EXPENSE TRACKER APP

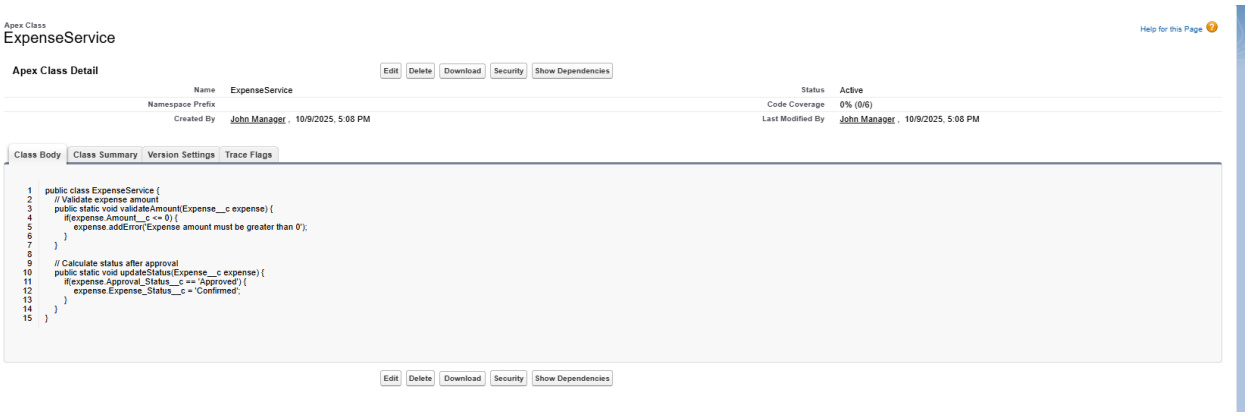
Phase 5: Apex Programming (Developer)

Goal: Add advanced logic and automation for Expense Tracker using Apex.

1. Apex Service Class

Purpose: Centralize business logic for reusability in triggers, flows, and batch classes.

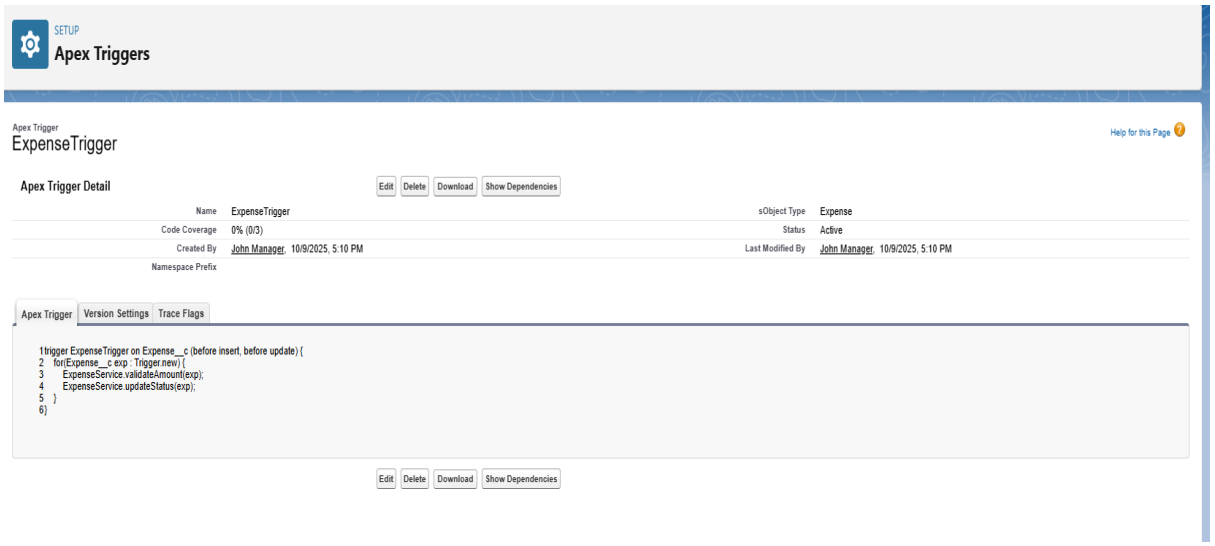
Navigation:
Setup → Apex Classes → New



2. Apex Trigger

Purpose: Apply logic automatically when records are inserted or updated.

Navigation:
Setup → Object Manager → Expense → Triggers → New

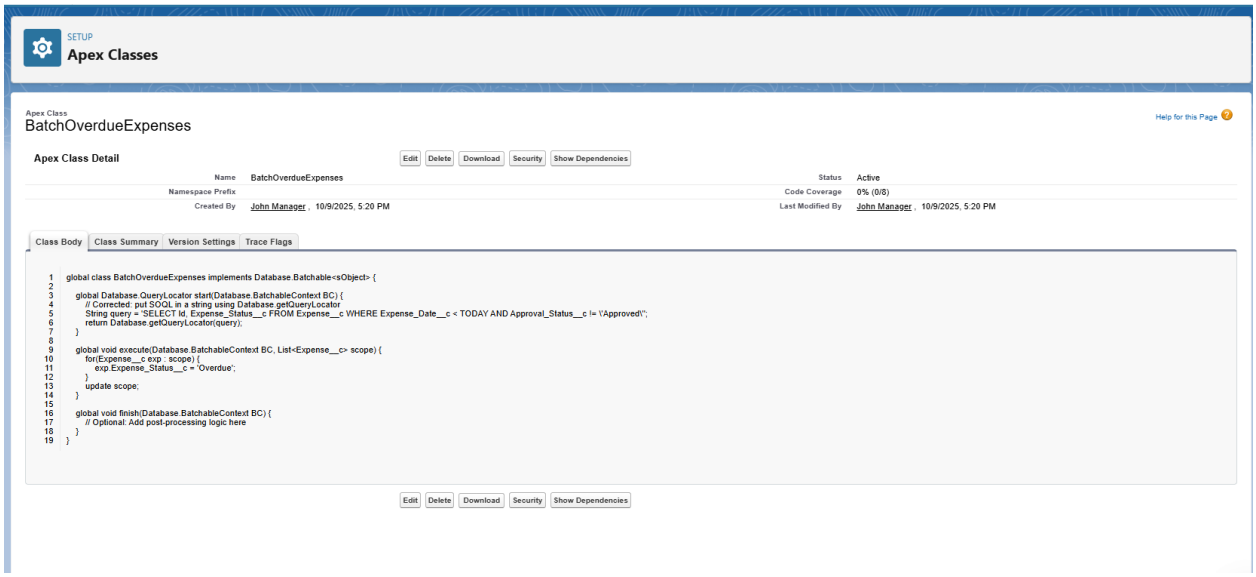


3. Batch Apex — Overdue Expenses

Purpose: Automatically mark expenses as overdue if not approved and past the expense date.

Navigation:

Setup → Apex Classes → New

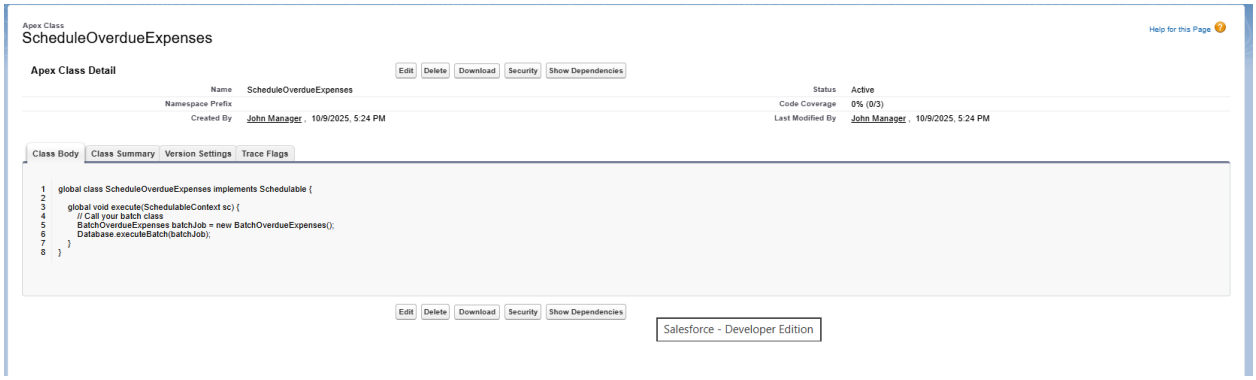


4. Scheduler Class — Run Batch Automatically

Purpose: Schedule the batch to run daily/weekly.

Navigation:

Setup → Apex Classes → New



Steps to Schedule:

1. Setup → Apex Classes → Schedule Apex
2. Job Name: Overdue_Expenses_Batch
3. Apex Class: ScheduleOverdueExpenses

4. Frequency: Daily / Weekly

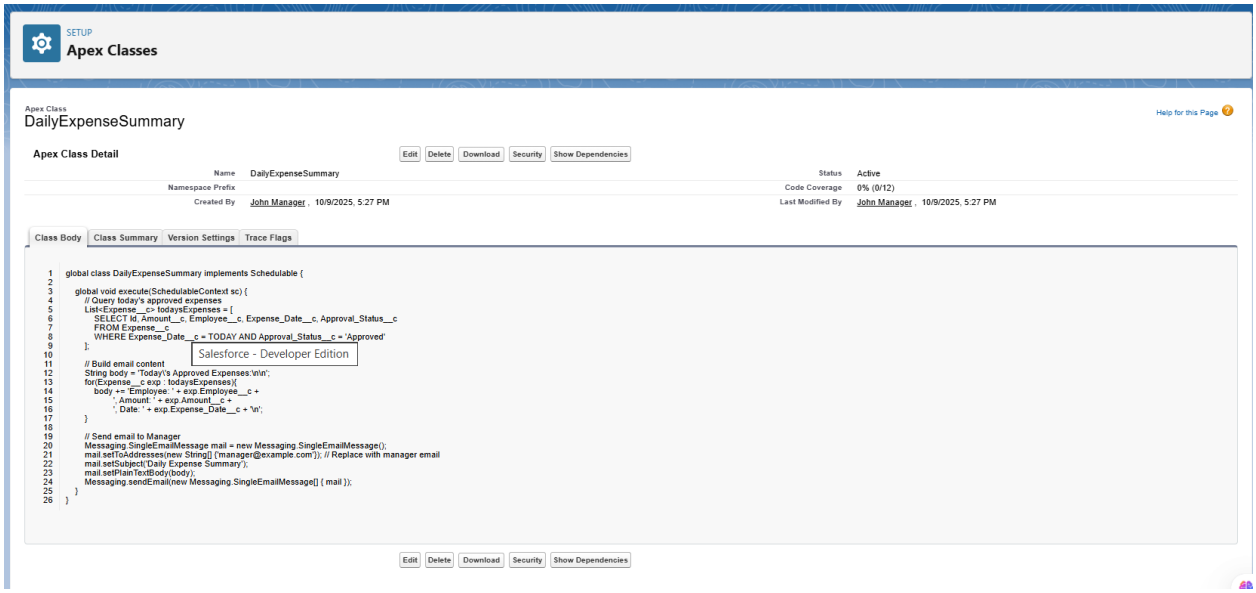
5. Set Start/End Dates and Time → Save

5. Scheduled Apex — Daily Expense Summary Email

Purpose: Send daily approved expense summary to manager.

Navigation:

Setup → Apex Classes → New



Steps to Schedule:

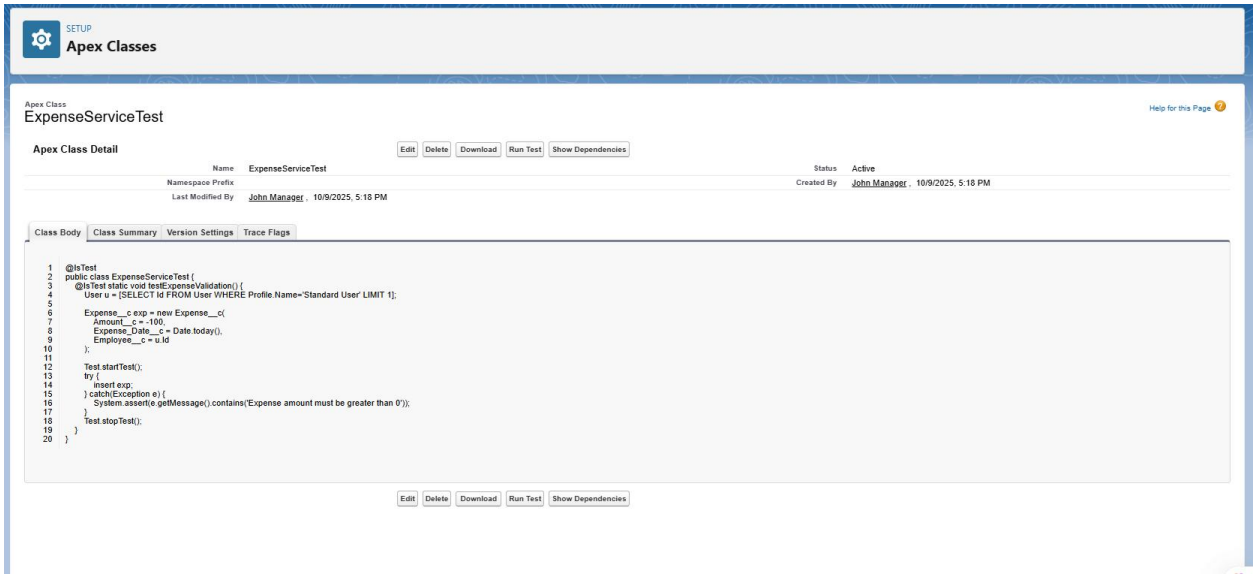
- Setup → Apex Classes → Schedule Apex → Select DailyExpenseSummary
- Frequency: Daily
- Preferred Start Time → Save

6. Test Classes (Mandatory for Deployment)

Purpose: Ensure code coverage and correctness before deployment.

Navigation:

Setup → Apex Classes → New



✅ Phase 5 Complete

- Apex Service Class for logic reuse
- Trigger for real-time validation and status updates
- Batch Apex to mark overdue expenses
- Scheduler class to automate batch execution
- Scheduled Apex for daily manager email
- Exception handling for data integrity
- Test Classes for deployment compliance
-