TITLE

CALCULATING FAMILY EXPENSES

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TEAM SIZE : 4

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Calculating Family Expenses Using Service Now

⊕ Setting Up ServiceNow Instance

⊕ Creation Of New Update Set

⊕ Creation Of Table

⊕ Creation Of Table

⊕ Creation Of Table(Daily Expenses)

⊕ Creation Of Relationship

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.
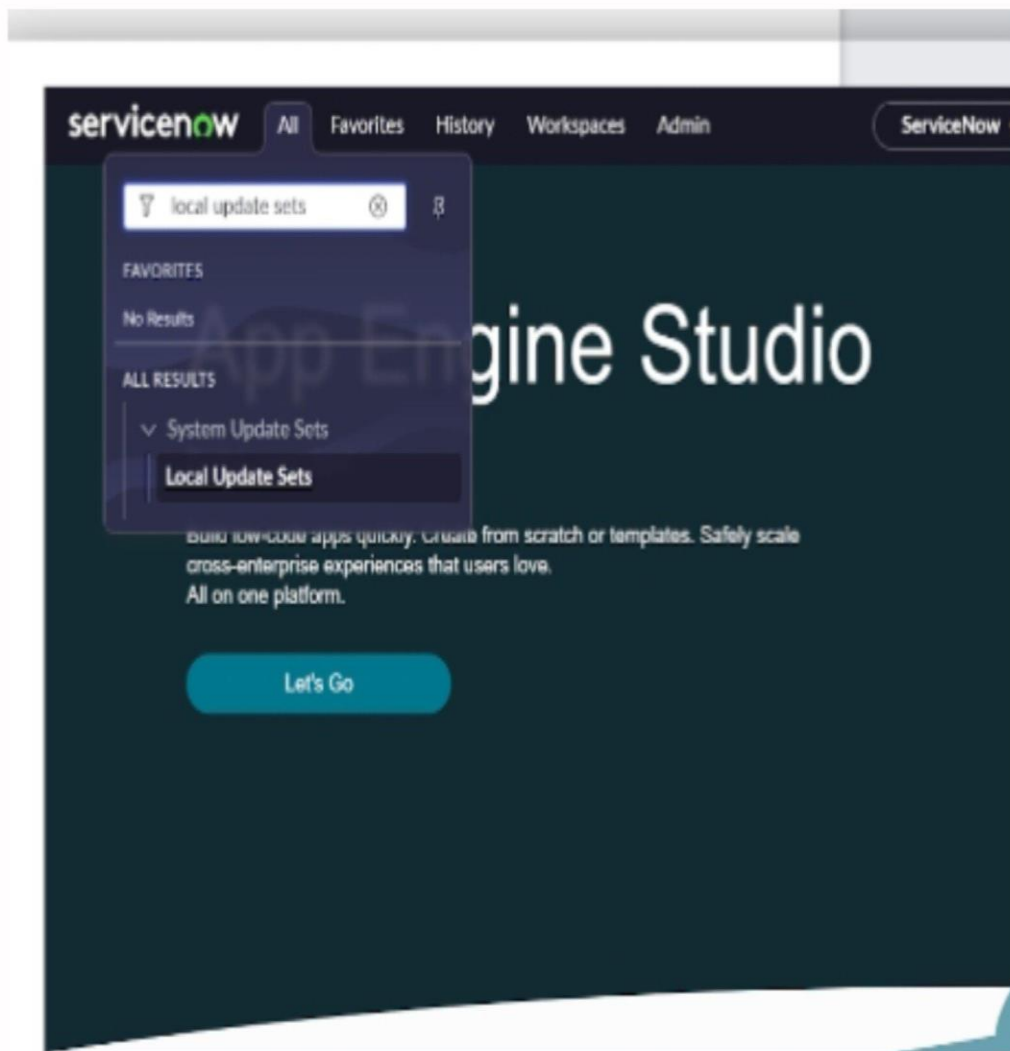
TASK INITATION :

MILE STONE 1 : SETTING UP

SERVICE NOW INSTANCE

ACTIVITY 1 :

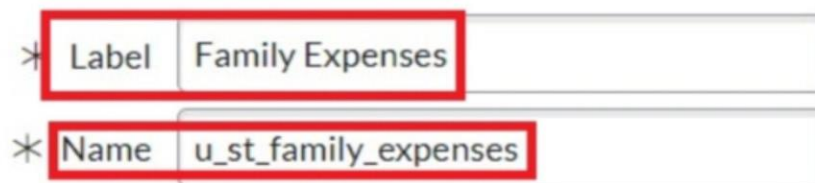# CREATION OF NEW UPDATE SET

STEPS :

GO TO ALL >> IN THE FILTER SEARCH FOR LOCAL UPDATE SET >

CLICK ON NEW

ENTER THE DETAILS AS:

NAME : FAMILY EXPENSES

ACTIVITY 2 : CREATION OF FAMILY EXPENSES TABLE

	Label	Family Expenses
*	Name	u_st_family_expenses

STEPS:

GO TO ALL > IN THE FILTER SEARCH FOR TABLES > CLICK ON NEW

ENTER THE DETAILS

LABEL : FAMILY EXPENSES
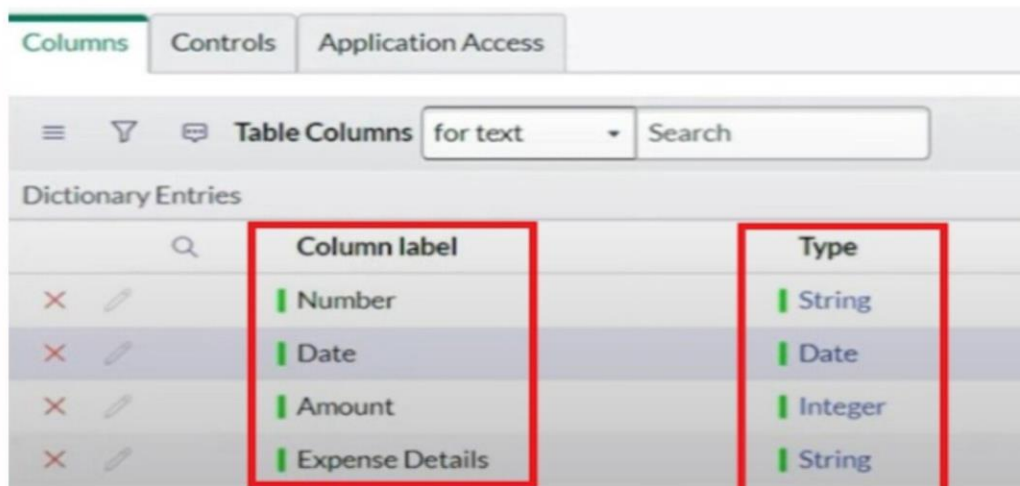
NAME : AUTO-POPULATED

NEW MENU NAME : FAMILY EXPENDITURE

GO TO THE HEADER AND RIGHT CLICK THERE>>

CLICK ON SAVE

ACTIVITY 3:

CREATION OF COLUMN 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

9: GO TO THE HEADER AND RIGHT CLICK THERE>>

CLICK ON SAVE

- -

ACTIVITY 4:MAKING NUMBER FIELD

AN AUTO -NUMBER

DOUBLE CLICK ON THE NUMBER FIELD/COLUMN

GO DOWN AND DOUBLE CLICK ON ADVANCED VIEW

IN DEFAULT VALUE:

USE DYNAMIC DEFAULT : CHECK THE BOX

DYNAMIC DEFAULT VALUE : GET NEXT PADDED NUMBER

CLICK ON UPDATE.

GO TO ALL >> IN THE FILTER SEARCH FOR NUMBER

 MAINTENANCE >> SELECT NUMBER MAINTENANCE

CLICK ON NEW.

ENTER THE BELOW DETAILS:

TABLE : FAMILY EXPENSES

PREFIX : MFE

CLICK ON SUBMIT

ACTIVITY 5:

CONFIGURE THE FORM

GO TO ALL >> IN THE FILTER SEARCH FOR FAMILY EXPENSES >>
OPEN FAMILY EXPENSES

CLICK ON NEW

GO TO THE HEADER AND RIGHT CLICK THERE>>

CLICK ON CONFIGURE >> SELECT FORM DESIGN

CUSTOMIZE OR DRAG DROP THE FORM AS PER YOUR REQUIREMENT

MAKE NUMBER READ-ONLY FIELD BY CLICKING ON THE
GEAR ICON AND CHECKING READ-ONLY

MAKE DATE, AMOUNT MANDATORY FIELD BY CLICKING ON THE
GEAR ICON AND CHECKING MANDATORY

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 TABLE

(DAILY EXPENSES) : IS SAME AS LIKE BEFORE

CREATED TABLE JUST FEW CHANGES WILL BE

MODIFY ON THAT PROCESS

ACTIVITY 6: CREATION OF RELATIONSHIP BETWEEN FAMILY EXPENSES AND DAILY EXPENSES TABLES

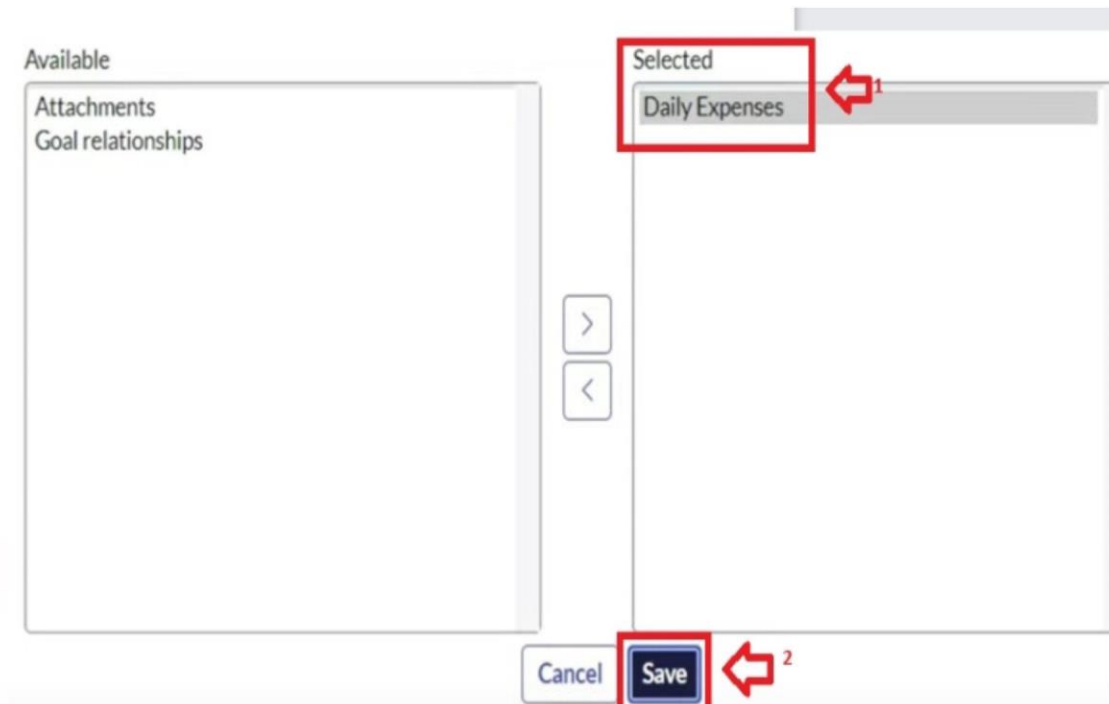GO TO ALL >> IN THE FILTER SEARCH FOR RELATIONSHIPS >> OPEN RELATIONSHIPS

CLICK ON NEW

ENTER THE DETAILS:

NAME : DAILY EXPENSES

APPLIES TO TABLE : SELECT FAMILY EXPENSES

DAILY EXPENSES : SELECT DAILY EXPENSES

CLICK SAVE

ACTIVITY 7: CONFIGURING RELATED LIST ON FAMILY EXPENSES

GO TO ALL >> IN THE FILTER SEARCH FOR

FAMILY EXPENSES >> OPEN FAMILY EXPENSES

CLICK ON NEW

GO TO THE HEADER AND RIGHT CLICK THERE>>

CLICK ON CONFIGURE >> SELECT RELATED LISTS

ADD DAILY EXPENSES TO THE SELECTED AREA

CLICK ON SAVE

ACTIVITY 8:

CREATION OF BUSINESS RULES

GO TO ALL >> IN THE FILTER SEARCH FOR BUSINESS RULES

UNDER SYSTEM DEFINITION SELECT

BUSINESS RULES THEN CLICK ON NEW

ENTER THE DETAILS:

NAME : FAMILY EXPENSES BR

TABLE : SELECT DAILY EXPENSES

CHECK ADVANCED

IN WHEN TO RUN CHECK INSERT AND UPDATE

Script

```javascript
1   (function executeRule(current, previous /*null when async*/) {
2
3       var FamilyExpenses = new GlideRecord('u_family_expenses');
4       FamilyExpenses.addQuery('u_date',current.u_date);
5       FamilyExpenses.query();
6       if(FamilyExpenses.next())
7       {
8           FamilyExpenses.u_amount += current.u_expense;
9           FamilyExpenses.u_expense_details += ">"+current.u_comments+":"+"Rs."+current.u_expense+"/-";
10          FamilyExpenses.update();
11      }
12      else
13      {
14          var NewFamilyExpenses = new GlideRecord('u_family_expenses');
15          NewFamilyExpenses.u_date = current.u_date;
16          NewFamilyExpenses.u_amount = current.u_expense;
17          NewFamilyExpenses.u_expense_details += ">"+current.u_comments+":"+"Rs."+current.u_expense+"/-";
18          NewFamilyExpenses.insert();
19      }
20
21  })(current, previous);
```

GO TO THE HEADER AND RIGHT

CLICK THERE>> CLICK ON SAVE

ACTIVITY 9:

CONFIGURE THE RELATIONSHIP

GO TO ALL >> IN THE FILTER SEARCH FOR RELATIONSHIPS >>

OPEN RELATIONSHIPS

IN THAT, OPEN DAILY EXPENSES RELATIONSHIP

FOR APPLIES TO TABLE : SELECT FAMILY EXPENSES

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);
```

CLICK ON UPDATE

CONCLUSION

DEMO VIDEO DRIVE LINK : https://drive.google.com/file/d/1hOcQQ-rb56wHtMoXlLZL_7qDAygKDj-z/view?usp=drivesdk