

CALCULATING FAMILY EXPENSES USING SERVICE NOW

Team Id: NM2025TMID14995

Team Members: 4

Team leader : Vidya Priya J

Member 1 : Nandhitha V

Member 2 : Rathna priyaM N

Member 3 : Vishali K

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.

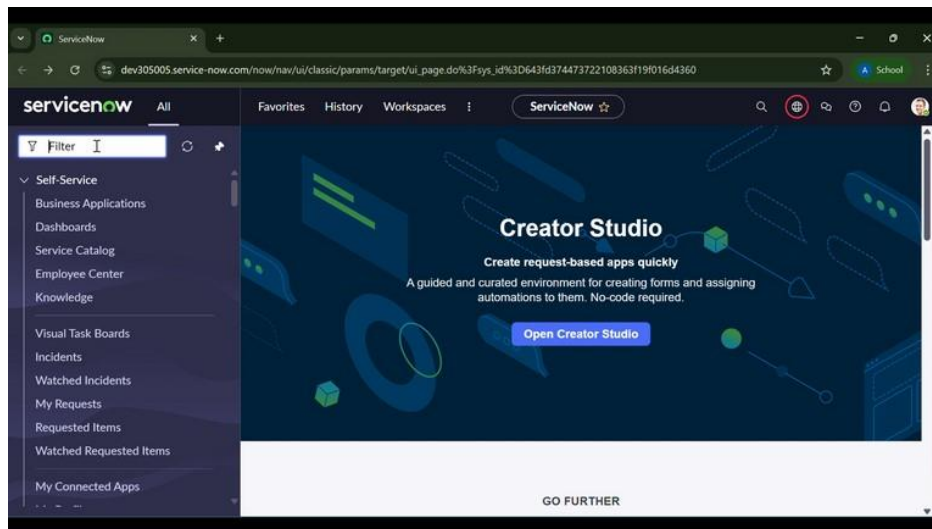
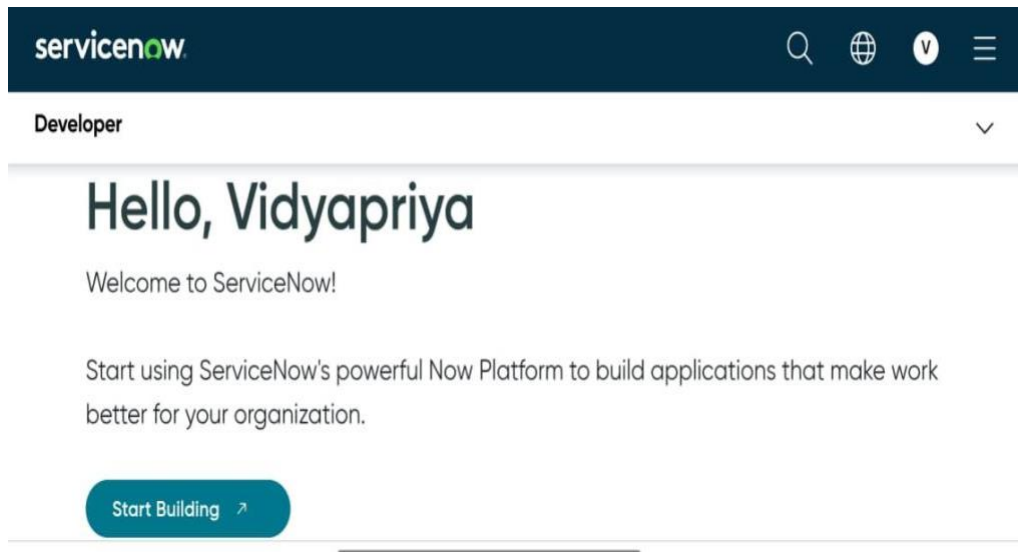
Skills : IOT, Open Hardware Platforms And Data Structures

TASK INITIATION :

Milestone 1 : Setting up ServiceNow Instance

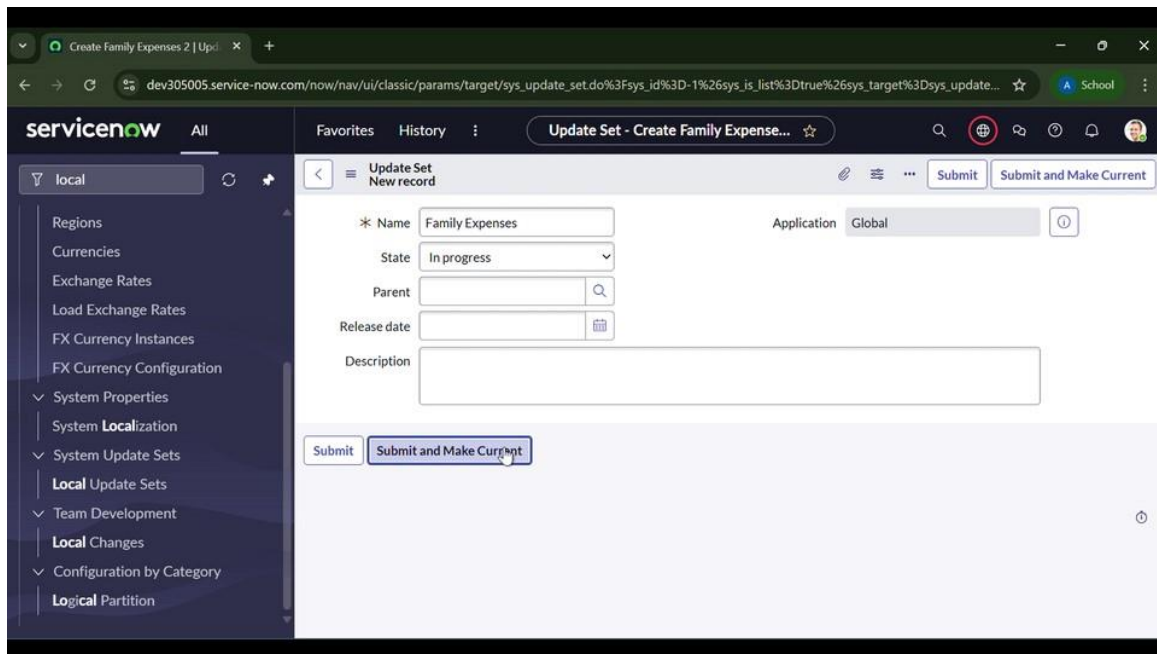
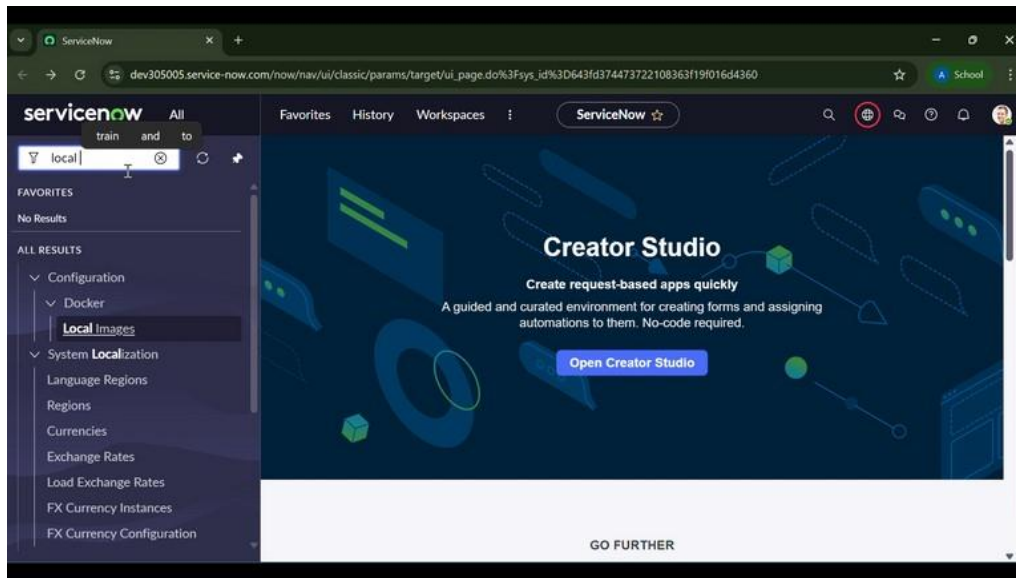
1. Sign up for a developer account on the ServiceNow Developer site "<https://developer.servicenow.com>".
2. Once logged in, navigate to the "Personal Developer Instance" section.
3. Click on "Request Instance" to create a new ServiceNow instance.
4. Fill out the required information and submit the request.
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.



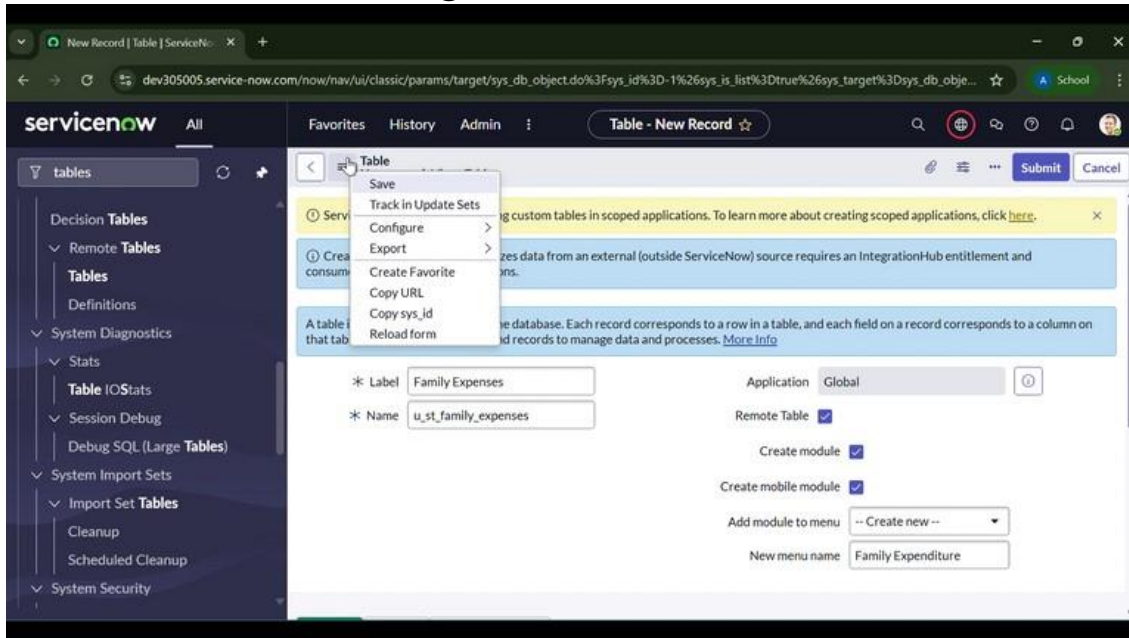
Milestone 3: Creation of Table

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.

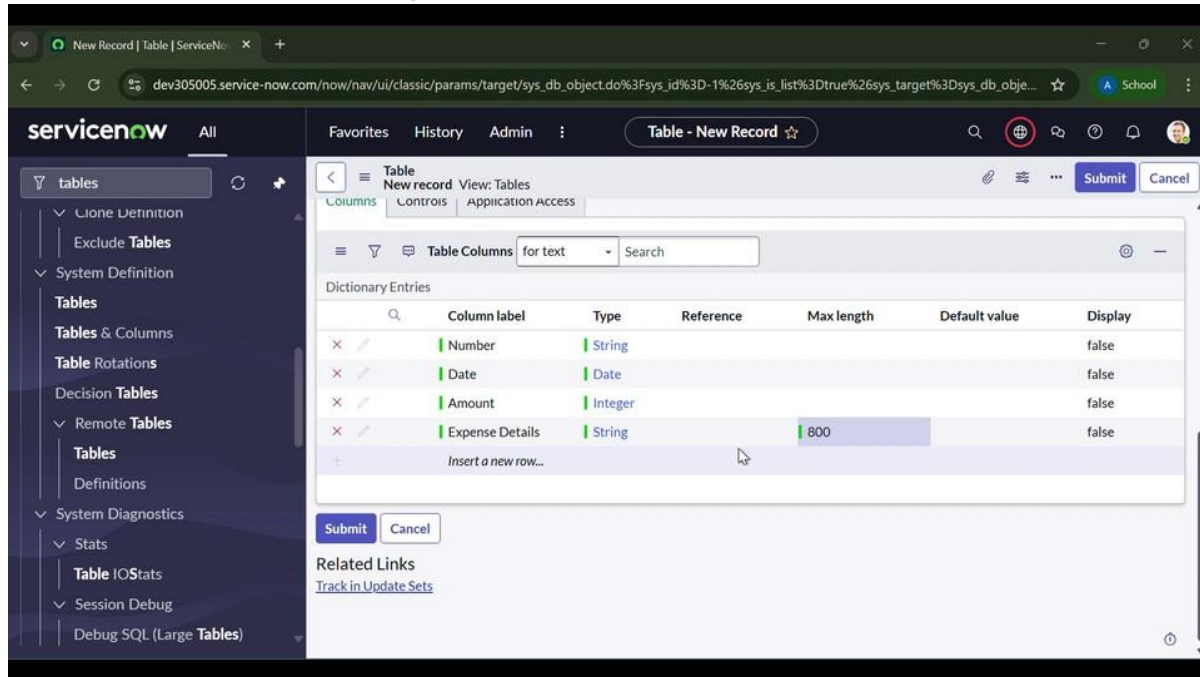


Creation of Columns (Fields)

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.







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  

[Delete Column](#) [Update](#)


servicenow All Favorites History [Number - New Record](#)  Search     

[Number](#) [New record](#)    [Submit](#)

* Table  

Prefix

* Number

Application 

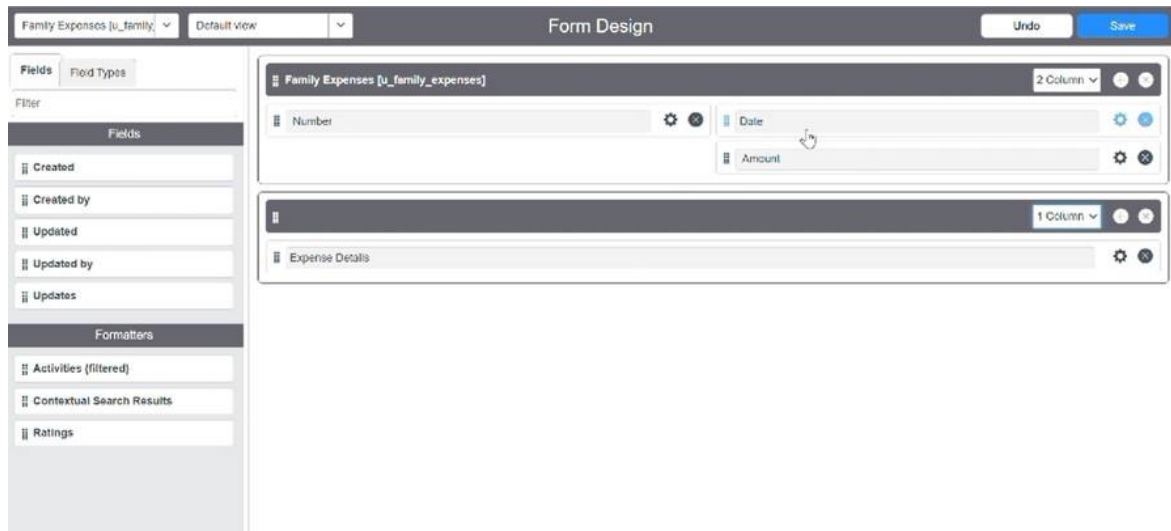
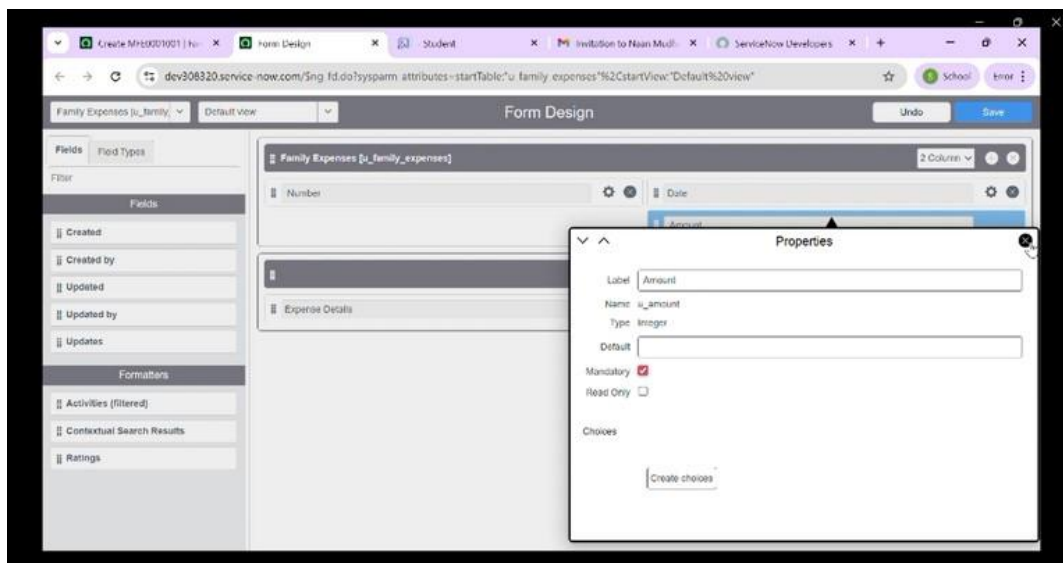
Number of digits

[Submit](#)

Related Links
[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.

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 to All >> In the filter search for Relationships >> Open Relationships

2. Click on New.

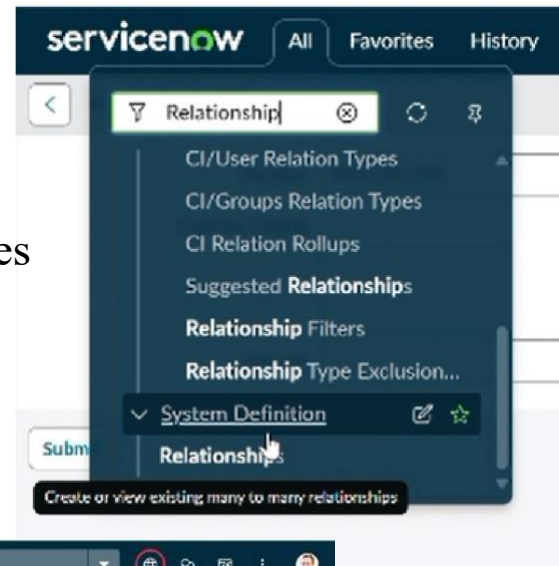
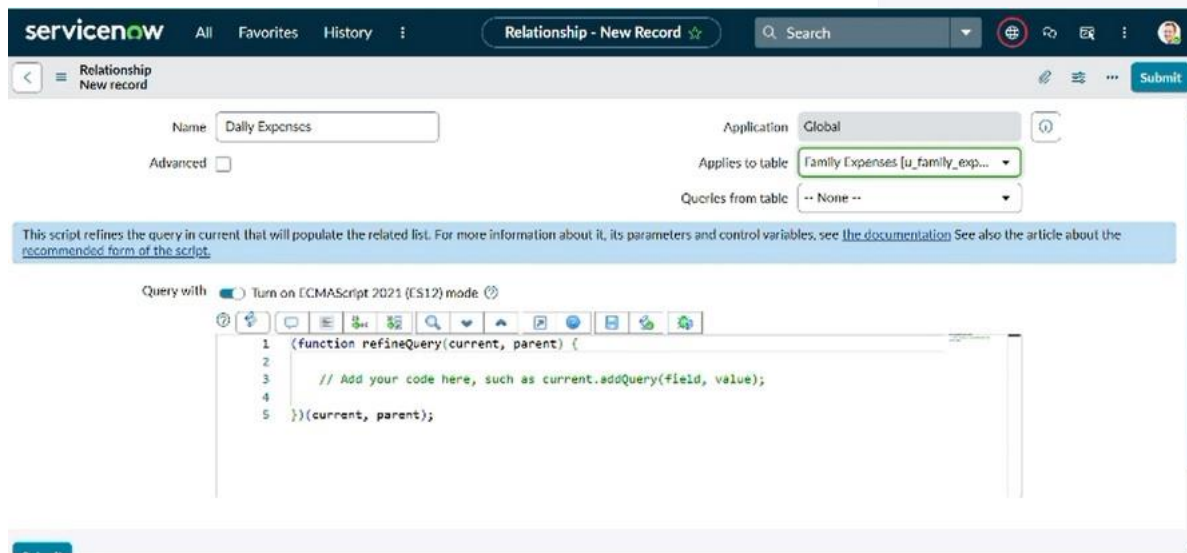
3. Enter the details:

Name : Daily Expenses

Applies to table : Select Family Expenses

Daily Expenses : Select Daily Expenses

4. Click Save.

Relationship - New Record

Name:

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.

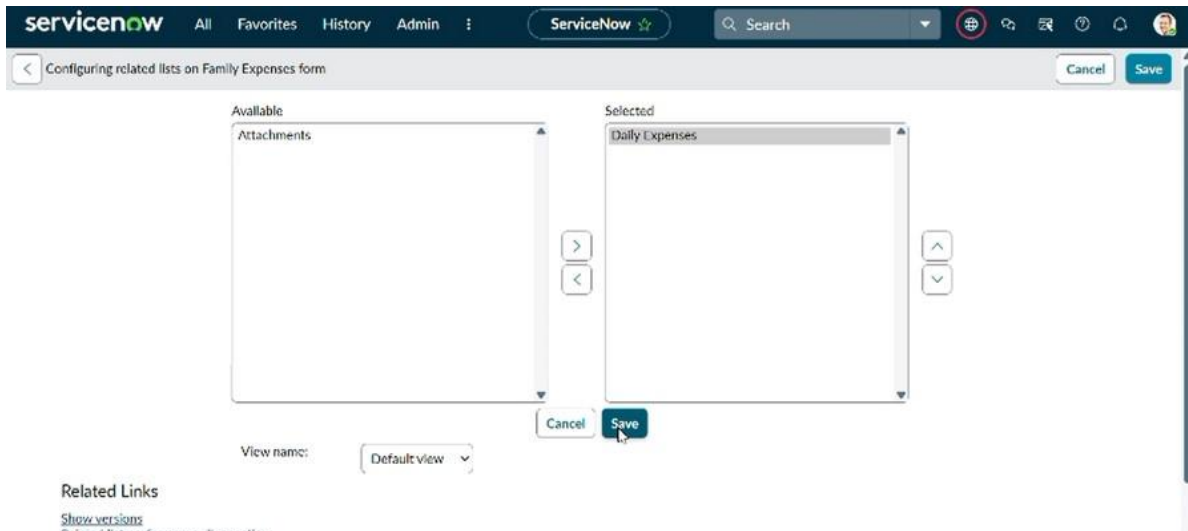
Query with ☐ Turn on ECMAScript 2021 (ES12) mode

```

1 (function refineQuery(current, parent) {
2
3   // Add your code here, such as current.addQuery(field, value);
4
5 })(current, parent);
  
```

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.



serviceNow All Favorites History Admin ServiceNow Search

< Configuring related lists on Family Expenses form Cancel Save

Available Attachments

Selected Daily Expenses

> < ^ v

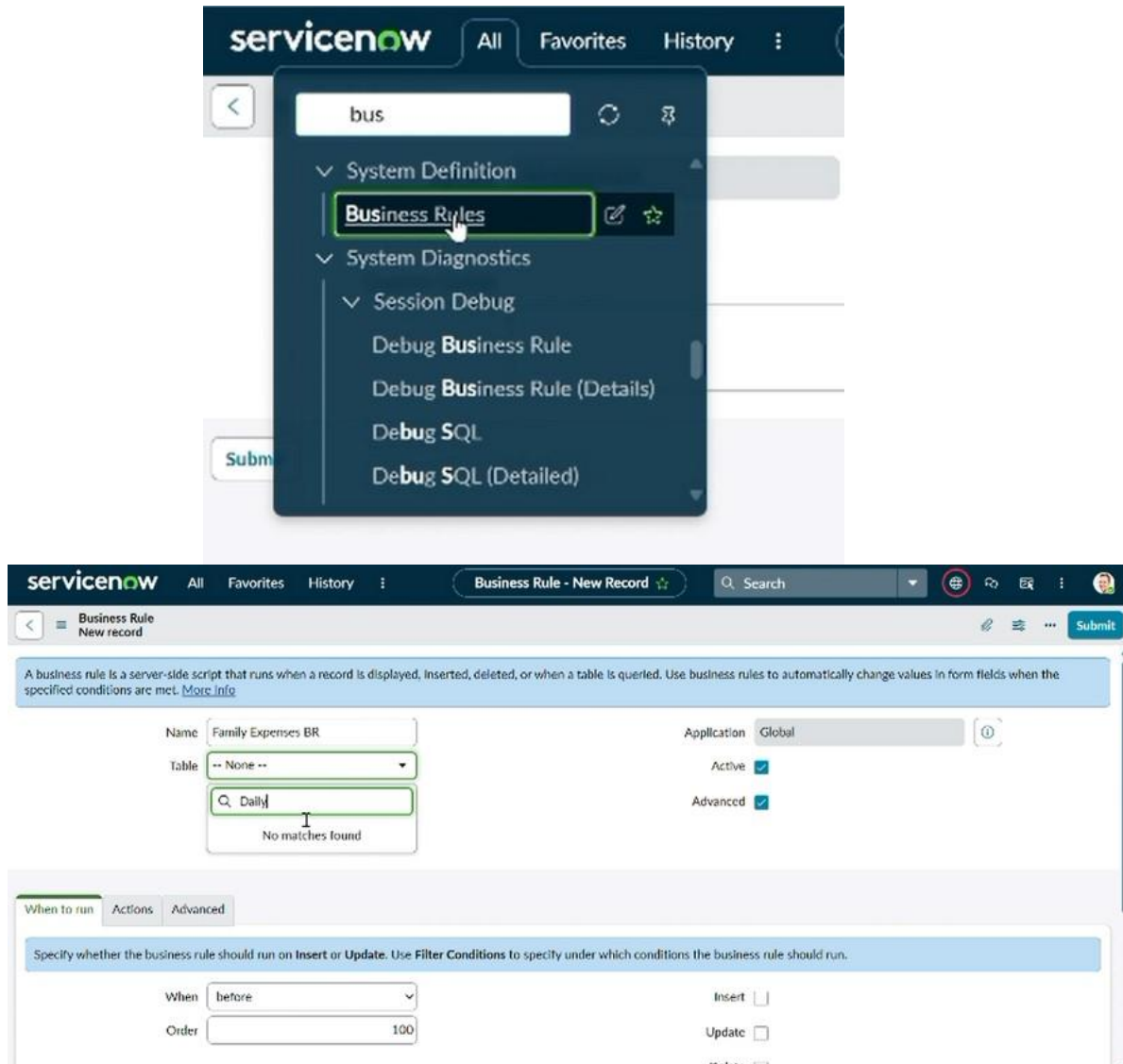
Cancel Save

View name: Default view

Related Links
[Show versions](#)

Milestone 8 : 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
4. Check Advanced
5. In when to run Check Insert and Update



The screenshot shows the ServiceNow interface for creating a new Business Rule. The top navigation bar includes 'servicenow', 'All', 'Favorites', and 'History'. A search bar contains the text 'bus'. A dropdown menu is open, showing a list of options under 'System Definition' and 'System Diagnostics'. The 'Business Rules' option is highlighted. Below the dropdown, the 'Business Rule - New Record' form is visible. It includes fields for 'Name' (Family Expenses BR), 'Table' (None), and 'Query' (Daily). The 'Application' is set to 'Global'. The 'Active' and 'Advanced' checkboxes are checked. The 'When to run' tab is selected, showing options for 'When' (before) and 'Order' (100). The 'Insert', 'Update', and 'Delete' checkboxes are also visible.

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

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 - x - Student x +

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

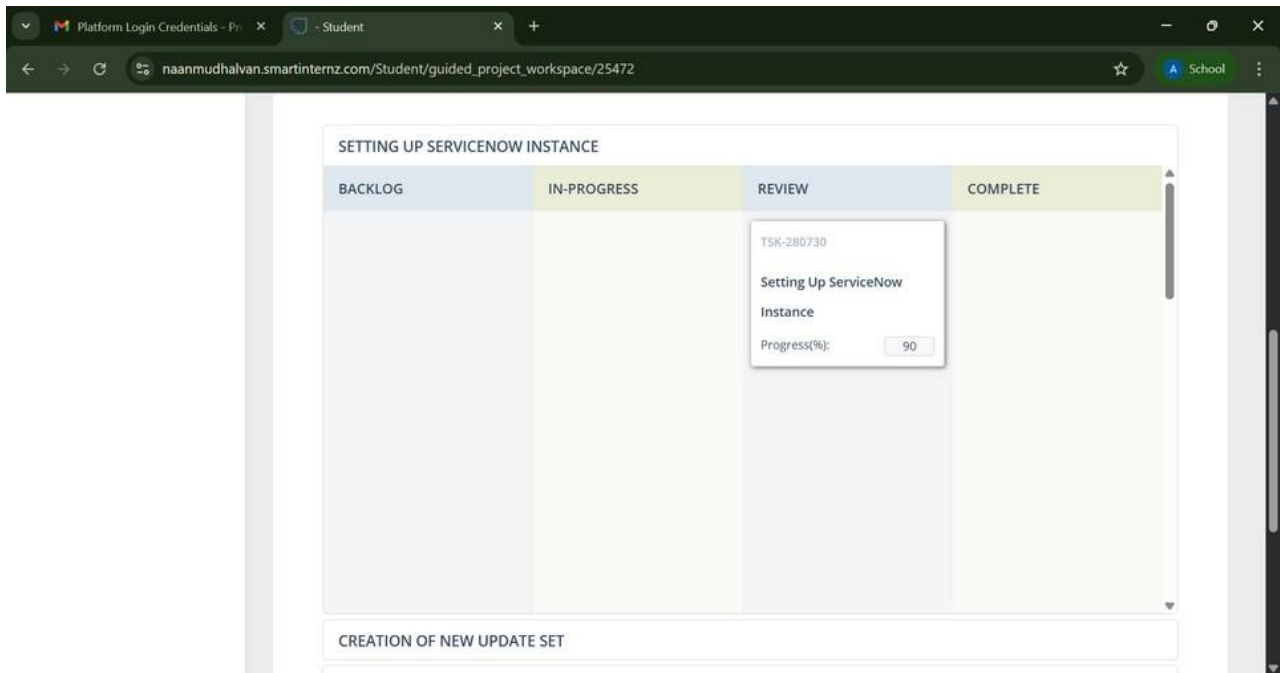
Project Progress: 90.00%

GENERAL INSTRUCTION SHOW

Demo Link View Mentor Comments View Industry Mentor Comments

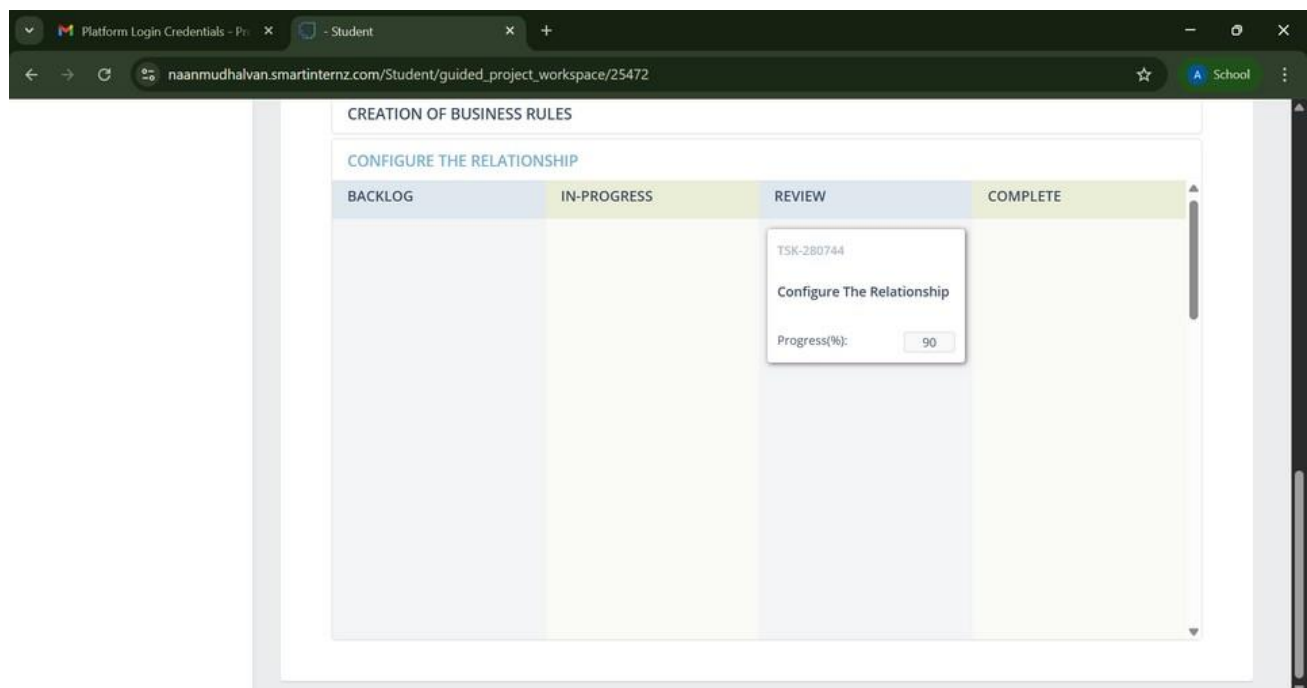
PROJECT DETAILS TASK & PROGRESS MENTOR REVIEW

19:43 09-09-2025



The screenshot shows a web browser window with the URL `naanmudhalvan.smartinternz.com/Student/guided_project_workspace/25472`. The browser tabs include 'Platform Login Credentials - Pr...' and '- Student'. The main content area displays a Kanban board titled 'SETTING UP SERVICENOW INSTANCE'. The board has four columns: 'BACKLOG', 'IN-PROGRESS', 'REVIEW', and 'COMPLETE'. A card titled 'Setting Up ServiceNow Instance' with ID 'TSK-280730' is in the 'REVIEW' column. The card shows a progress bar at 90%. Below the board, there is a section titled 'CREATION OF NEW UPDATE SET'.

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



The screenshot shows the same web browser window, but the Kanban board is now titled 'CONFIGURE THE RELATIONSHIP'. The board has the same four columns: 'BACKLOG', 'IN-PROGRESS', 'REVIEW', and 'COMPLETE'. A card titled 'Configure The Relationship' with ID 'TSK-280744' is in the 'REVIEW' column. The card shows a progress bar at 90%. The section below the board is still titled 'CREATION OF NEW UPDATE SET'.