

Calculating Family Expenses in ServiceNow

Step 1: Create a New Table for Family Expenses

- 1. Go to: System Definition > Tables.
- 2. Click: New
- 3. Enter Details:
 - Label: Family Expenses
 - Name: u_family_expenses
 - Auto Number: Yes (e.g., EXP0001)
 - Extends: Task (or leave empty if standalone)
- 4. Click Submit.

Step 2: Add Fields to the Table

Go to the u_family_expenses table and add the following fields:

Field Label	Field Name	Type
Item Name	u_item_name	String
Category	u_category	Choice
Amount	u_amount	Currency
Date	u_date	Date
Notes	u_notes	String

Category Choices:

- Food
- Rent
- Utilities
- Education
- Medical
- Others

Step 3: Create a Form Layout

1. Go to: System UI > Forms
2. Design the layout to show:
 - Item Name
 - Category
 - Amount
 - Date
 - Notes

Step 4: Create a Total Calculation Script

Let's assume we want to calculate the monthly total for a given user or family.

Create a Script Include (Backend Logic)

1. Go to: System Definition > Script Includes
2. Click New
3. Fill in:
 - Name: CalculateMonthlyExpenses
 - Client Callable: True
 - Accessible from: All application scopes
 - Active: True

Add this code:

```
var CalculateMonthlyExpenses = Class.create();
CalculateMonthlyExpenses.prototype = {
  initialize: function() {
  },

  getMonthlyTotal: function(month, year) {
    var total = 0;
    var gr = new GlideRecord('u_family_expenses');
    gr.addQuery('MONTH(u_date)', month);
    gr.addQuery('YEAR(u_date)', year);
    gr.query();
    while (gr.next()) {
      total += parseFloat(gr.u_amount);
    }
  }
}
```

```
        return total;
    },

    type: 'CalculateMonthlyExpenses'
};
```

Step 5: Client Script to Show Total on Form

1. Go to: Client Scripts for the table.
2. Click New and use:

```
// Client Script
function onLoad() {
    var month = new Date().getMonth() + 1; // JavaScript months are 0-based
    var year = new Date().getFullYear();

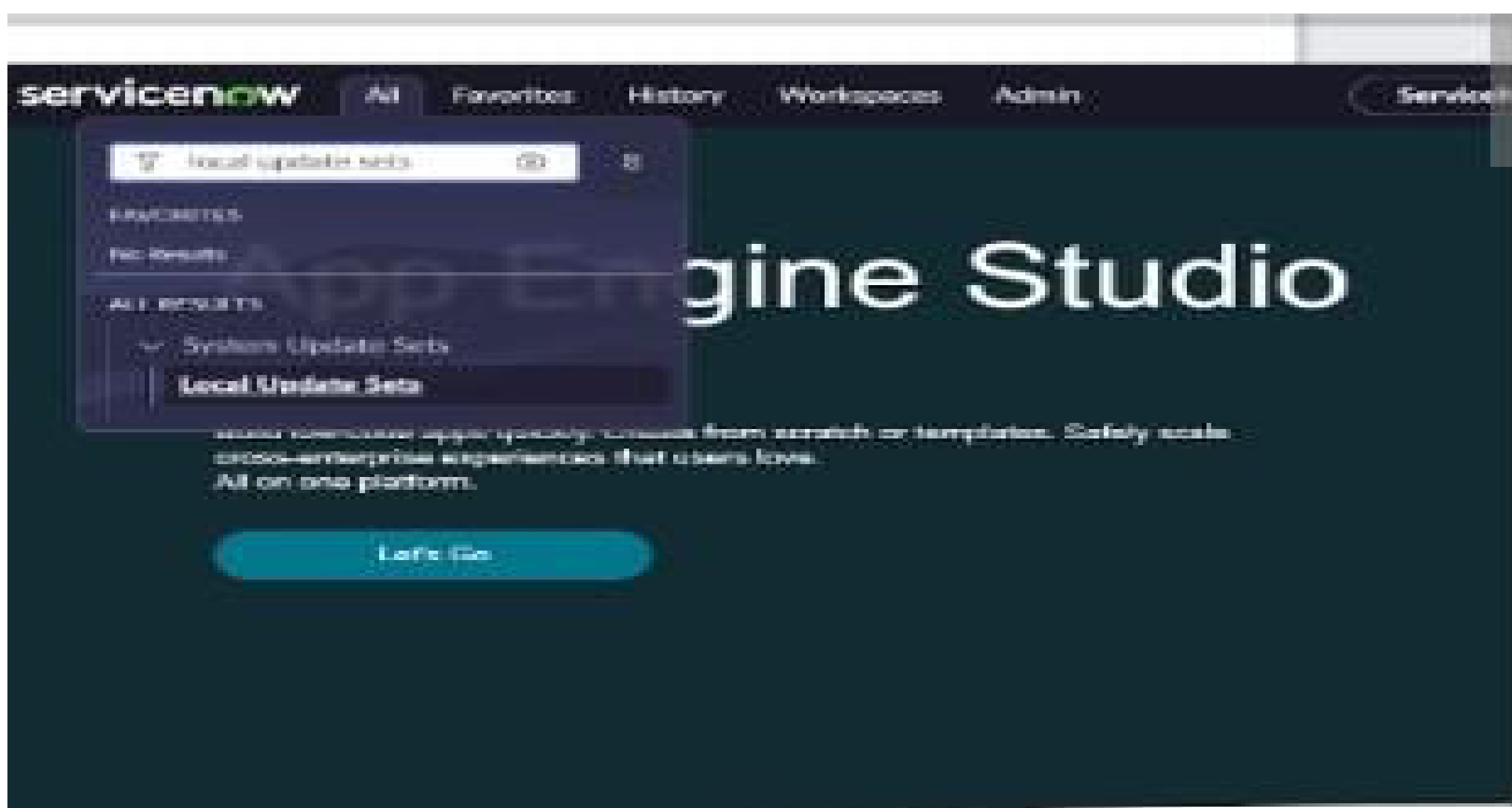
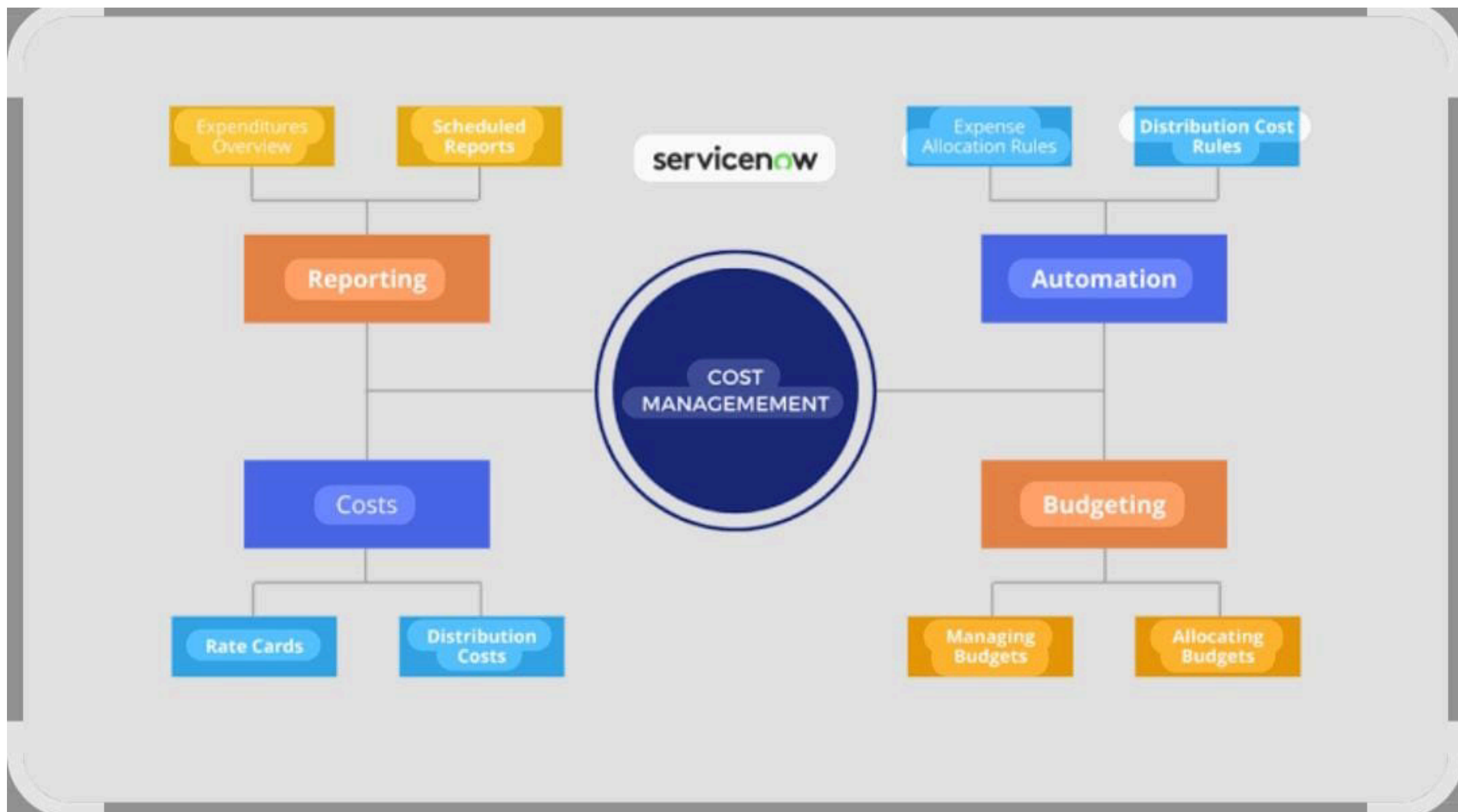
    var ga = new GlideAjax('CalculateMonthlyExpenses');
    ga.addParam('sysparm_name', 'getMonthlyTotal');
    ga.addParam('month', month);
    ga.addParam('year', year);
    ga.getXMLAnswer(function(response) {
        var total = response;
        g_form.addInfoMessage('Total expenses for this month: ₹' + total);
    });
}
```

Step 6: Create a Report

1. Go to: Reports > Create New
2. Name: Monthly Expense Report
3. Table: u_family_expenses
4. Type: Bar or Pie Chart
5. Group by: Category
6. Aggregation: Sum of Amount

Optional Enhancements

- Use a scheduled job to send email alerts if expenses exceed a certain threshold.
- Add user-based filtering if multiple family members use the same system.



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AllFavorites

ServiceNow

Business RuleFamily Expenses BR

NameFamily Expenses BR

TableDaily Expenses [u_daily_expens

ApplicationGlobal

Active☒

Advanced☒

Web Services☐

When to run

Actions

Advanced

Web Services

Whenbefore

Order100

Filter Conditions

Role conditions

Insert☒

Update☒

Delete☐

Query☐

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Business Rule - Ne...

Business RuleNew record

A business rule is a server-side script that runs when a record is displayed, inserted, deleted, or when a table is queried. Use business rules to automa change values in form fields when the specified conditions are met. [More Info](#)

Name

Table-- None --

ApplicationGlobal

Active☒

Advanced☐

When to run

Actions

Specify whether the business rule should run on **Insert** or **Update**. Use **Filter Conditions** to specify under which conditions the business rule should

Filter Conditions

Role conditions

Insert☐

Update☐

Submit

Guided Project

Project Workspace

Project Title : Calculating Family Expenses using Service Now

NM Id : 47FA0F5E19D21DFBF154CD84EC849551


Industry Mentor(s) Name : No Mentor has been assigned

Project Progress



GENERAL INSTRUCTION

SHOW

 Demo Link

0

 View Mentor Comments

0

 View Industry Mentor Comments

PROJECT DETAILS

TASK & PROGRESS

MENTOR REVIEW

Comments for team ☐ My task comments only

SNO.	STUDENT NAME	ACTIVITY NAME	COMMENT	REPLY FROM MENTOR	COMMENTED DATE
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