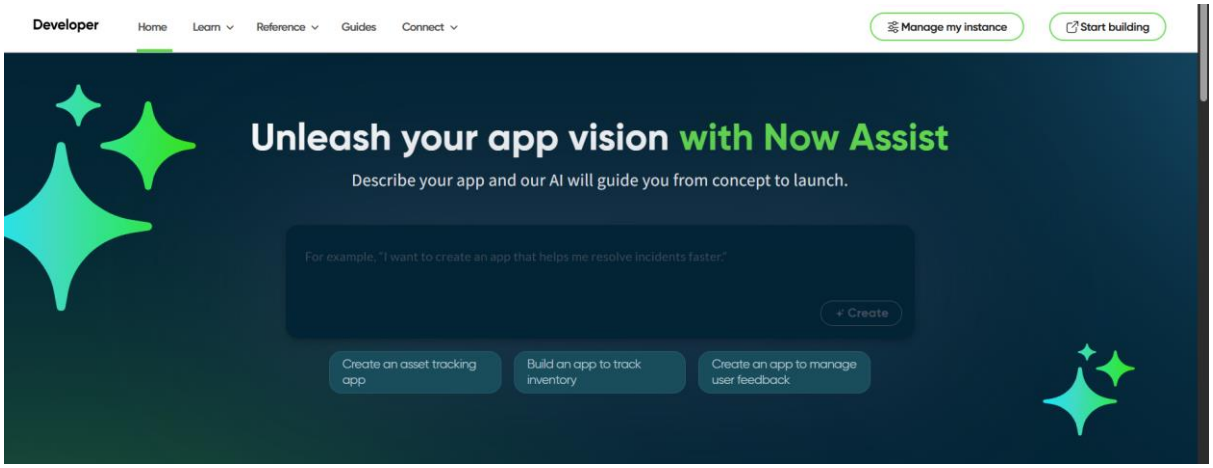
Calculating Family Expenses using Service Now

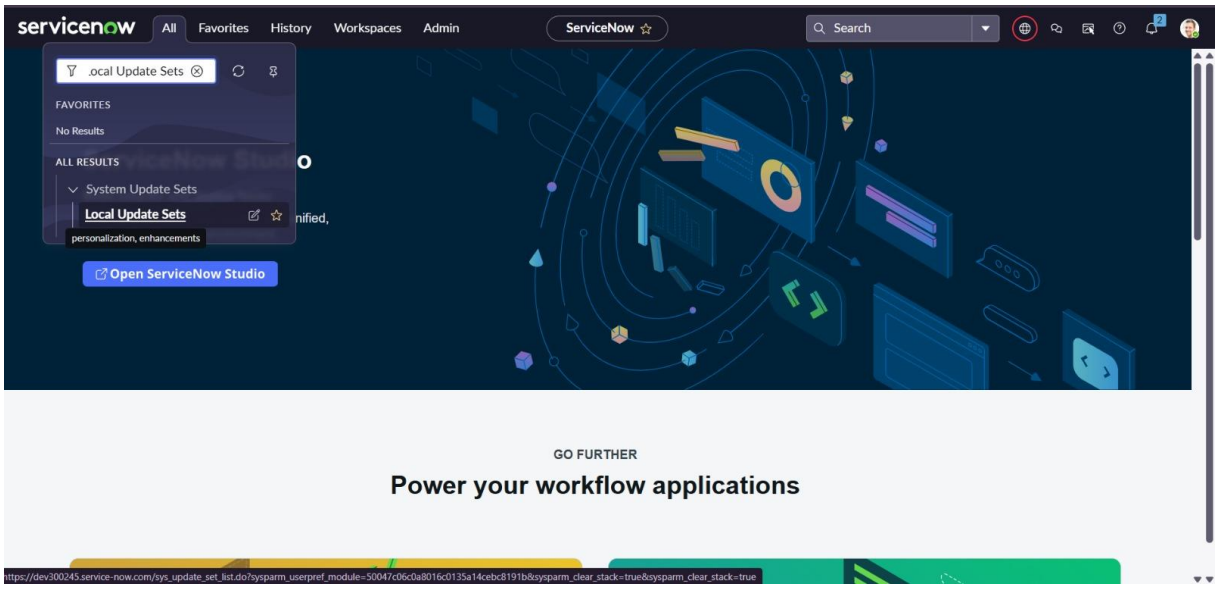
1. Setting up ServiceNow Instance

Sign up for a developer account at developer.servicenow.com.
Go to Personal Developer Instance → Request Instance and fill in the required details.
Once your instance is ready, log in using the provided credentials to access ServiceNow.

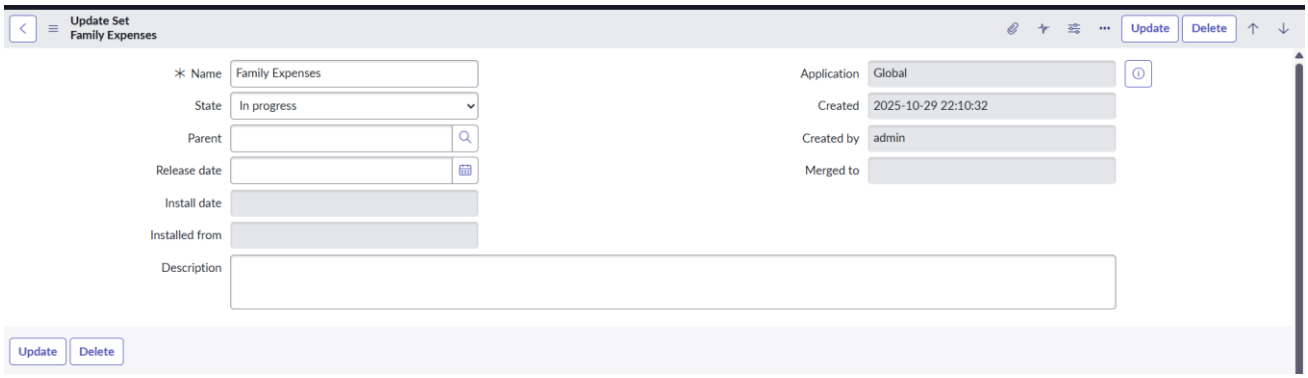


2. Creation of New Update Set

In the filter navigator, search Local Update Set → click New.

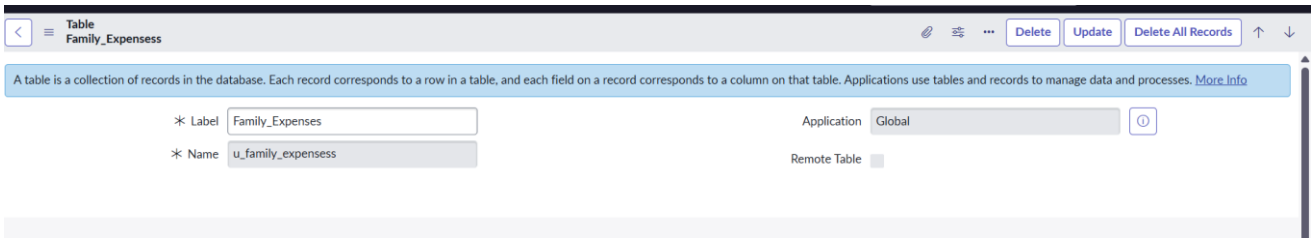


Enter Name: Family Expenses, then click Submit and Make Current.



3.Creation of Family Expenses Table

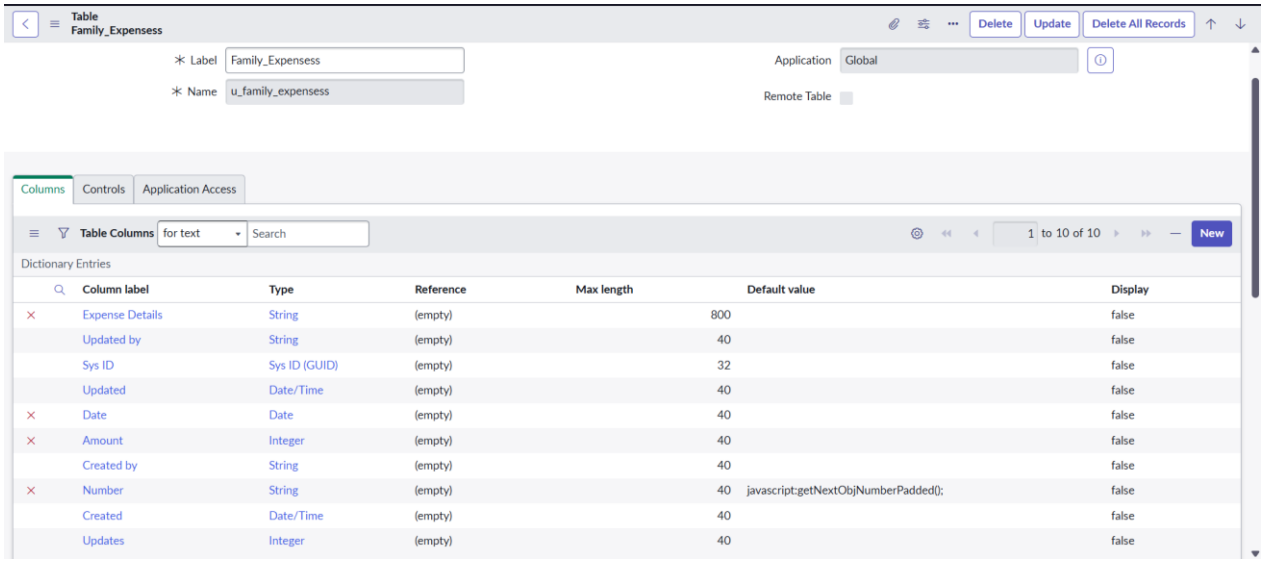
In the filter navigator, search Tables → click New.
Enter Label: Family Expenses, Menu Name: Family Expenditure, then right-click the header and select Save.

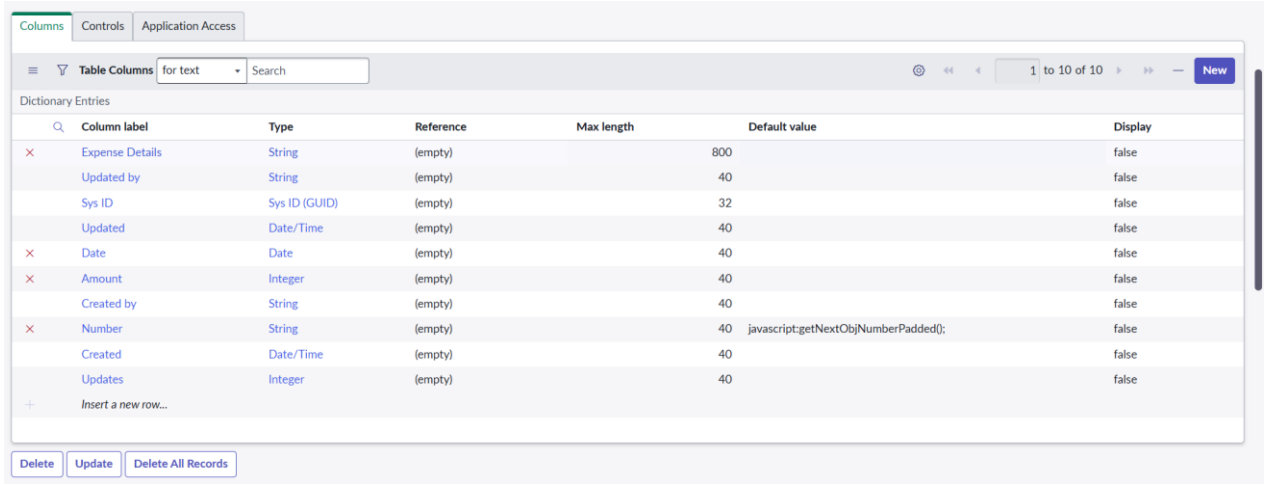


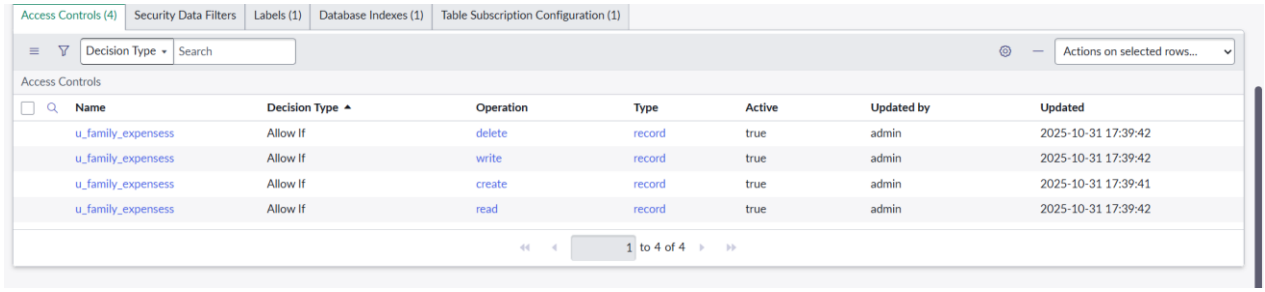
4.Creation of Columns (Fields)

Add new rows under **Columns** with the following details:

- **Number** – String
- **Date** – Date
- **Amount** – Integer
- **Expense Details** – String (Max length: 800)



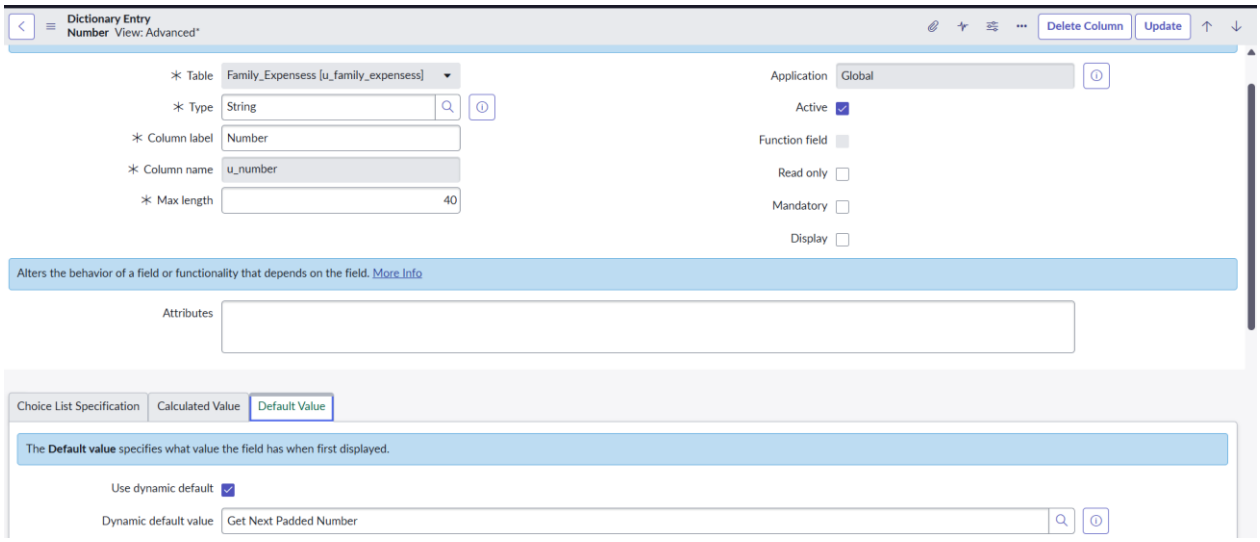




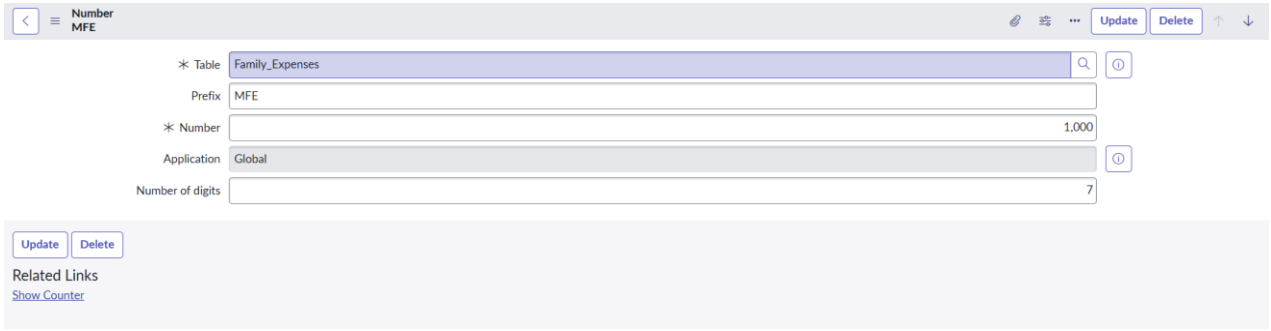
Right-click the header and select **Save**.

4. Making Number Field an Auto-Number

Open the Number field → Advanced view.
Check Use dynamic default and select Get Next Padded Number, then click Update.

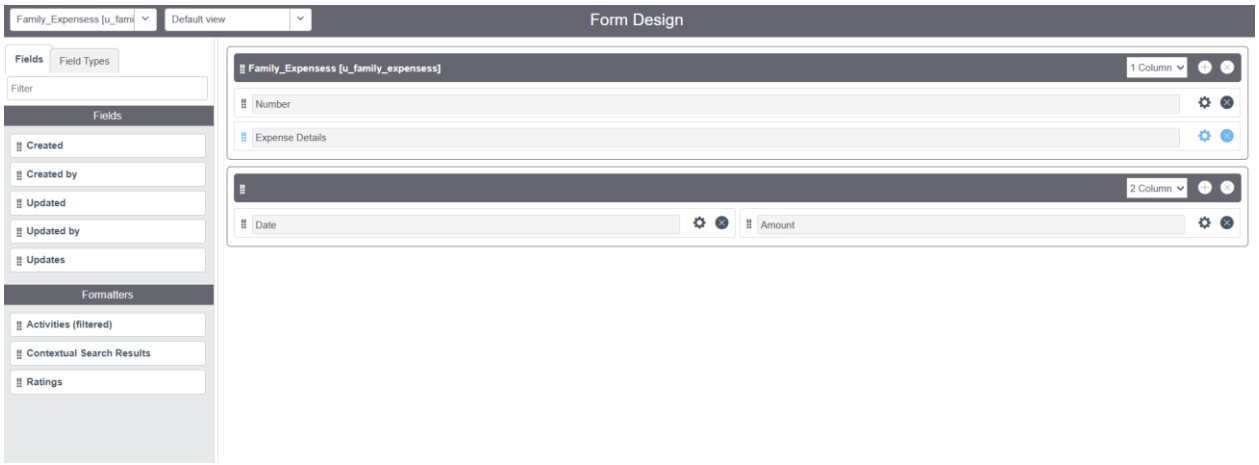


Search Number Maintenance → click New.
Set Table: Family Expenses, Prefix: MFE, and click Submit.



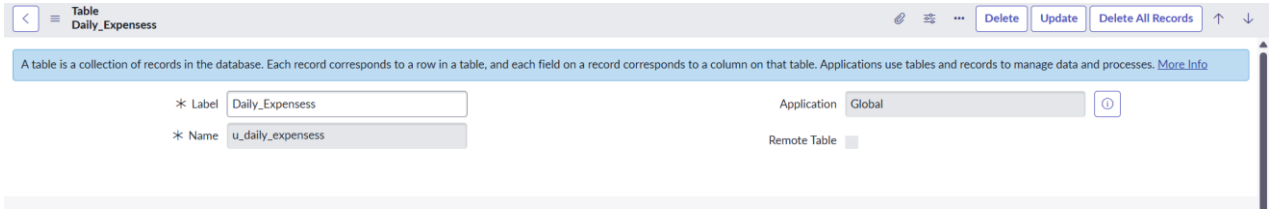
5. Configure the Form

Search Family Expenses and open it.
Click New, then right-click the header → Configure → Form Design.
Arrange fields as needed.
Set Number as *Read-only* and make Date and Amount *Mandatory*.
Click Save.

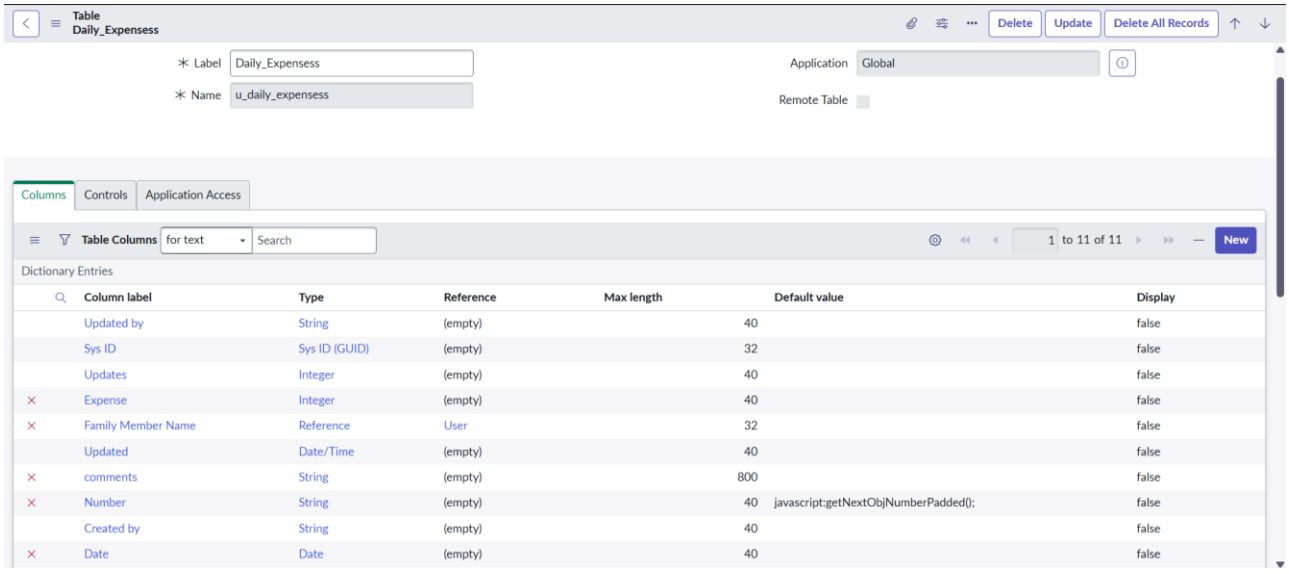


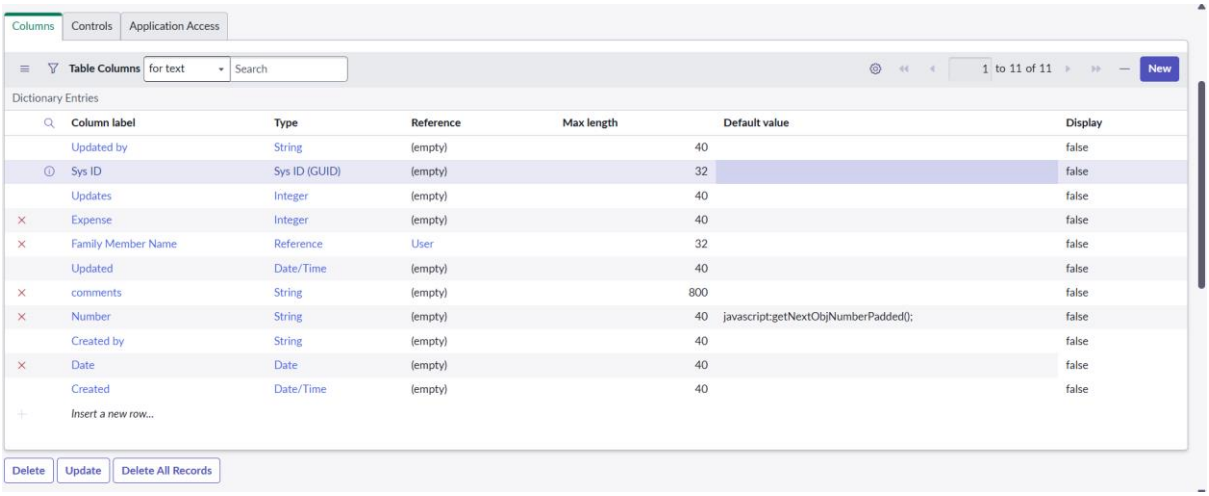
6.Creation of Daily Expenses Table

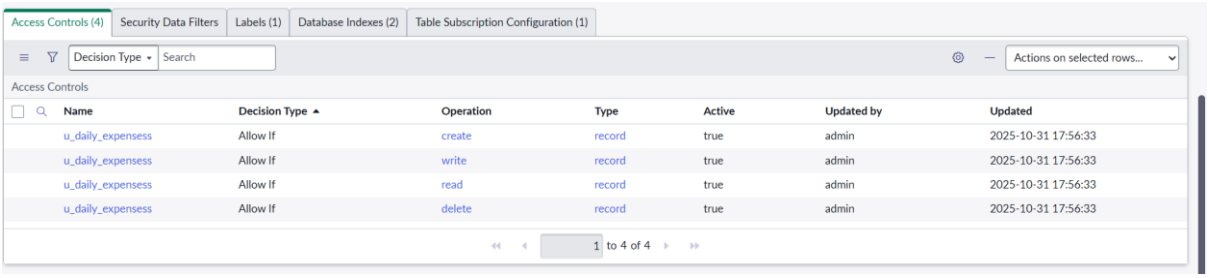
Search Tables → click New.



Enter Label: Daily Expenses, add to Menu: Family Expenditure, then right-click the header and select Save.







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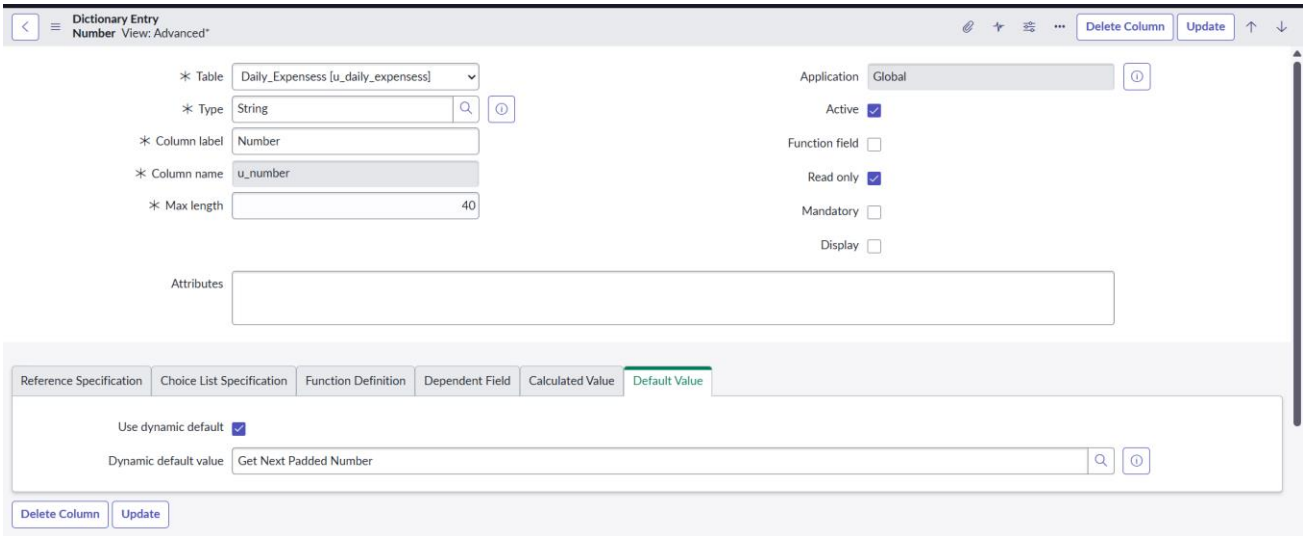
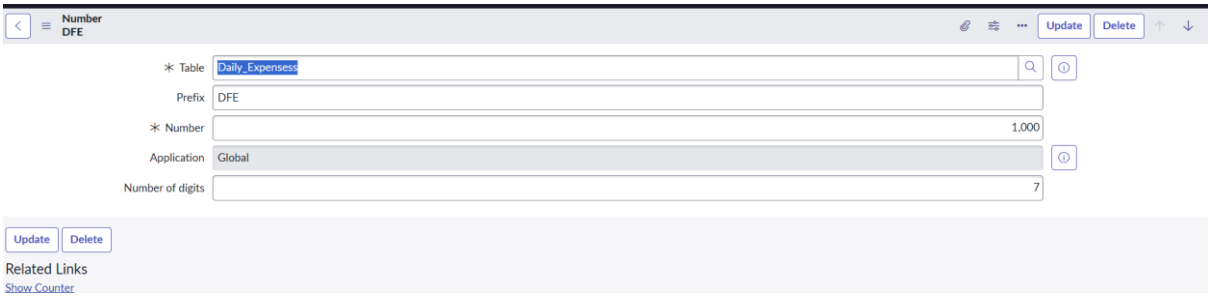
Enable Use dynamic default and choose Get Next Padded Number, then click Update

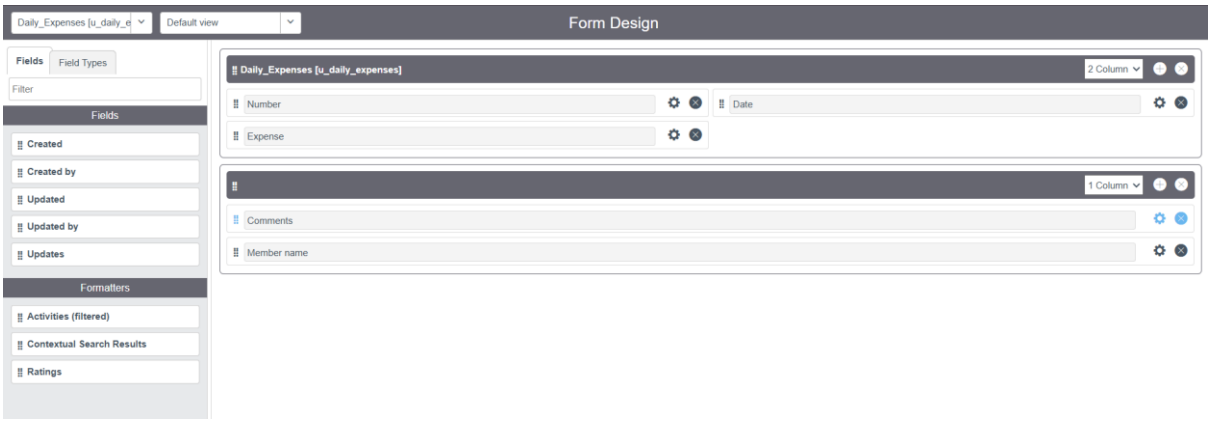


Search Number Maintenance → New.
Set Table: Daily Expenses, Prefix: DFE, and click Submit.



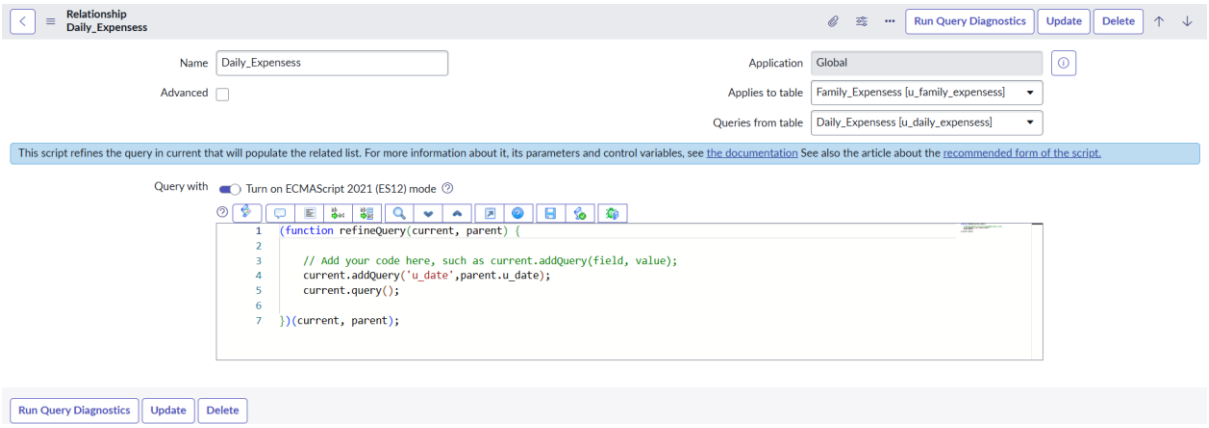
8.Configure the Form

Search Daily Expenses and open it.
Click New, then right-click the header → Configure → Form Design.
Arrange fields as needed.
Set Number as *Read-only* and make Date and Family Member Name *Mandatory*.
Click Save.



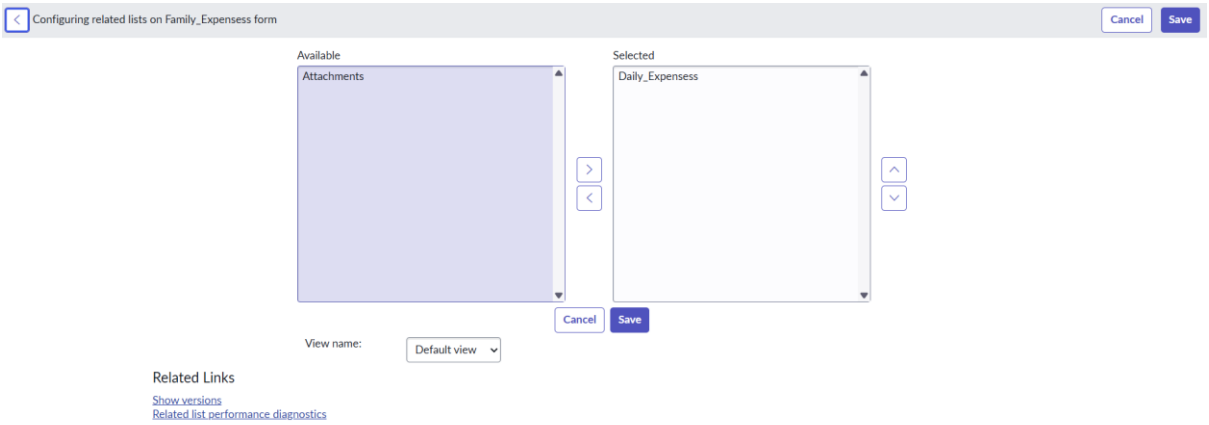
9.Creating Relationship Between Tables

Search Relationships → click New.
Set Name: Daily Expenses, Applies to Table: Family Expenses, Related Table: Daily Expenses, then click Save.



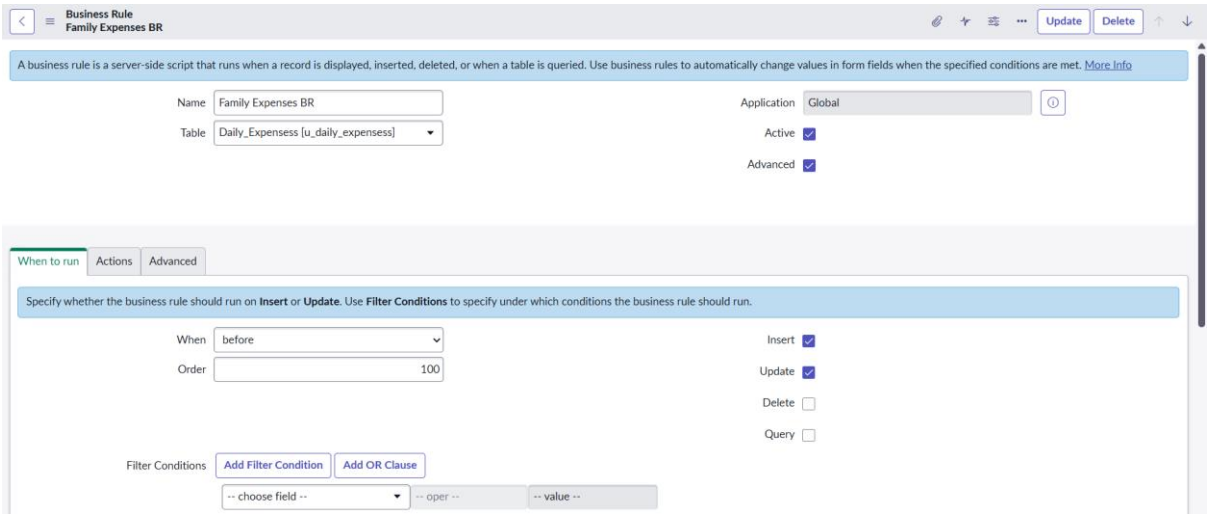
10.Configuring Related List

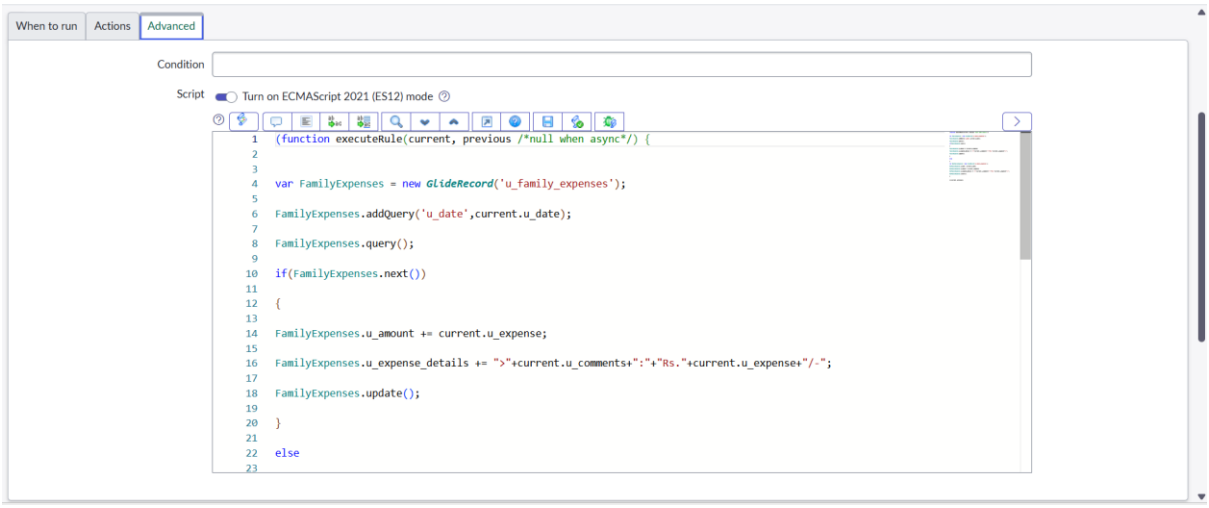
Open Family Expenses → New → Configure > Related Lists → add Daily Expenses → Save.



11.Business Rule Creation

Navigate to All → Business Rules → New.
Name: Family Expenses BR
Table: Daily Expenses
Add query: required





12.Configure Relationship

Go to All → Relationships and open Daily Expenses Relationship.
Set Applies to table: Family Expenses.

Add Query:

(function refine Query (current, parent) {

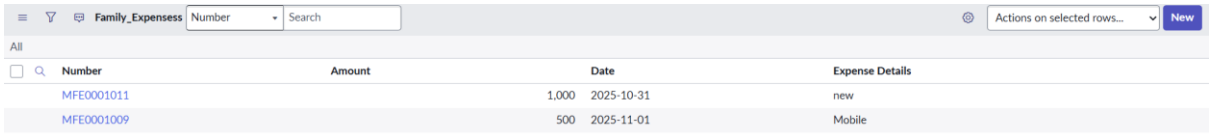
current. add Query('update', parent. u_date);

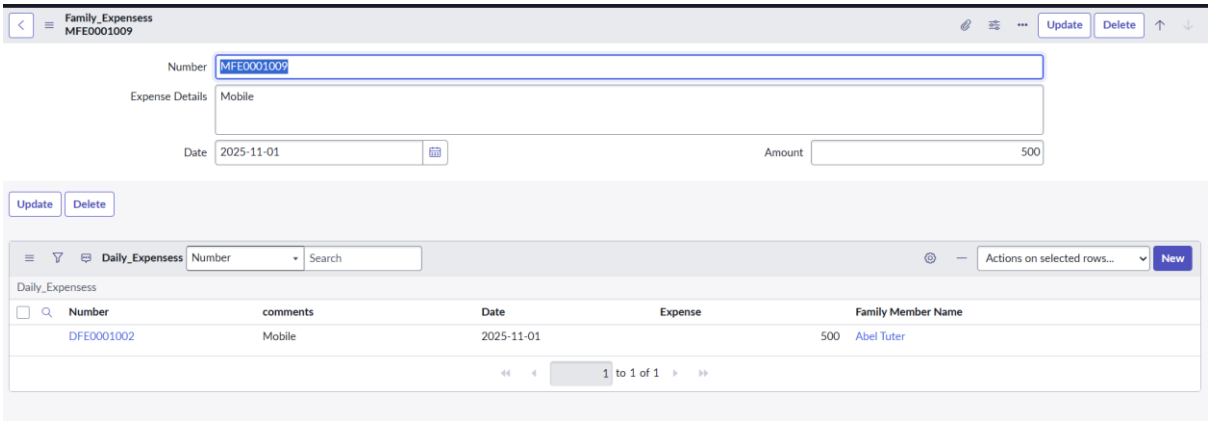
current. query ();

}) (current, parent);

Update the Relationships by clicking on update.

- Built in **ServiceNow** to manage family spending.
- **Daily Expenses** table records:
    - Date, Amount, Comments, Family Member
- **Family Expenses** table shows:
    - Total spent per date, with summary
- Tables are **linked**:
    - Daily entries update family totals automatically
- Helps track spending and keep financial records organized.





Conclusion:

In conclusion, the *Family Expenses Calculation System* built on ServiceNow provides an efficient and organized way to manage household finances. By leveraging ServiceNow's automation and data management capabilities, the system simplifies expense tracking, ensures accuracy, and offers real-time insights into family spending patterns. This project not only enhances financial transparency but also promotes better budgeting and informed decision-making—ultimately contributing to improved financial stability and well-being for families.

Done By,

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Thank You!