**Calculating Family Expenses using Service Now**

Team Id: NM2025TMID16054

Team Size: 3

Team Leader: KAMESH S

Team Member 1: HARISH R

Team Member 2: KUMARESH S

Problem Statement: To develop a centralized and automated solution using ServiceNow for efficiently tracking, categorizing, and managing family expenses.

Objective: 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.

Skills: IOT Open Hardware platforms,Data Structures

**TASK INITIATION**

**Milestone 1: Setting up ServiceNow Instance**

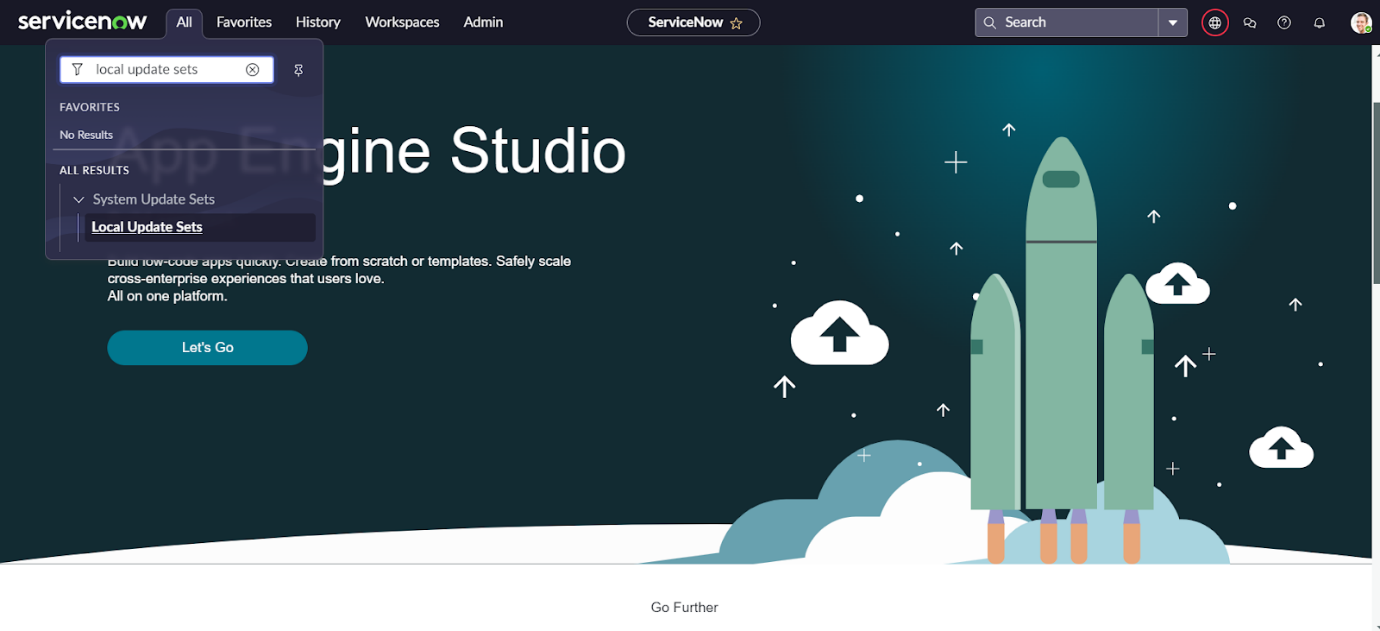
**Activity 1: Setting up ServiceNow Instance**

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**

**Activity 1: Creation of New Update Set**

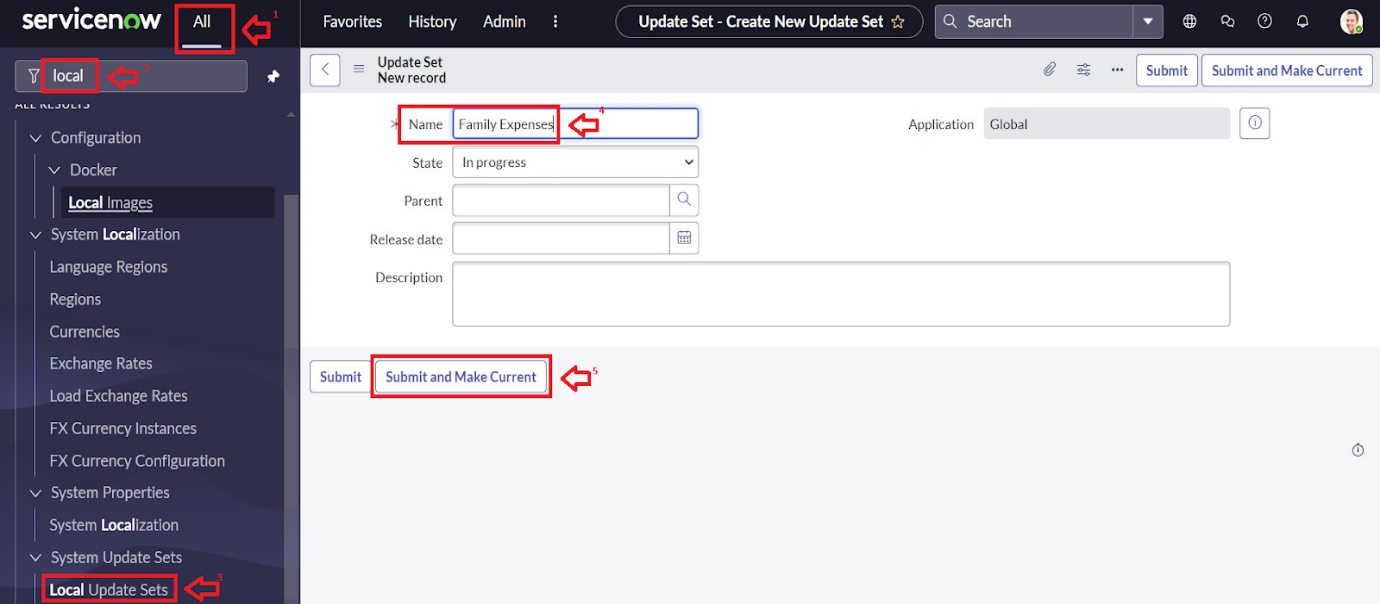
1. **Go to All >> In the filter search for Local Update set > click on New.**

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1. **Enter the Details as:**

**Name : Family Expenses**

1. **Then click on Submit and Make current.**

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**Milestone 3: Creation of Table**

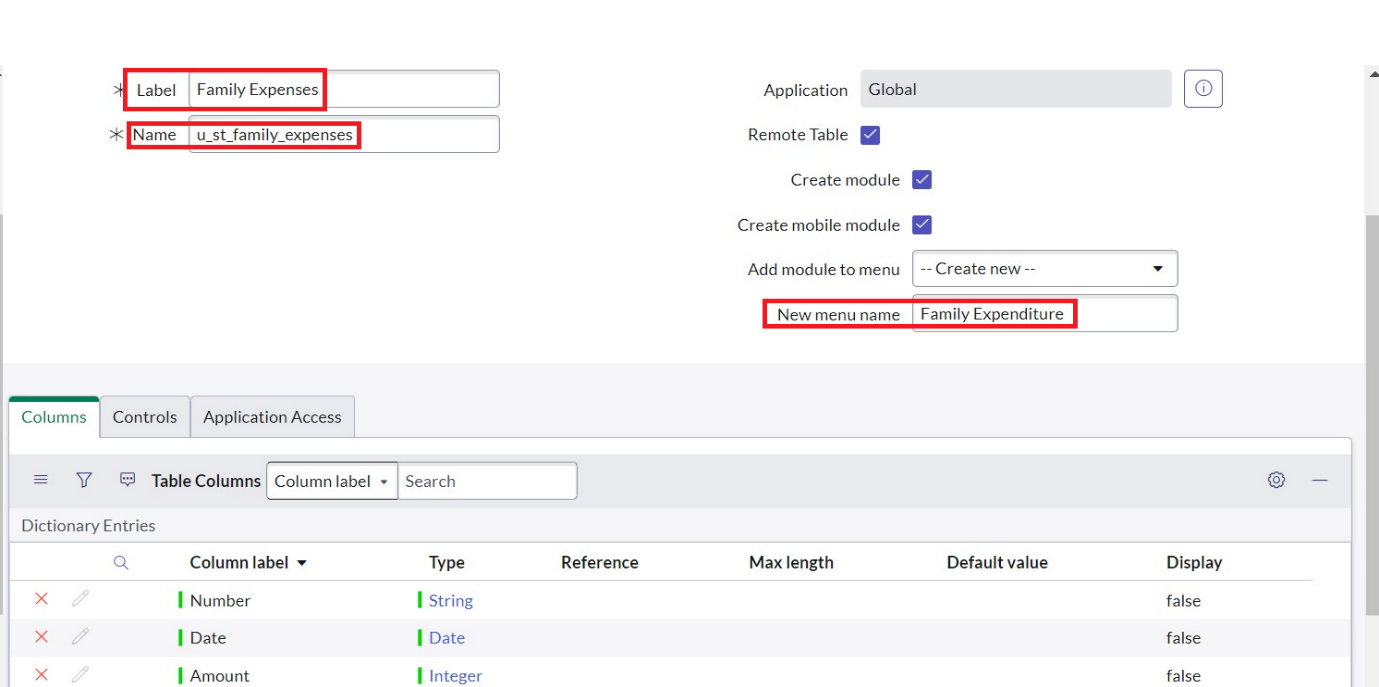
**Activity 1: Creation of Family Expenses Table**

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.**

**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**

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**

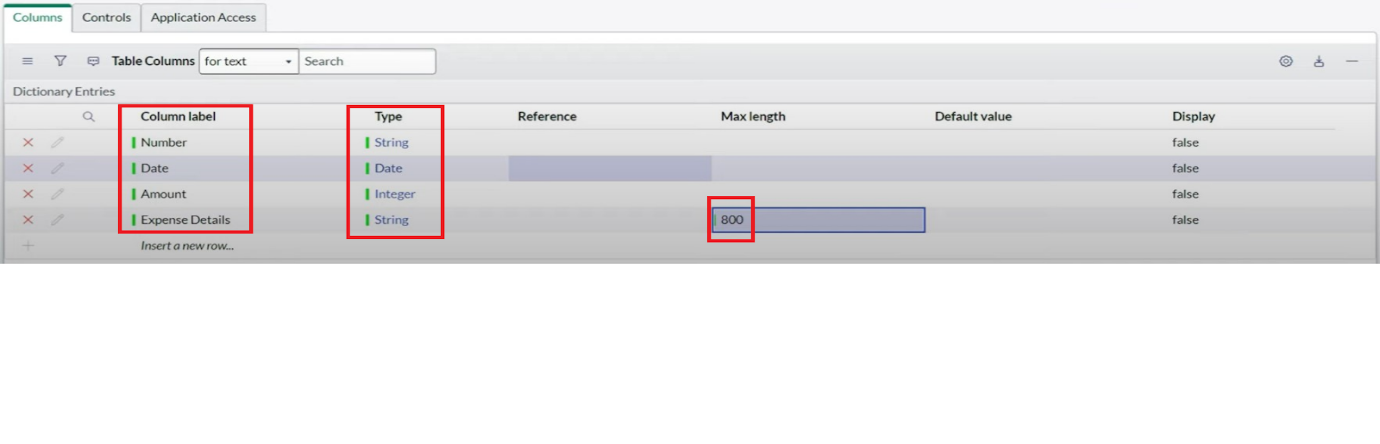
**Type : Integer**

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.**

**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**

1. **Click on Update.**
2. ****
3. **Go to All >> In the filter search for Number Maintenance >> select Number Maintenance**
4. **Click on New.**
5. **Enter the below Details:**

**Table : Family Expenses**

**Prefix : MFE**

****

1. **Click on Submit.**

**Activity 4: 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.**

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1. **Make Number Read-Only Field by clicking on the gear icon and checking Read-Only**
2. **Make Date, Amount Mandatory Field by clicking on the gear icon and checking Mandatory**
3. **Click on Save.**

**Milestone 4: Creation of Table(Daily Expenses)**

**Activity 1: 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**

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1. **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**

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 : Expense**

**Type : Integer**

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

**Column label : Family Member Name**

**Type : Reference**

**Max length : 800**

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

**Column label : Comments**

**Type : String**

**Max length : 800**

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

**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:**

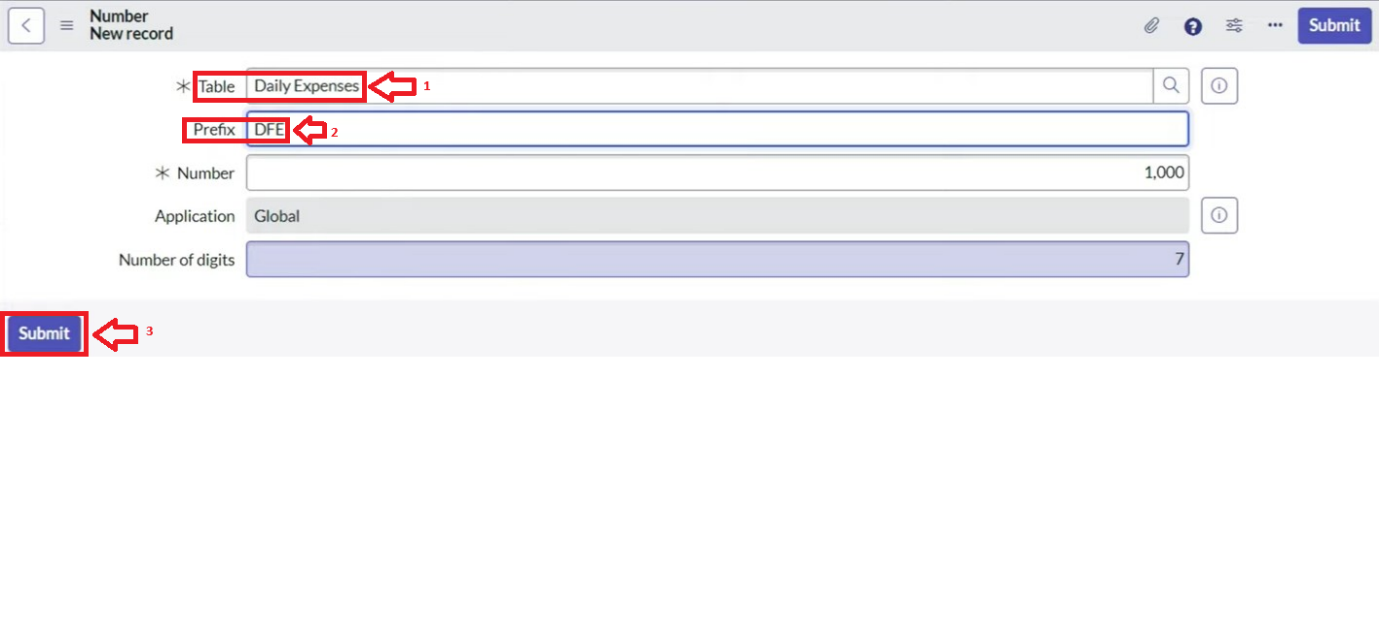
**Use dynamic default : check the box**

**Dynamic default value : Get Next Padded Number**

1. **Click on Update.**
2. ****
3. **Go to All >> In the filter search for Number Maintenance >> select Number Maintenance**
4. **Click on New.**
5. **Enter the below Details:**

**Table : Family Expenses**

**Prefix : MFE**

****

1. **Click on Submit.**

**Activity 4: 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.**

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1. **Make Number Read-Only Field by clicking on the gear icon and checking Read-Only**
2. **Make Date, Family Member Name Mandatory Field by clicking on the gear icon and checking Mandatory**
3. **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**

1. **Click Save.**

**Milestone 5: Configuring Related List on Family Expenses**

**Activity 1: 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**

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**Milestone 7: Creation of Business Rules**

**Activity 1: 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**

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1. **In when to run Check Insert and Update**

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1. **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\_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);**

****

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

**Milestone 8: Configure the Relationship**

**Activity 1: 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) {**

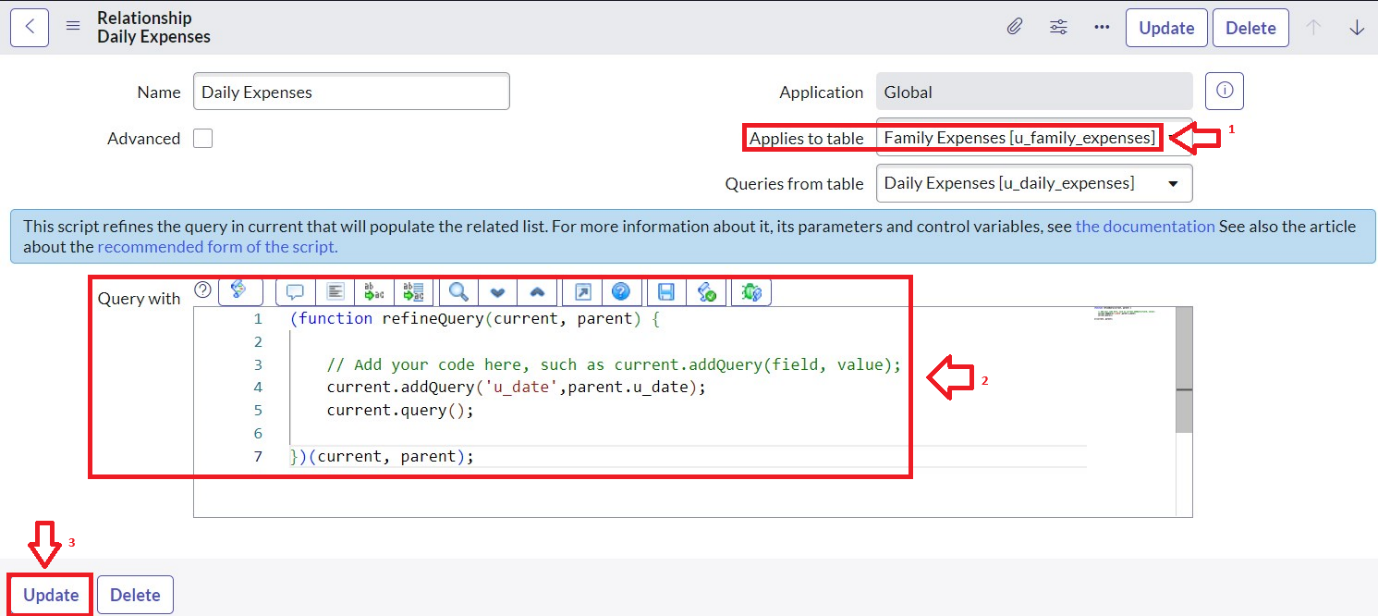
**// Add your code here, such as current.addQuery(field, value);**

**current.addQuery('u\_date',parent.u\_date);**

**current.query();**

**})(current, parent);**

1. **Click on Update.**

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**Conclusion**

**Calculating Family Expenses Using ServiceNow**

**In conclusion, leveraging ServiceNow to calculate and manage family expenses offers a structured, automated, and user-friendly solution for financial tracking. By utilizing ServiceNow’s powerful features—such as workflows, forms, reporting, and dashboards—families can gain real-time visibility into their spending patterns, set budgets, and receive alerts when expenses exceed set thresholds.**

**This approach not only reduces manual effort but also improves financial awareness and planning. Integrating family finance tracking into a centralized platform like ServiceNow ensures data accuracy, transparency, and consistency, ultimately supporting better financial decisions and long-term budgeting goals.**

**As a highly customizable tool, ServiceNow can be tailored to suit different family needs, making it a valuable and innovative option for modern household financial management.**