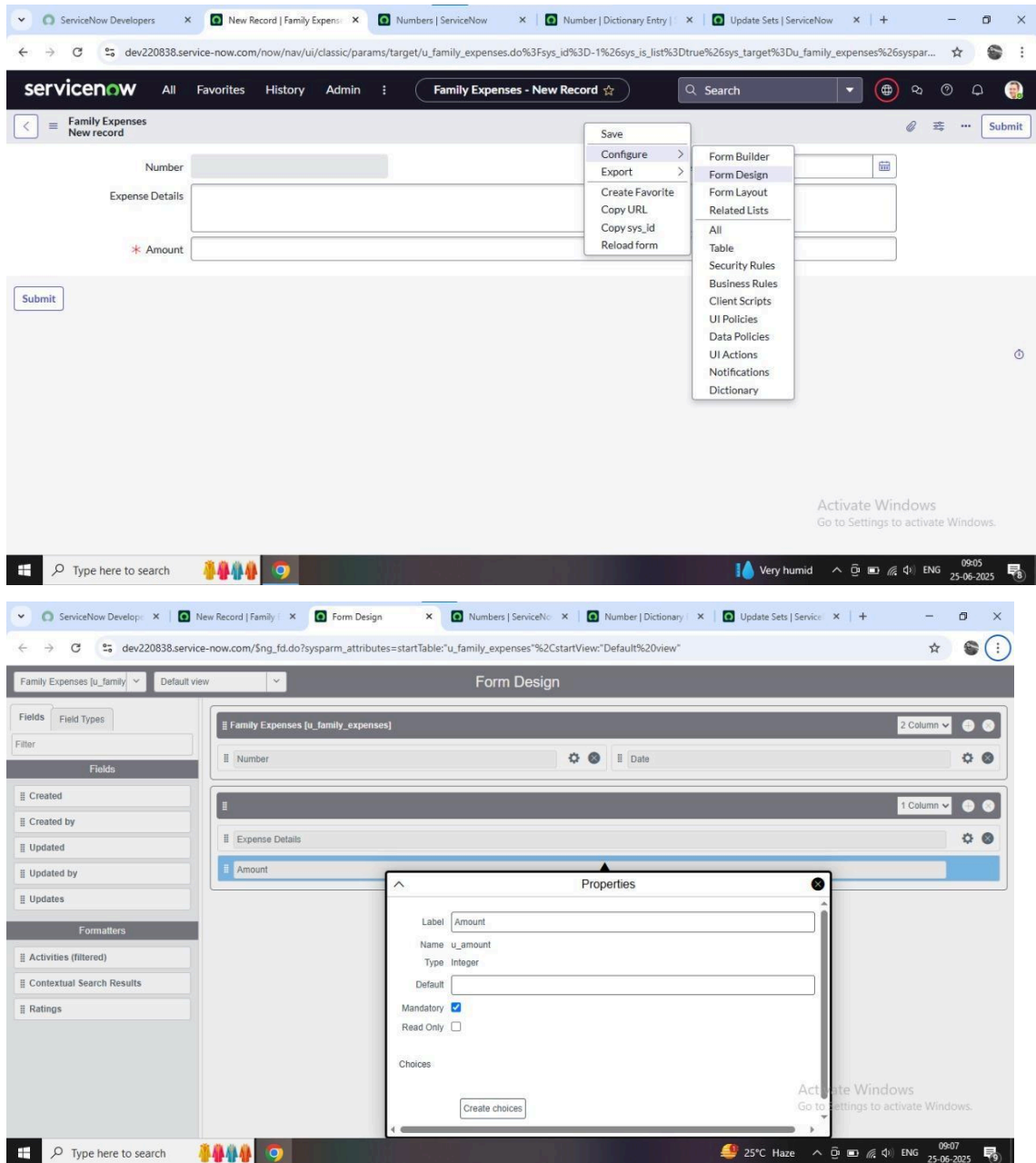
- **Making Number Field An Auto-Number :**

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

The first screenshot shows the 'Dictionary Entry - Number' configuration page. The 'Default Value' tab is active, showing 'Use dynamic default' checked and 'Dynamic default value' set to 'Get Next Padded Number'. The second screenshot shows the 'Number - New Record' form. The form fields are: Table (Family Expenses), Prefix (MFE), Number (1,000), Application (Global), and Number of digits (7). Both screenshots show the ServiceNow interface with the 'dev220838.service-now.com' URL and the 'Activate Windows' watermark.

- **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.

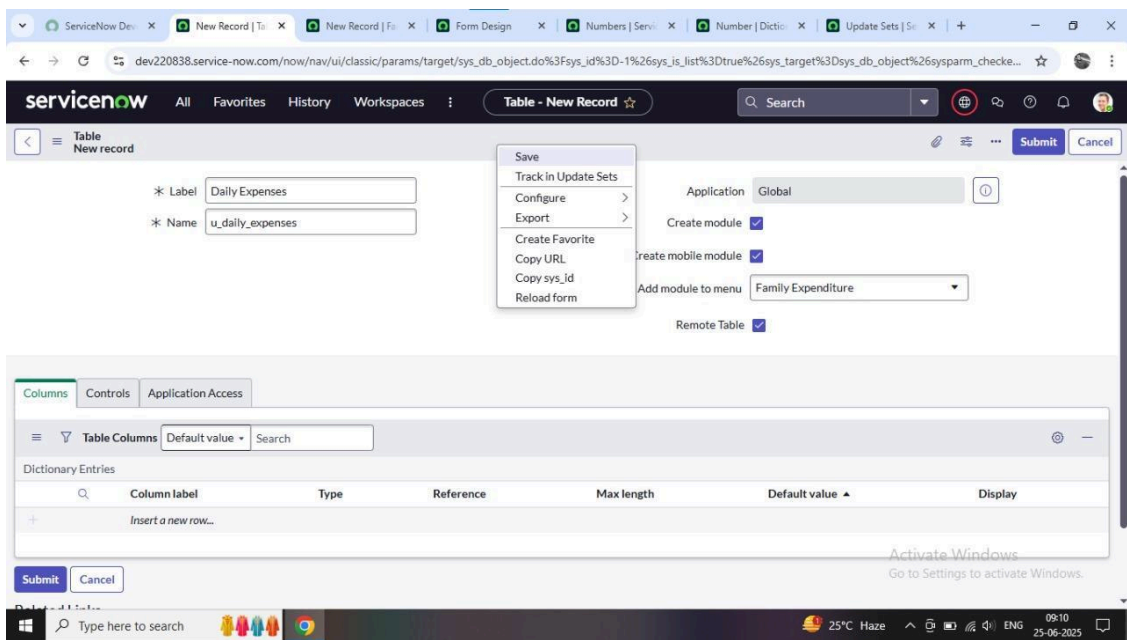


Step-4: Creation of Table(Daily Expenses)

- **Creation of Daily Expenses Table:**

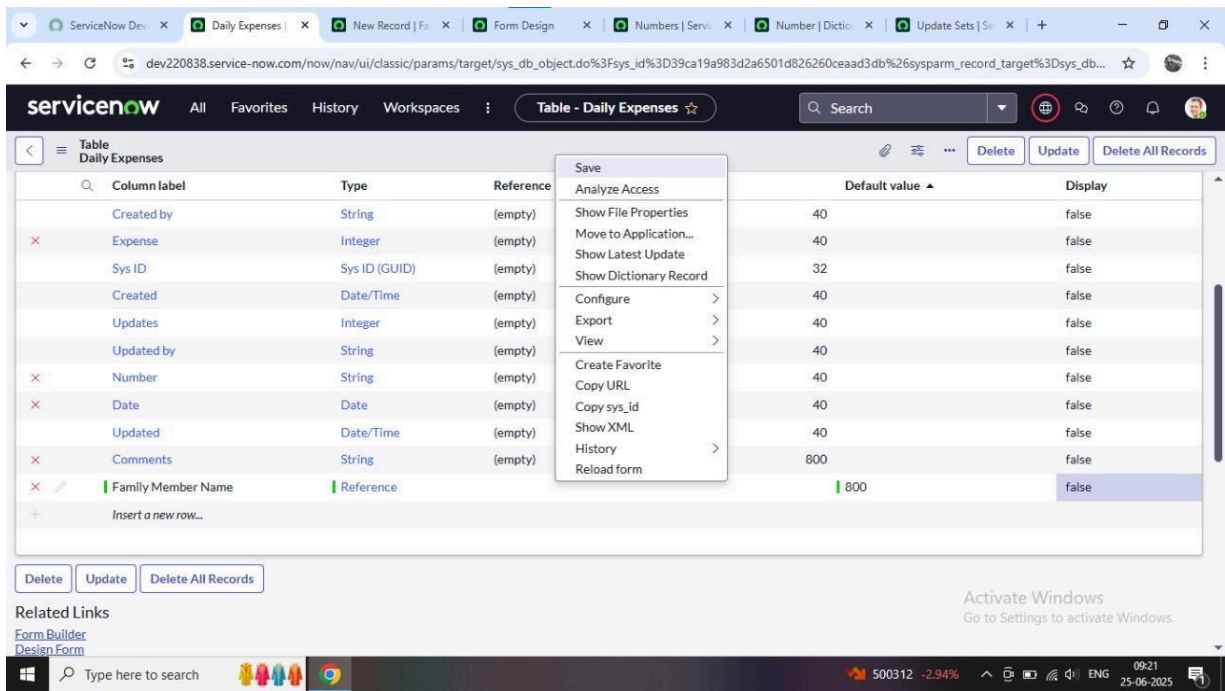
Key Objective: Record and manage everyday spending data in a structured format, enabling users to track daily financial activity, monitor patterns, and generate useful

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.



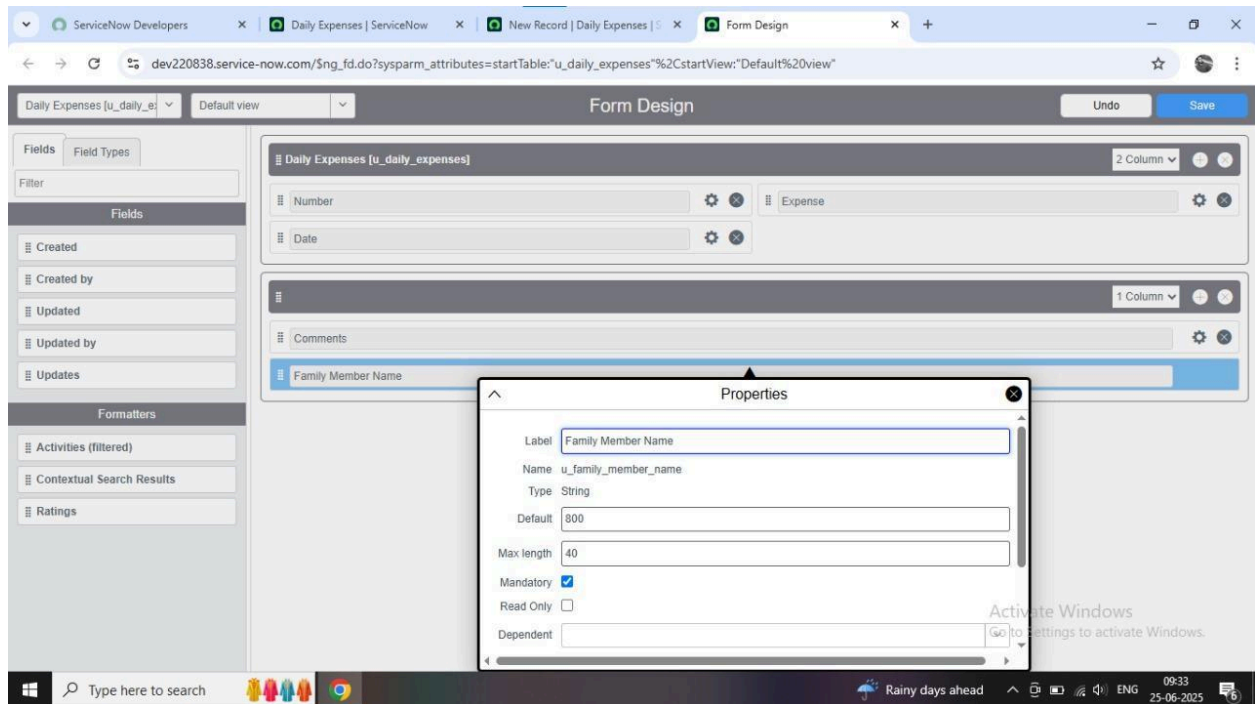
- **Making Number Field An Auto-Number:**

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.

The first screenshot shows the 'Dictionary Entry - Number' configuration page. The 'Default Value' tab is active, showing the 'Use dynamic default' checkbox checked and the 'Default value' field set to 'Get Next Padded Number'. The second screenshot shows the 'Number - New Record' form. The form fields are: Table (Daily Expenses), Prefix (DFE), Number (1,000), Application (Global), and Number of digits (7). Both screenshots show the ServiceNow header with the search bar and navigation menu, and the Windows taskbar at the bottom.

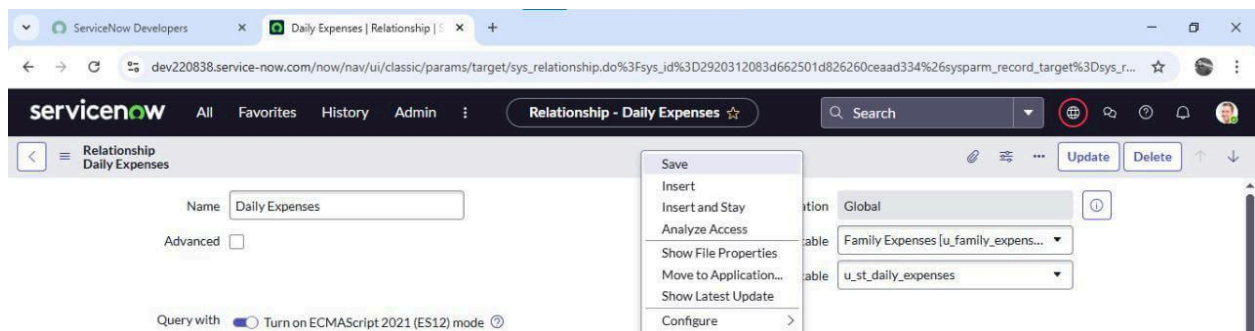
- **Configure the Form:**

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



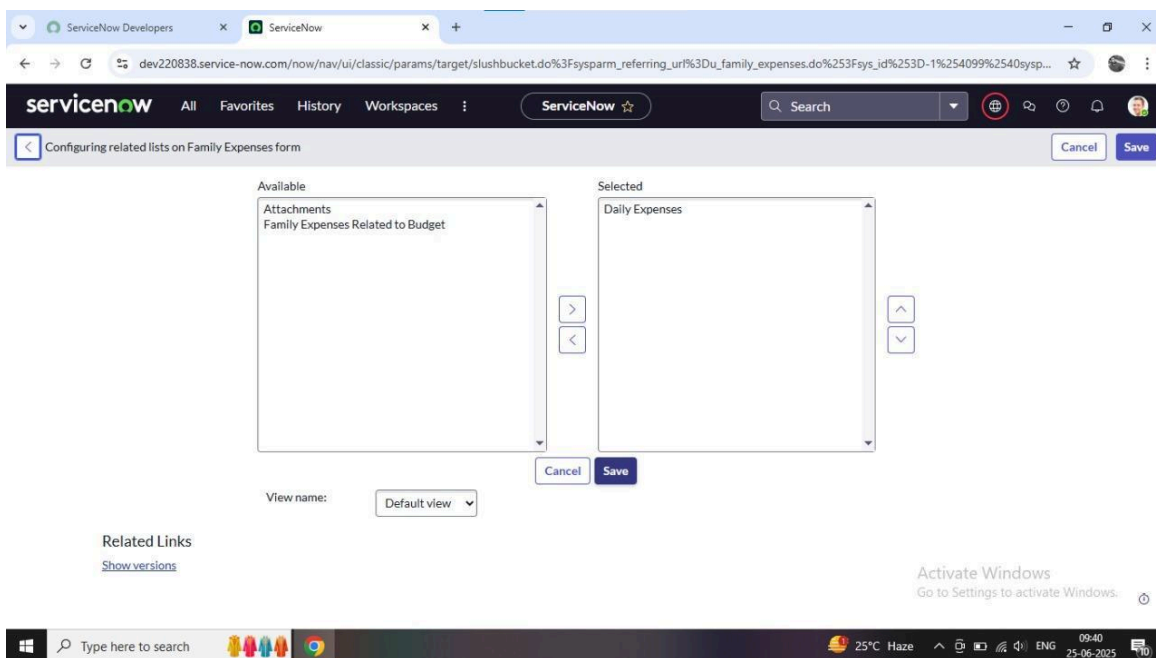
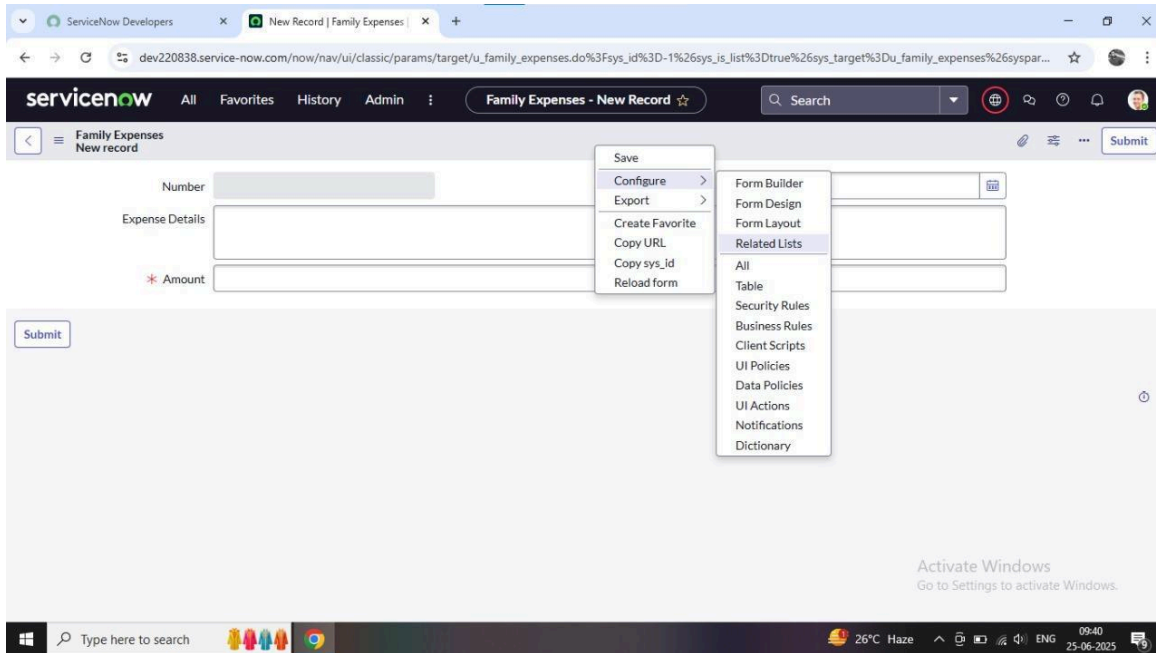
Step-5: Creation of Relationship Between Family Expenses And Daily Expenses Tables

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:

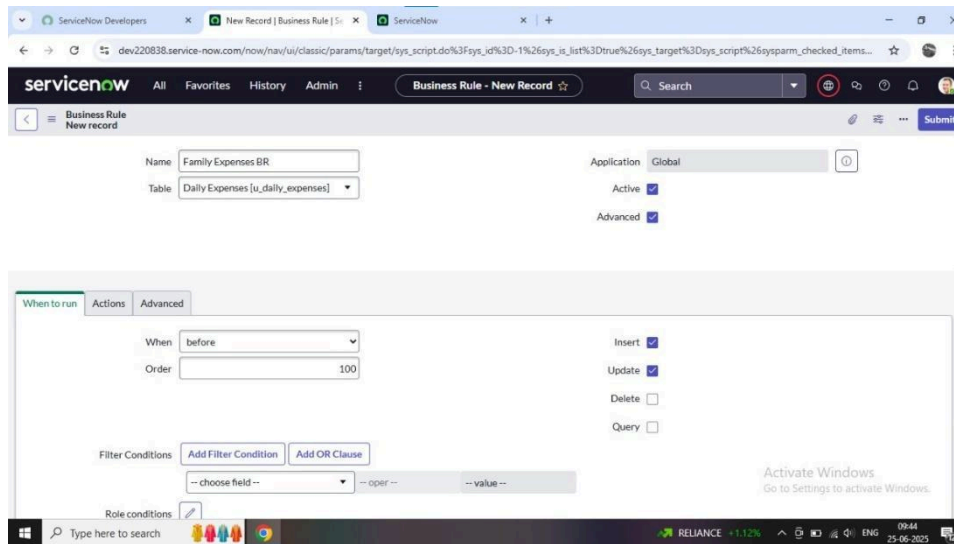
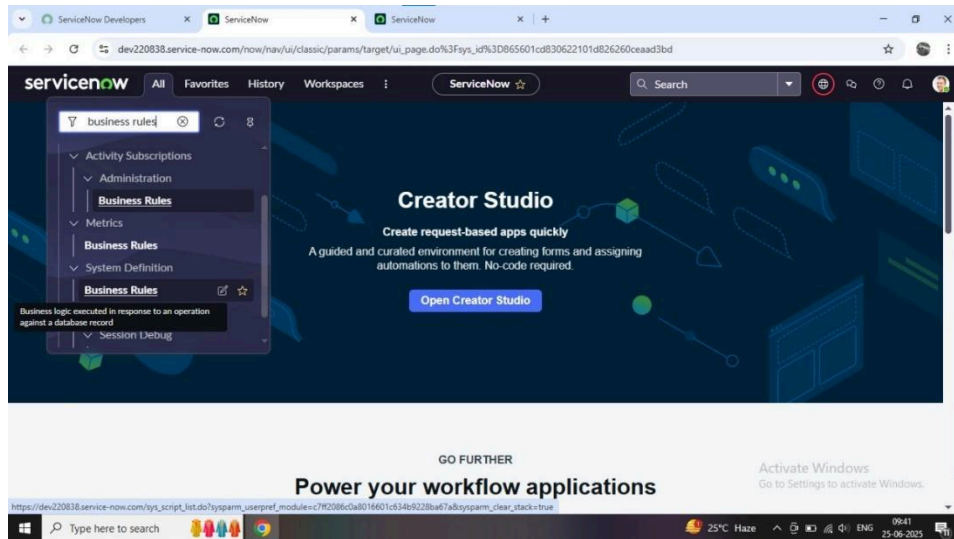
Key Objective: Display all related Daily Expenses record for each family member directly within their family expenses form, enabling users to view and manage associated expense entries in one place.

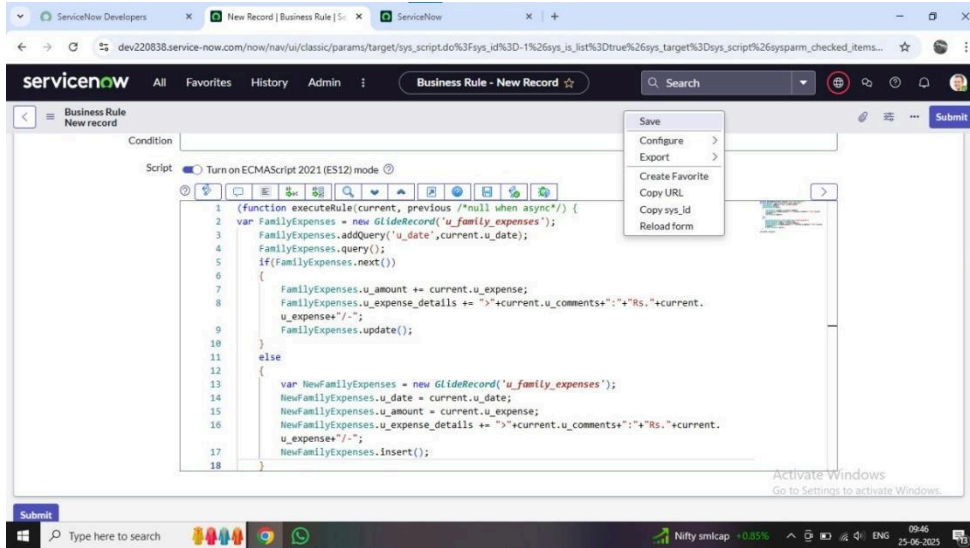


Step-7: Creation of Business Rules:

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

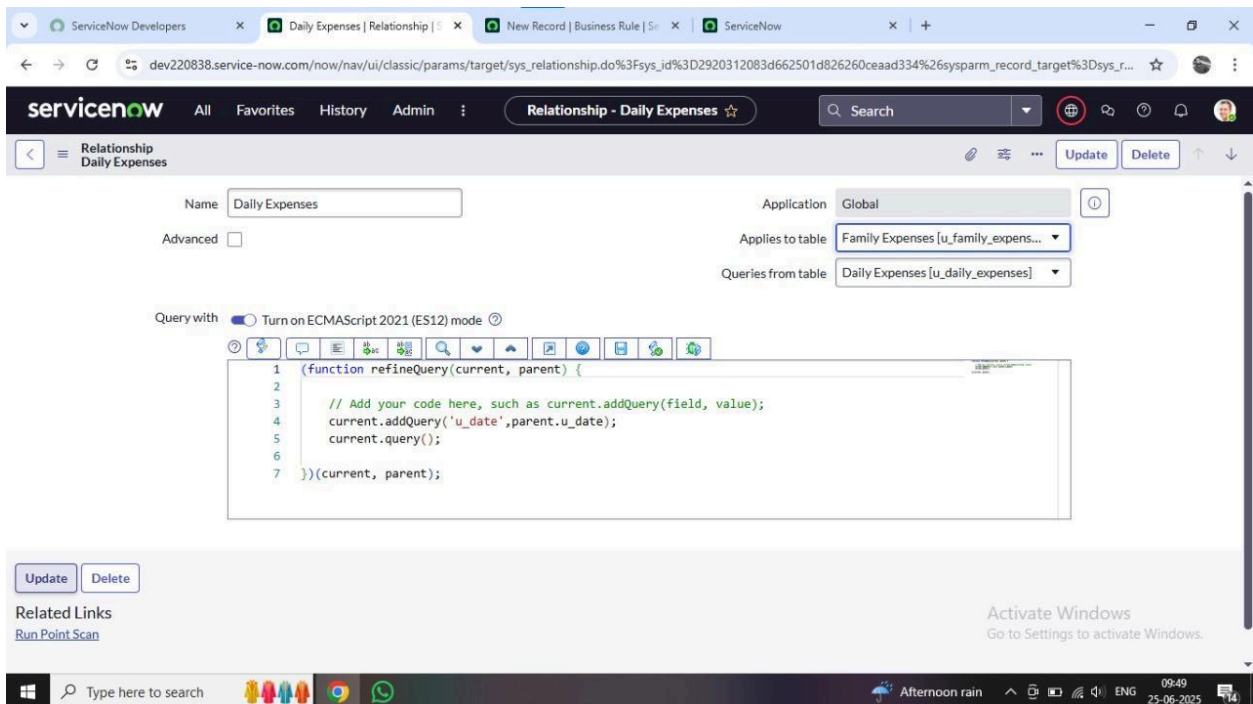
validation, and process automation.





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:

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Calculating Family Expenses Using ServiceNow

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.

Activate Windows
Go to Settings to activate Windows.

Type here to search

From WhatsApp to Ti...

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25-06-2025