

# Calculating Family Expenses in ServiceNow

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## Step 1: Create a New Table for Family Expenses

1. Go to: System Definition > Tables.
2. Click: New
3. Enter Details:
  - Label: Family Expenses
  - Name: u\_family\_expenses
  - Auto Number: Yes (e.g., EXP0001)
  - Extends: Task (or leave empty if standalone)
4. Click Submit.

## Step 2: Add Fields to the Table

Go to the u\_family\_expenses table and add the following fields:

Field Label	Field Name	Type
Item Name	u_item_name	String
Category	u_category	Choice
Amount	u_amount	Currency
Date	u_date	Date
Notes	u_notes	String

Category Choices:

- Food
- Rent
- Utilities
- Education
- Medical
- Others

### Step 3: Create a Form Layout

1. Go to: System UI > Forms
2. Design the layout to show:
  - Item Name
  - Category
  - Amount
  - Date
  - Notes

### Step 4: Create a Total Calculation Script

Let's assume we want to calculate the monthly total for a given user or family.

#### Create a Script Include (Backend Logic)

1. Go to: System Definition > Script Includes
2. Click New
3. Fill in:
  - Name: CalculateMonthlyExpenses
  - Client Callable: True
  - Accessible from: All application scopes
  - Active: True

*Add this code:*

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```
var CalculateMonthlyExpenses = Class.create();
CalculateMonthlyExpenses.prototype = {
  initialize: function() {
  },

  getMonthlyTotal: function(month, year) {
    var total = 0;
    var gr = new GlideRecord('u_family_expenses');
    gr.addQuery('MONTH(u_date)', month);
    gr.addQuery('YEAR(u_date)', year);
    gr.query();
    while (gr.next()) {
      total += parseFloat(gr.u_amount);
    }
  }
}
```

```
        return total;
    },

    type: 'CalculateMonthlyExpenses'
};
```

## Step 5: Client Script to Show Total on Form

1. Go to: Client Scripts for the table.
2. Click New and use:

```
// Client Script
function onLoad() {
    var month = new Date().getMonth() + 1; // JavaScript months are 0-based
    var year = new Date().getFullYear();

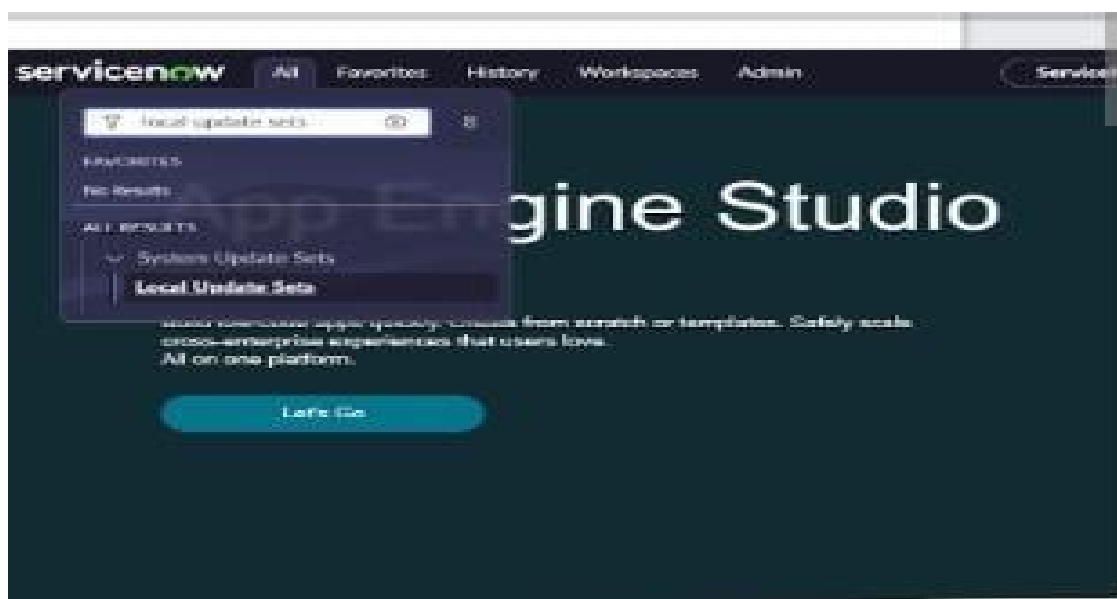
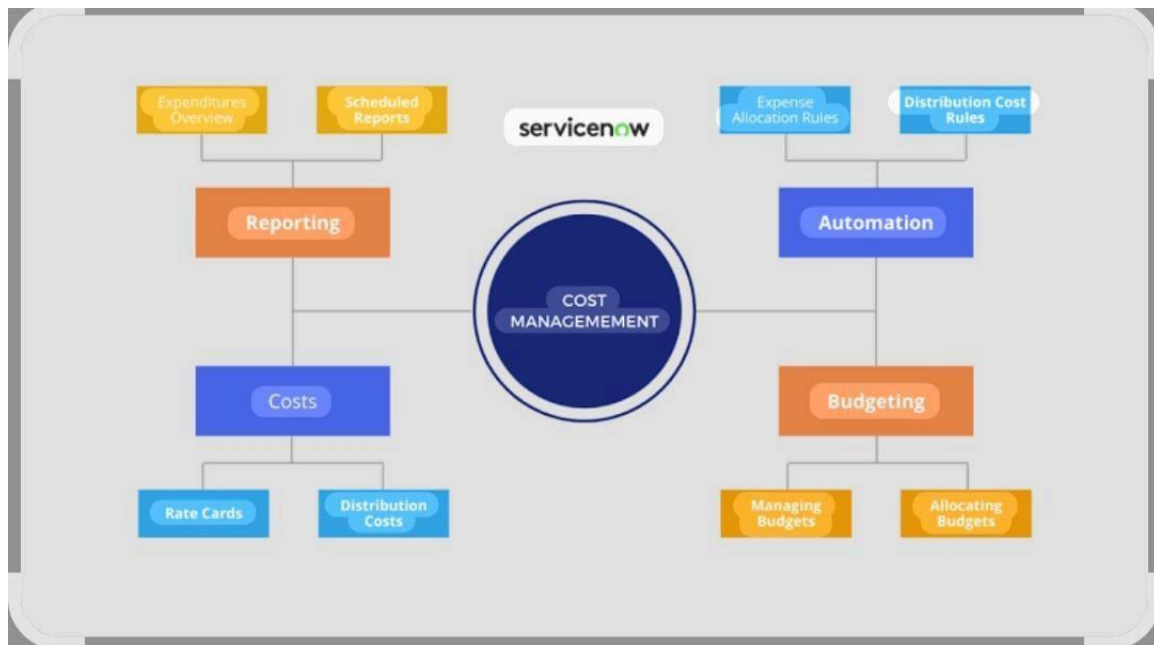
    var ga = new GlideAjax('CalculateMonthlyExpenses');
    ga.addParam('sysparm_name', 'getMonthlyTotal');
    ga.addParam('month', month);
    ga.addParam('year', year);
    ga.getXMLAnswer(function(response) {
        var total = response;
        g_form.addInfoMessage('Total expenses for this month: ₹' + total);
    });
}
```

## Step 6: Create a Report

1. Go to: Reports > Create New
2. Name: Monthly Expense Report
3. Table: u\_family\_expenses
4. Type: Bar or Pie Chart
5. Group by: Category
6. Aggregation: Sum of Amount

## Optional Enhancements

- Use a scheduled job to send email alerts if expenses exceed a certain threshold.
- Add user-based filtering if multiple family members use the same system.



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AllFavorites

ServiceNow

Business Rule

Family Expenses BR

UpdateDelete

NameFamily Expenses BR

TableDaily Expenses [u\_daily\_expens]

ApplicationGlobal

Active

Advanced

Web Services

When to run

ActionsAdvancedWeb Services

Whenbefore

Order100

Filter ConditionsAdd Filter ConditionAdd OR Clause

Role conditions

InsertUpdateDeleteQuery

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AllFavorites

Business Rule - Ne...

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 automa change values in form fields when the specified conditions are met. [More Info](#)

Name

Table-- None --

ApplicationGlobal

Active

Advanced

When to run

Actions

Specify whether the business rule should run on Insert or Update. Use Filter Conditions to specify under which conditions the business rule should

Insert

Update

Filter ConditionsAdd Filter ConditionAdd OR Clause

Role conditions

Submit

Smart Internz

Dashboard

Internship

Support

Guided Project

Project Workspace

Project Title : Calculating Family Expenses using Service Now

Team : 

VD

KR

PV

KS

Industry Mentor(s) Name : No Mentor has been assigned

Faculty Mentor(s) Name : Office

Overall Project Progress

Assigned Tasks Progress

90%

90%

GENERAL INSTRUCTION

SHOW

Demo Link

View Mentor Comments

View Industry Mentor Comments

PROJECT DETAILS

TASK & PROGRESS

MENTOR REVIEW

Calculating Family Expenses

INTERMEDIATE