

TITLE



CALCULATING
FAMILY EXPENSES

TEAM ID : NM2025TMID17996

TEAM SIZE : 4

TEAM LEADER : KANA SHARMA.K

TEAM MEMBER 1 : DINESH KUMAR.M

TEAM MEMBER 2 : PARTHIBAN.V

TEAM MEMBER 3 : BUVANESHWARAN.M

The screenshot displays the Smart Internz Project Workspace. On the left, a navigation menu includes 'Home', 'Projects' (selected), and 'Support'. The main workspace is divided into two tabs: 'Guided Project' and 'Project Workspace'. Under the 'Guided Project' tab, a vertical list of tasks is shown, each with a plus icon and a colored box: a green box for 'Calculating Family Expenses Using Service Now' and five orange boxes for 'Setting Up ServiceNow Instance', 'Creation Of New Update Set', 'Creation Of Table', 'Creation Of Table', and 'Creation Of Table(Daily Expenses)'. The 'Project Workspace' tab is active, showing a large card for the project. The card has a title 'Calculating Family Expenses Using Service Now' and a detailed description: '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.'

Smart Internz

Home Projects Support

Guided Project Project Workspace

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.

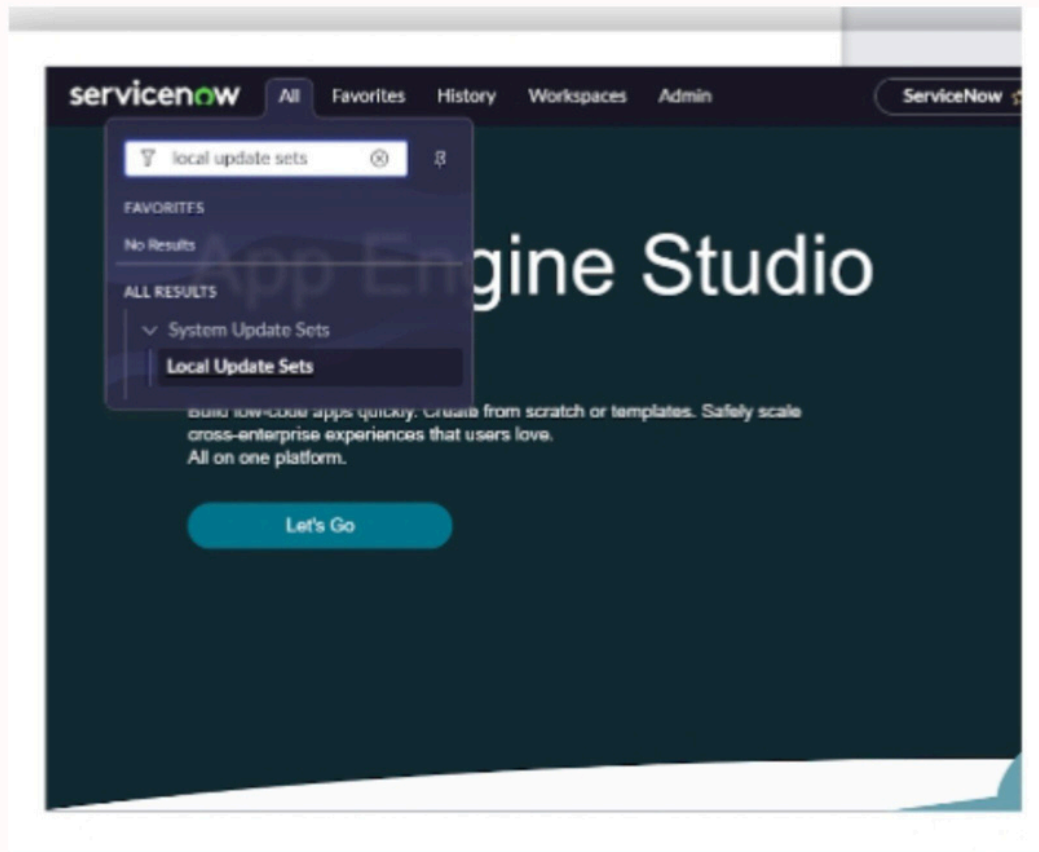
TASK INITATION :

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 >

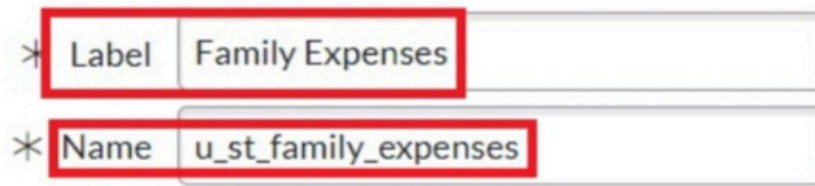
CLICK ON NEW

ENTER THE DETAILS AS:

NAME : FAMILY EXPENSES

THEN CLICK ON SUBMIT AND MAKE CURRENT

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

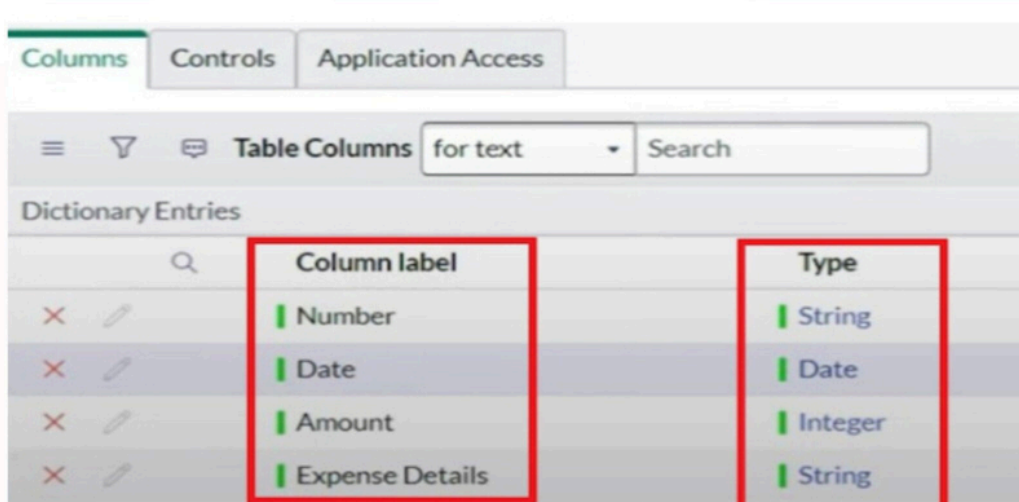
NEW MENU NAME : FAMILY EXPENDITURE

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

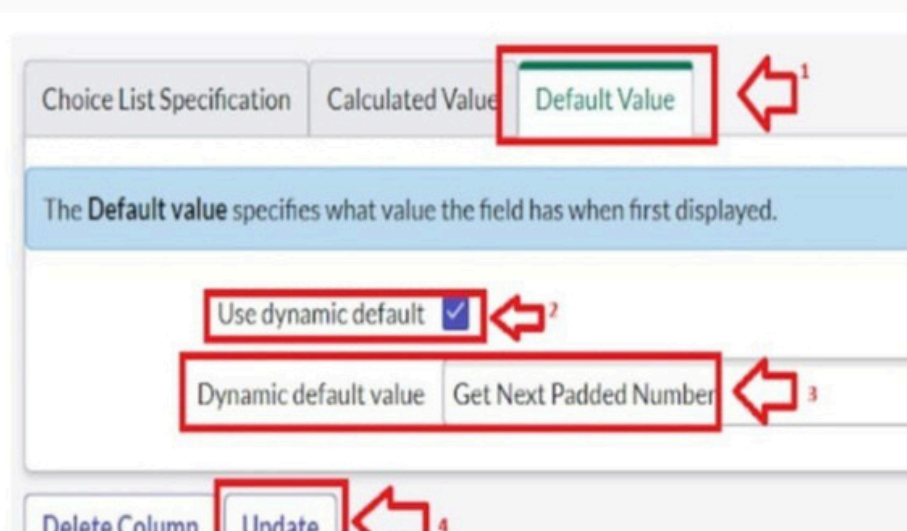
MAX LENGTH : 800

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) : 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

Script that runs when a record is displayed, inserted, deleted, or when a table is queried. Use business rules to automatically change values in form fields when a record is displayed, inserted, deleted, or when a table is queried.

Name	Family Expenses BR	← ¹	Application	Global
Table	Daily Expenses [u.daily_expenses]	← ²	Active	<input checked="" type="checkbox"/>
			Advanced	<input checked="" type="checkbox"/> ← ³

IN WHEN TO RUN CHECK INSERT AND UPDATE

When to run ←¹ Advanced

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

When	before	↓	Insert	<input checked="" type="checkbox"/>
Order		100	Update	<input checked="" type="checkbox"/>
			Delete	<input type="checkbox"/>
			Query	<input type="checkbox"/>

Filter Conditions [Add Filter Condition](#) [Add "OR" Clause](#)

-- choose field -- -- oper -- -- value --

Role conditions [\[edit\]](#)


```
Script
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

< = Relationship Daily Expenses

Application Global

Update Delete

Name Daily Expenses

Advanced ☐

Applies to table Family Expenses [u_family_expenses]

Queries from table Daily Expenses [u_daily_expenses]

This script refines the query in current that will populate the related list. For more information about it, its parameters and control variables, see the documentation See also the article about the recommended form of the script.

Query with

```
1 (function refineQuery(current, parent) {
2
3     // Add your code here, such as current.addQuery(field, value);
4     current.addQuery('u_date',parent.u_date);
5     current.query();
6
7 }}(current, parent);
```

Update Delete

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