Calculating Family Expenses Using Service Now

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Team Size : 3

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Sub Titles

- Introduction

- Project Objective
- Setting Up Service Now Instance
- Creation of New Update set
- Creation of Table (Family Expenses)
- Creation of Table (Daily Expenses)
- Creation of Relationship
- Configuring Related List on Family Expenses
- Creation of Business Rules
- Configure the Relationship
- Conclusion

Introduction

Calculating Family Expenses Using Service Now

A Guided project was designed to build a clear, flexible, and easy-to-use system for keeping track of and organizing family expenses through the ServiceNow platform.

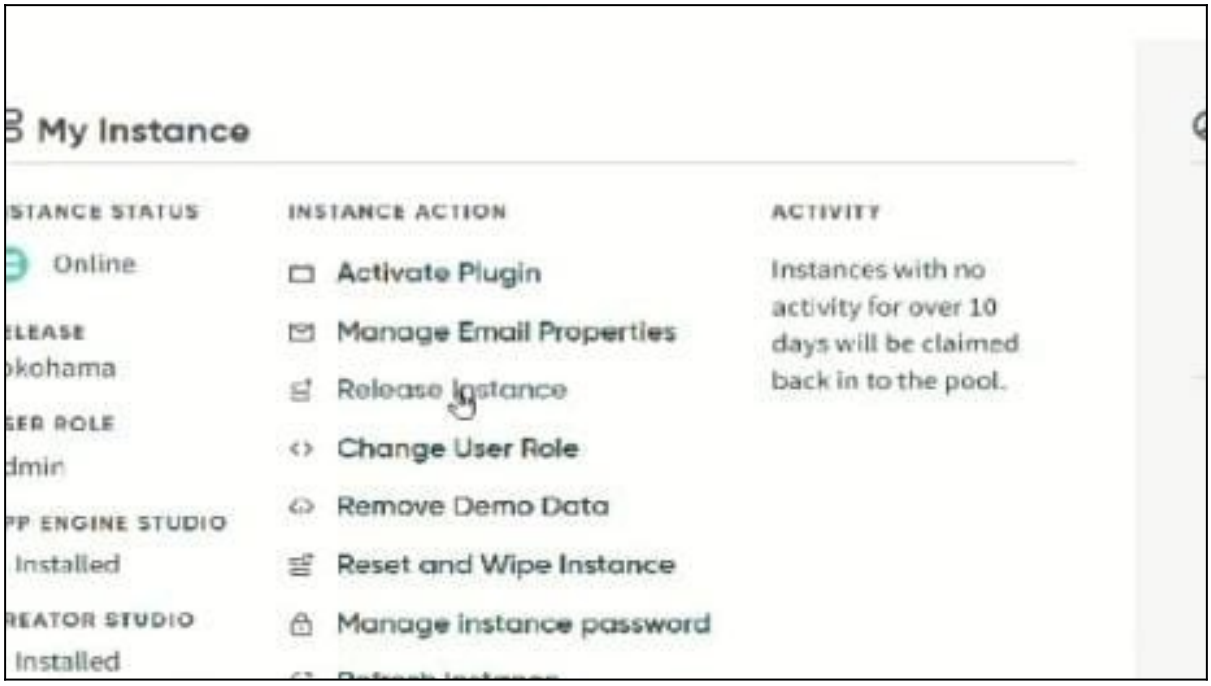
Project Objective

The goal of this project is to build a comprehensive family expenses calculation system that allows users to categorize and record expenses, set budgets, and track them in real time.

It also aims to establish relationships between tables for better organization of data.

Setting Up ServiceNow Instance

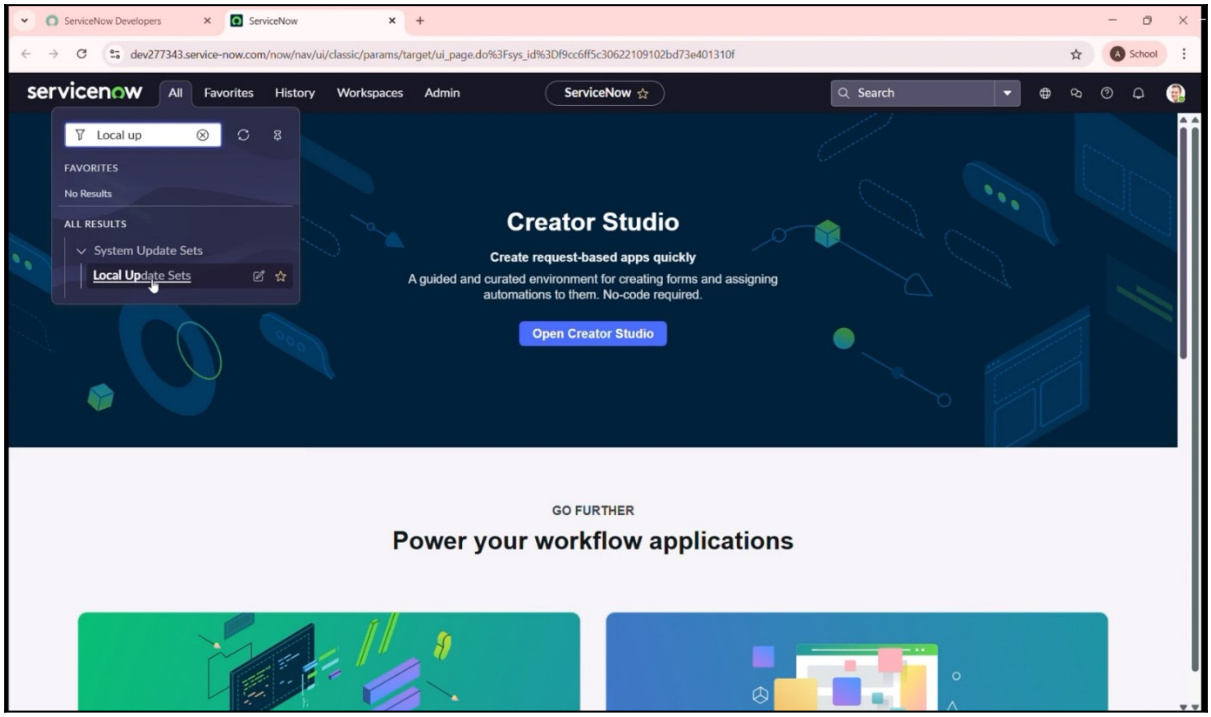
1. A personal developer instance (PDI) was created from ServiceNow to start building and testing the application.
2. Open "https://developer.servicenow.com".
3. Create a personal developer instance.
4. Click on Request Instance.
5. Submit the request.
6. Navigate to the ServiceNow platform.



Creation of New Update Set

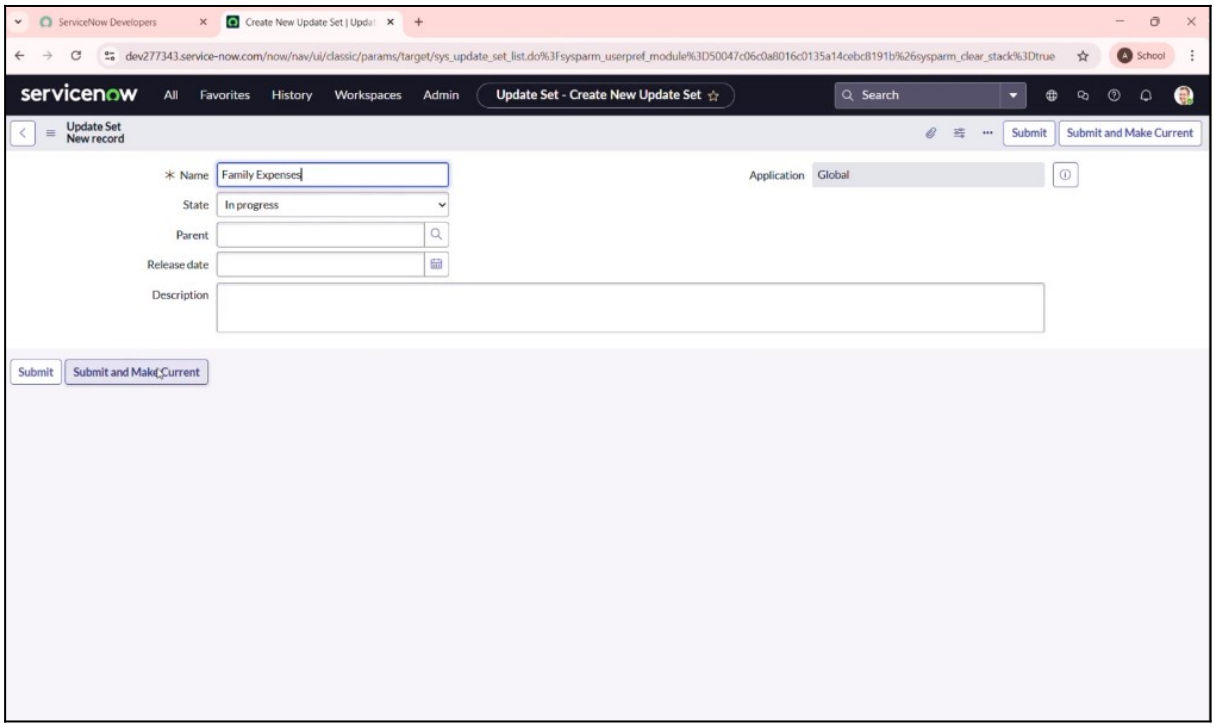
An update set was created to capture all customizations and configurations during the project development.

Click Local Update Set



Enter the Details:

Name: Family Expenses, then click Submit.



Creation of Table (Family Expenses)

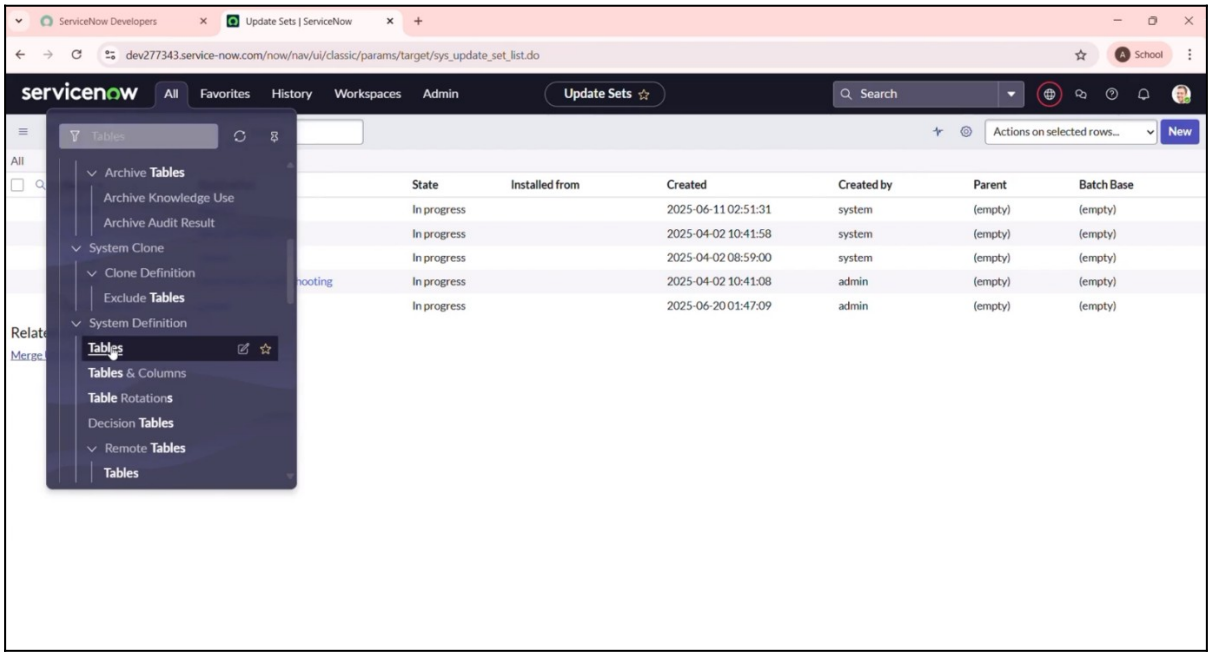
A new table was added to store core family expense details such as category, amount, and date.

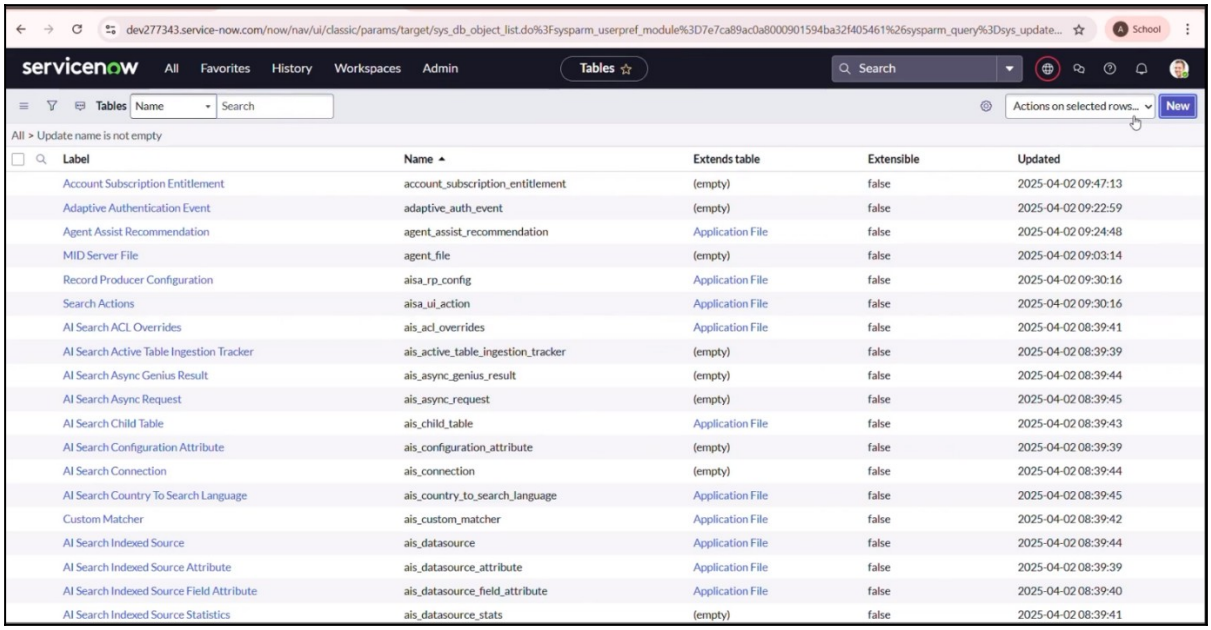
1. Creation of family expenses table

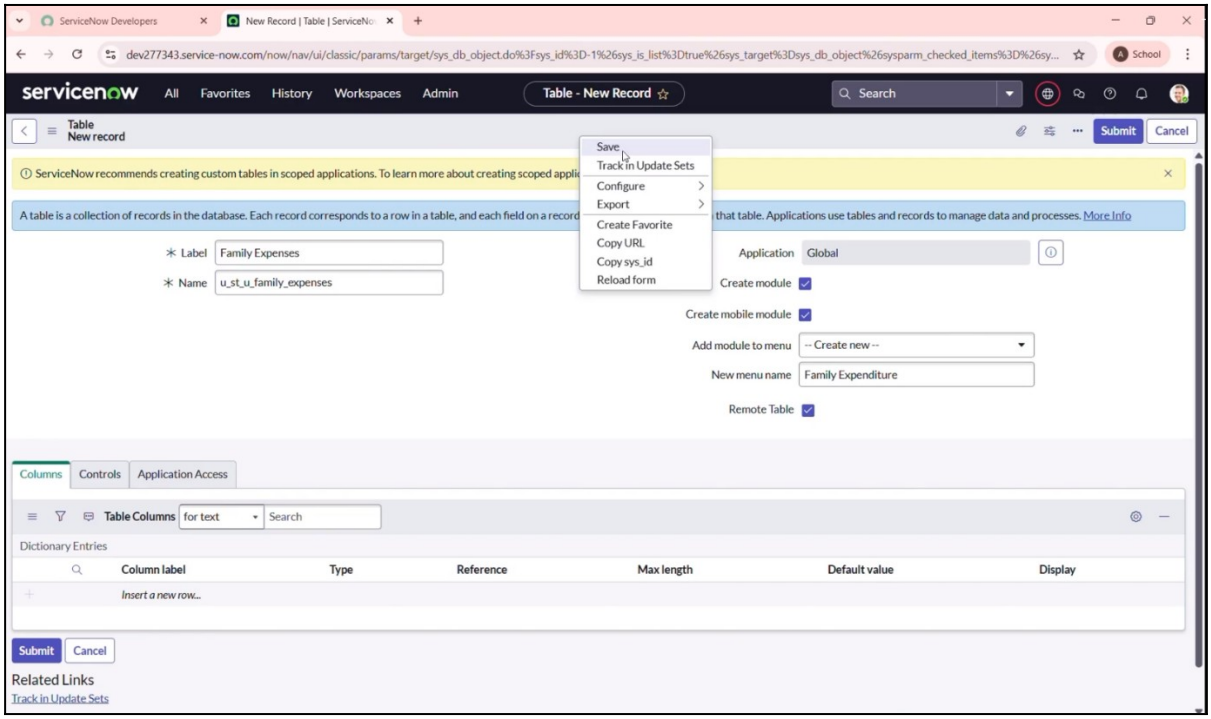
a. Search for tables and click New.

b. Label: Family Expenses

Name: Auto – Populated
New menu name: Family Expenditure







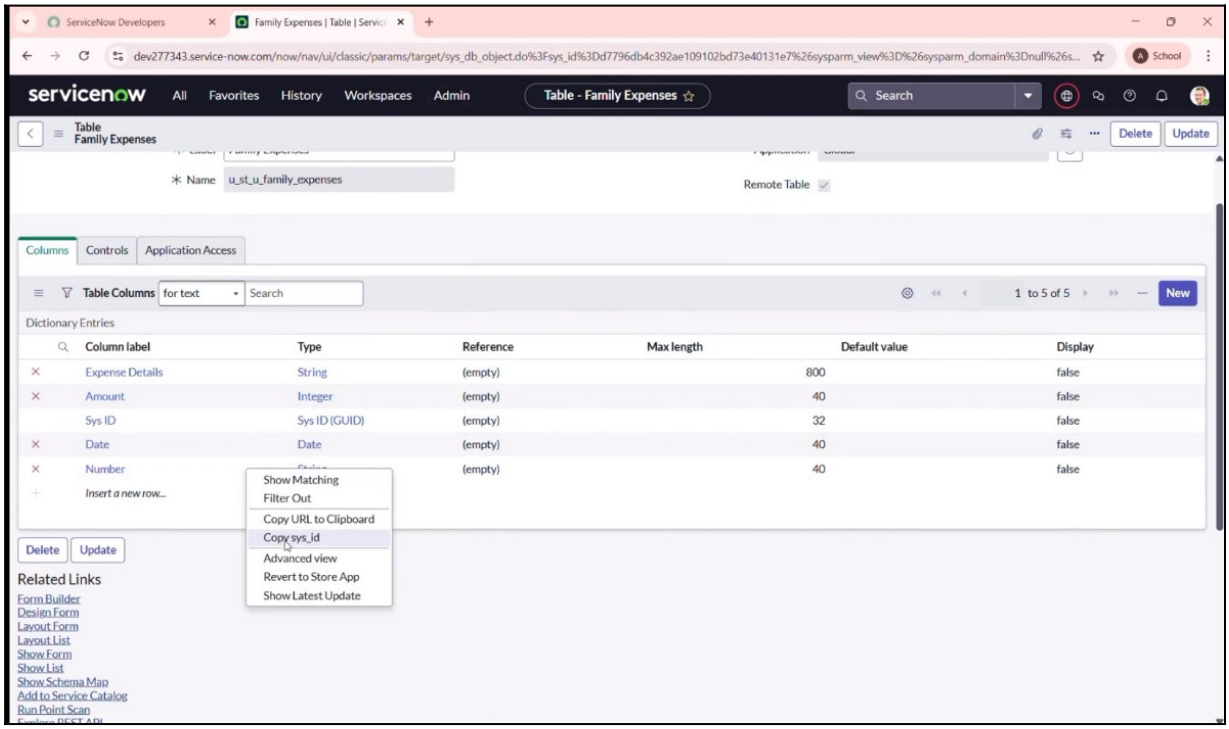
c. Go to the header, right-click, and click Save.

2.Creation of Columns (Fields)

a. Insert a new row
b. Column label: Number
   Type: String
c. Column label: Date
   Type: Date
d. Column label: Amount
   Type: Integer
e. Column label: Expense Details

   Type: String

   Max length: 800



3. Making Number Field An auto – Number

a. Double-click the Number field.

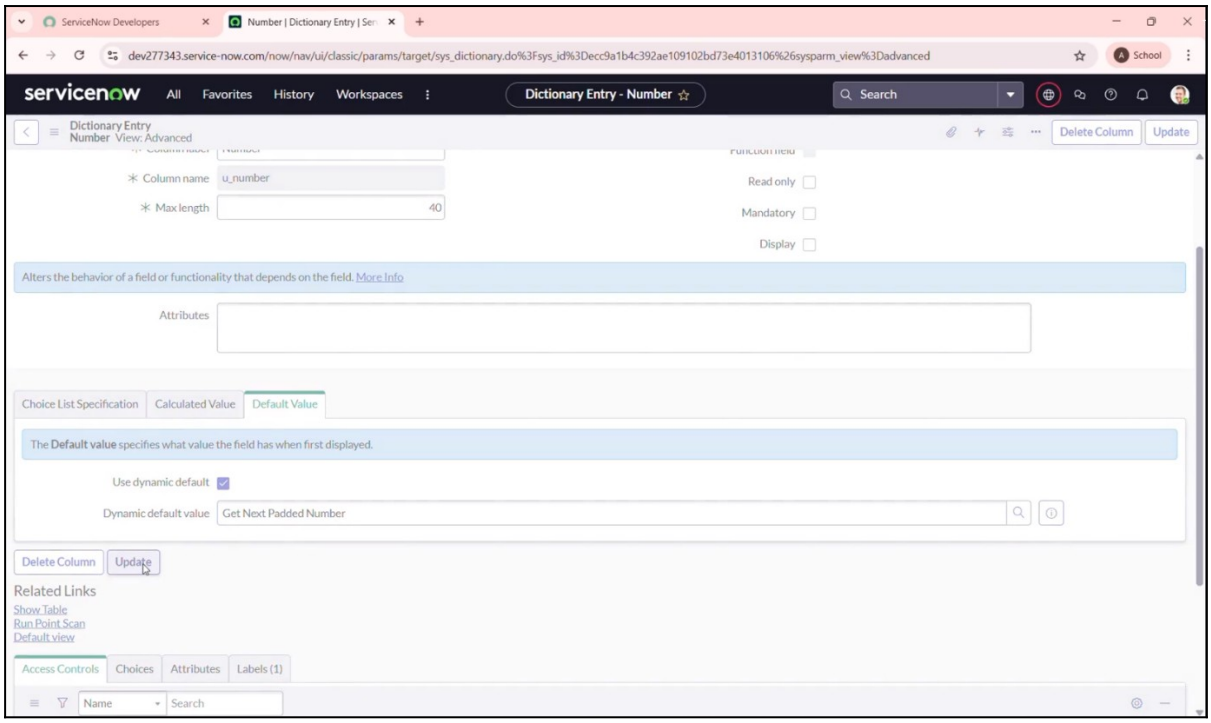
b. Click on Advanced view

c. Click Default value

Use dynamic default: checks the box

Dynamic default value: Get Next Padded Number

d. Click Update button



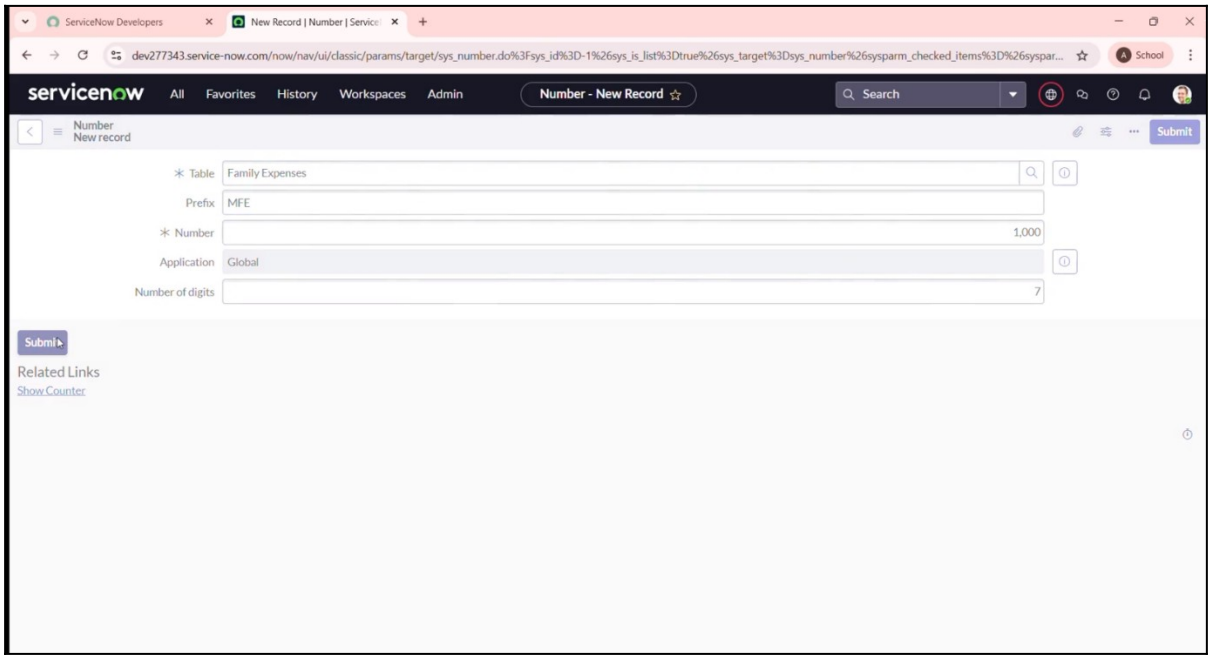
e. Go to all – search number maintenance select “Number Maintenance”

f. Click on new

g. Table: Family Expenses

Prefix: MFE

h. Click on “Submit” button



4. Configure The Form

a. Search for Family Expenses and open it.

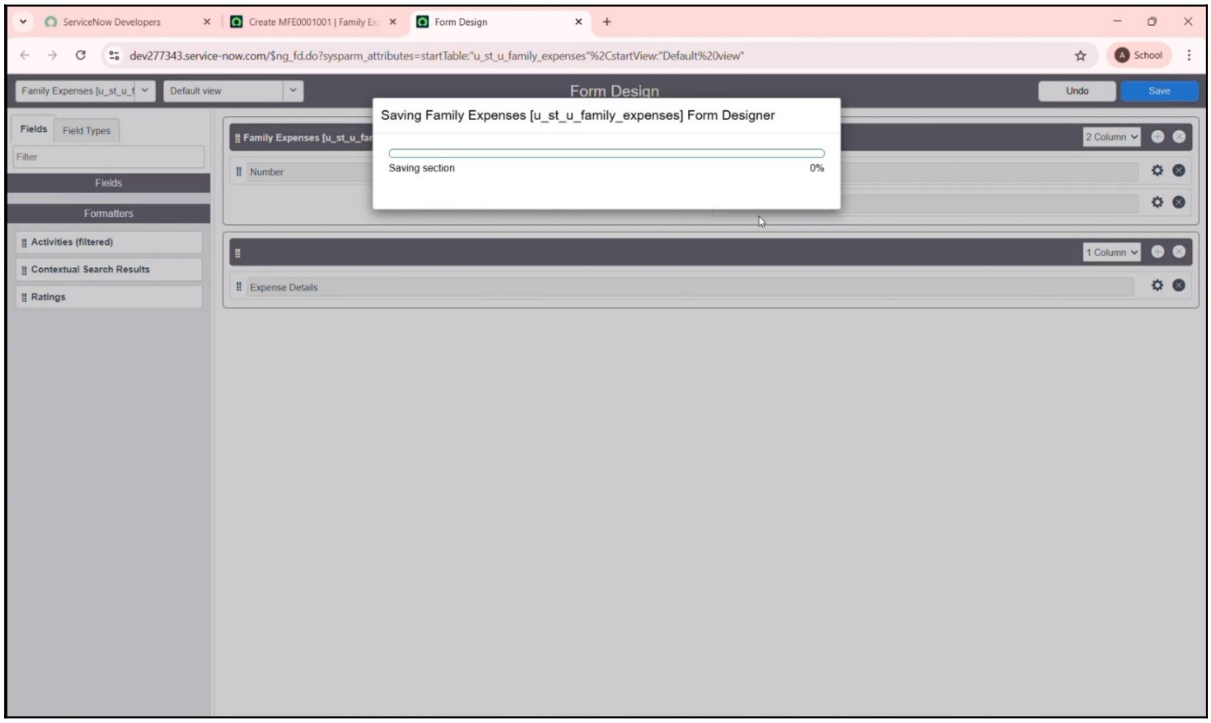
b. Click New

c. Go to the Header >> Right click >> click on configure select from design

d. Make the Number field read-only by clicking the gear icon and checking "Read-Only."

e. Make Date and Amount mandatory fields by checking the mandatory option.

f. Click save



Creation of Table (Daily Expenses)

A related table was created to record individual daily expense entries linked to the main family record.

1. Creation of daily expenses table

a. Go to All >> search “Tables” >> click new

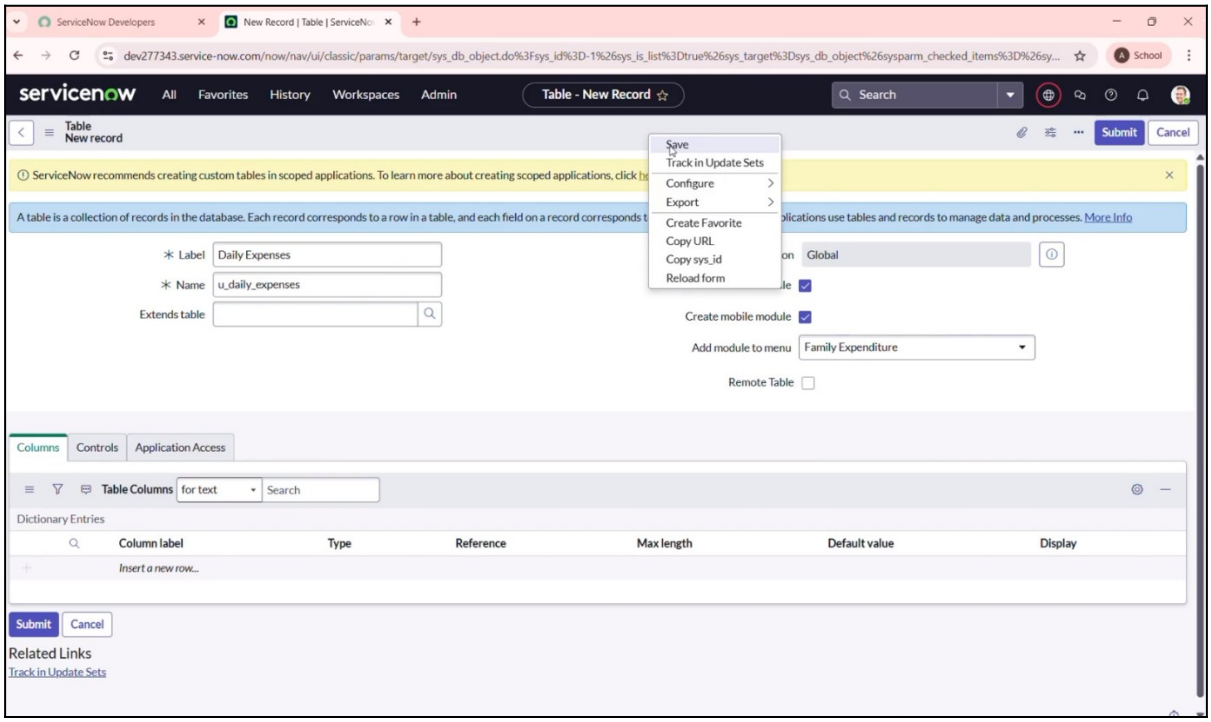
b. Enter the details

Label: Daily Expenses

Name : Auto – Populated

Add Module to menu : Family Expenditure

e. Click save



2. Creation of Columns (Fields)

a. Insert a new row for each column.

b. Column label: Number

Type: String

c. Column label: Date

Type: Date

d. Column label: Expense

Type: Reference

e. Column label: Family Member Name

Type: Reference

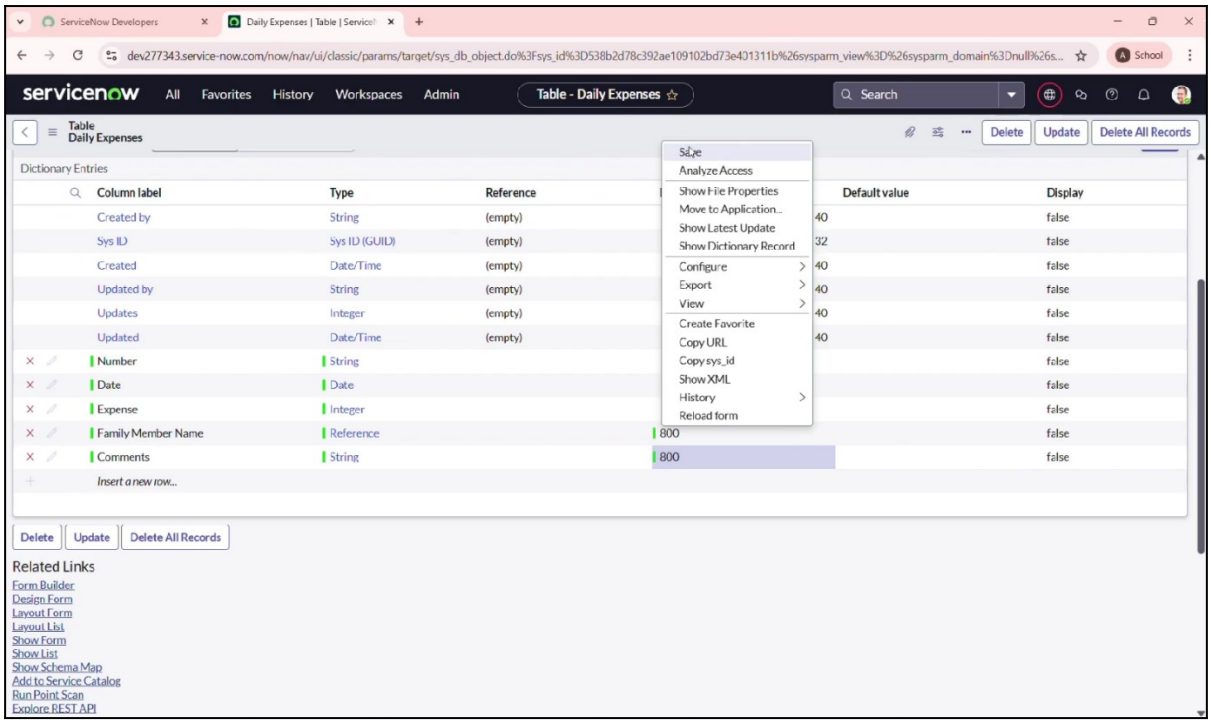
Max length: 800

f. Column label: Comments

Type: String

Max length: 800

g. Click on Save



3. Making Number Field an Auto – Number

a. Double click on the number Field

b. Click Advanced View

c. Click Default value

Use dynamic default: checks the box

Dynamic default value: Get Next Padded Number

d. Click Update

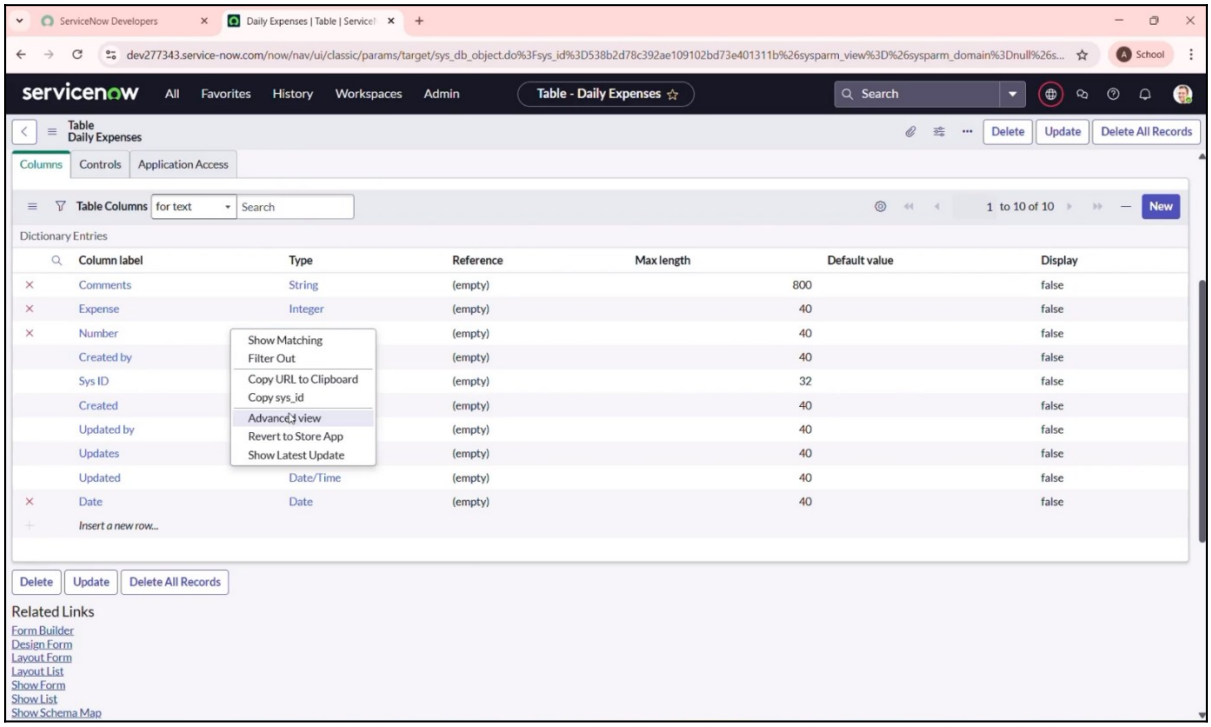
e. Go to all >> search for “number Maintenance select number Maintenance

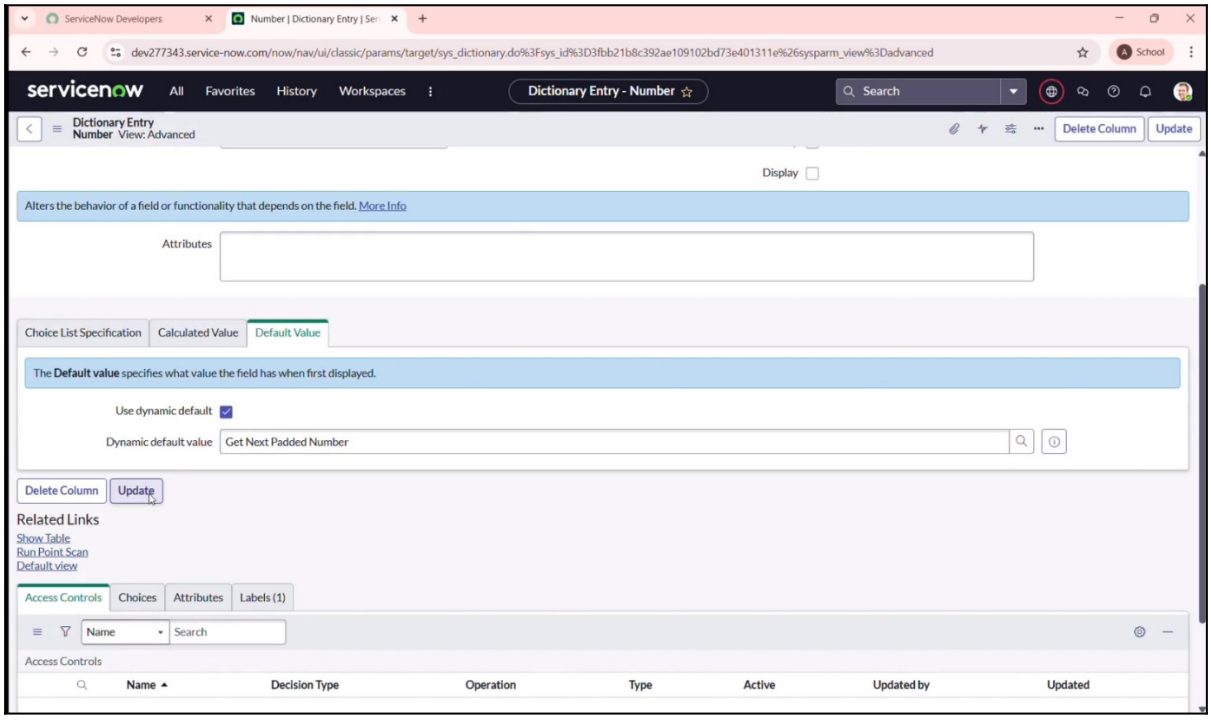
f. Click new

g. Table: Daily Expenses

Prefix: DFE

h. Click on submit


ServiceNow Developers
Daily Expenses | Table | Service
dev277343.service-now.com/now/nav/ui/classic/params/target/sys_db_object.do%3Fsys_id%3D538b2d78c392ae109102bd73e401311b%26sysparm_view%3D%26sysparm_domain%3Dnull%26s...
School
servicenow
All
Favorites
History
Workspaces
Admin
Table - Daily Expenses
Search
Table
Daily Expenses
Delete
Update
Delete All Records
Columns
Controls
Application Access
Table Columns
for text
Search
1 to 10 of 10
New
Dictionary Entries
Column label
Type
Reference
Max length
Default value
Display
Comments
String
(empty)
800
false
Expense
Integer
(empty)
40
false
Number
(empty)
40
false
Created by
(empty)
40
false
Sys ID
(empty)
32
false
Created
(empty)
40
false
Updated by
(empty)
40
false
Updates
(empty)
40
false
Updated
Date/Time
(empty)
40
false
Date
Date
(empty)
40
false
Insert a new row...
Show Matching
Filter Out
Copy URL to Clipboard
Copy sys_id
Advanced view
Revert to Store App
Show Latest Update
Delete
Update
Delete All Records
Related Links
Form Builder
Design Form
Layout Form
Layout List
Show Form
Show List
Show Schema Map


ServiceNow Developers
Number | Dictionary Entry | Ser
dev277343.service-now.com/now/nav/ui/classic/params/target/sys_dictionary.do%3Fsys_id%3D3fbb21b8c392ae109102bd73e401311e%26sysparm_view%3Dadvanced
School
servicenow
All
Favorites
History
Workspaces
Dictionary Entry - Number
Search
Dictionary Entry
Number View: Advanced
Delete Column
Update
Display
Alters the behavior of a field or functionality that depends on the field. More Info
Attributes
Choice List Specification
Calculated Value
Default Value
The Default value specifies what value the field has when first displayed.
Use dynamic default
Dynamic default value
Get Next Padded Number
Delete Column
Update
Related Links
Show Table
Run Point Scan
Default view
Access Controls
Choices
Attributes
Labels (1)
Name
Search
Access Controls
Name
Decision Type
Operation
Type
Active
Updated by
Updated

Creation Of Relationship

Define the relationship between the Family Expenses and Daily Expenses tables to enable hierarchical tracking.

Creation of relationship between family expenses and daily expenses tables

a. Go to all >> search Relationships >> open relationships

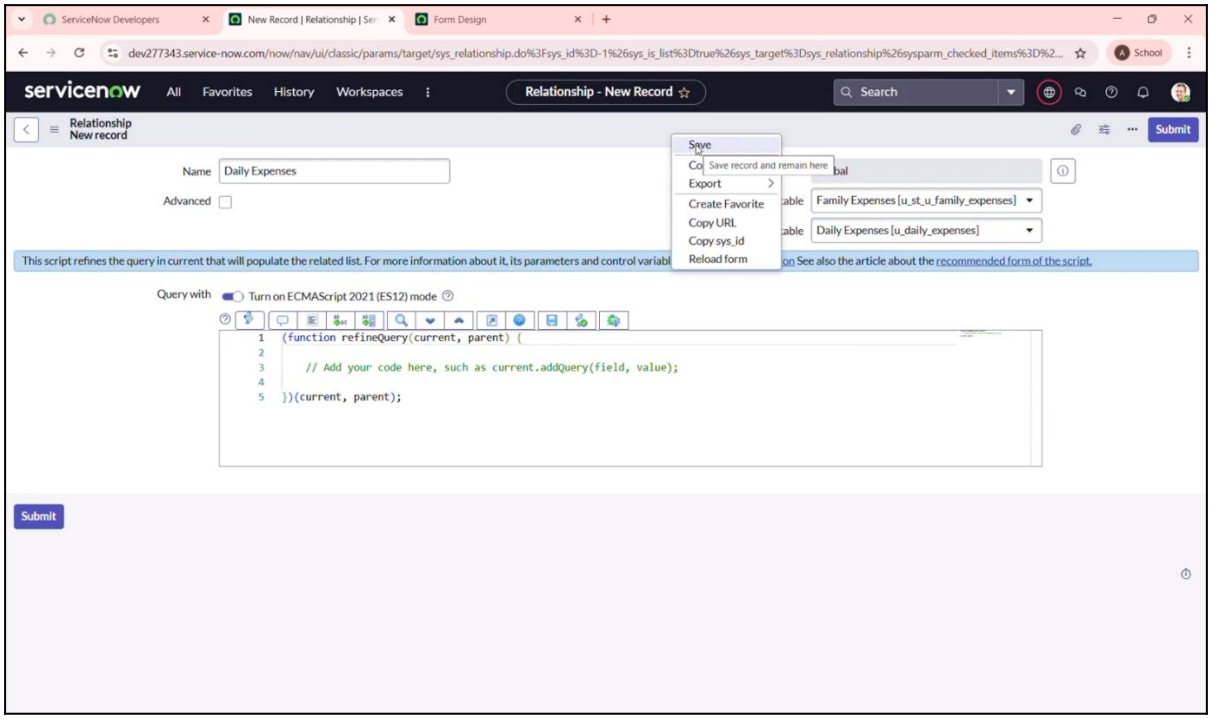
b. Click on New

c. Name : Daily Expenses

Applies to table : Select Family Expenses

Daily Expenses : Select Daily Expenses

d. Click save



Configuring Related list on family expenses

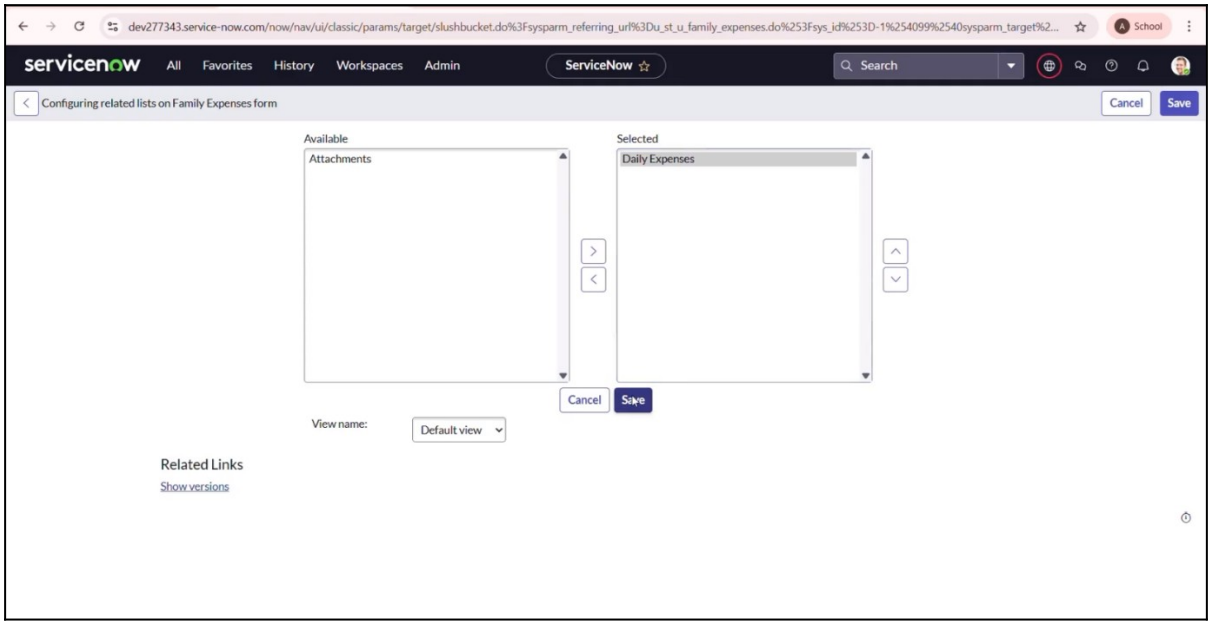
Set up a related list in the family expenses form to view all liked daily expenses for easy reference

a. Go to all>>search “Family Expenses”>>open family Expenses

b. Click new >> configure

d. add Daily Expenses to the Selected area

e. Click on save



Creation of Business Rules

Implemented business logic using Business Rules to automate tasks like field validations, updates, or notifications.

a. Go to all>>search>>Business Rules

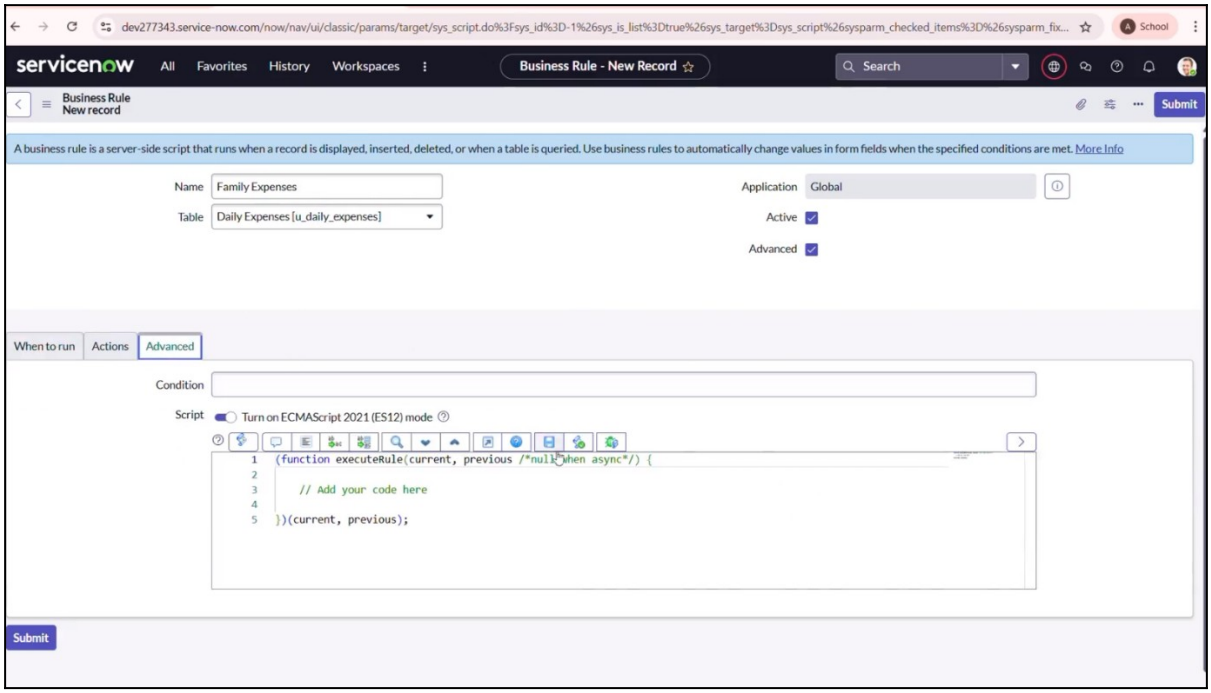
b. Click new

c. Name : Family Expenses BR

Table : Select Daily Expenses

d. In when to run check insert and update

e. Write the code



Configure the Relationship

Used ServiceNow’s dictionary setting to fine-tune the relationship (one–to–many) between the tables for accurate data linkage.

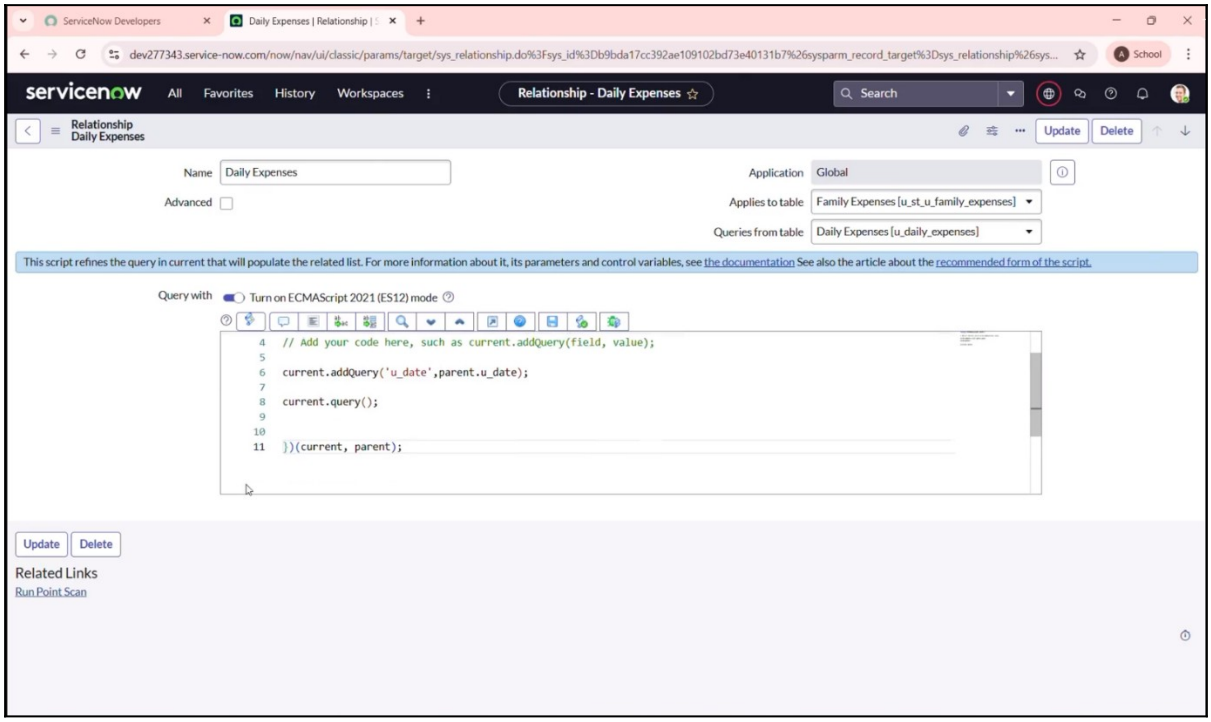
a. Go to all>>search>>open relationship

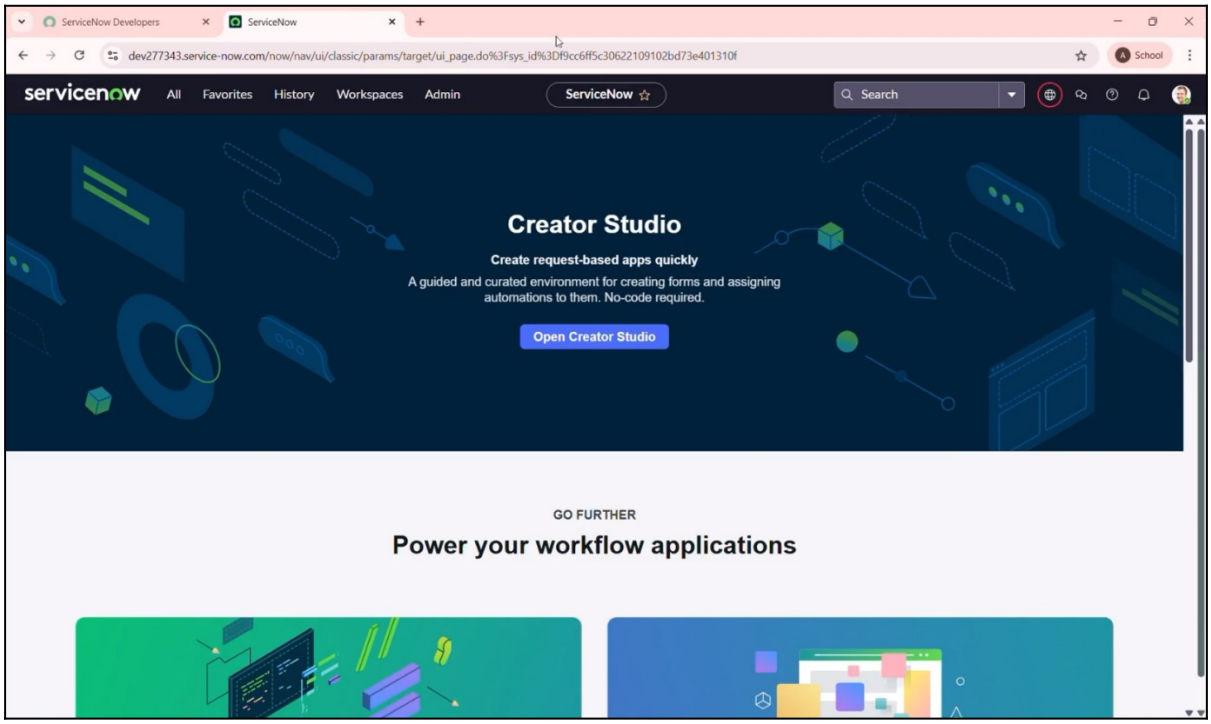
b. Open Daily Expenses Relationship

c. For applies to table : Select Family Expenses

d. In Query with

e. Click Update


ServiceNow Developers
Daily Expenses | Relationship |
dev277343.service-now.com/now/nav/ui/classic/params/target/sys_relationship.do%3Fsys_id%3Db9bda17cc392ae109102bd73e40131b7%26sysparm_record_target%3Dsys_relationship%26sys...
School
servicenow
All
Favorites
History
Workspaces
Relationship - Daily Expenses
Search
Relationship
Daily Expenses
Update
Delete
Name
Daily Expenses
Advanced
Application
Global
Applies to table
Family Expenses [u_st_u_family_expenses]
Queries from table
Daily Expenses [u_daily_expenses]
This script refines the query in current that will populate the related list. For more information about it, its parameters and control variables, see the documentation See also the article about the recommended form of the script.
Query with
Turn on ECMAScript 2021 (ES12) mode
4 // Add your code here, such as current.addQuery(field, value);
5
6 current.addQuery('u_date',parent.u_date);
7
8 current.query();
9
10
11 })(current, parent);
Update
Delete
Related Links
Run Point Scan


ServiceNow Developers
ServiceNow
dev277343.service-now.com/now/nav/ui/classic/params/target/ui_page.do%3Fsys_id%3Df9cc6ff5c30622109102bd73e401310f
School
servicenow
All
Favorites
History
Workspaces
Admin
ServiceNow
Search
Creator Studio
Create request-based apps quickly
A guided and curated environment for creating forms and assigning automations to them. No-code required.
Open Creator Studio
GO FURTHER
Power your workflow applications

Conclusion

Used ServiceNow to implement and tested the end–to–end application and confirmed that it allows for efficient recording, tracking, and management of family expenses, providing users with a real–time financial overview.