

# **Project title : Calculating Family Expenses Using Servicenow**

**TEAM ID : LTVIP2026TMIDS41463**

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## **CALCULATING FAMILY EXPENSES USING SERVICENOW**

### **Aim of the project**

To develop a centralized and automated platform that helps individuals or families track, manage, and optimize their expenses with ease. The goal is to promote financial discipline and simplify budget planning by using the powerful features of ServiceNow like scripting, reporting, and process automation. The project aims to develop a comprehensive 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. Utilizing 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.

### **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.

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developer.servicenow.com/dev.do#/

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ServiceNow

signon.servicenow.com/x\_snc\_sso\_auth.do?pageld=login

servicenow Developer Portal

## Solve problems. Explore resources. Get help.

Sign in with your ServiceNow ID

\*Email

varadharajunavya@gmail.com

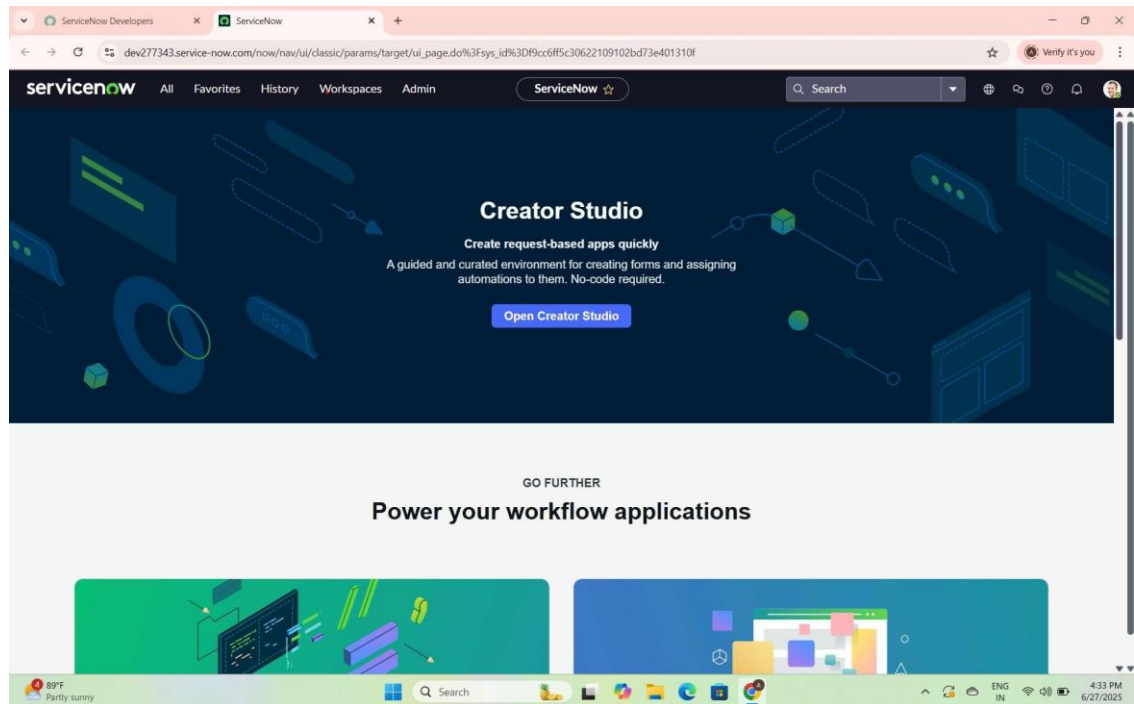
Next

New user? Get a ServiceNow ID

Need assistance with sign in?

Search

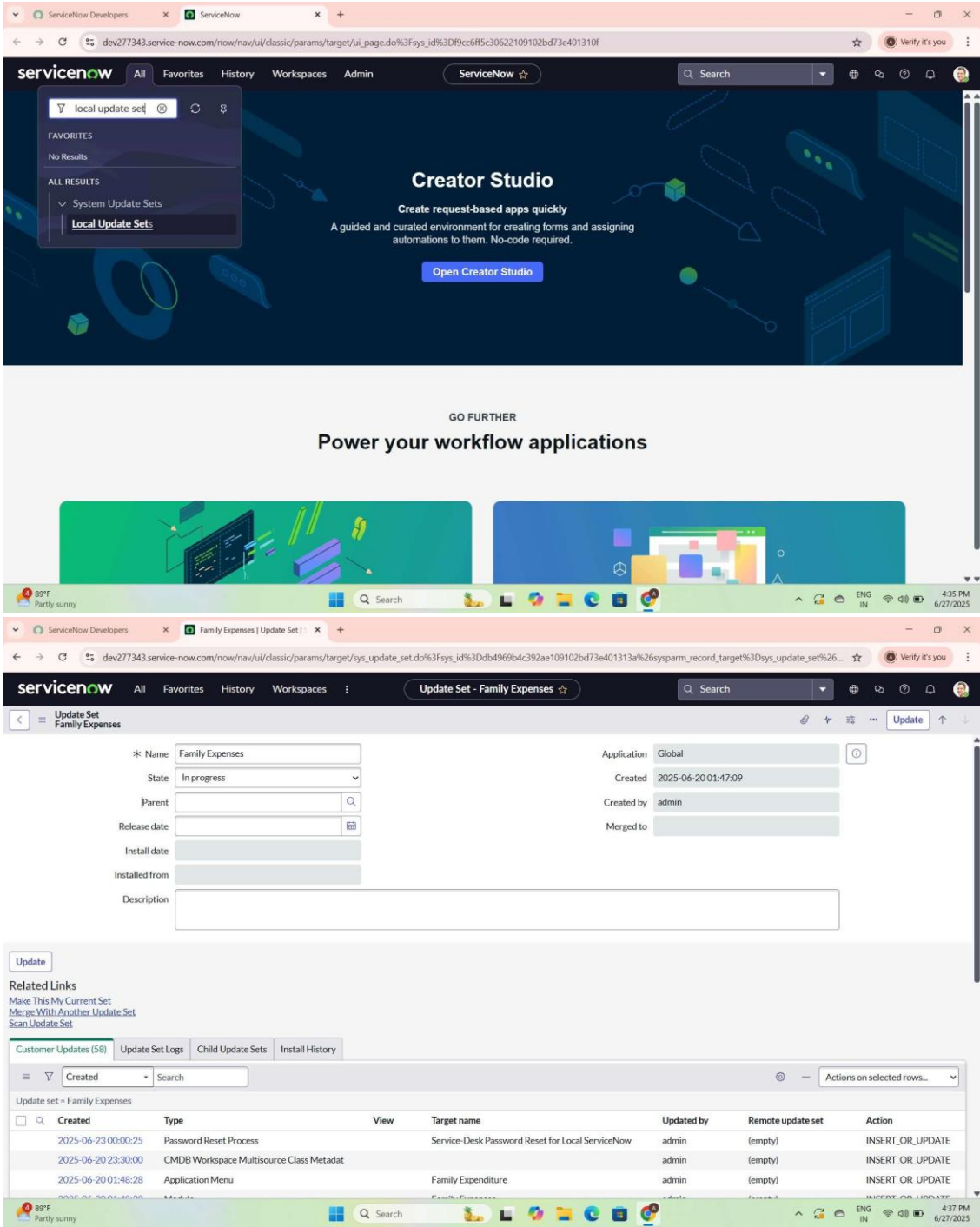
ENG IN 18:06 19-02-2026



## Milestone-2

### Creation Of New Update Set

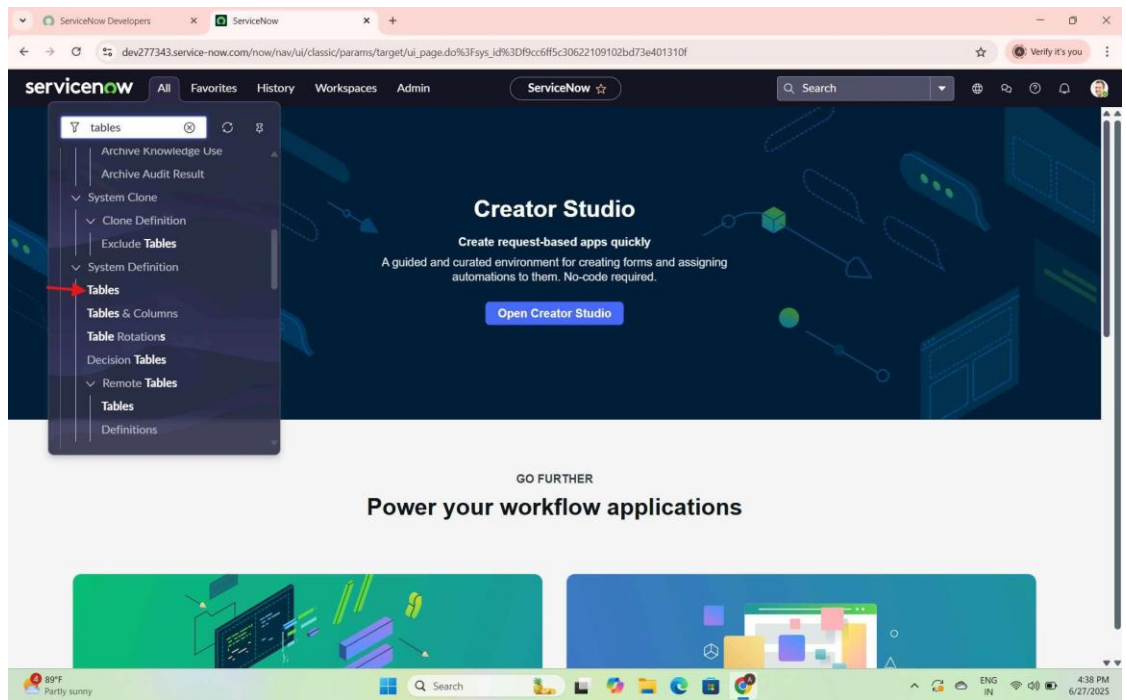
1. Go to All >> In the filter search for Local Update set > click on New.
2. Enter the Details as: Name : Family Expenses
3. Then click on Submit and Make current.



### Milestone-3

### Creation Of Family Expenses Table

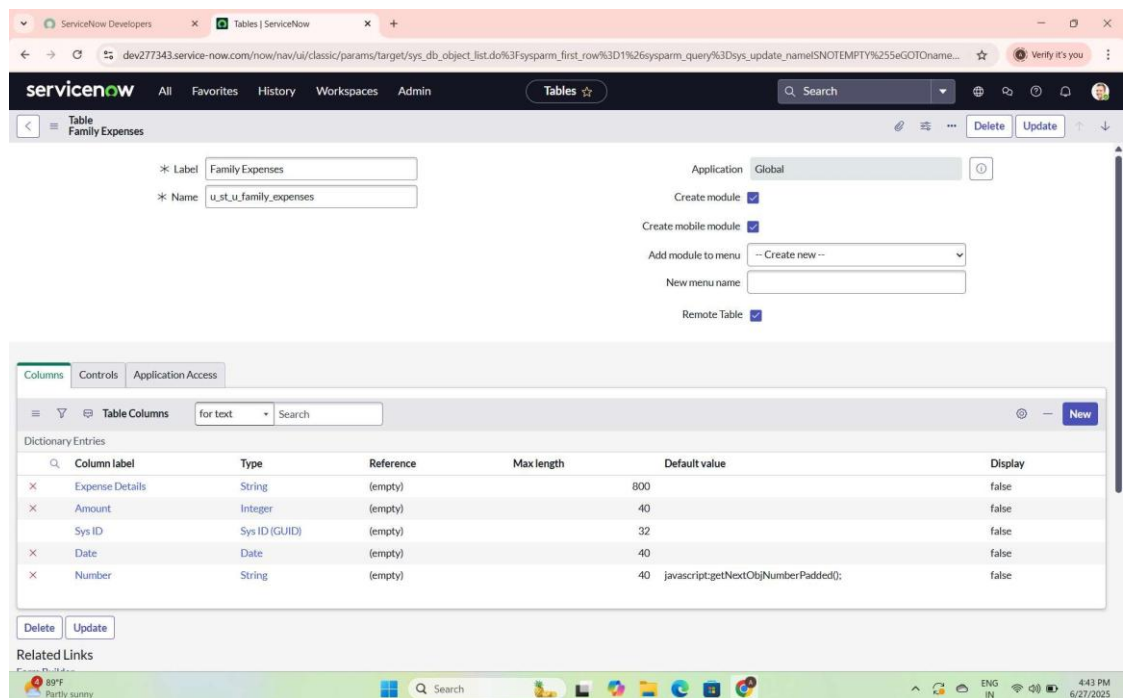
1. Go to All > In the filter search for Tables > click on New.



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.

### Creation of columns(fields)

4. Near Columns Double click near insert a new row.
5. Give the details as: Column label : Number Type : String
6. Double click on insert a new row again
7. Give the details as: Column label : Date Type : Date
8. Double click on insert a new row again
9. Give the details as: Column label : Amount Type : Integer
10. Double click on insert a new row again
11. Give the details as: Column label : Expense Details Type : String Max length : 800
12. Go to the Header and right click there>> click on Save.

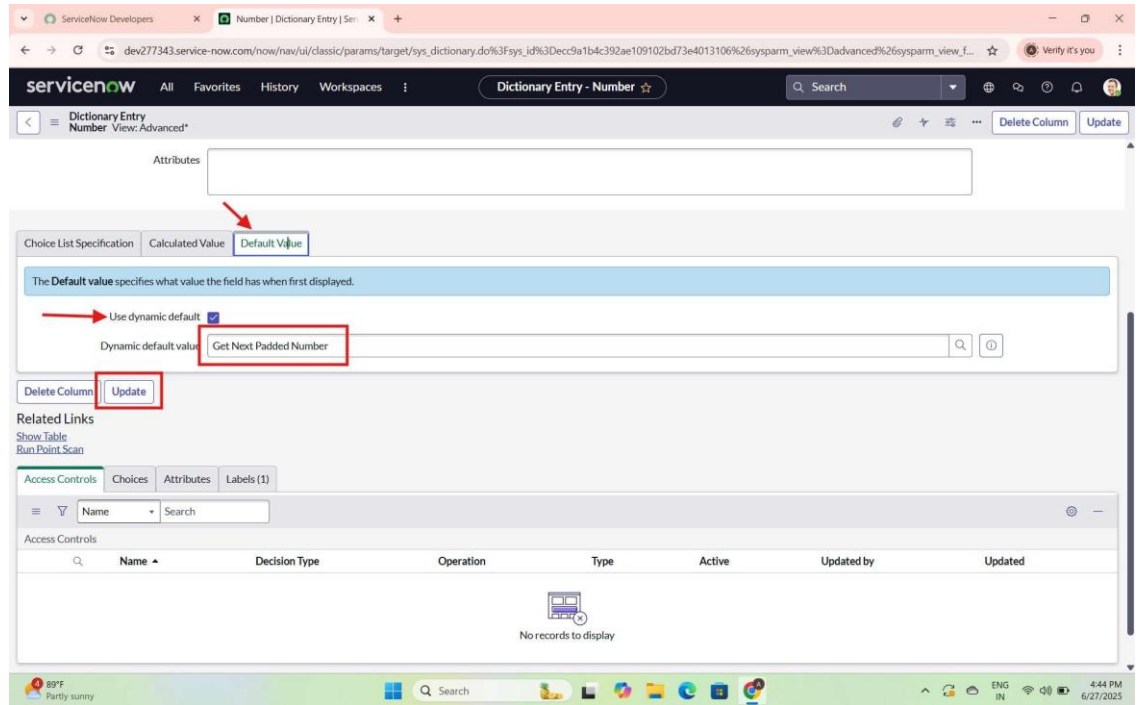


### . Making Number Field An Auto-Number

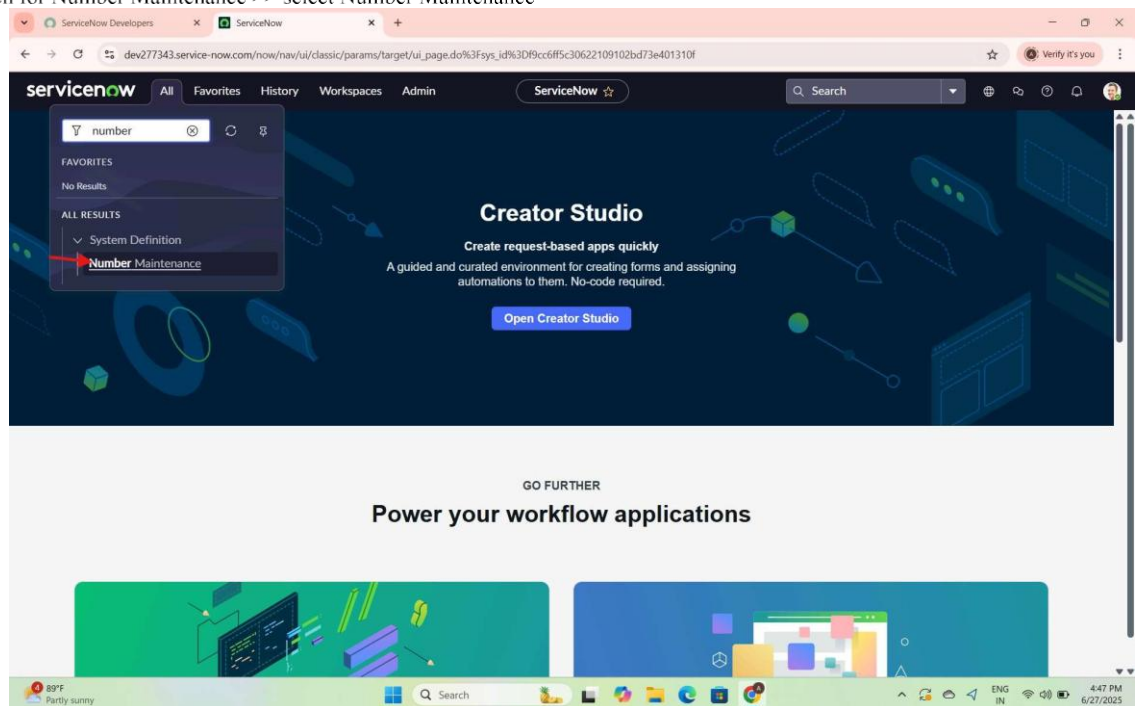
1. Double click on the Number Field/Column.
2. Go down and double click on Advanced view

## Project

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.



## Project

The screenshot shows the ServiceNow configuration page for the 'Family Expenses' table. The table name is 'Family Expenses', the prefix is 'MFE', the number is '1,000', the application is 'Global', and the number of digits is '7'. There are 'Update' and 'Delete' buttons at the top right. Below the configuration fields, there is a 'Related Links' section with a 'Show Counter' link. The bottom of the screen shows a Windows taskbar with various icons and the system clock at 4:50 PM on 6/27/2025.

### . 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

The screenshot shows the 'Family Expenses - Create MFE0001006' form. The configuration menu is open, showing options like 'Form Builder', 'Form Design', 'Form Layout', 'Related Lists', 'All', 'Table', 'Security Rules', 'Business Rules', 'Client Scripts', 'UI Policies', 'Data Policies', 'UI Actions', 'Notifications', and 'Dictionary'. The form fields include 'Date' and 'Amount', both marked as mandatory with an asterisk. There is a 'Submit' button at the bottom left. The bottom of the screen shows a Windows taskbar with various icons and the system clock at 4:53 PM on 6/27/2025.

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 ServiceNow Form Designer interface for the 'Family Expenses' table. The interface is divided into a sidebar and a main workspace. The sidebar contains a 'Fields' tab, a 'Field Types' tab, a 'Filter' section, and a 'Formatters' section. The main workspace displays the 'Family Expenses [u\_st\_u\_family\_expenses]' table with columns for 'Number', 'Date', and 'Amount'. Below this, there is a section for 'Expense Details'.

## Milestone-4

### 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.

#### Creation of columns(fields)

4. Near Columns Double click near insert a new row.
5. Give the details as: Column label : Number Type : String
6. Double click on insert a new row again
7. Give the details as: Column label : Date Type : Date
8. Double click on insert a new row again
9. Give the details as: Column label : Expense Type : Integer
10. Double click on insert a new row again
11. Give the details as: Column label : Family Member Name Type : Reference Max length : 800
12. Double click on insert a new row again
13. Give the details as: Column label : Comments Type : String Max length : 800
14. Go to the Header and right click there>> click on Save.



ServiceNow configuration page for 'Table: Daily Expenses'. The 'Columns' tab is active, showing a list of columns for the 'Daily Expenses' table. The columns include Comments, Expense, Family Member Name, Number, Created by, Sys ID, Created, Updated by, Updates, Updated, and Date. The 'Number' column is highlighted, and its 'Default value' is set to 'javascript:getNextObjNumberPadded();'.

Column label	Type	Reference	Max length	Default value	Display
Comments	String	(empty)	800		false
Expense	Integer	(empty)	40		false
Family Member Name	Reference	.NET Application	32		false
Number	String	(empty)	40	javascript:getNextObjNumberPadded();	false
Created by	String	(empty)	40		false
Sys ID	Sys ID (GUID)	(empty)	32		false
Created	Date/Time	(empty)	40		false
Updated by	String	(empty)	40		false
Updates	Integer	(empty)	40		false
Updated	Date/Time	(empty)	40		false
Date	Date	(empty)	40		false

### . Making Number Field An Auto-Number

15. Double click on the Number Field/Column.
16. Go down and double click on Advanced view
17. In Default Value: Use dynamic default : check the box Dynamic default value : Get Next Padded Number
18. Click on Update.

ServiceNow configuration page for 'Dictionary Entry - Number'. The 'Default Value' tab is active, showing the 'Dynamic default value' section. The 'Use dynamic default' checkbox is checked, and the 'Dynamic default value' is set to 'Get Next Padded Number'. The 'Update' button is circled in red.

Attributes

Choice List Specification | Calculated Value | **Default Value**

The **Default value** specifies what value the field has when first displayed.

☒ Use dynamic default

Dynamic default value: Get Next Padded Number

Delete Column | **Update**

19. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance
20. Click on New.
21. Enter the below Details: Table : Family Expenses Prefix : DFE
22. Click on Submit.

### . Configure the form

23. Go to All >> In the filter search for Daily Expenses >> Open Daily Expenses
24. Click on New
25. Go to the Header and right click there>> click on Configure >> Select Form Design
26. Customize or Drag Drop the form as per your requirement.

## Project

The screenshot shows the ServiceNow Form Design interface for the 'Daily Expenses' form. The left sidebar contains a list of fields and formatters. The main area displays the form layout with fields for 'Number', 'Date', 'Expense', and 'Family Member Name'. The 'Number' field is marked as 'Read-Only' and the 'Date' and 'Family Member Name' fields are marked as 'Mandatory'. The 'Comments' field is at the bottom.

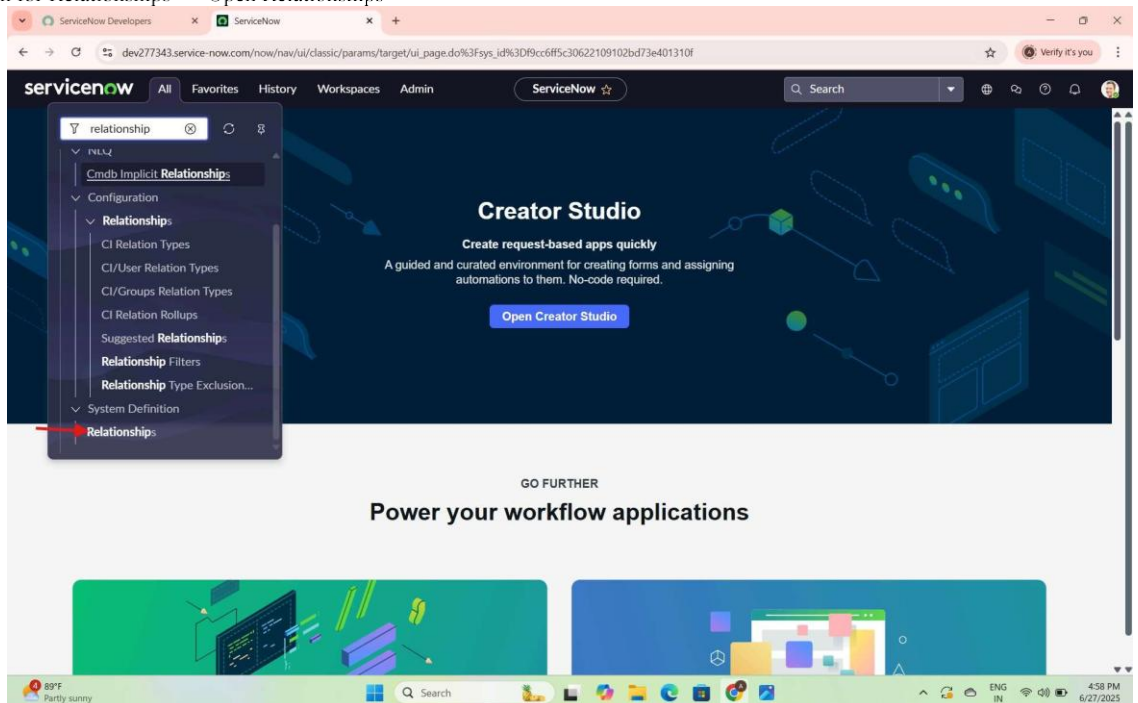
27. Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
28. Make Date, Family Member Name Mandatory Field by clicking on the gear icon and checking Mandatory
29. Click on Save.

## Milestone-5

### Creation Of Relationship

#### . Creation Of Relationship Between Family Expenses And Daily Expenses

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.

ServiceNow Relationship - Daily Expenses

Name:

Advanced: ☐

Application:

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);
  
```

Update Delete

Related Links

Run Point Scan

## Milestone-6

### 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

ServiceNow Family Expenses - Create MFE0001007

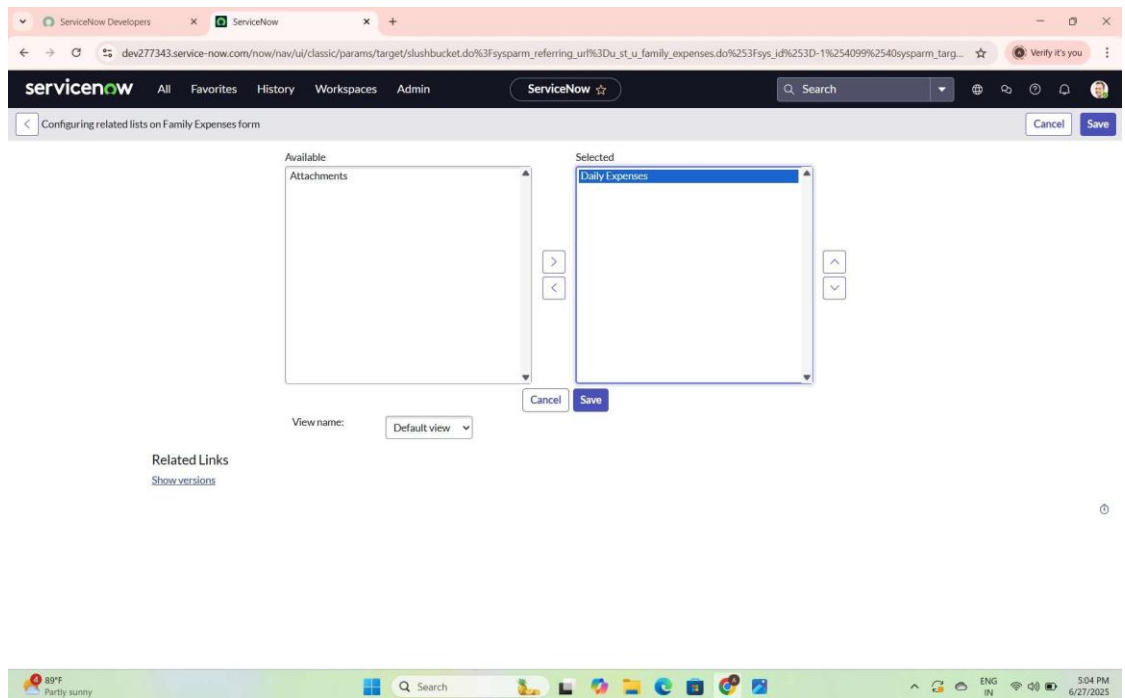
Number:

Expense Details:

Submit

Save  
Configure  
Export  
Create Favorite  
Copy URL  
Copy sys\_id  
Reload form  
Form Builder  
Form Design  
Form Layout  
Related Lists  
All  
Table  
Security Rules  
Business Rules  
Client Scripts  
UI Policies  
Data Policies  
UI Actions  
Notifications  
Dictionary

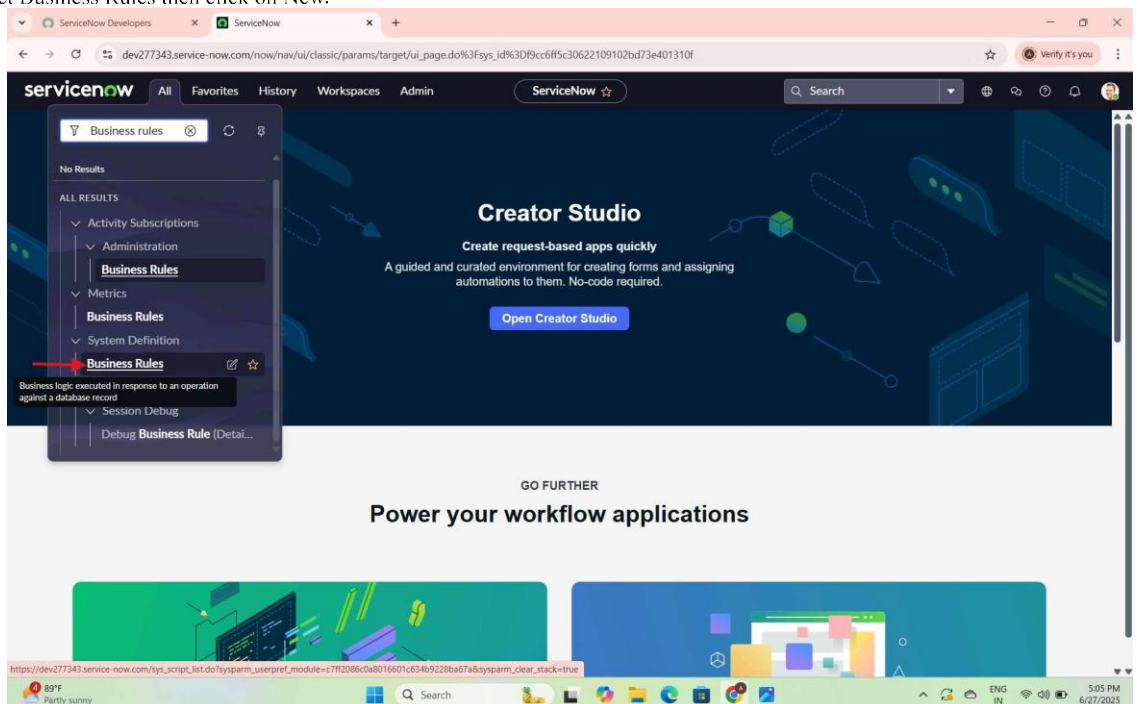
4. Add Daily Expenses to the Selected Area.
5. Click on Save



## Milestone-7

### 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

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  
Table: Daily Expenses [u\_daily\_expenses]

Application: Global  
Active: ☒  
Advanced: ☒

When to run: **When** before, **Order** 100  
Filter Conditions: Add Filter Condition, Add OR Clause  
Role conditions:

Insert: ☒  
Update: ☒  
Delete: ☐  
Query: ☐

Update Delete

- In Advance (we write the code): Write the below code >> (function executeRule(current, previous /\*null when async\*/) { var FamilyExpenses = new GlideRecord('u\_family\_expenses'); FamilyExpenses.addQuery('u\_date', current.u\_date); FamilyExpenses.query(); if (FamilyExpenses.next()) { FamilyExpenses.u\_amount += current.u\_expense; FamilyExpenses.u\_expense\_details += ">" + current.u\_comments + ":" + "Rs." + current.u\_expense + "/-"; FamilyExpenses.update(); } else { var NewFamilyExpenses = new GlideRecord('u\_family\_expenses'); NewFamilyExpenses.u\_date = current.u\_date; NewFamilyExpenses.u\_amount = current.u\_expense; NewFamilyExpenses.u\_expense\_details += ">" + current.u\_comments + ":" + "Rs." + current.u\_expense + "/-"; NewFamilyExpenses.insert(); } })(current, previous);
- Go to the Header and right click there >> click on Save.

Name: Family Expenses  
Table: Daily Expenses [u\_daily\_expenses]

Application: Global  
Active: ☒  
Advanced: ☒

When to run: **When** before, **Order** 100  
Filter Conditions: Add Filter Condition, Add OR Clause  
Role conditions:

Insert: ☒  
Update: ☒  
Delete: ☐  
Query: ☐

Update Delete

Condition:

Script: ☒ Turn on ECMAScript 2021 (ES12) mode

```

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  }
13  }
14  }
15  }
16  }
17  }
18  }
19  }

```

## Milestone-8

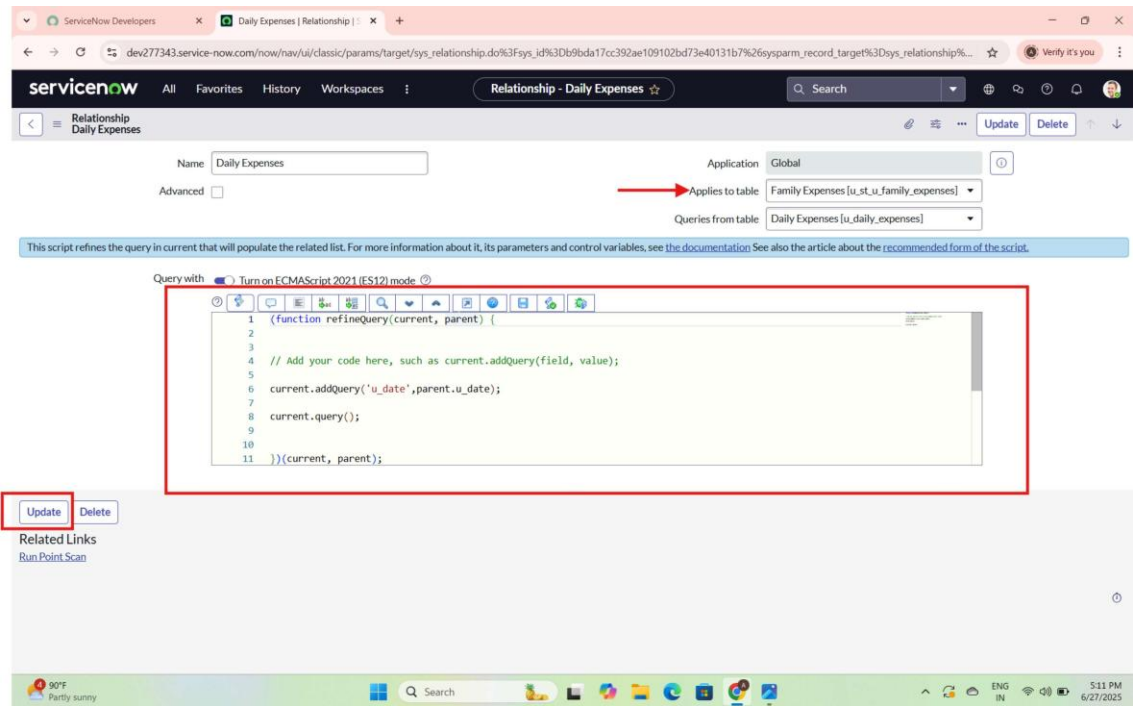
### Configure The Relationship

- Go to All >> In the filter search for Relationships >> Open Relationships.
- 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);





5. Click on Update.



## Conclusion

In conclusion, implementing the "Calculation of Family Expenses Using ServiceNow" project offers numerous benefits to the household. By leveraging the robust capabilities of ServiceNow, family members can efficiently submit, track, and manage their expenses in a centralized and streamlined manner.