

# **CALCULATING FAMILY EXPENSES USING SERVICE NOW**

**Team Id: NM2025TMID15135**

**Team Members: 4**

**Team leader : HARIKARAN K**

**Member 1 : SIVASANKAR**

**Member 2 : SATHISH**

**Member 3 : NARENDHARAN**

**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.

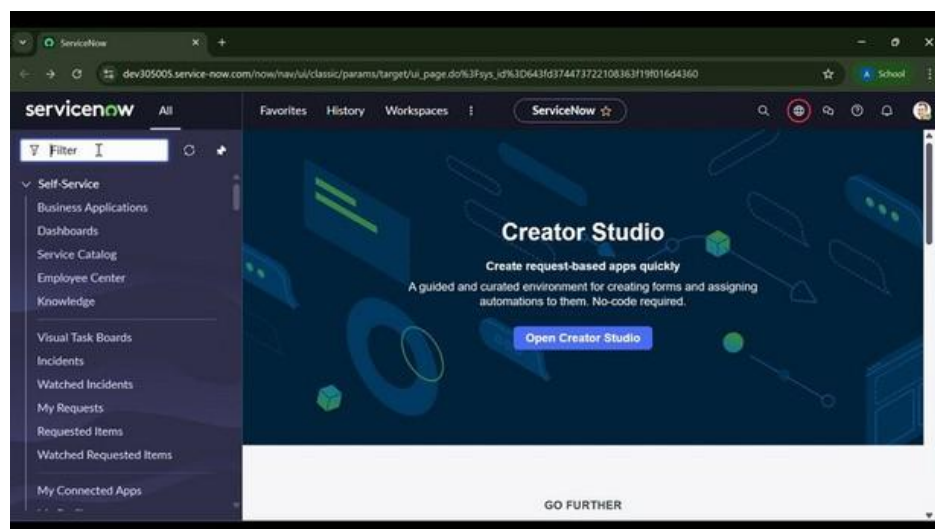
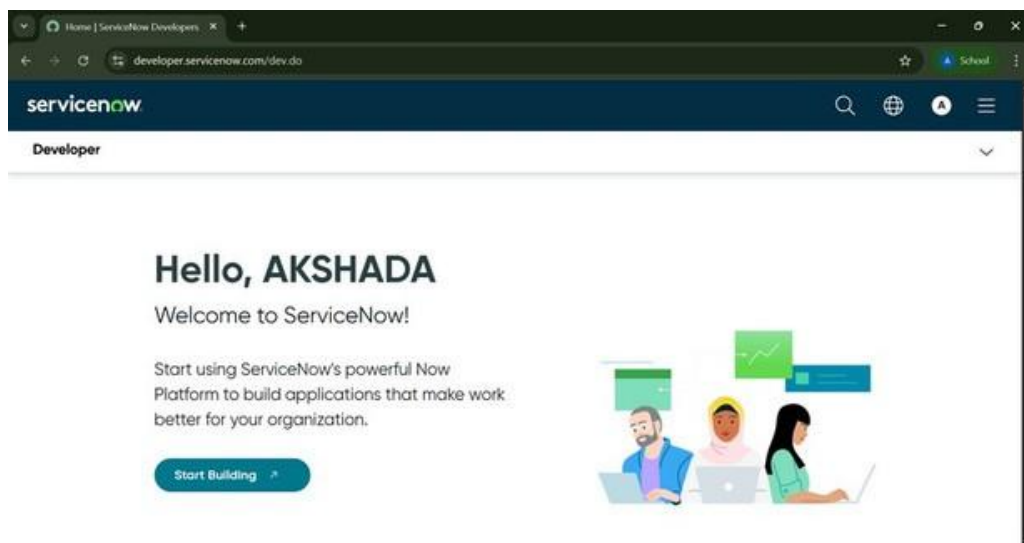
**Objective:** To design and implement a family expense tracking solution in ServiceNow that enables efficient recording, categorization, and analysis of household expenses.

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

## TASK INITIATION :

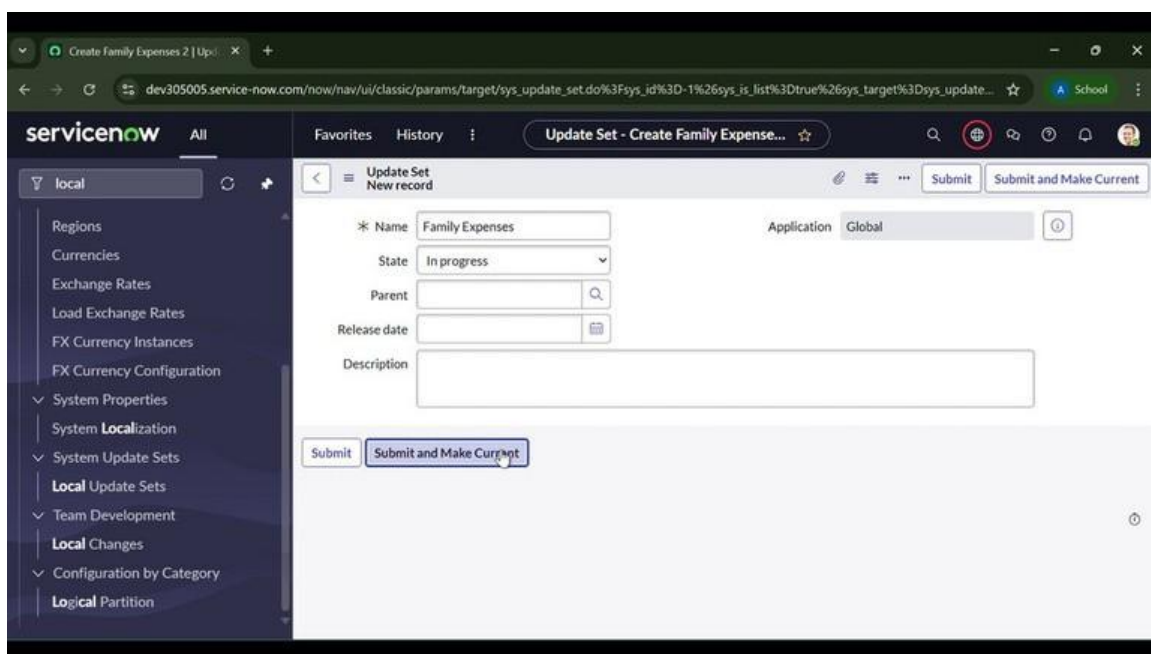
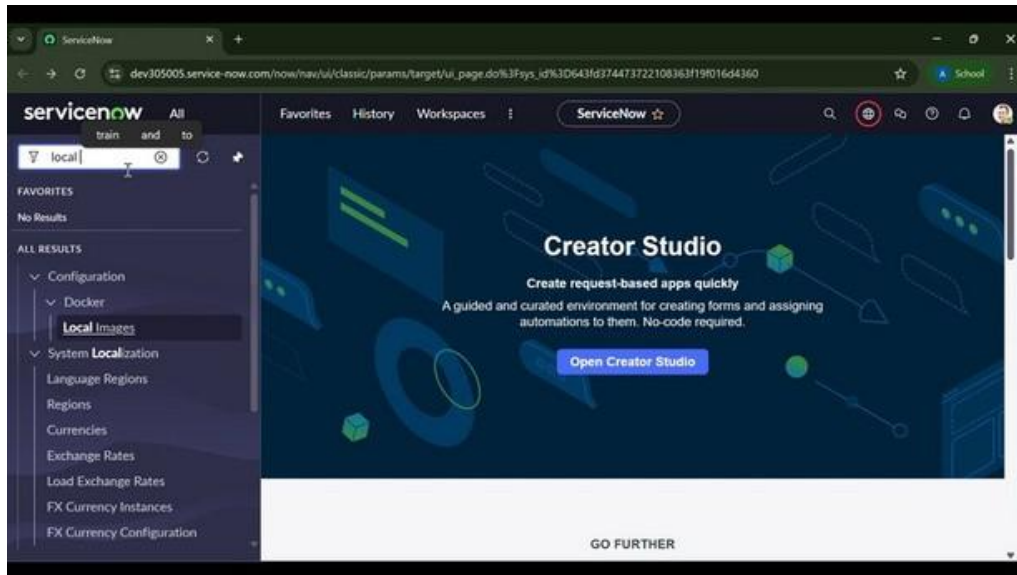
### Milestone 1 : Setting up ServiceNow Instance

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

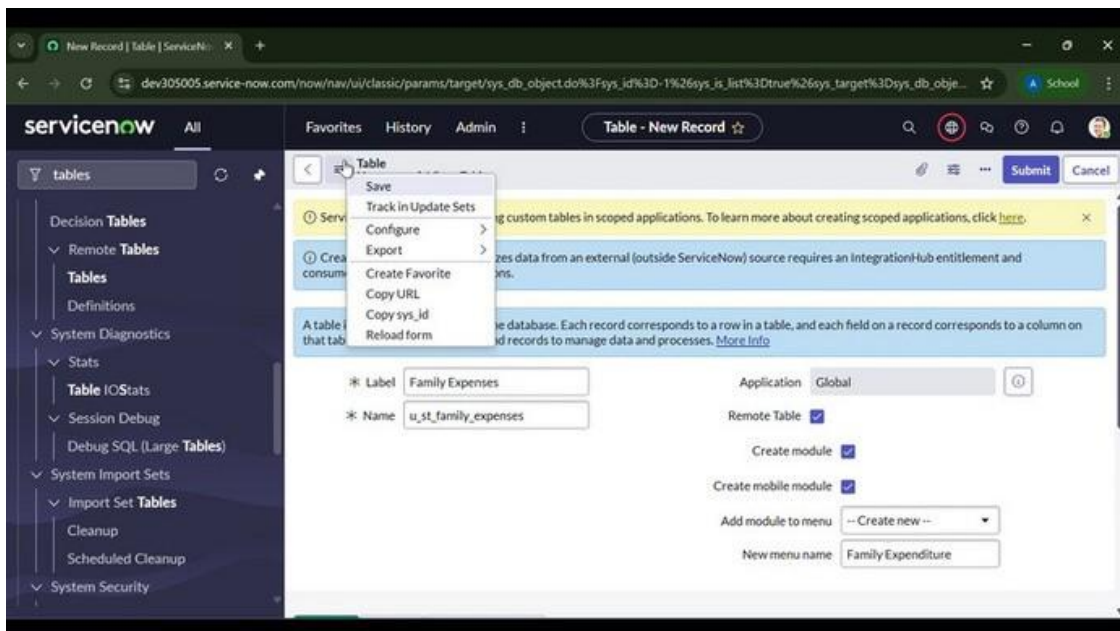
1. Go to All >> In the filter search for Local Update set > click on New.
2. Enter the Details as:
3. Name : Family Expenses
4. Then click on Submit and Make current.

**Note :** Follows the same step in Milestone 2

## Milestone 4: Creation of Table

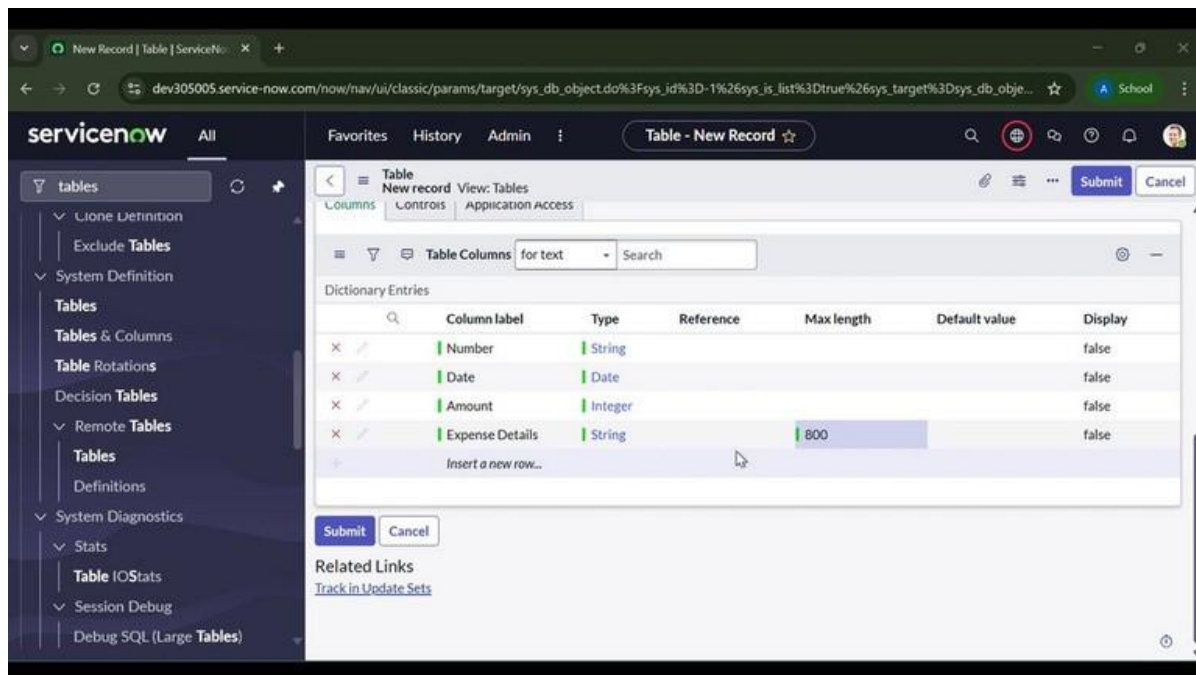
### Creation of Family Expenses Table

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.

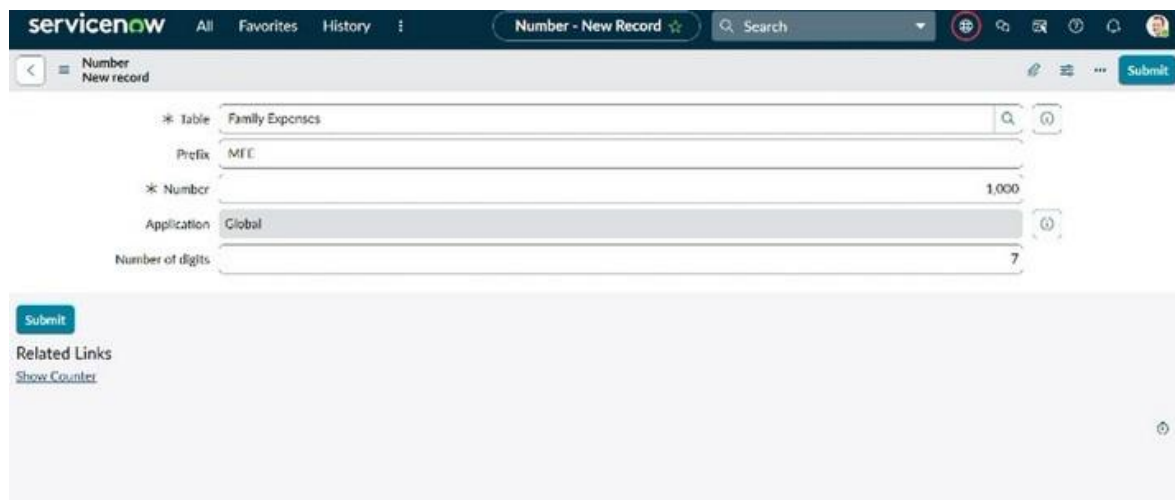


## Making Number Field an Auto-Number

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 Number Maintenance
6. Click on New.
7. Enter the below Details:  
Table : Family Expenses  
Prefix : MFE
8. Click on Submit.



The screenshot shows the 'Default Value' configuration tab. It includes a description: 'The Default value specifies what value the field has when first displayed.' Below this, there is a checkbox for 'Use dynamic default' which is checked. A text field for 'Dynamic default value' contains 'Get Next Padded Number'. At the bottom, there are 'Delete Column' and 'Update' buttons.



The screenshot shows the 'Number - New Record' form in the ServiceNow interface. The form fields are as follows:

Field	Value
* Table	Family Expenses
Prefix	MFE
* Number	1,000
Application	Global
Number of digits	7

Below the form, there is a 'Submit' button and a 'Related Links' section with a link to 'Show Counter'.

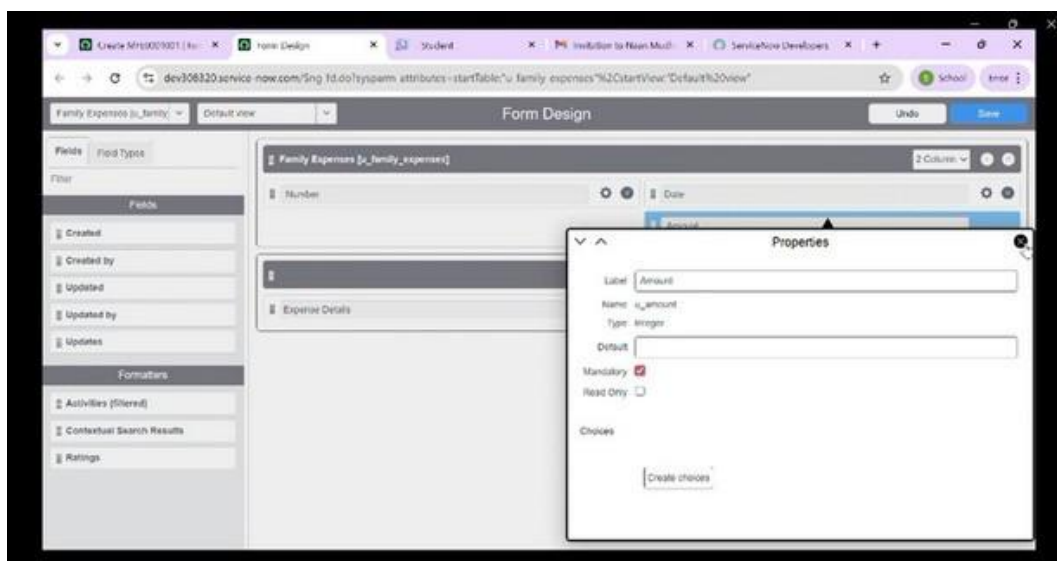


## Configure the Form

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.



The screenshot shows the 'Form Design' interface for 'Family Expenses [u\_family\_expenses]'. The sidebar on the left contains 'Fields' (Created, Created by, Updated, Updated by, Updates) and 'Formatters' (Activities (filtered), Contextual Search Results, Ratings). The main form area shows a layout with fields: Number, Date, Amount, and Expense Details. The Number field is highlighted with a gear icon, indicating it is being configured.



The screenshot shows the 'Form Design' interface with the 'Properties' dialog box open. The dialog box displays the configuration for the 'Amount' field. The 'Mandatory' checkbox is checked, and the 'Read Only' checkbox is unchecked. The 'Label' is 'Amount', the 'Name' is 'u\_amount', and the 'Type' is 'Integer'. The 'Default' field is empty. The 'Choices' section is also empty, with a 'Create choices' button below it.

## 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

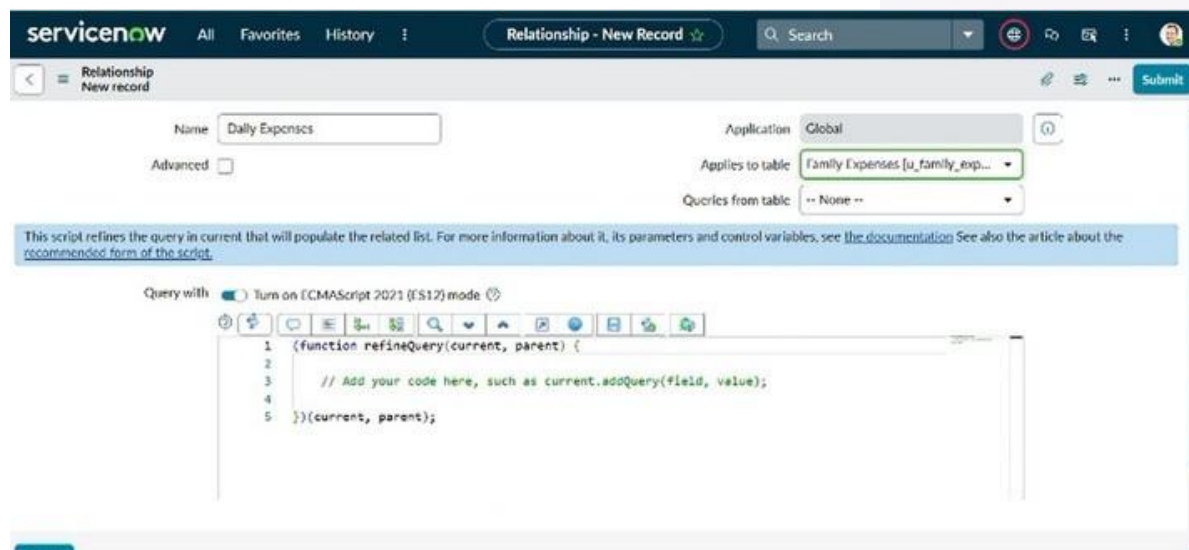
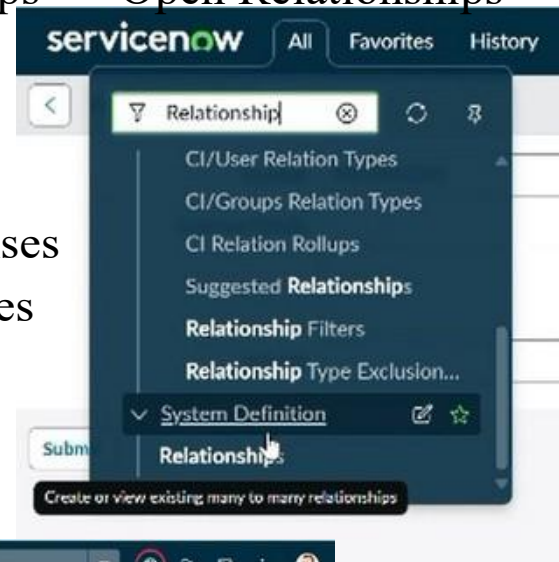
- 1.Go toAll>> In the filter search for Relationships >> Open Relationships
- 2.ClickonNew.
- 3.En terthedetails:

Name : Daily Expenses

Applies to table : Select Family Expenses

Daily Expenses : Select Daily Expenses

- 4.Click Save.





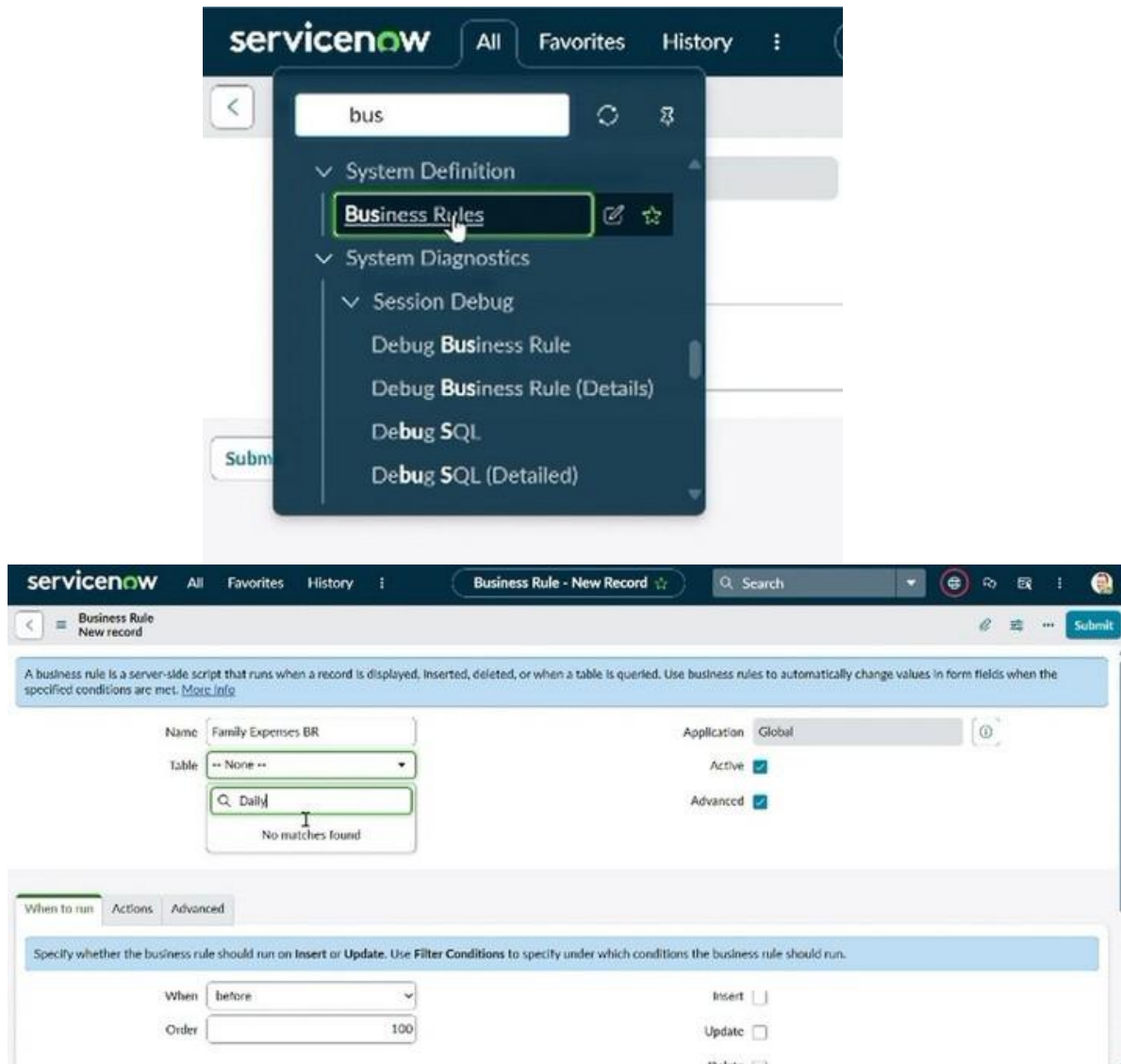
## Milestone 7: Configuring Related List on Family Expenses

- 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



**servicenow** All Favorites History

bus

- System Definition
  - Business Rules**
- System Diagnostics
  - Session Debug
    - Debug Business Rule
    - Debug Business Rule (Details)
    - Debug SQL
    - Debug SQL (Detailed)

**servicenow** All Favorites History Business Rule - New Record Search

Business Rule New record

A business rule is a server-side 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 the specified conditions are met. [More info](#)

Name: Family Expenses BR Application: Global

Table: -- None --

Query: Daily

No matches found

Active ☒ Advanced ☒

When to run Actions Advanced

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

When: before

Order: 100

Insert ☐ Update ☐ Delete ☐

## 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.

**servicenow** All Favorites History Relationship - Daily Expenses Search

Relationship Daily Expenses Run Query Diagnostics Update Delete

Name:  Application:

Advanced ☐ Applies to table:  Queries from table:

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 ☐ Turn on ECMAScript 2021 (ES12) mode

```

1 (function refineQuery(current, parent) {
2
3
4 // Add your code here, such as current.addQuery(field, value);
5
6 current.addQuery('u_date',parent.u_date);
7
8 current.query();
9
10
11 })(current, parent);
  
```

## Conclusion:

Platform Login Credentials - Pr... Student

naanmudhalvan.smartinternz.com/Student/guided\_project\_workspace/25472

**Smart Internz**

Home Projects Support

Guided Project Project Workspace

Project Title : Calculating Family Expenses using Service Now  
 NM Id : 3CE5E46E74DDAD4B9A24CBE87BFC09BF  
 Industry Mentor(s) Name : No Mentor has been assigned

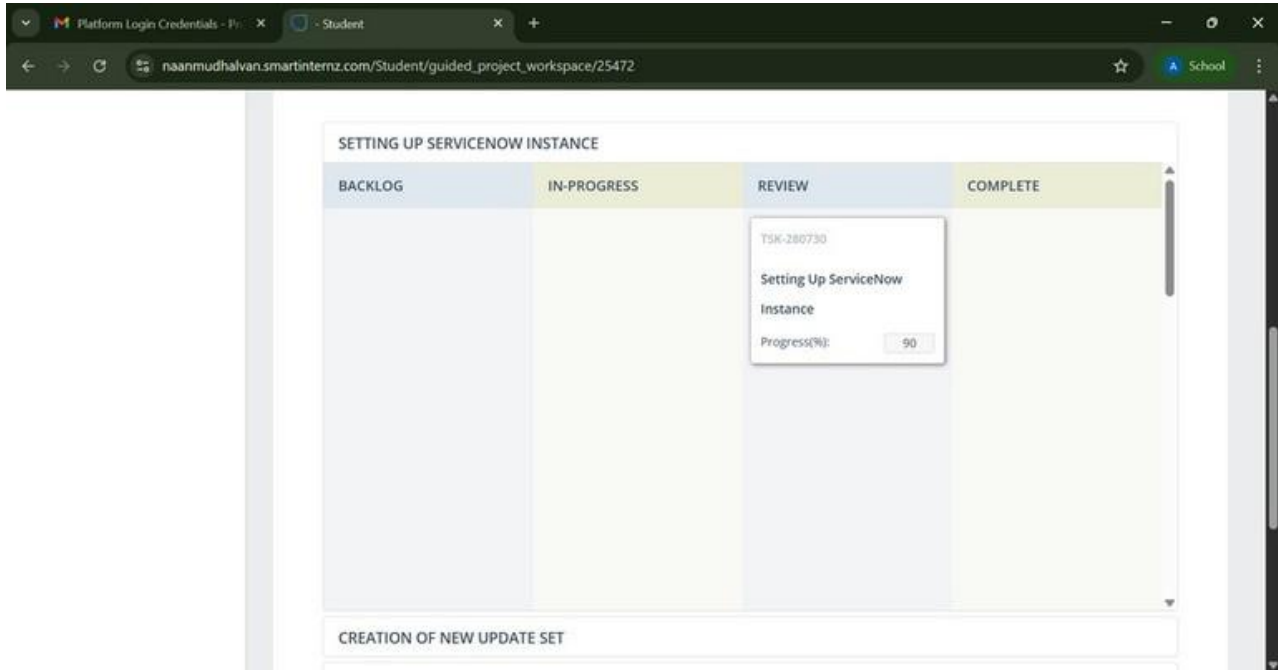
Project Progress: 90.00%

GENERAL INSTRUCTION SHOW

Demo Link View Mentor Comments View Industry Mentor Comments

PROJECT DETAILS TASK & PROGRESS MENTOR REVIEW

15:43 09-09-2025



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

