FAMILY EXPENSES

Team Id: NM2025TMID18889

Team Size: 4

Team Leader: ABINAYA.P

Member 1: AMRIN NISHA.G.A

Member 2: ANOUSHKA.N

Member 3: ARTHI.A

Problem statement:

The project aims to develop the comprehensive expense calculation system using ServiceNow. This system will enable users to track and manage family expenses effectively. It will include features such as expenses 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 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.

Objective:

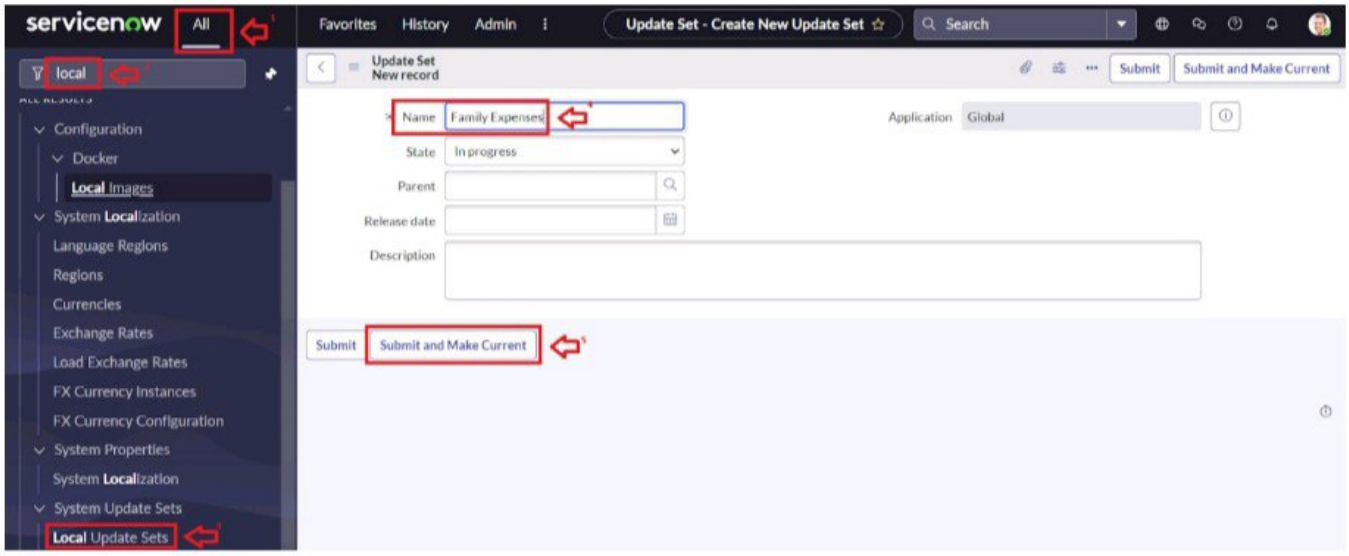
The "family expensive project" phrase seems to be a misunderstanding, but if referring to ServiceNow's Strategic Portfolio Management (SPM), also known as Project Portfolio Management(PPM), its objective is to strategically manage and optimize a portfolio of projects by aligning them with business goals, proving real-time visibility into performance, and improving agility and resource allocation to deliver maximum customer value.

Skills: Service now family expense IOT Open Hardware platforms, Data structures

TASK INITIATION

Milestone 1: Update set

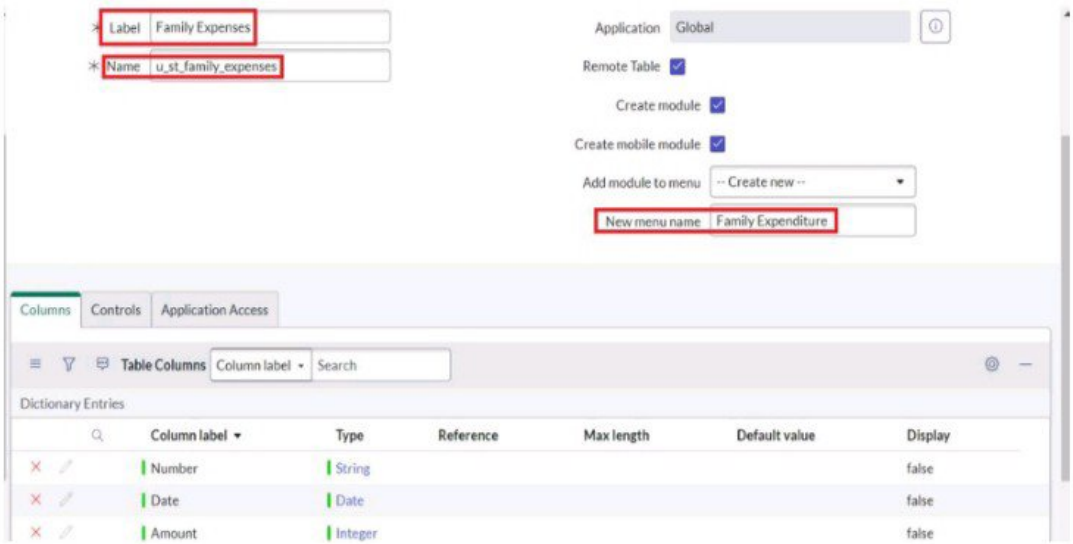
2. Click on All >> search for Local update
3. Click on new
4. Name: Family Expenses
5. Then click on submit and make current.



Milestone 2: CREATION OF TABLE

Activity 1: TABLE

1. Open service now.
2. Click on All >> search for Table
3. Click on new.
4. Label: Family Expenses, Name: Auto-Populated,
   New menu name: Family Expenditure.
5. Go to the Header and right click there>> click on Save.



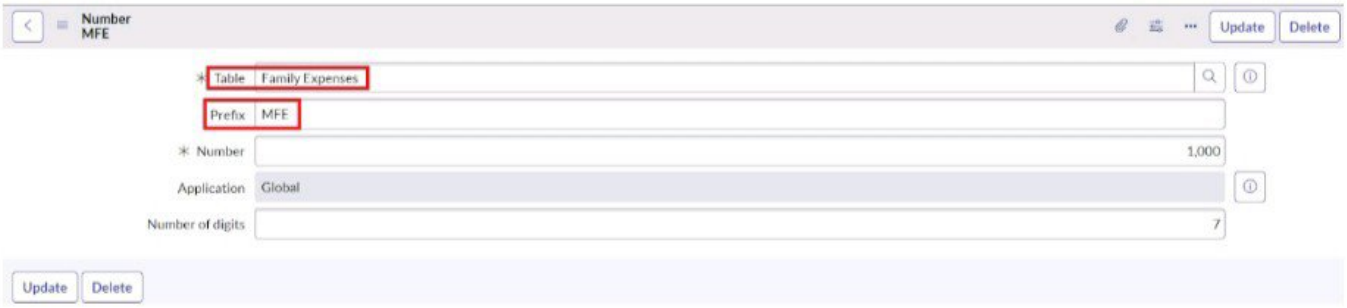
Activity 2: Creation of Columns (Fields)

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

ACTIVITY3: Making Number Field an Auto-Number

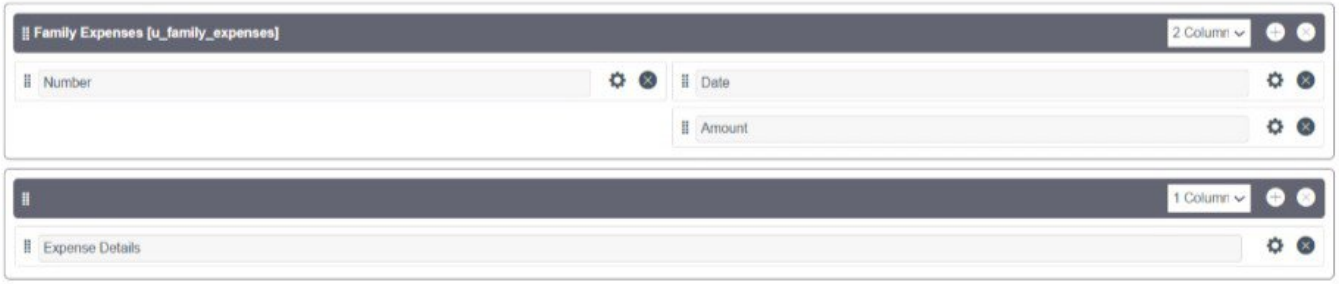
1.Double click on the Number Field/Column.
2.Go down and double click on Advanced view
3.In Default Value:
Use dynamic default: check the box
Dynamic default value: Get Next Padded Number
4.Click on Update.

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



ACTIVITY 4: CONFIGER 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.

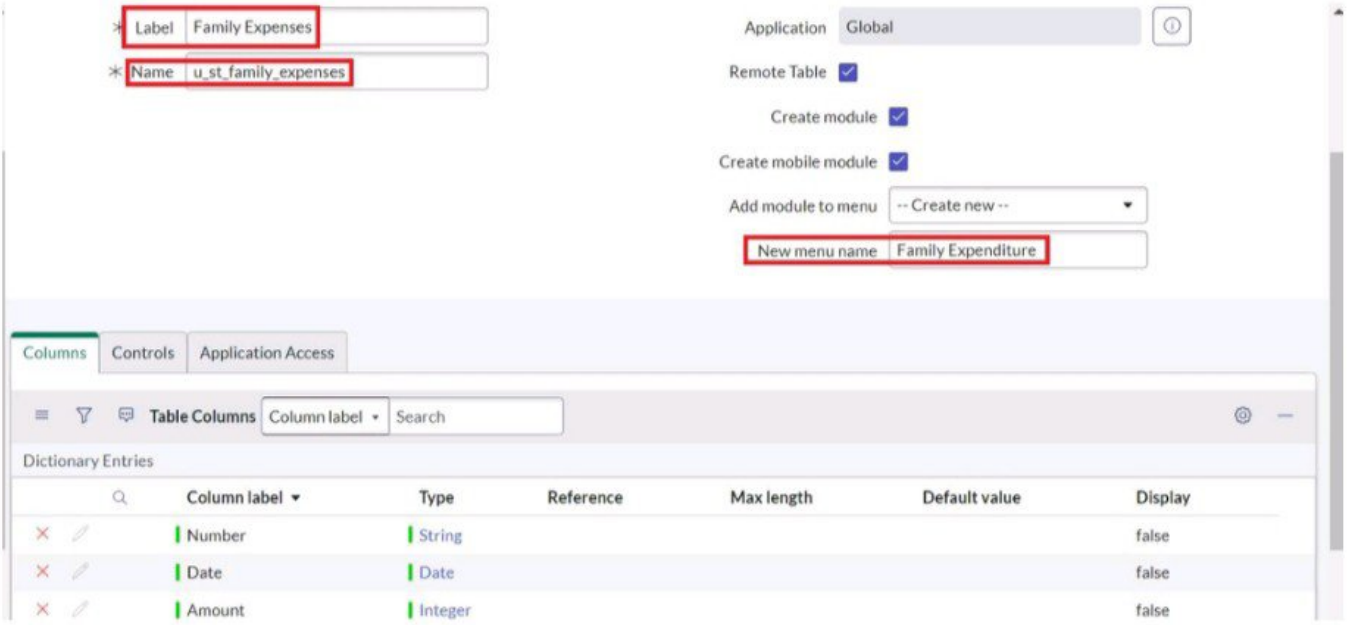


5. Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
6. Make Date, Amount Mandatory Field by clicking on the gear icon and checking Mandatory
7. Click on Save.

Milestone 3: CREATION OF TABLE(DAILY EXPENSES)

Activity 1: Creation of Daily Exepenses Table.

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



Activity 2: Creation of columns(Field)

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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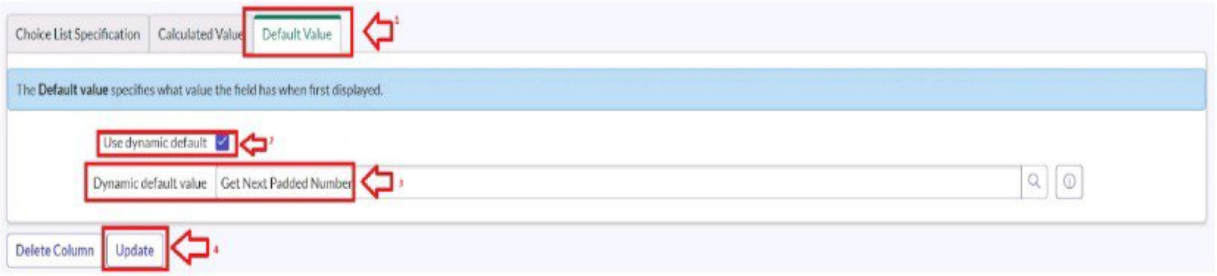
Activity 3: **Making Number Field an Auto-Number**

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

8.Click on Submit.

ACTIVITY4: Configer 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.

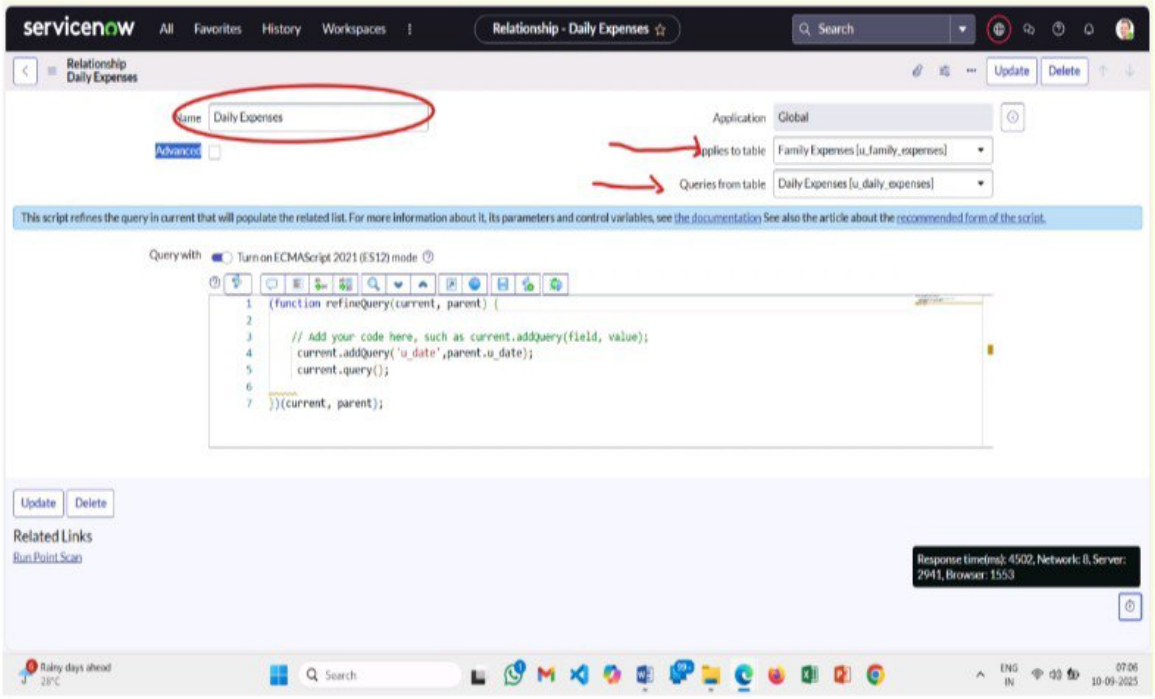
5. Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
6. Make Date, Family Member Name Mandatory Field by clicking on the gear icon and checking Mandatory
7. Click on Save.

Milestone 4: CREATION OF RELATIONSHIP

Activity 1: 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.

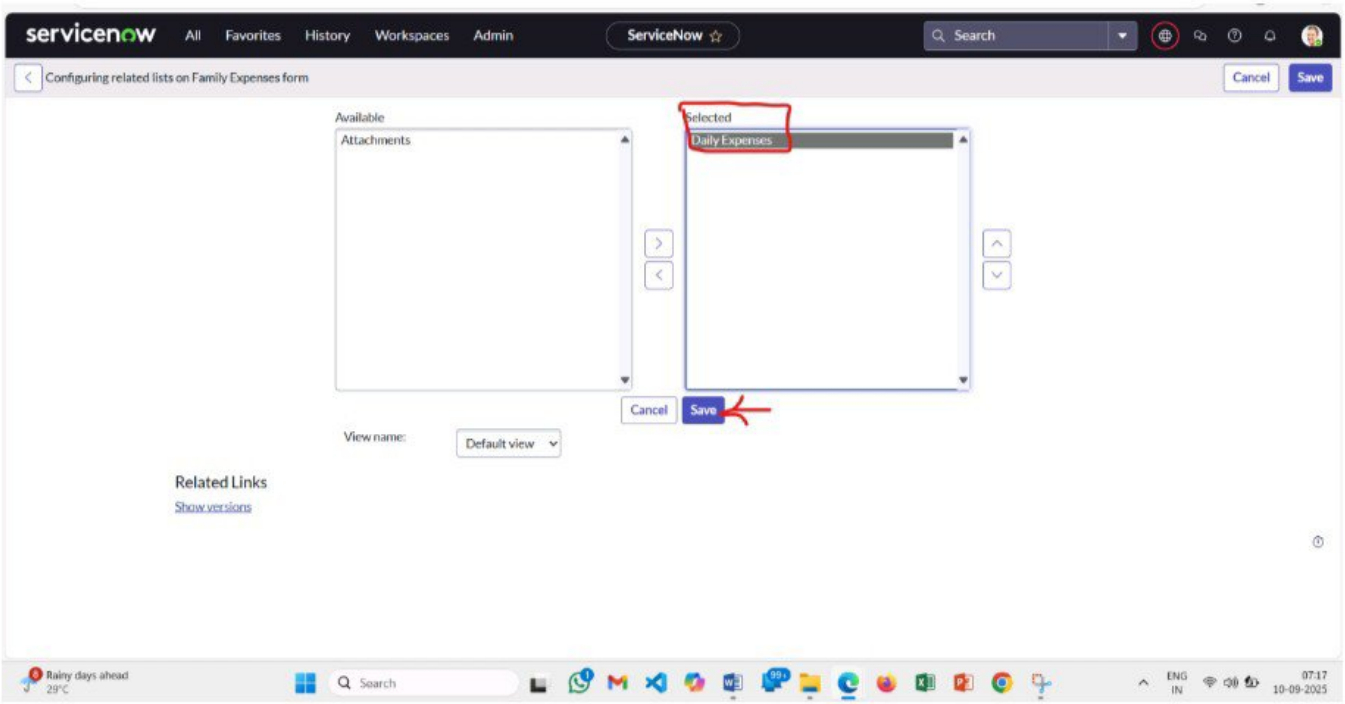
6. Fill the following details to create a new ACL
7. Scroll down under requires role
8. Double click on insert a new row
9. Give task table and team member role
10. Click on submit
11. Similarly create 4 acl for the following fields



Milestone 5: Configuring Related List on Family Expenses

Activity 1: Create a Flow to Assign operations ticket to group

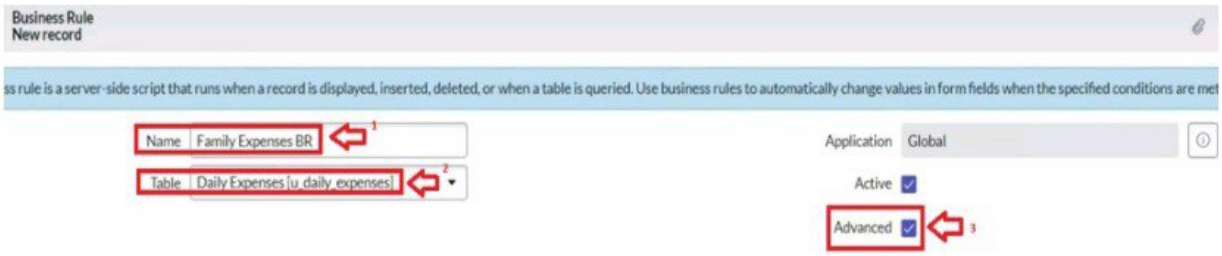
1. Go to All >> In the filter search for Family Expenses >> Open Family Expenses
2. Click on New
3. Go to the Header and right click there>> click on Configure >> Select Related Lists
4. Add Daily Expenses to the Selected Area.
5. Click on Save



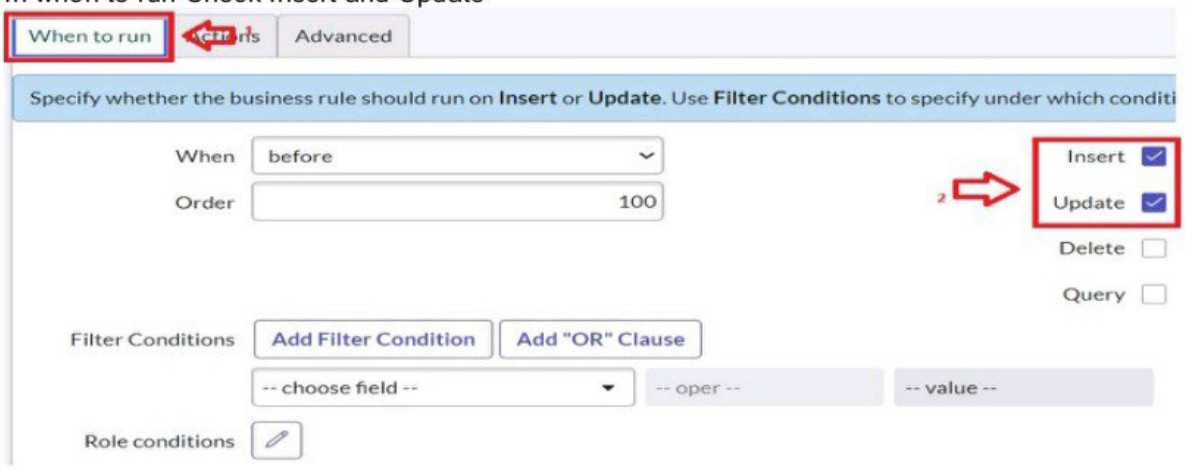
Milestone 6: Creation of Business Rules

Activity1: Creation of Business Rules

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



4. In when to run Check Insert and Update



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

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

var Family Expenses = new Glide Record (' u_family_expenses ');
Family Expense. Add Query('u_ date',current.u  _ date);
Family Expenses. query();
If (Family Expenses. next())
{
Family Expenses  .u _amount += current .u_ expense;
```

```
Family Expenses .u_ expense_ details += ">"+current. u comments+":"+"Rs."+ current. u_ expense+"/-
";
Family Expenses. update();
}
else
{
var New Family Expenses = new Glide Record('u_ family_ expenses');
New Family Expenses. u_ date = current. u_ date;
New Family Expenses. u_ amount = current. u_ expense;
New Family Expenses .u_ expense_ details +=
">"+current.u_comments+":"+"Rs."+current.u_expense+"/-";
New Family Expenses. insert();
}


})(current, previous);
```

Script

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

    var FamilyExpenses = new GlideRecord('u_family_expenses');
    FamilyExpenses.addQuery('u_date',current.u_date);
    FamilyExpenses.query();
    if(FamilyExpenses.next())
    {
        FamilyExpenses.u_amount += current.u_expense;
        FamilyExpenses.u_expense_details += ">"+current.u_comments+":"+"Rs."+current.u_expense+"/-";
        FamilyExpenses.update();
    }
    else
    {
        var NewFamilyExpenses = new GlideRecord('u_family_expenses');
        NewFamilyExpenses.u_date = current.u_date;
        NewFamilyExpenses.u_amount = current.u_expense;
        NewFamilyExpenses.u_expense_details += ">"+current.u_comments+":"+"Rs."+current.u_expense+"/-";
        NewFamilyExpenses.insert();
    }

})(current, previous);
```

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

Milestone 7: Configure the Relationship

Activity1: Configure the Relationship

1. Go to All >> In the filter search for Relationships >> Open Relationships.
2. In that, open Daily Expenses Relationship.

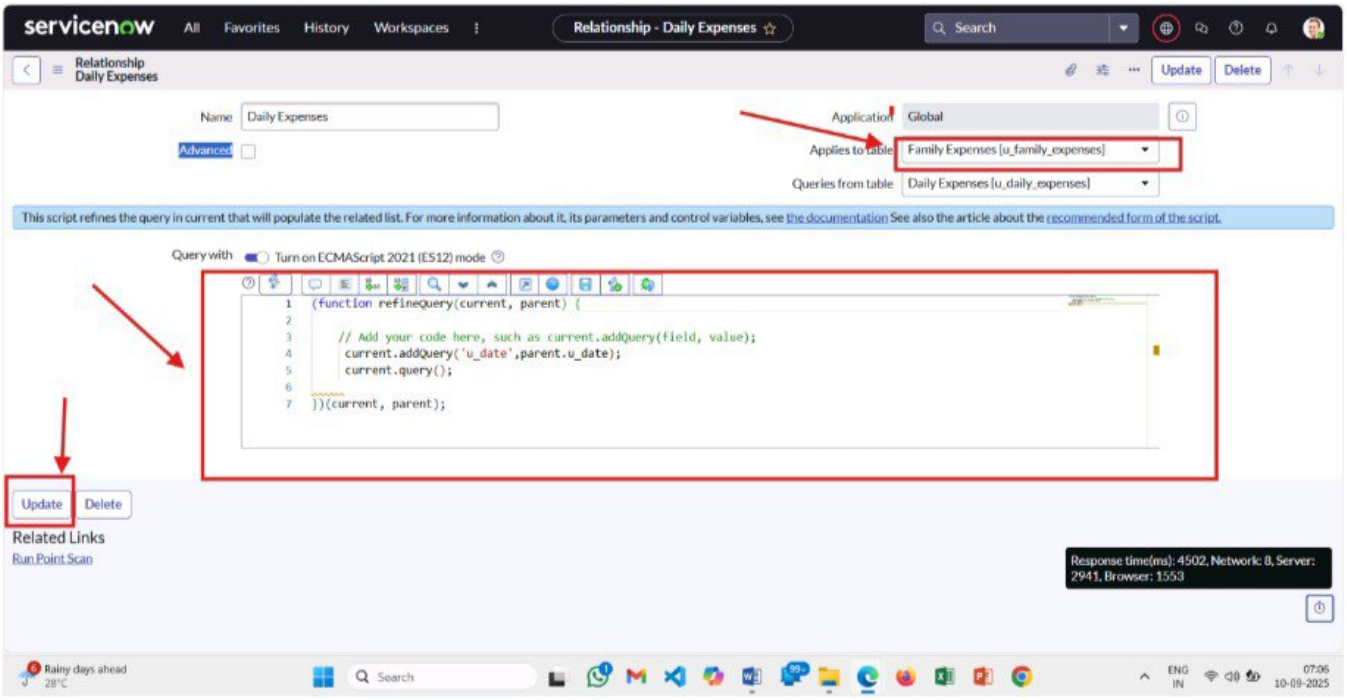
3. For Applies to table: Select Family Expenses.
4. In Query with: write the below Query.

```
(function refine Query (current, parent) {

// Add your code here, such as current. add Query (field, value);
 current. add Query ('u_ date', parent. u_ date);
 current. Query ();

}) (current, parent);
```

5. Click on Update.



Conclusion: A successful ServiceNow "family" (project or platform) implementation, even a costly one, is concluded by demonstrating tangible business value through strategic alignment, improved operational efficiency, and positive user satisfaction. Achieving these outcomes requires senior expertise, comprehensive process mapping, a strong focus on configuration over customization, and ongoing transparent communication to manage risks, ensuring the project delivers its intended benefits and a positive return on investment.