

Smart Internz

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
- Configuring Related List

Configure The Relationship

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Navigation: Home, Projects, Support

Guided Project: Project Workspace

Calculating Family Expenses Using Service Now

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- Setting Up ServiceNow Instance**
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### 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.

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Home Projects Support


Guided Project Project Workspace

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### Creation Of New Update Set

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



2. Enter the Details as:  
Name : Family Expenses

3. Then click on Submit and Make current.



servicenow All Favorites History Workspace Admin Update Set: Create New Update Set Search

Local Update Set

Name Family Expenses

Scale Reprogram

Application Configured

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Home Projects Support

Guided Project Project Workspace

Calculating Family Expenses Using ServiceNow

Setting Up ServiceNow Instance

Setting Up ServiceNow Instance

Creation Of New Update Set

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Creation Of Table

Creation Of Table

Creation Of Table(Daily Expenses)

Creation Of Relationship

2. Enter the Details as:  
Name : Family Expenses

3. Then click on Submit and Make current.

servicenow

Local

max Number of

Configuration

✓ Docker

Local Instance

✓ System Localization

Language Regions

Regions

Currencies

Exchange Rates

Local Exchange Rates

FX Currency Instances

FX Currency Configuration

✓ System Properties

System Localization

✓ System Update Sets

Local Update Sets

Update Set New Record

Name Family Expenses

Code

Parent

Release date

Description

Submit

Submit and Make Current

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Support

- Creation Of New Update Set
  - Creation Of New Update Set
- Creation Of Table
  - Creation Of New Update Set
- + Creation Of Table
  - Creation Of Table(Daily Expenses)
  - Creation Of Relationship
  - Configuring Related List On Family Expenses
  - Creation Of Business Rules
  - Configure The Relationship

## Creation Of New Update Set

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



2. Enter the Details as:  
Name : Family Expenses

3. Then click on Submit and Make current.

servicenow All Favorites History Admin Update Set: Create New Update Set Search

Update Set

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Support

- Creation Of New Update Set
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- + Creation Of Table
  - Creation Of Table(Daily Expenses)
- + Creation Of Relationship
  - Configuring Related List On Family Expenses
- + Creation Of Business Rules
  - Creation Of Business Rules
- + Configure The Relationship
  - Configure The Relationship

2. Enter the Details as:  
Name : Family Expenses  
3. Then click on Submit and Make current.

servicenow

Local

max Number of

Configuration

- ✓ Docker
- Local Locales
- ✓ System Localization
  - Language Regions
  - Regions
  - Currencies
  - Exchange Rates
  - Local Exchange Rates
  - FX Currency Indicators
  - FX Currency Configuration
- ✓ System Properties
- System Localization
- ✓ System Update Sets
  - Local Update Sets

Update Set New record

Name: Family Expenses

Code: Rupee/INR

Parent:

Release date:

Description:

Submit Submit and Make Current

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Support

- Creation Of New Update Set
  - Creation Of New Update Set
- Creation Of Table
  - Creation Of New Update Set
- Creation Of Table
  - Creation Of Family Expenses Table**
  - Creation Of Columns(Fields)
  - Making Number Field An Auto-Number
  - Configure The Form
- Creation Of Table(Daily Expenses)

### 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



The screenshot shows the configuration interface for the 'Family Expenses Table'. It includes a table structure with columns for 'Label' and 'Name'. The 'Label' column contains 'Family Expenses' and the 'Name' column contains 'Auto-Populated'. To the right of the table, there are settings for 'Application' (Global), 'Business Table' (checked), 'Create module' (checked), and 'Create mobile module' (checked). Below the table, there is a 'Save' button.

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

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Support

Creation Of New Update Set

Creation Of New Update Set

Creation Of Table

Creation Of New Update Set

Creation Of Table

Creation Of Family Expenses Table


Creation Of Columns(Fields)

Making Number Field An Auto-Number

Configure The Form

Creation Of Table(Daily Expenses)

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.

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Creation Of New Update Set

Creation Of New Update Set

Creation Of Table

Creation Of New Update Set

Creation Of Table

Creation Of Family Expenses Table

Creation Of Columns(Helds)


**Making Number Field An Auto-Number**

Configure The Form

Creation Of Table(Daily Expenses)

## Making Number Field An Auto-Number

1. Double click on the Number Field/Column.
2. Co 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.
6. Co to All >> In the filter search for Number Maintenance >> select Number Maintenance
7. Click on New.
8. Enter the below Details:  
Table : Family Expenses  
Prefix : MFE

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Support

- Creation Of New Update Set
- Creation Of New Update Set
- Creation Of Table
- Creation Of New Update Set
- Creation Of Table
- Creation Of Family Expenses Table
- Creation Of Columns(Helds)
- Making Number Field An Auto-Number**
- Configure The Form
- Creation Of Table(Daily Expenses)

4. Click on Update.

Default Value

The Default value specifies what value the field has when first displayed

Use default value

Dynamic default value Get Next Field's Number

5.

6. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance

7. Click on New.

8. Enter the below Details:  
Table : Family Expenses  
Prefix : MFE

Number Maintenance

Table : Family Expenses  
Prefix : MFE

9. Click on Submit.

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- Creation Of New Update Set
- Creation Of New Update Set
- Creation Of Table
- Creation Of New Update Set
- Creation Of Table
- Creation Of Family Expenses Table
- Creation Of Columns(Helds)
- Making Number Field An Auto-Number
- Configure The Form**
- Creation Of Table(Daily Expenses)

### 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.

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New Tab

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All Bookmarks

Support

Expenses Table

Creation Of Columns(Fields)

Making Number Field An Auto-Number

Configure The Form

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 Relationship

## Creation Of Daily Expenses Table

- Go to All > In the filter search for Tables > click on New.
- Enter the Details:  
Label : Daily Expenses  
Name : Auto-Populated  
Add Module to menu : Family Expenditure

Label : Daily Expenses

Name : daily\_expenses

Extend table

Application: Global

Create module

Create module module

Add module to menu : Family Expenditure

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

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Navigation: Support, Certification Applica..., Mercer Mettl | Best...

Left sidebar (Navigation Menu):

- Expenses Table
- Creation Of Columns(Fields)
- Making Number Field An Auto-Number
- Configure The Form
- 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 Relationship

Main content area (List of steps):

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.

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Support

Making Number Field An Auto-Number

Configure The Form

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 Relationship

Configuring Related List On Family Expenses

Creation Of Business Rules

## 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.

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Navigation: Home, Projects, Support


Guided Project: Project Workspace

Calculating Family Expenses Using ServiceNow

- Setting Up ServiceNow Instance
  - Setting Up ServiceNow Instance
- Creation Of New Update Set
  - Creation Of New Update Set
- Creation Of Table
  - Creation Of New Update Set
- Creation Of Table
  - Creation Of New Update Set
- Creation Of Family Expenses Table

### 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. [Unlabeled step]
6. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance
7. Click on New.
8. Enter the below Details:  
Table : Family Expenses  
Prefix : MFE

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Support

Expenses Using Service Now

- Setting Up ServiceNow Instance
- Setting Up ServiceNow Instance
- Creation Of New Update Set
- Creation Of New Update Set
- Creation Of Table
- Creation Of New Update Set
- Creation Of Table
- Creation Of Family Expenses Table
- Creation Of Columns/Fields

4. Click on Update.

Order Use Specifications Calculated Value Update Value

The Default value specifies what value the field has when first displayed.

Use default value Get Next Field Value

5.

6. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance

7. Click on New.

8. Enter the below Details:

Table : Family Expenses  
Prefix : MFE

1 = Number New record

Table : Daily Expenses

Number 1000

Application Global

Number of digits 7

9. Click on Submit.

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Support

- Configure The Form
- Creation Of Relationship
  - Creation Of Relationship Between Family Expenses And Daily Expenses Tables
- Configuring Related List On Family Expenses
  - Configuring Related List On Family Expenses
- Creation Of Business Rules
  - Creation Of Business Rules
- Configure The Relationship
  - Configure The Relationship

5. Click on Update.

The screenshot shows the Salesforce configuration interface for a relationship between 'Daily Expenses' and 'Family Expenses'. The 'Name' field is 'Daily Expenses'. The 'Application' dropdown is set to 'Global'. The 'Applies to table' dropdown is set to 'Family Expenses (o\_family\_expenses)'. The 'Queries from table' dropdown is set to 'Daily Expenses (o\_daily\_expenses)'. A script is shown in the 'Query with' field:

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

The 'Update' button is highlighted with a red box and an arrow pointing to it. The 'Delete' button is also visible.

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Navigation: Support

Left sidebar menu:

- Making Number Field An Auto-Number
- Configure The Form
- 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 Relationship
- Creation Of Relationship Between Family Expenses And Daily Expenses Tables

Main content area:

### 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.

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Support

Expenses Table

Creation Of Columns(Fields)

Making Number Field An Auto-Number

Configure The Form

Creation Of Relationship

Creation Of Relationship Between Family Expenses And Daily Expenses Tables

Configuring Related List On Family Expenses


Configuring Related List On Family Expenses


Creation Of Business Rules

Configure The

## Configuring Related List On Family Expenses

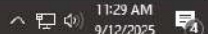
1. Go to All >> In the filter search for Family Expenses >> Open Family Expenses
2. Click on New
3. Go to the Header and right click there>> click on Configure >> Select Related Lists
4. Add Daily Expenses to the Selected Area.
5. Click on Save





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Configure The Form

Creation Of Relationship

Creation Of Relationship Between Family Expenses And Daily Expenses Tables

Configuring Related List On Family Expenses

Configuring Related List On Family Expenses

Creation Of Business Rules

Creation Of Business Rules

Configure The Relationship

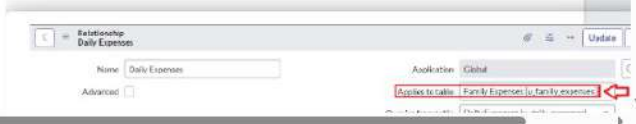
Configure The Relationship

## 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.



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