

Calculating Family Expenses Using Service Now

Problem Statement

In a project of managing family expenses is often challenging due to the lack of a centralization system for tracking income,expenses, and savings.Families typically rely on manual methods such as spreadsheet,paper records,or multiple apps,which can lead to errors,duplication, and difficulty in analyzing financial patterns.

Objective

Simplify Expense Tracking- provide a centralization system for recording and categorizing all family expenses

Improve Financial Awareness-offer real-time dashboards and reports to give clear insights into spending patterns

Enhance Budget Planning-support better financial planning by identify high-spending categories and opportunities to save

Skills: Servicenow Development, Workflow&Automation, Scripting in Servicenow,Reporting&Dashboards, Integration Skills

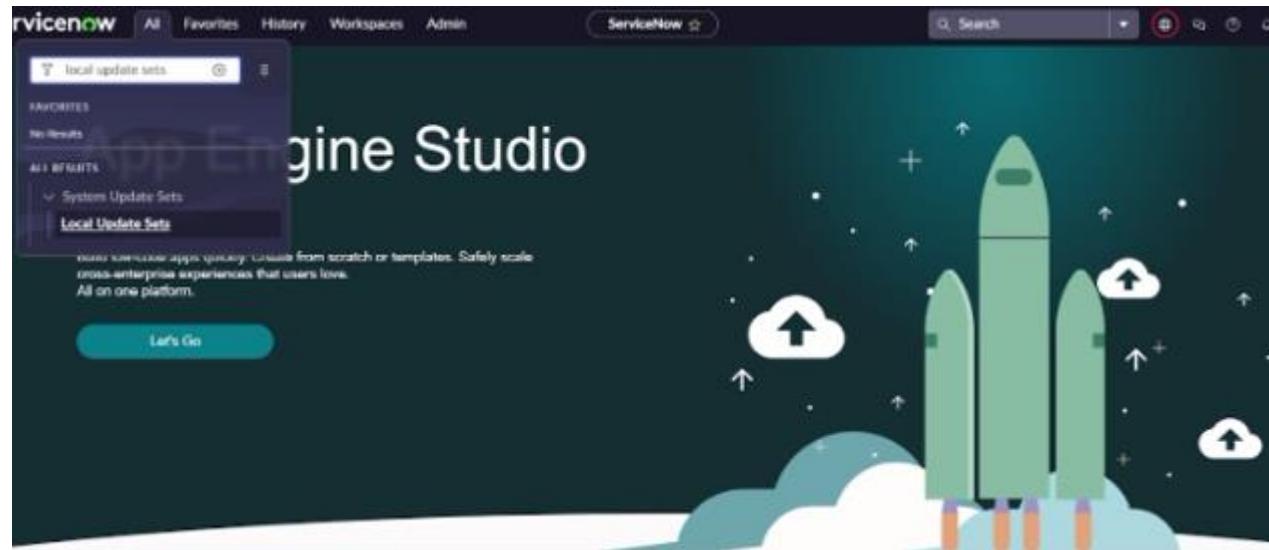
TASK INITIATION

Update

Activity 1:

1.Open Service now

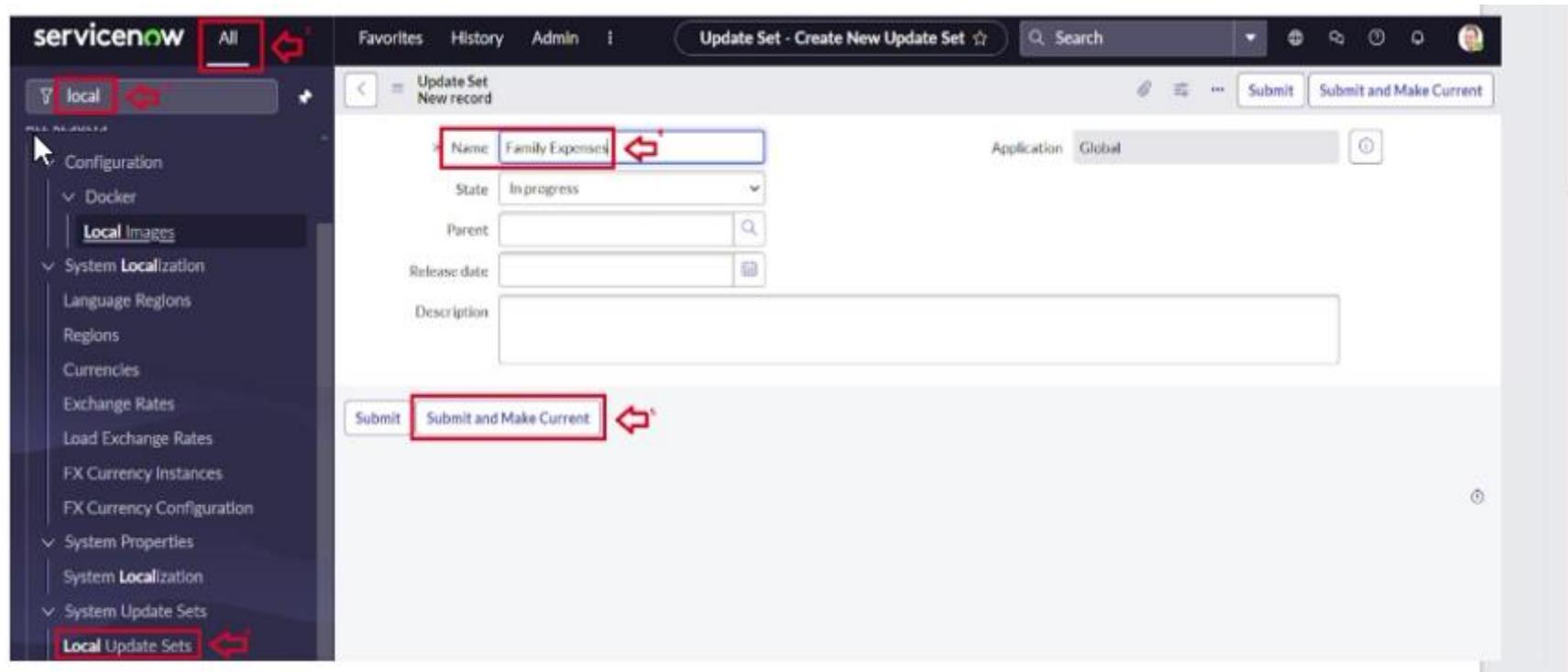
2.Go to All>>search for Local Update Set>Click on New



3.Enter the Details as:

Name:Family Expenses

4.And then click on Submit and make current



Table

Activity 2:

1. Open Service now

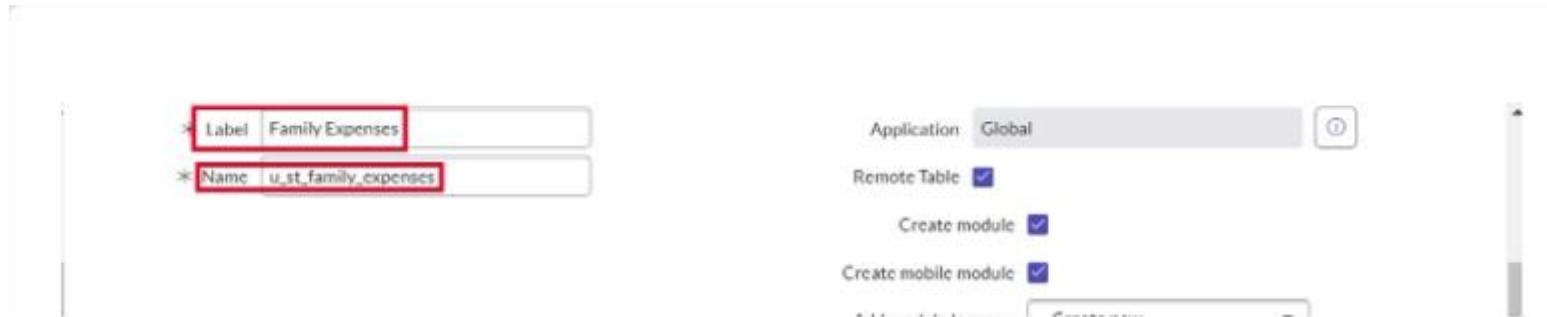
2. Go to all>search for Tables>Click on New

3. Enter the Details:

Label: Family Expenses

Name: Auto-Populated

New menu name: Family Expenditure



4.Click on save

Activity 2:

1.Open Service now

2.Near Columns Double Click near insert a new row

Give the details as:

Column label:Number

Type:String

3.Double click on insert a new row again

Give the details as:

Column label>Date

Type:Date

4.Double click on insert a new row again

Give the details as:

Column label:Amount

Type:Integer

5 .Double click on insert a new row again

Give the details as:

Column label:Expense Details

Type:String

Max length:800

Column	Controls	Application Access	Table Columns	for text	Search			
Dictionary Entries								
			Column label	Type	Reference	Max length	Default value	Display
			Number	String				false
			Date	Date				false
			Amount	Integer		800		false
			Expense Details	String				false

6.Click on save

Activity 2:

1.Open Service now

2.Double click on the Number field/Column

3.Go down and double click on Advanced view

4.In Default Value:

Use dynamic default:check the box

Dynamic default value:Get Next Padded Number

5.click on update



6.Go to all>>search for Number Maintenance>>select number maintenance

7.click on new

8.Enter the details:

Table:Family Expenses

Prefix:MFE

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

8.Click on Submit

Activity 2:

- 1.Open Service now
- 2.Go to all>>search for Family Expenses>>Open family Expenses
- 3.Click on new
- 4.Go to header and click there>>click on configure>>Select Form Design
- 5.Drag Drop the form as requirement

Family Expenses [u_family_expenses]

Number	Date	Amount
Expense Details		

6. Make Number Read-Only Field by Clicking

7. Make Date, Amount Mandatory field by Clicking

8. Click on save

Table(Daily Expenses)

Activity 3

1. 1. Open Service now

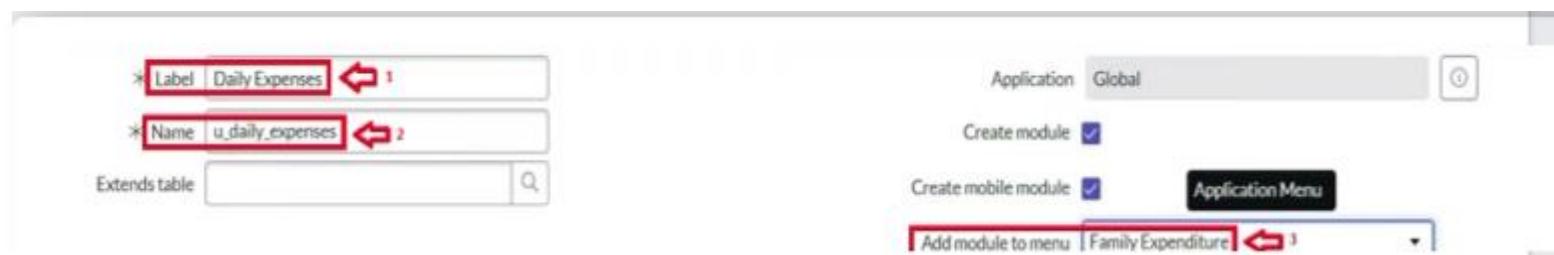
2. Go to all>search for Tables>Click on New

3. Enter the Details:

Label: Daily Expenses

Name: Auto-Populated

Add Module to menu : Family Expenditure



4. click on save

Activity 3:

- 1.Open Service now
- 2.Near Columns Double Click near insert a new row

Give the details as:

Column label:Number

Type:String

- 3.Double click on insert a new row again

Give the details as:

Column label:Date

Type:Date

4. Double click on insert a new row again

Column label:Amount

Type:Integer

- 5 .Double click on insert a new row again

Column label:Expense Details

Type:String

Max length:800

- 6.Double click on insert a new row again

Give the details as:

Column label:Comments

Type:String

Max length:800

6.Click on save

Activity 3:

1.Open Service now

2.Double click on the Number field/Column

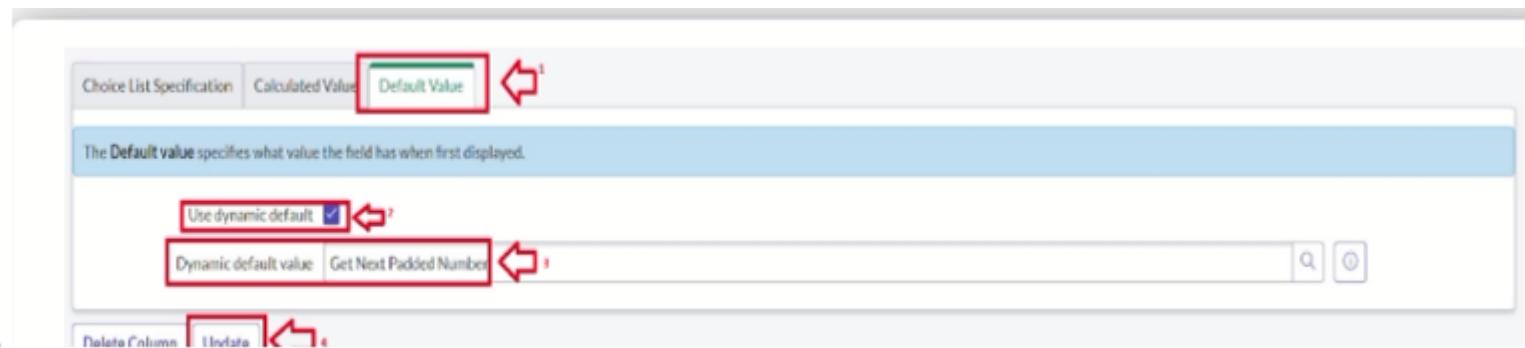
3.Go down and double click on Advanced view

4.In Default Value:

Use dynamic default:check the box

Dynamic default value:Get Next Padded Number

5.click on update



6.Go to all>>search for Number Maintenance>>select number maintenance

7.click on new

8.Enter the details:

Table:Daily Expenses

Prefix:MFE

The screenshot shows a software interface for managing number maintenance. At the top, there's a header with a back arrow, a search icon, and a 'Submit' button. Below the header, the title 'Number' and 'New record' are displayed. The form contains several input fields:

- A dropdown menu labeled 'Table' with 'Daily Expenses' selected, indicated by a red box and a red arrow.
- A 'Prefix' field containing 'MFE', also highlighted with a red box and a red arrow.
- A 'Number' field showing '1,000'.
- An 'Application' field set to 'Global'.
- A 'Number of digits' field set to '7'.

At the bottom of the form is a dark grey footer bar with a 'Submit' button, which is also highlighted with a red box and a red arrow.

9.click on submit

Activity 3:

1.Open Service now

2.Go to all>>search for Daily Expenses>>Open Daily Expenses

3.Click on new

4.Go to header and click there>>click on configure>>Select Form Design

5.Drag Drop the form as requirement

The screenshot shows a table configuration interface with the following fields:

- Number**: A field with a gear icon and a mandatory indicator.
- Date**: A field with a gear icon and a mandatory indicator.
- Family Member Name**: A field with a gear icon and a mandatory indicator.
- Expense**: A field with a gear icon and a mandatory indicator.

Below the main table area, there is a section labeled **Comments** with its own gear icon.

6. Make Number Read-Only Field by Clicking

7. Make Date, Family Member Name Mandatory field by Clicking

8. Click on save

Relationship

Activity 4:

1. Open Service now

2. Go to all>>search for relationships>>open relationships

3. click on new

4. Enter the details:

Name: Daily Expenses

Applies to table: select Family Expenses

Daily Expenses: select Daily Expenses

5.click save

Configuring Related List

Activity 5:

1.open Service now

2. .Go to all>>search for Family Expenses>>Open Family Expenses

3.Click on new

4.Go to header and click there>>click on configure>>select Related Lists

5.Add Daily Expenses to selected area

6.click on save



Business rule

Activity 6:

1. Open Service Now
2. Go to all>>search for Business Rules
3. Under system definition select business rules then click new
4. Enter the Details:

Name: Family Expenses BR

Table: Select Daily Expenses

Check Advanced

The screenshot shows the 'Business Rule' configuration page in Service Now. The 'Name' field contains 'Family Expenses BR' with a red arrow pointing to it. The 'Table' dropdown menu is open, showing 'Daily Expenses (u_daily_expenses)' with a red arrow pointing to it. The 'Application' field is set to 'Global'. The 'Active' checkbox is checked. The 'Advanced' checkbox is also checked. A red arrow points to the 'Advanced' checkbox.

5. In when the run check insert and update



6.In Advance(we write the code)

Script

```
1 (function executeRule(current, previous /*null when async*/) {
2
3     var FamilyExpenses = new GlideRecord('u_family_expenses');
4     FamilyExpenses.addQuery('u_date',current.u_date);
5     FamilyExpenses.query();
6     if(FamilyExpenses.next())
7     {
8         FamilyExpenses.u_amount += current.u_expense;
9         FamilyExpenses.u_expense_details += ">" + current.u_comments + ":" + Rs. + current.u_expense + "-";
10        FamilyExpenses.update();
11    }
12    else
13    {
14        var NewFamilyExpenses = new GlideRecord('u_family_expenses');
15        NewFamilyExpenses.u_date = current.u_date;
16        NewFamilyExpenses.u_amount = current.u_expense;
17        NewFamilyExpenses.u_expense_details += ">" + current.u_comments + ":" + Rs. + current.u_expense + "-";
18        NewFamilyExpenses.insert();
19    }
20
21 })(current, previous);
```

7.click on save

Configure The Relationship

Activity 7:

1.Open Service now

2.Go to all>>search for relationships>>open relationships

3.In open Daily Expenses relationship

For Applies to table:select Family Expenses

In Query with:write the below Query

4.click on update

