CALCULATING FAMILY EXPENSES USING SERVICE NOW

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**TeamMembers:**4

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**ProblemStatement:** 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

**Objective:** The objective of this project is to design and implement a dynamic expense management

system on the ServiceNow platform that empowers families to monitor,categorize,and control their

financial activities with precision and ease

**Skills:** ServiceNow App Development ,Report and dashboard creation

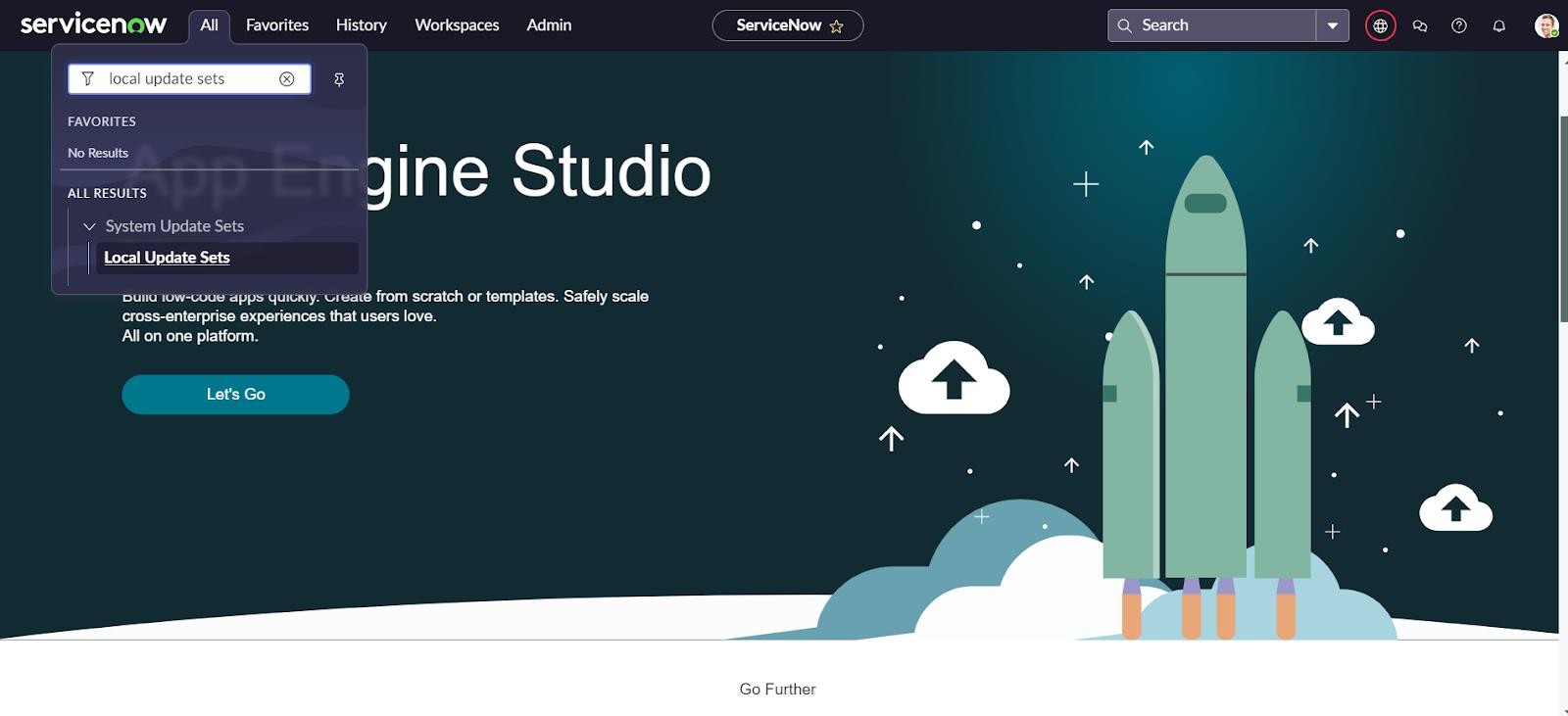
**TASK INITIATION**

**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.

**Creation of New Update Set**

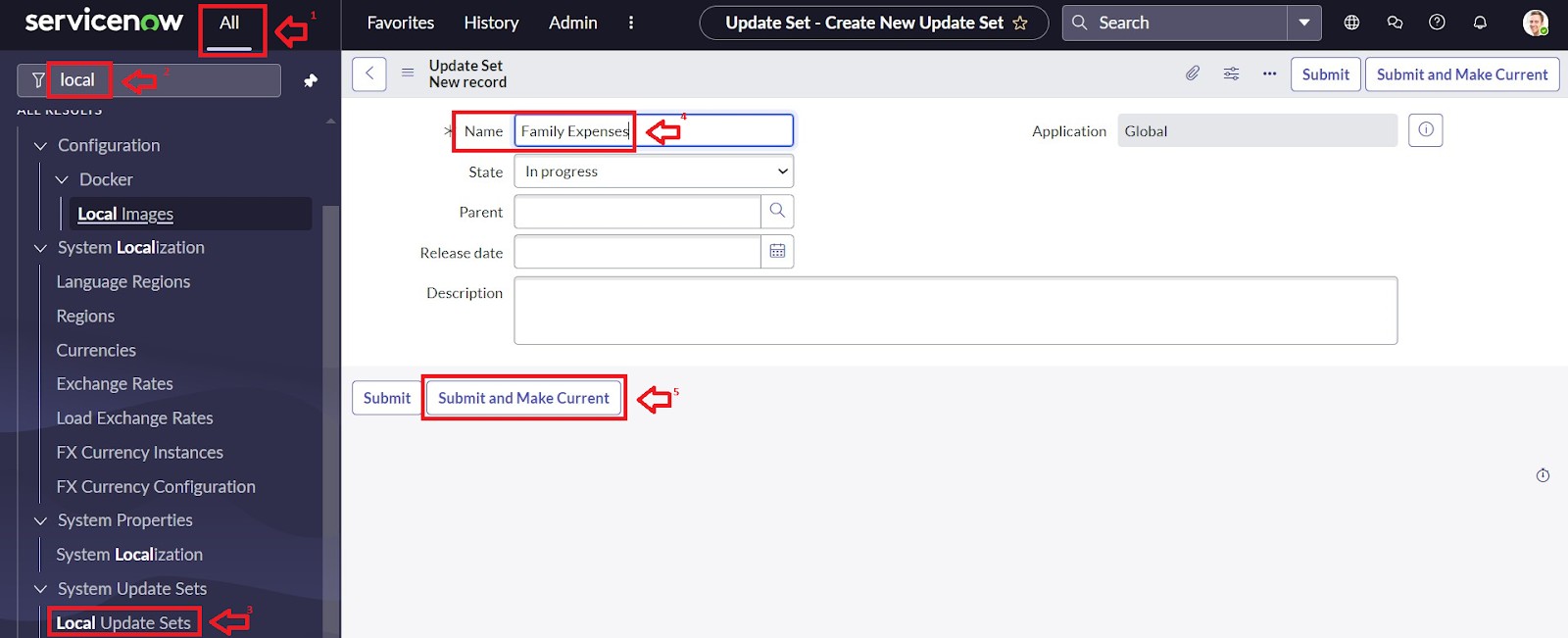
1. Go to All >> In the filter search for Local Update set > click on New.



1. Enter the Details as:

Name : Family Expenses

1. Then click on Submit and Make current.



# Creation of Table

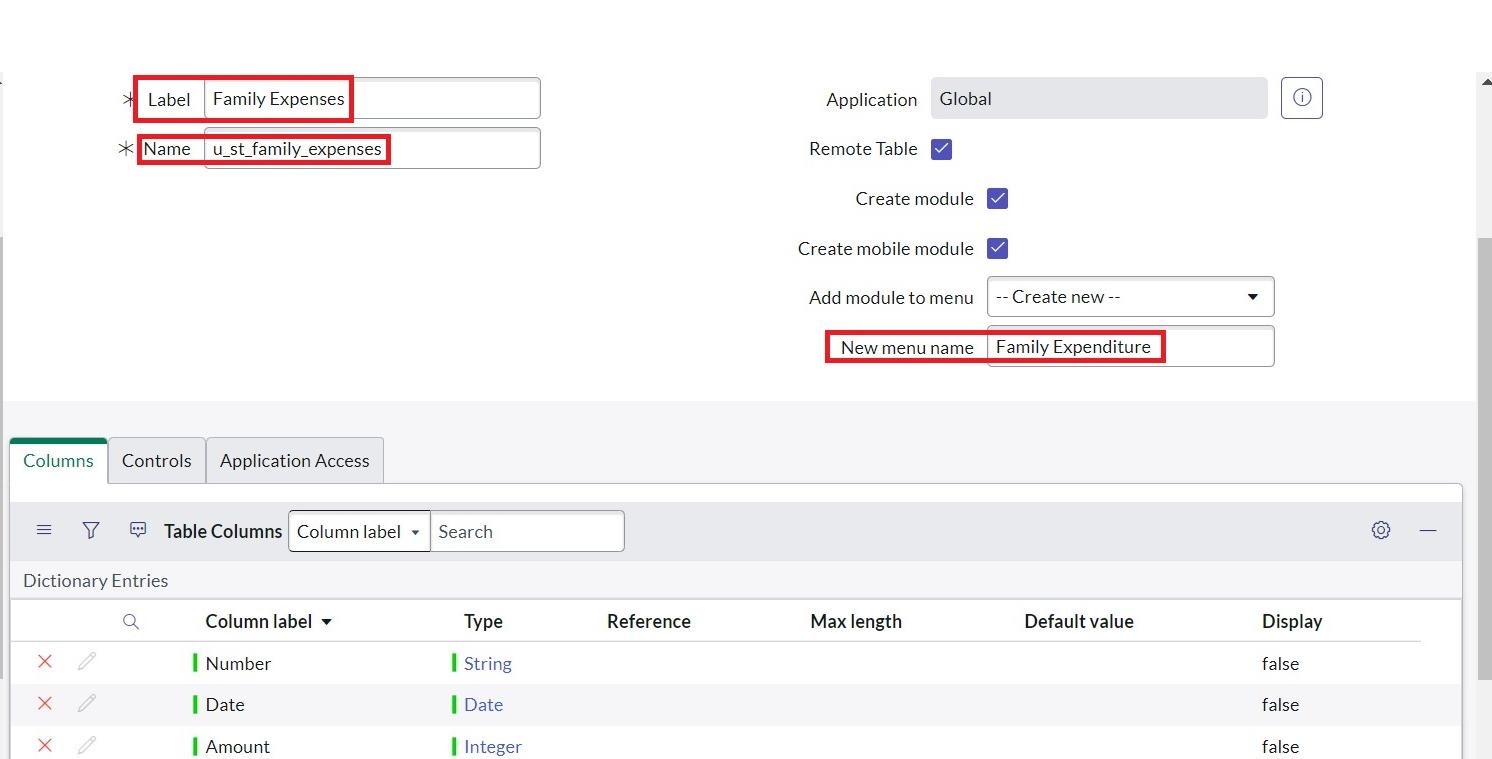
**Creation of Family Expenses Table**

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



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

Creation of Columns(Fields)

1. Near Columns Double click near insert a new row.
2. Give the details as:

Column label : Number

Type : String

1. Double click on insert a new row again
2. Give the details as:

Column label : Date

Type : Date

1. Double click on insert a new row again
2. Give the details as:

Column label : Amount

Type : Integer

1. Double click on insert a new row again
2. Give the details as:

Column label : Expense Details

Type : String

Max length : 800



1. 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.



5.Go to All >> In the filter search for

Number Maintenance >> select Number

Maintenance

* 1. Click on New.
  2. Enter the below Details: Table : Family Expenses

Prefix : MFE



9.Click on Submit.

# Configure the Form

1.Go to All >> In the filter search for Family Expenses >> Open

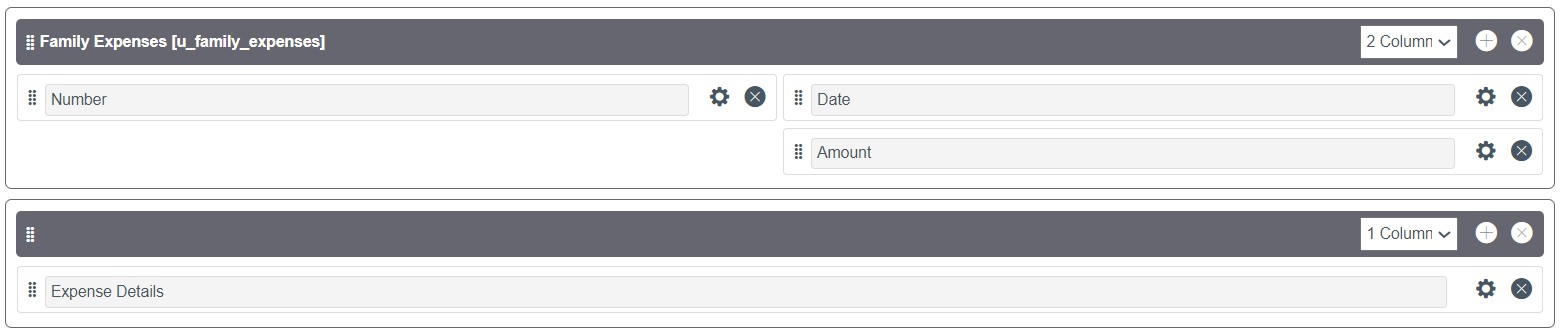
Family Expenses

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.



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**

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



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

# 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.

## 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.

## Configure the Form

1.Go to All >> In the filter search for Daily Expenses >> Open Daily

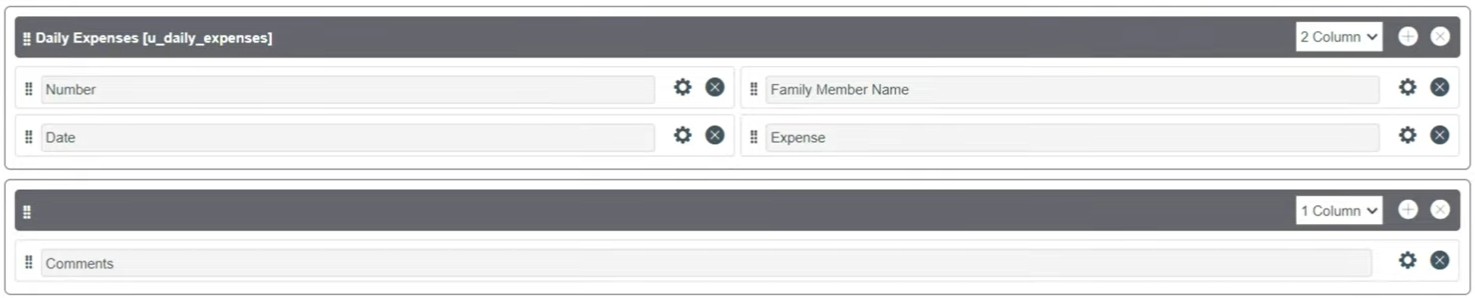
Expenses

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.

## Creation of Relationship

**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.

# Configuring Related List on Family Expenses

## 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

## Creation of Business Rules

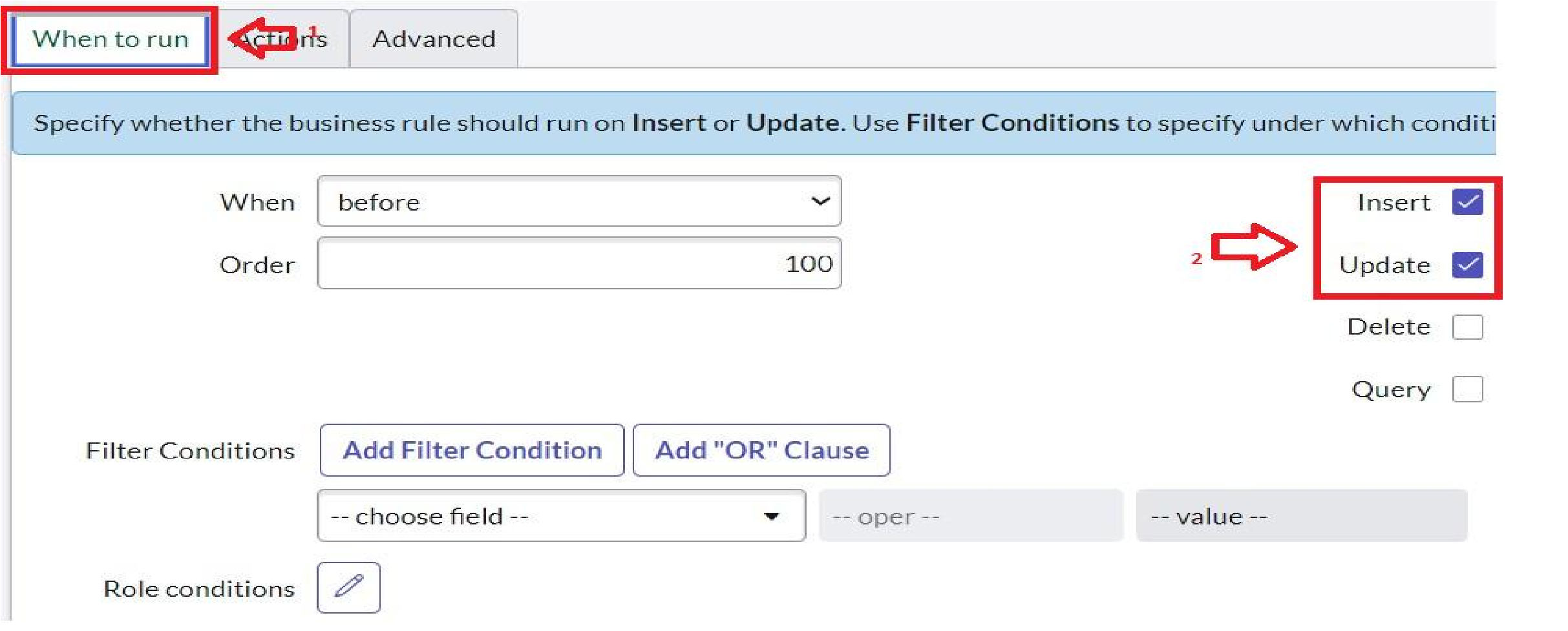
1.Go to All >> In the filter search for Business Rules.

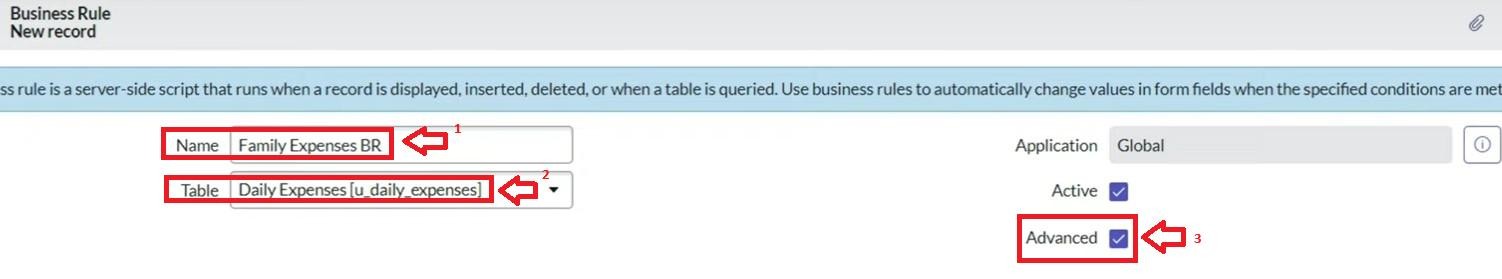
2.Under System Definition Select Business Rules then click on New.

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 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\_expen se+"/-";

FamilyExpenses.update();

}

else

{

var NewFamilyExpenses = new GlideRecord('u\_family\_expenses');

NewFamilyExpenses.u\_date = current.u\_date;

NewFamilyExpenses.u\_amount = current.u\_expense;

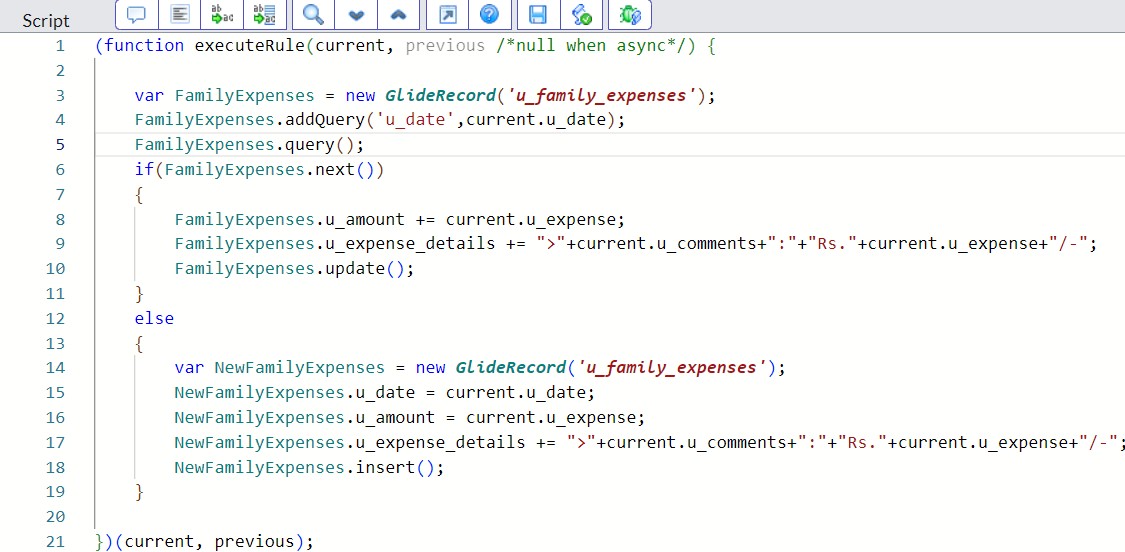
NewFamilyExpenses.u\_expense\_details +=

">"+current.u\_comments+":"+"Rs."+current.u\_expen se+"/-";

NewFamilyExpenses.insert();

}

})(current, previous);

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

# 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.

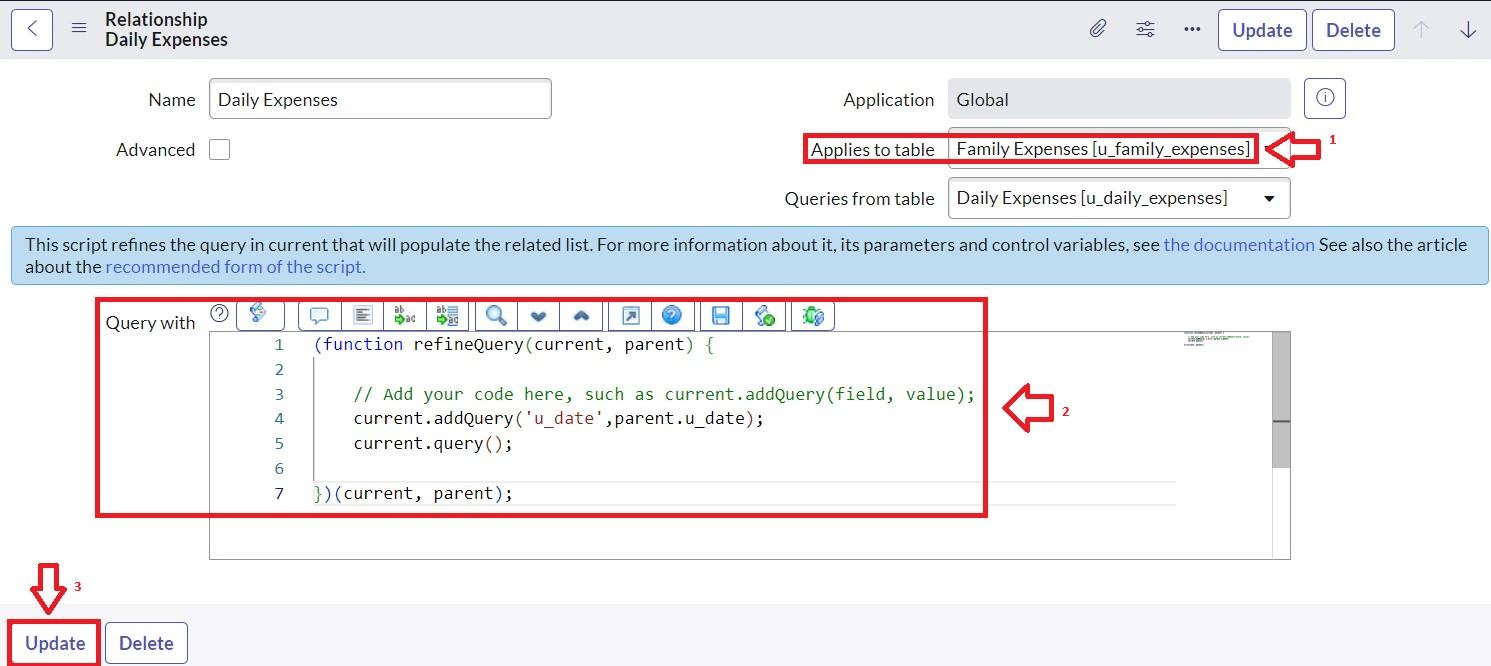
4.In Query with : write the below Query.

(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.



**Conclusion:**

This project is more than just an expense tracker—it's a step toward transforming how families engage with their financial lives. By leveraging ServiceNow’s powerful capabilities, we’re building a smart, scalable, and intuitive system that adapts to the unique needs of every household. From real-time insights to personalized budgeting tools, the platform empowers users to take control of their finances with confidence and clarity. Ultimately, this solution fosters financial transparency, strengthens family collaboration, and promotes long-term financial well-being—turning everyday expense management into a strategic advantage for the modern family.