

# **Calculating Family Expenses using Service Now**

**Team Id: NM2025TMID15166**

**Team Members: 4**

**Team leader : Thangam M**

**Member 1 : Atchaya M**

**Member 2 : Maha Lakshmi M**

**Member 3 : Swetha V**

**Problem Statement : Built a family expense management system in ServiceNow with features for categorization, budgeting, real-time tracking, and reporting to support informed financial decisions.**

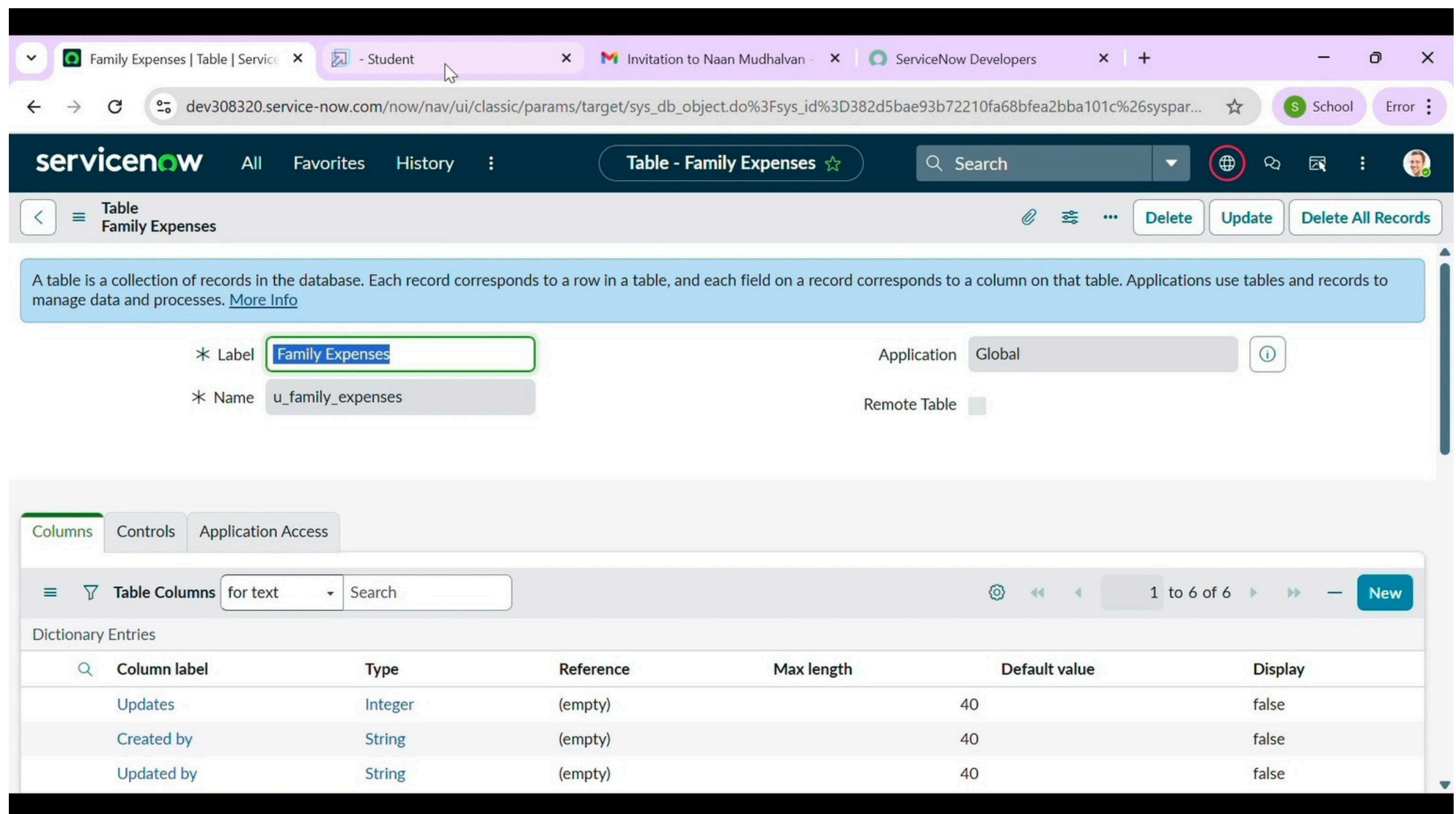
**Objective: To design and implement a family expense tracking solution in ServiceNow that enables efficient recording, categorization, and analysis of household expenses.**

**Skills :IOT Open Hardware platforms,Data Structures**

## **TASK INITIATION**

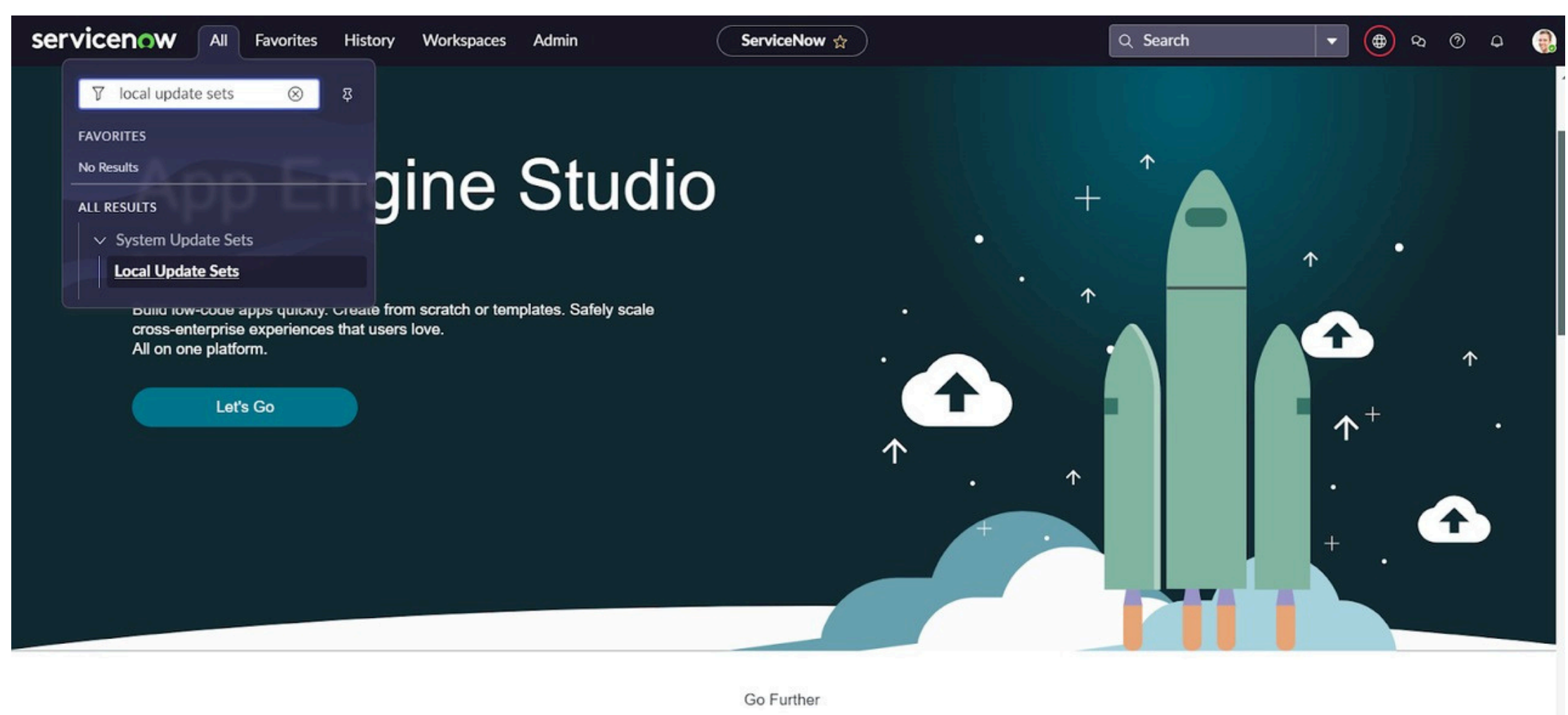
### **Milestone 1 : Setting up ServiceNow Instance**

- 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.



## Milestone 2 : 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.

### Milestone 3 : Creation of Family Expenses Table

1. **Go to All > In the filter search for Tables > click on New.**
2. **Enter the Details:**
3. **Label : Family Expenses**
4. **Name : Auto-Populated**
5. **New menu name : Family Expenditure**
6. **Go to the Header and right click there>> click on Save.**

✖

Label

Family Expenses

✖

✖

Name

u\_st\_family\_expenses

Application

Global

ⓘ

Remote Table

✓

Create module

✓

Create mobile module

✓

Add module to menu

-- Create new --

▼

New menu name

Family Expenditure

Columns

Controls

Application Access

☰

🔍

💬

Table Columns

Column label ▼

Search

⚙️

—

Dictionary Entries

|   | 🔍 | Column label ▼ | Type    | Reference | Max length | Default value | Display |
|---|---|----------------|---------|-----------|------------|---------------|---------|
| ✖ | ✎ | Number         | String  |           |            |               | false   |
| ✖ | ✎ | Date           | Date    |           |            |               | false   |
| ✖ | ✎ | Amount         | Integer |           |            |               | false   |

## Milestone 4 : Creation of Daily Expenses Table

- 1. Goto All > In the filter search for Tables > click on New.**
- 2. Enter the Details:**
- 3. Label : Daily Expenses**
- 4. Name : Auto-Populated**
- 5. Add Module to menu : Family Expenditure**
- 6. Go to the Header and right click there >> click on Save.**

\* Label   1

\* Name   2

Extends table

Application  

Create module ☒

Create mobile module ☒

Application Menu

Add module to menu   3



# Milestone 5 : 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.

# Milestone 6 : 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



# Conclusion