



### Calculating Family Expenses Using Service Now

- 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

## 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 ServiceNow

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## 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.

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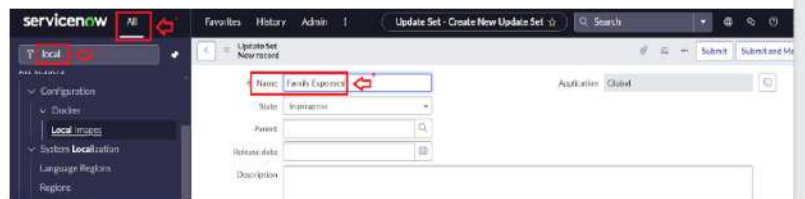
Creation Of Business Rules

## 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:  
Name : Family Expenses  
3. Then click on Submit and Make current.





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2. Enter the Details as:  
Name : Family Expenses
3. Then click on Submit and Make current.

Creation Of Family Expenses Table

Creation Of Columns(Fields)

Making Number Field An Auto-Number

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## Creation Of Family Expenses Table

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

Label: Family Expenses

Name: auto.family.expense

Application: Global

Remove Table

Create module

Create module module

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

STUDIOFileSource ControlWindowSearch

Create Application File

Application Explorer

Data Model

Tables

Daily Expenses

Family Expenses

Relationships

Daily Expenses

Forms & UI

Forms

Daily Expenses (Default view)

Family Expenses (Default view)

List Layouts

Daily Expenses (Default view)

Related Lists

Family Expenses - Default view (Default view)

Server Development

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Family Expenses BR

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Roles

x\_1604995\_family\_exp\_admin

x\_1604995\_family\_exp\_daily\_expenses\_admin

x\_1604995\_family\_exp\_user

Access Controls

x\_1604995\_family\_exp\_daily\_expenses\_admin

x\_1604995\_family\_exp\_daily\_expenses\_admin

x\_1604995\_family\_exp\_daily\_expenses\_admin

x\_1604995\_family\_exp\_daily\_expenses\_admin

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x\_1604995\_family\_exp\_daily\_expenses\_admin

x\_1604995\_family\_exp\_daily\_expenses\_admin

x\_1604995\_family\_exp\_daily\_expenses\_admin

Navigation

Application Menus

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Modules

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Daily Expenses

Family Expenses

Open

Data Model - Table - Family Expenses

Family Expenses

Table

Table

Family Expenses

Delete

Update

Delete All Records

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

Application

Family Expenditure

\* Name

x\_1604995\_family\_exp\_family\_expenses

Remote Table

Extends table

Task

Columns

Controls

Application Access

Table Columns

for text

Search

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New

Dictionary Entries

Column label	Column name	Type	Reference	Max length	Default value	Display
Amount	amount	Integer	(empty)	30		false
Parent	parent	Reference	Task	32		false
Close notes	close_notes	String	(empty)	4000		false
Due date	due_date	Date/Time	(empty)	40		false
Updates	sys_mod_count	Integer	(empty)	40		false
Approval	approval	String	(empty)	40	not requested	false
Knowledge	knowledge	True/False	(empty)	40	false	false
Updated by	sys_updated_by	String	(empty)	40		false
Priority	priority	Integer	(empty)	40	4	false
Reassignment count	reassignment_count	Integer	(empty)	40	0	false
Order	order	Integer	(empty)	40		false
Task type	sys_class_name	System Class Name	(empty)	80	javascript:current.setTableName();	false
Assignment group	assignment_group	Reference	Group	32		false
Duration	calendar_duration	Duration	(empty)	40		false
Correlation display	correlation_display	String	(empty)	100		false
Expense Details	u_expense_details	String	(empty)	40		false
Actual start	work_start	Date/Time	(empty)	40		false
Workflow activity	wf_activity	Reference	Workflow Activity	32		false

Family Expenses: 1.0.0 33 Files (Unsaved)

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 Relationship

+ Configuring Related List On Family Expenses

+ Creation Of Business Rules

+ Configure The Relationship

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## 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

Column label	Type	Reference	Max length	Default value	Display
1 Number	String				Value
2 Date	Date				Value
3 Amount	Integer				Value
4 Expense Details	String		800		Value

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



## 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.

Choose list specification Computed Value **Default Value**

The Default value specifies the value that the field has when first displayed.

Use dynamic default ☒

Dynamic default value: Get Next Padded Number

OK Cancel

- 5.
6. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance
7. Click on New.
8. Enter the below Details:  
Table : Family Expenses  
Prefix : MFE

Number Maintenance Update

Table: Family Expenses

Prefix: MFE

Number: 1,000

OK Cancel

Creation Of Family Expenses Table

Creation Of Columns(Fields)

**Making Number Field An Auto-Number**

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Making Number Field An Auto-Number

**Configure The Form**

+ Creation Of Table(Daily Expenses)

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## 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.

The screenshot shows the Salesforce form configuration for 'Family Expenses (a\_family\_expenses)'. The form layout includes a header section with two fields: 'Number' and 'Date'. Below the header is a table with one row labeled 'Expense Details'. The interface includes a gear icon for field configuration and a 'Save' button.

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 icon and checking Mandatory
7. Click on Save.



## 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 On Family Expenses

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## 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

Label : Daily Expenses

Name : u\_daily\_expenses

Application : Global

Add module to menu : Family Expenditure

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

## Creation Of Table(Daily Expenses)

Creation Of Daily Expenses Table

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Making Number Field An Auto-Number

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## 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
10. Give the details as:  
Column label : Comments  
Type : String  
Max length : 800
11. Go to the Header and right click there>> click on Save.

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Creation Of Table(Daily Expenses)

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## 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:  
Table : Family Expenses  
Prefix : MFE

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## 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 clicking on the gear icon and checking Mandatory
7. Click on Save.

STUDIO

File

Source Control

Window

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System Administrator

Go To

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x\_1604995\_family\_exp\_admin

x\_1604995\_family\_exp\_daily\_expenses\_admin

x\_1604995\_family\_exp\_user

Access Controls

x\_1604995\_family\_exp\_daily\_expenses (for admin)

x\_1604995\_family\_exp\_daily\_expenses (for user)

x\_1604995\_family\_exp\_daily\_expenses (for user)

x\_1604995\_family\_exp\_daily\_expenses (for user)

x\_1604995\_family\_exp\_family\_expenses (for admin)

x\_1604995\_family\_exp\_family\_expenses (for user)

x\_1604995\_family\_exp\_family\_expenses (for user)

x\_1604995\_family\_exp\_family\_expenses (for user)

x\_1604995\_family\_exp\_family\_expenses (for user)

x\_1604995\_family\_exp\_family\_expenses (for user)

x\_1604995\_family\_exp\_family\_expenses (for user)

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Daily Expenses Table

Table Daily Expenses

Delete Update Delete All Records

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 Daily Expenses

Application Family Expenditure

\* Name x\_1604995.family\_exp\_daily\_expenses

Remote Table

Columns Controls Application Access

Table Columns for text Search

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Dictionary Entries

Column label	Column name	Type	Reference	Max length	Default value	Display
Created by	sys_created_by	String	(empty)	40		false
Number	number	String	(empty)	40		false
Sys ID	sys_id	System ID (GUID)	(empty)	32		false
Updates	sys_mod_count	Integer	(empty)	40		false
Created	sys_created_on	Date/Time	(empty)	40		false
Comments	comments	String	(empty)	800		false
Family Member Name	family_member_name	String	(empty)	800		false
Updated by	sys_updated_by	String	(empty)	40		false
Updated	sys_updated_on	Date/Time	(empty)	40		false
Date	date	Date	(empty)	40		false
Expense	expense	Integer	(empty)	40		false
Insert a new row...						

Delete Update Delete All Records

Related Links

[Form Builder](#)

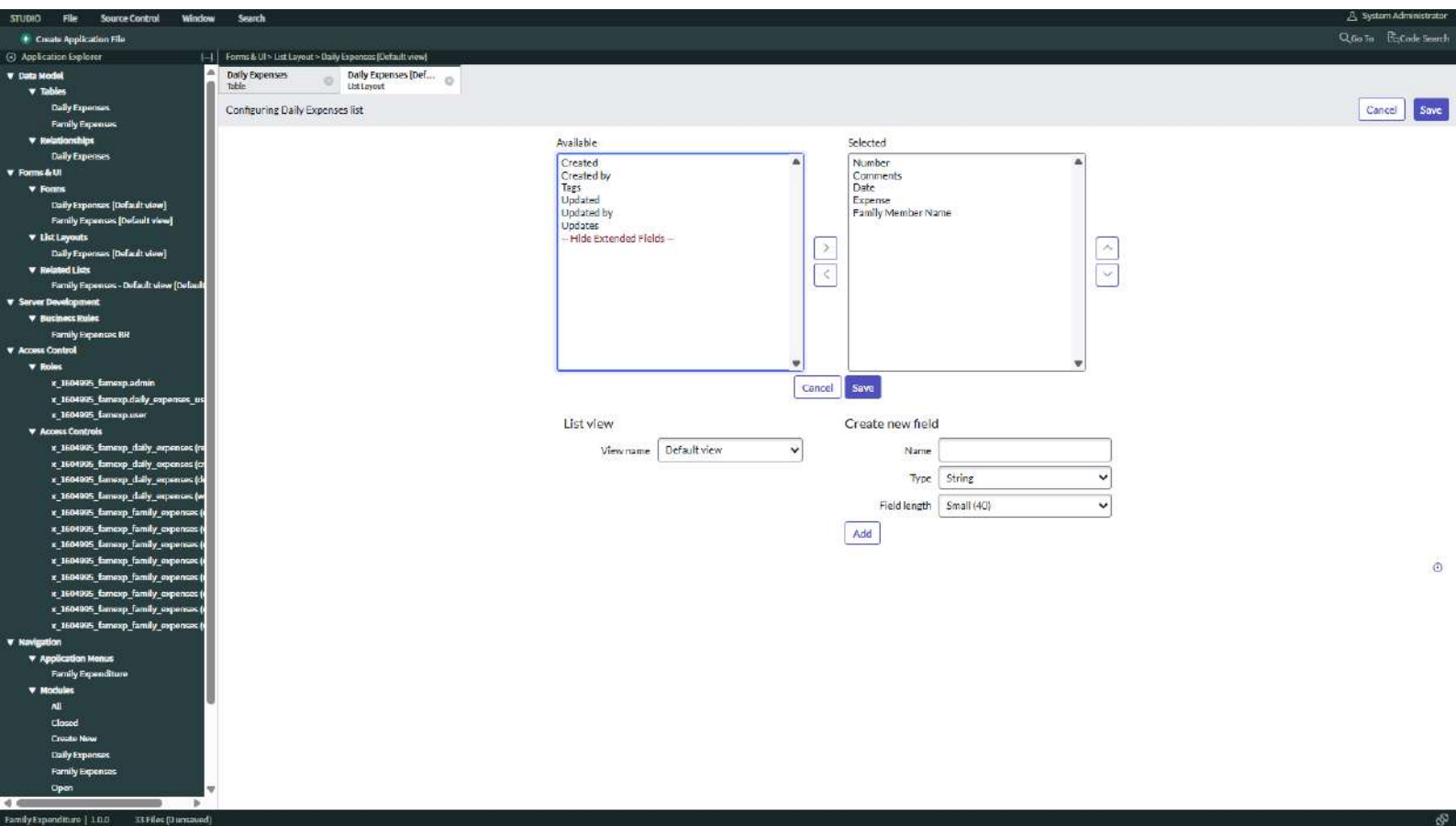
[Design Form](#)

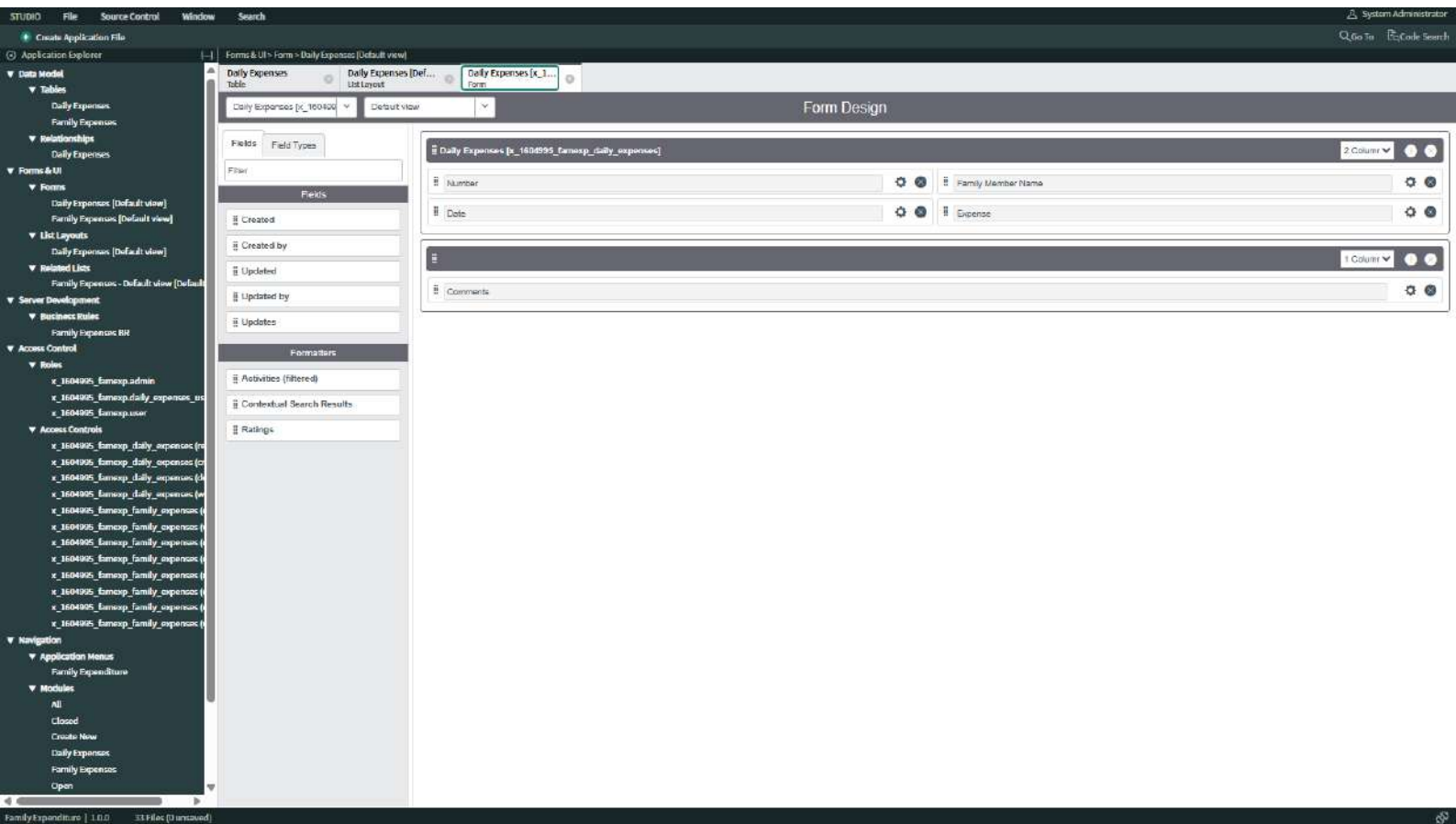
[Layout List](#)

[Show Form](#)

Family Expenditure | 1.0.0 33 Files (1 unsaved)







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## 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.



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## 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



Available

Affected CIs

Affected Cost Centers

Affected Groups

Affected Locations

Appointment->Task

Approvers

Assessment Instance->Task

Asset Reclamation Request->Parent

Asset Reclamation Request->Universal Request

Asset Task->Parent

Asset Task->Universal Request

Attached Knowledge

Attached Knowledge

Attachments

Auto-Resolution Simulation Context->Task

Business Application Request->Parent

Business Application Request->Universal Request

>

<

Selected

Daily Expenses

^

v

Cancel

Save

View name:

Default view

Related Links

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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

Business Rule New record

Name : Family Expenses BR

Table : Daily Expenses (daily\_expenses)

Application : Detail

Active ☒

Advanced ☒

Save

4. In when to run Check Insert and Update

When to run ☒ Advanced

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

When : before

Order : 100

Insert ☒

Update ☒

Delete ☐

Query ☐

Filter Conditions: Add Filter Condition Add "OR" Clause

choose field value

Role conditions: Add

5. In Advance (we write the code): Write the below code >>

```
(function executeRule(current, previous /*null when async*/) {
```





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## Creation Of Relationship

Creation Of Relationship  
Between Family  
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RulesCreation Of Business  
RulesConfigure The  
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## Configure The Relationship

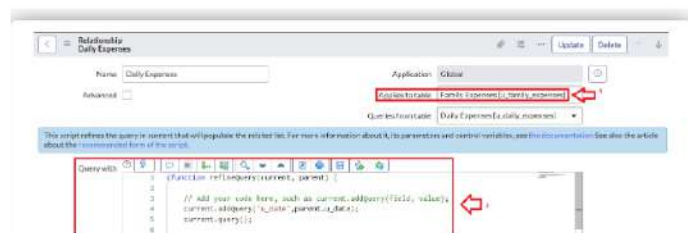
1. Go to All >> In the filter search for Relationships >> Open Relationships.
2. In that, open Daily Expenses Relationship.
3. For Applies to table : Select Family Expenses.
4. In Query with : write the below Query.

```
(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.



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Expenses Tables

Configuring Related List  
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Configuring Related List  
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Creation Of Business  
Rules

Configure The  
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Configure The  
Relationship

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## 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.