CALCULATING FAMILY EXPENSES USING SERVICE NOW

Team Id: NM2025TMID14970

Team Members: 4

Team leader : SHYAM J

Member 1 : KRISHNAN T

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Problem Statement : Built a family expense management system in ServiceNow with features for categorization, budgeting, real-time tracking, and reporting to support informed financial decisions.

Objective: To design and implement a family expense tracking solution in ServiceNow that enables efficient recording, categorization, and analysis of household expenses.

**Skills :** IOT, Open Hardware Platforms And Data Structures

TASK INITIATION :

Milestone 1 : 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.
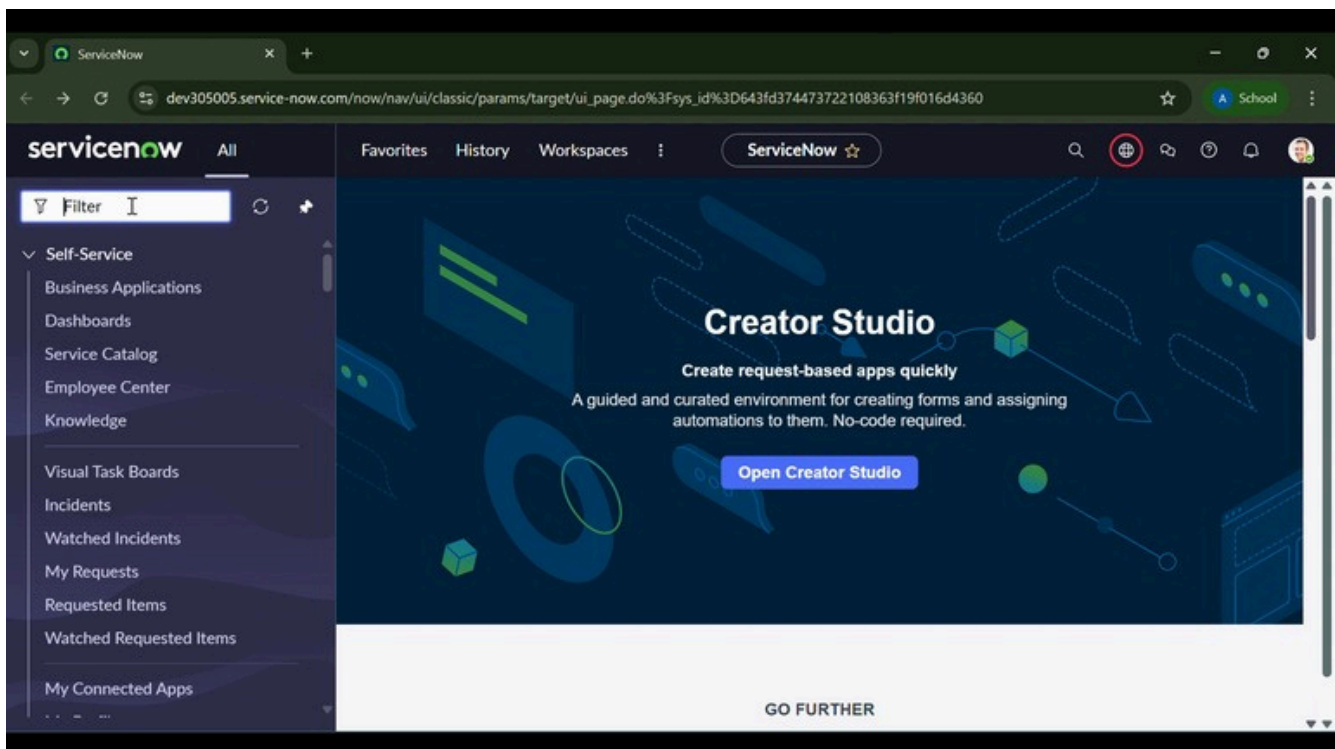
Milestone 2: Creation of New Update Set

1.Go to All >> In the filter search for Local Update set > click on New.
2.Enter the Details as:
3.Name : Family Expenses
4.Then click on Submit and Make current.
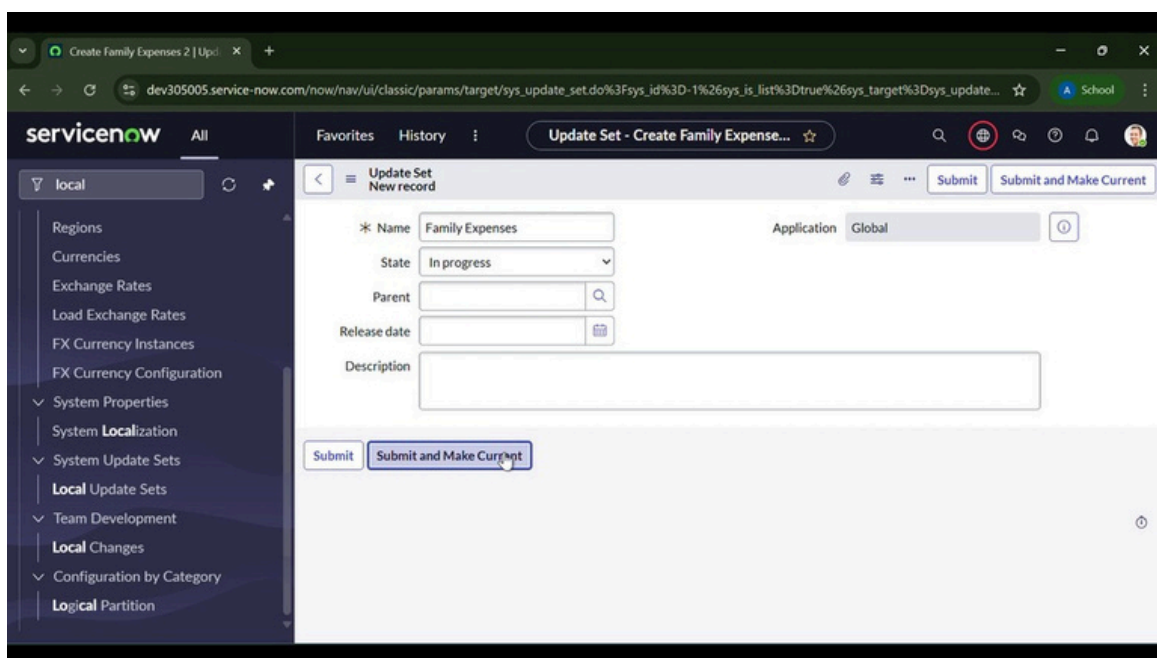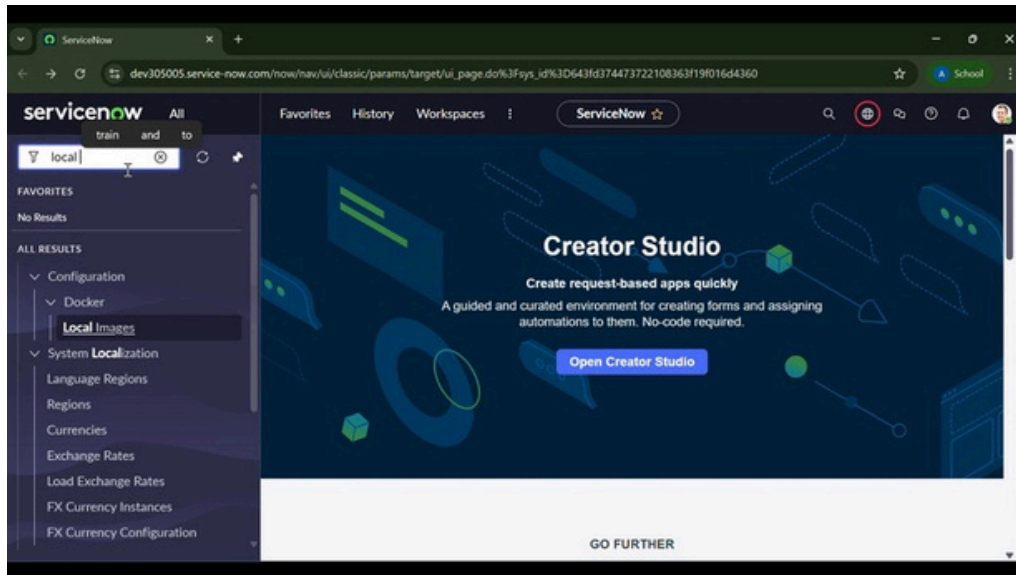
Milestone 3: Creation of Table

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

2.Enter the Details as:

3.Name : Family Expenses

4.Then click on Submit and Make current.

   Note : Follows the same step in Milestone 2

Milestone 4: Creation of Table

Creation of Family Expenses Table

1.Go to All > In the filter search for Tables > click on New.

2.Enter the Details:

3.Label : Family Expenses

4.Name : Auto-Populated

5.New menu name : Family Expenditure

6.Go to the Header and right click there>> click on Save.
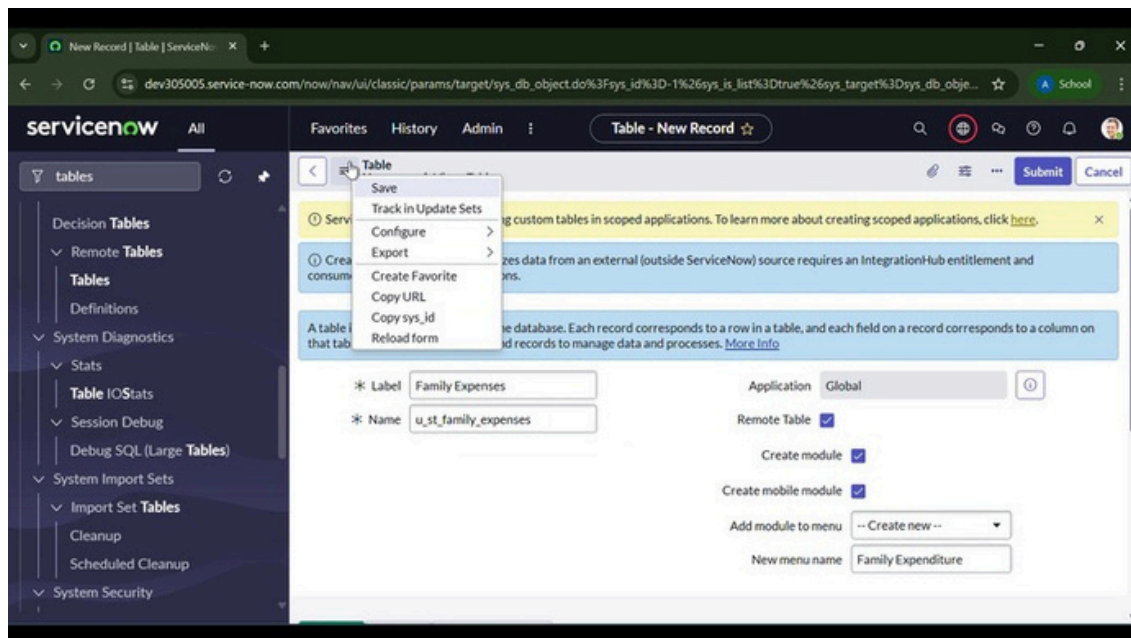
Creation of Columns (Fields)

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

  new row again
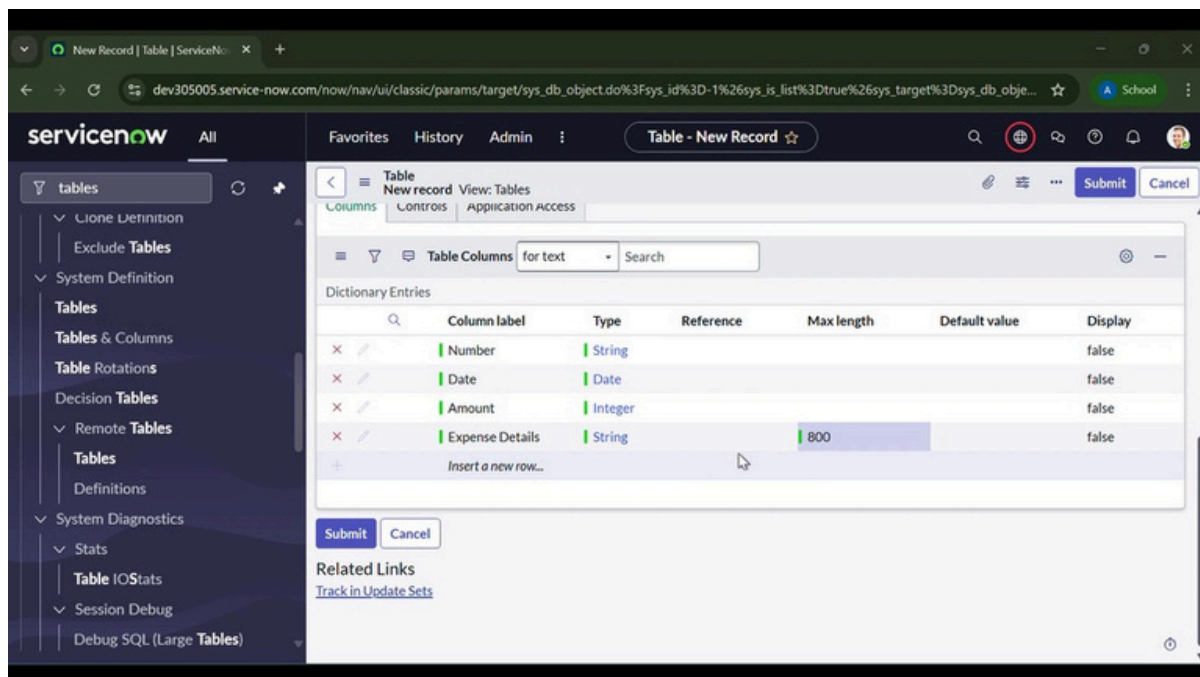
        Column label : Amount

        Type : Integer

  insert a new row again

        Column label : Expense Details

        Type : String

        Max length : 800

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

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 Numb Maintenance
6. Click on New.
7. Enter the below Details:

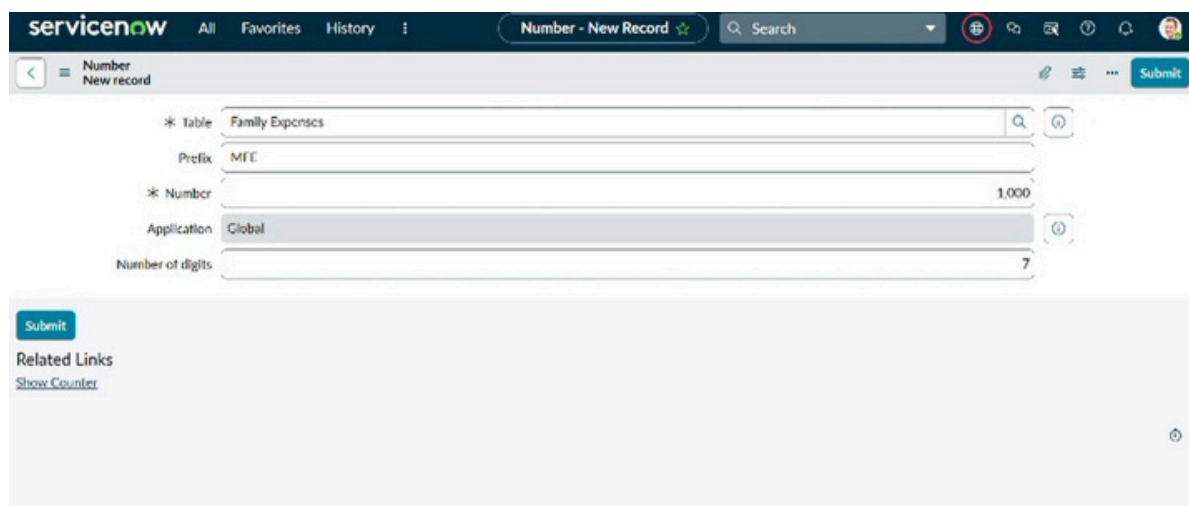 Table : Family Expenses
  Prefix : MFE

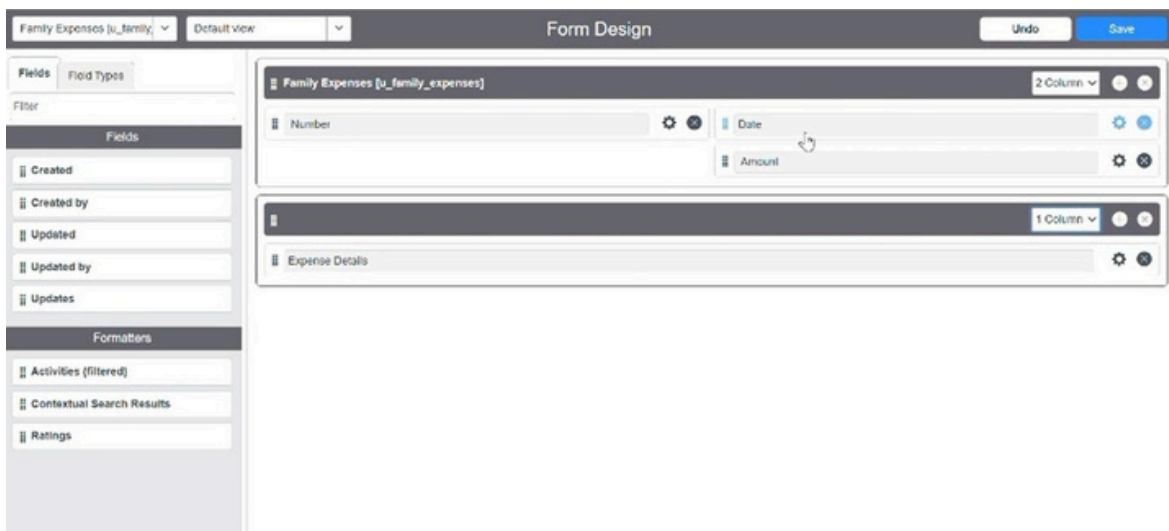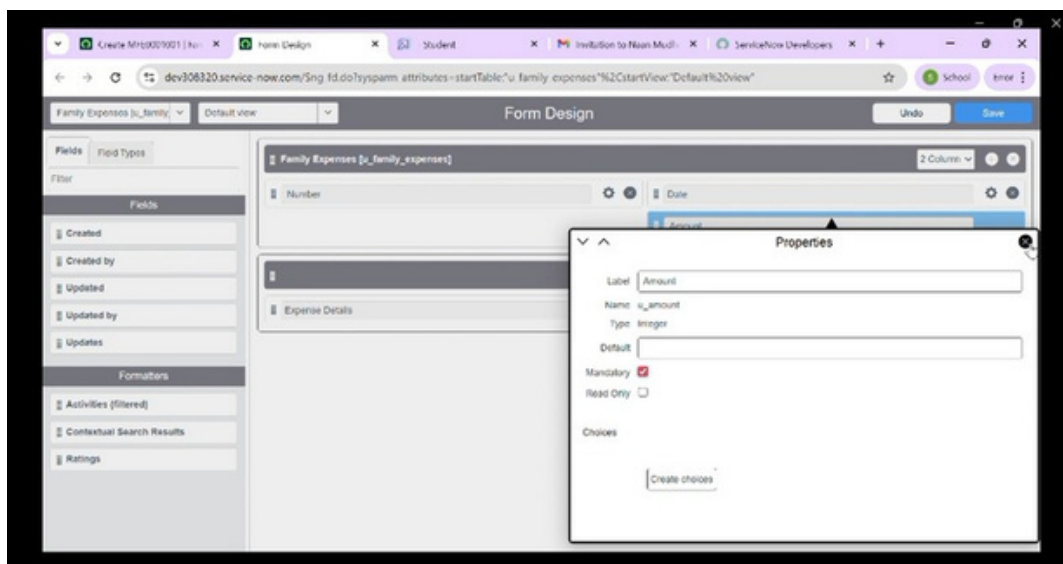8. Click on Submit.

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.

Milestone 5: Creation of Table(Daily Expenses)

Creation of Daily Expenses Table

   1.Go to All > In the filter search for Tables > click on New.

   2.Enter the Details:

         Label : Daily Expenses

         Name : Auto-Populated

         Add Module to menu : Family Expenditure

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

Same steps to be followed as in the milestone 3.
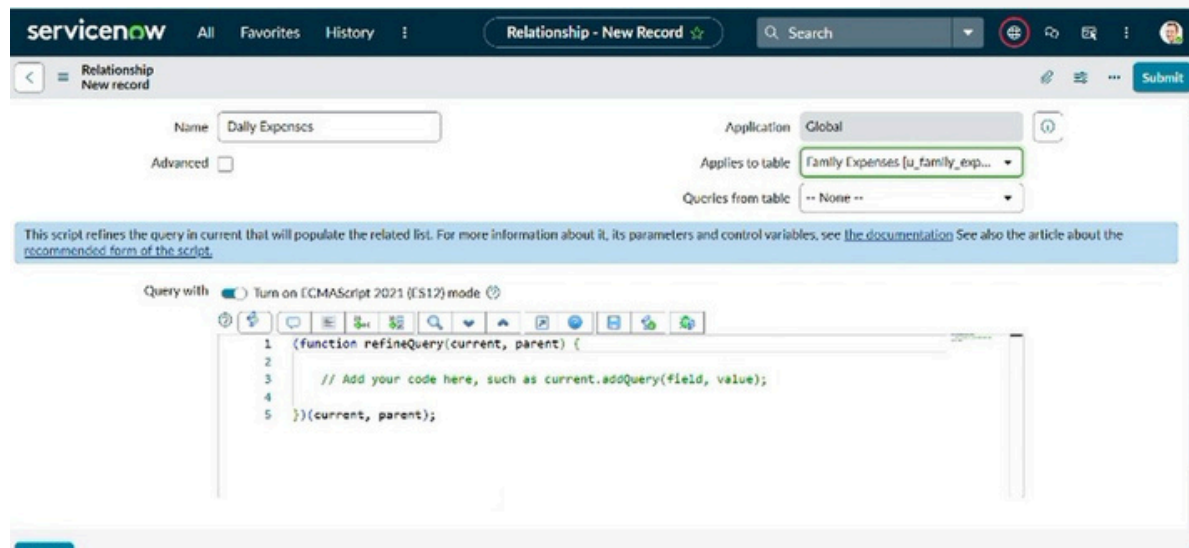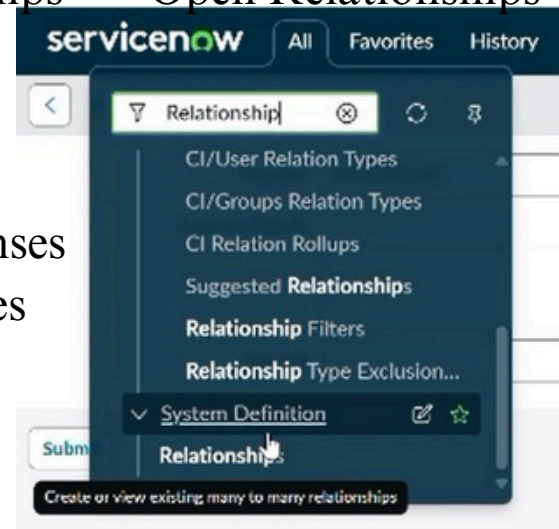
Milestone 6: Creation of Relationship

   1.Go toAll>> In the filter search for Relationships >> Open Relationships

   2.ClickonNew.

   3.En terthedetails:

         Name : Daily Expenses

         Applies to table : Select Family Expenses
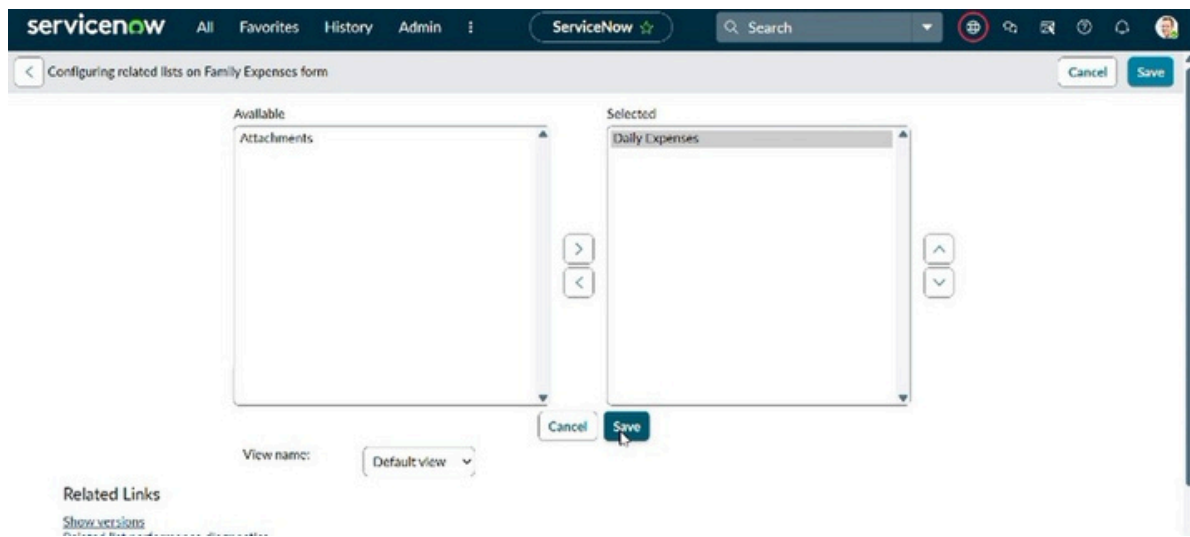
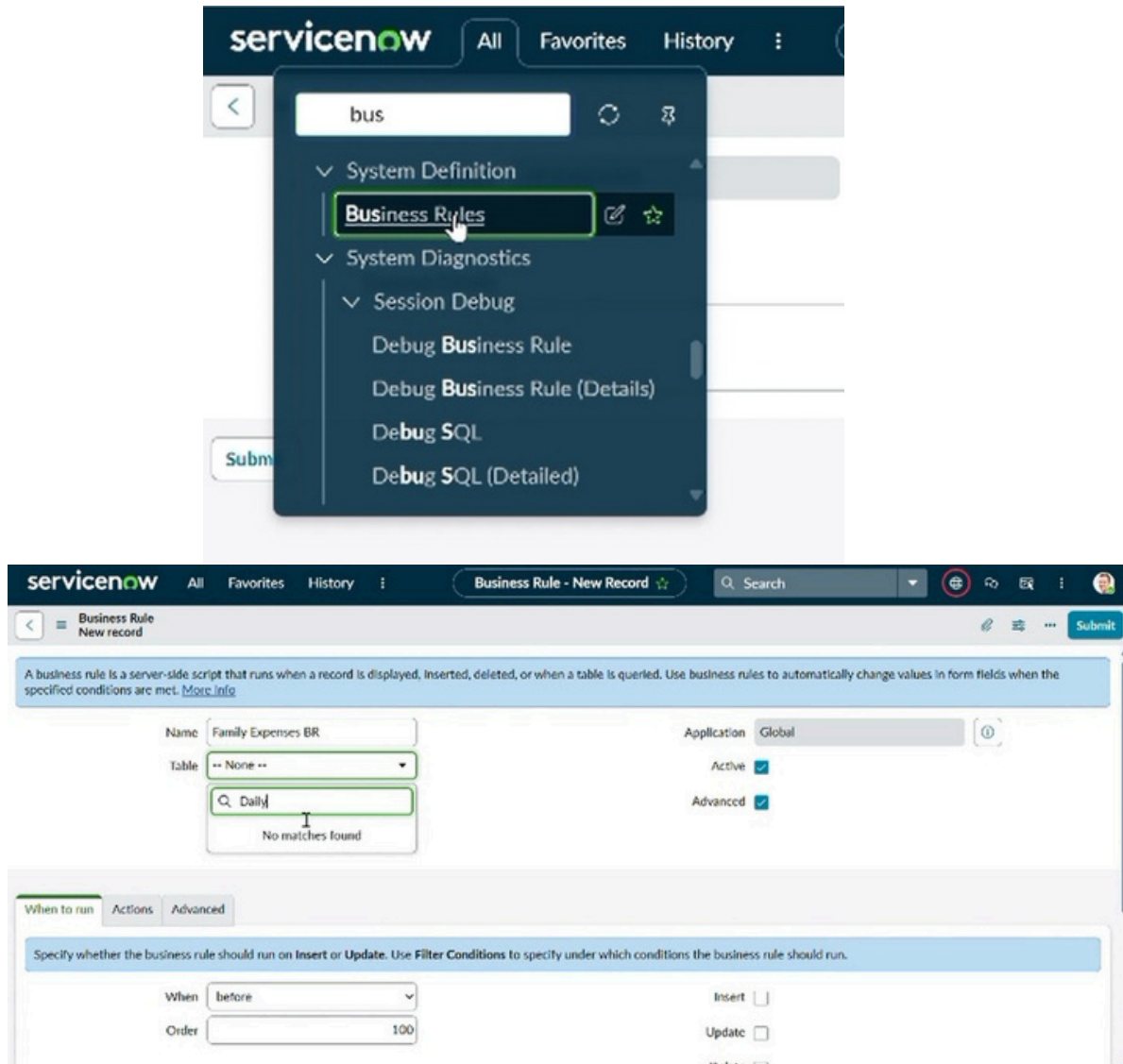   Daily Expenses : Select Daily Expenses

    4.Click Save.

Milestone 7: 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.

Milestone 8 : Creation of Business Rules

1. Go toAll >> In the filter search for Business Rules.
2. UnderSystem Definition Select Business Rules then click on New.
3. Enterthe Details:

        Name : Family Expenses BR

        Table : Select Daily Expenses

4. CheckAdvanced
5. Inwhen to run Check Insert and Update

Milestone 9 : Configure the Relationship

1. Go to All >> In the filter search for Relationships >> Open Relationships.
2. 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);
```

   3. Click on Update.

Conclusion:
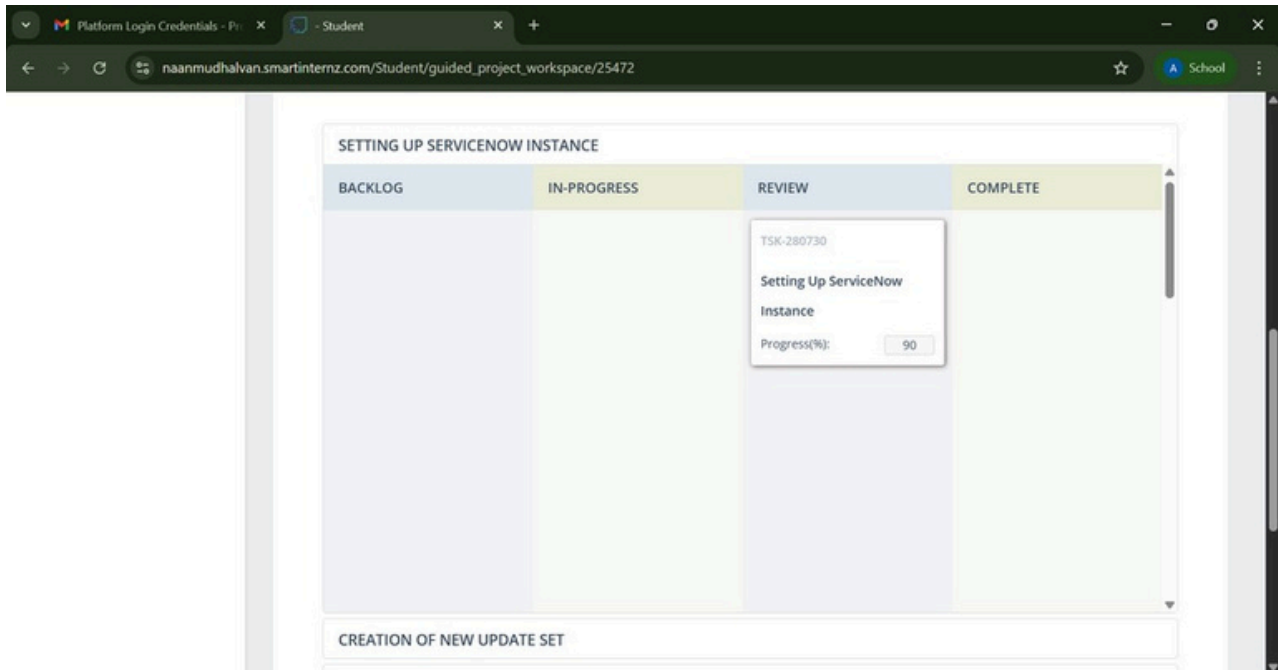
All the steps are completed successfully and the percentage has been updated.