Calculating Family Expenses in ServiceNow

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:

```
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:

```javascript
// 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);
    });
}
```
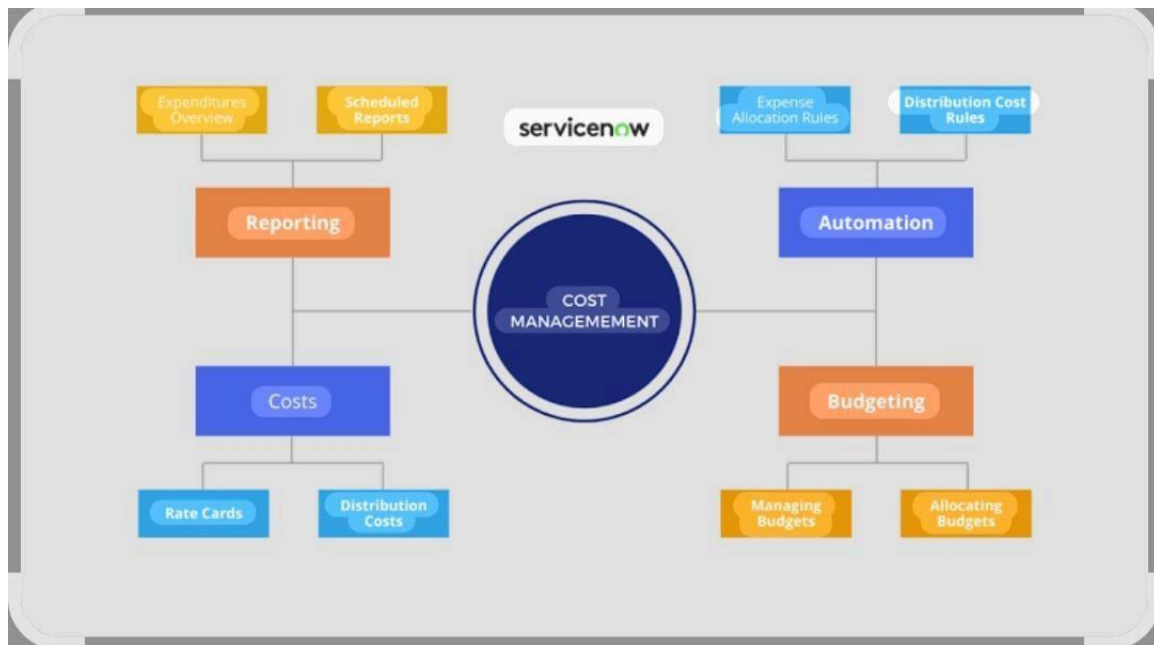
Step 6: Create a Report

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.

Business Rule
Family Expenses BR

Update   Delete

Name	Family Expenses BR
Table	Daily Expenses [u_daily_expens ∨]

Application	Global ⓘ
Active	☑
Advanced	☑
Web Services	☐

When to run | Actions | Advanced | Web Services

When	before ∨
Order	100

Insert	☑
Update	☑
Delete	☐
Query	☐

Filter Conditions   [Add Filter Condition] [Add OR Clause]

Role conditions   [✎]

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 automat change values in form fields when the specified conditions are met. More Info

Name	[ ]
Table	-- None -- ▼

Application	Global ⓘ
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 Conditions   [Add Filter Condition] [Add OR Clause]

Role conditions   [✎]

[Submit]

Guided Project | Project Workspace

Project Title : Calculating Family Expenses using Service Now

Team : PS SS KV PB LS

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

Faculty Mentor(s) Name : Office

Overall Project Progress **90**%

Assigned Tasks Progress **90**%

GENERAL INSTRUCTION   SHOW

🖹 Demo Link | 💬 View Mentor Comments [0] | 💬 View Industry Mentor Comments [0]

PROJECT DETAILS	TASK & PROGRESS	MENTOR REVIEW

Calculating Family Expenses Using Service Now

INTERMEDIATE

Calculating Family Expenses Using Service Now

Category: ServiceNow

Skills Required:

Project Description:

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.