FAMILY EXPENSES   
Team Id : NM2025TMID2023 6   
Team Members: 3   
 Team Leader : LOGESH R   
 Member 1 : SRIRAM T   
 Member 2 : VIGNESH E   
   
   
 Problem Statement  
 :   
   
The project aims to develop a comp rehensive 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. U tilizing   
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.   
   
Objectiv e: The "family expensive project" phrase seems to be a misunderstanding, but if referring to   
ServiceNow's Strategic Portfolio Management (SPM), also known as Project Portfolio Management   
(PPM), its objective is to strategically manage and optimize a portf olio of projects by aligning them with   
business goals, providing real -time visibility into performance, and improving agility and resource   
allocation to deliver maximum customer value.   
   
Skills  
 :   
 Service now Family expenses   
 IOT Open Hardware platforms, Data Structures   
TASK INITIATION   
 Milestone 1: update set

Activity 1: Local update set   
1. Open service now   
2. Click on All >> search for Local update   
3. Click on new   
4. Name: Family Expenses   
5. Then click on submit and make current.   
   
   
   
   
   
   
   
Milestone 2: CREATION OF TABLE   
 Activity 1: TABLE   
   
   
1.   
Open service now.   
2.   
Click on All >> search f or Table   
3.   
Click on n ew.   
4.   
Label: Family Expenses, Name: Auto -Populated,   
   
New menu name: Family Expenditure.   
 5.Go to the Header and right click there>> click o n 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   
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

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   
 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.

ACTIVITY 4: CONFIGER T HE 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 an d checking Mandatory   
7.   
Click on Save.

Milestone 3: CREATION OF TABLE(DAILY EXPE NSES)   
Activity 1 : Creation of Daily Exepenses Table.   
1.   
   
Go to All > In the f ilter search for Tables > click on New.   
2.   
Enter the Details:   
Label: Family Expenses   
Name: Auto -Populated   
New menu name: Family Expenditure   
 3.   
Go to the Header and right click there>> click on Save.   
   
   
   
Activity 2: Creation of columns(Field)   
1.   
   
Near Columns Double clic k 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.   
.   
   
   
   
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   
 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.   
   
   
   
ACTIVITY4: Configer 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.   
   
   
   
   
   
   
   
   
   
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   
 4.Click Save.   
   
   
6. Fill the following details to create a new ACL   
7. Scroll down under requires role   
8. Double click on insert a new row   
9. Give task table and team member role   
10. Click on submit   
11. Similarly create 4 acl for the following fields

Milestone 5: Configuring Related List on Family Expenses   
   
 Activity 1 : Create a Flow to Assign operations ticket to group   
   
 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

Milestone 6: Creation of Business Rules   
Activity1: 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 execute Rule (current, previous /\*null when async\*/) {   
   
   
var Family Expenses = new Glide Record (' u\_family\_expenses ');   
Family Expense. Add Query('u\_ date',current.u \_ date);   
Family Expenses. query();   
If (Family Expenses. next())   
{   
Family Expenses .u \_amount += current .u\_ expense;

Family Expenses .u\_ expense\_ details += ">"+current. u comments+":"+"Rs."+ current. u\_ expense+"/ -  
";   
Family Expenses. update();   
}   
else   
{   
var New Family Expenses = new Glide Record('u\_ family\_ expenses');   
New Family Expenses. u\_ date = current. u\_ date;   
New Family Expenses. u\_ amount = current. u\_ expense;   
New Family Expenses .u\_ expense\_ details +=   
">"+current.u\_comments+":"+"Rs."+current.u\_expense+"/ -";   
New Family Expenses. insert();   
}   
   
   
})(current, previous);   
   
   
   
   
   
6. Go to the Header and right click there>> click on Save.   
   
   
   
Milestone 7: Configure the Relationship   
   
   
Activity1:  
 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 Expe nses.   
4. In Query with: write the below Query.   
   
   
(function refine Query (current, parent) {   
   
   
// Add your code here, such as current. add Query (field, value);   
 current. add Query ('u\_ date', parent. u\_ date);   
 current. Query ();   
   
   
}) (current, parent);   
   
   
5. Click on Update.

Conclusion : A successful ServiceNow "family" (project or platform) implementation, even a costly one,   
is concluded by demonstrating tangible business value through strategic alignment, improved operational   
efficiency, and positive user satisfaction. Achieving these outcomes requires senior expertise,   
comprehensive process mapping, a strong focus on configuration over customization, and ongoing   
transparent communication to manage risks, ensuring t he project delivers its intended benefits and a   
positive return on investment.