

# Understanding the Integration between Action Groups and Finance Module Budgets

The Actions Module has the ability to link action groups with budgets in the Finance Module and new budgets can automatically be created when new Action Groups are created by assigning a dollar amount in the New Action Group Modal.

When creating new Action Groups, the New Action Group Modal allows for the input of a budget amount, for budget alerts to be added, and budget approvers to be designated.

Budget (\$)

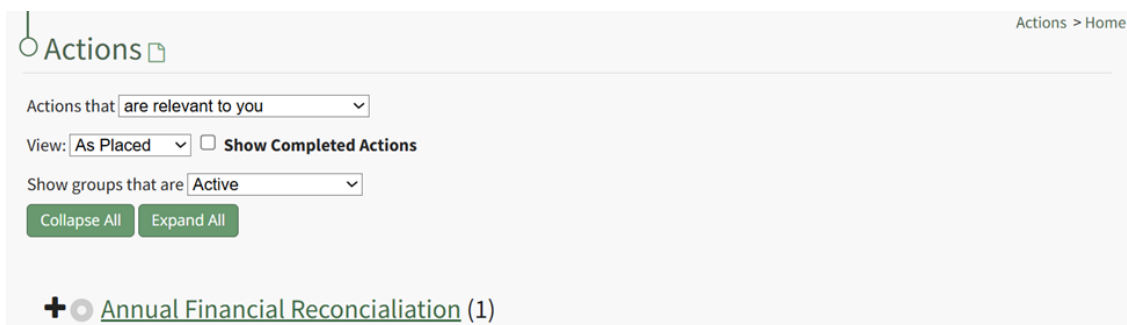
Budget Alerts  
*No Alerts Defined*  
[Add Alert](#)

Budget Approvers

Any budget can have customized alerts that notify individuals or certification roles when the amount or percentage remaining of a budget falls below a specified threshold. The Budget Alerts feature permits the user to designate a threshold for this alert. Selecting this option will have KAStrack send an alert to a designated user if the budget amount or percentage (selected from a drop-down list) falls below an amount set by the user. Budget Alerts can be sent to users or roles.

## How To: Add a Budget Alert for an Action Group

To add a budget alert for an action group, edit the group from the Groups Page, or go to the Actions Home Page and click the title of the action group you wish to create a budget alert for.



Actions > Home

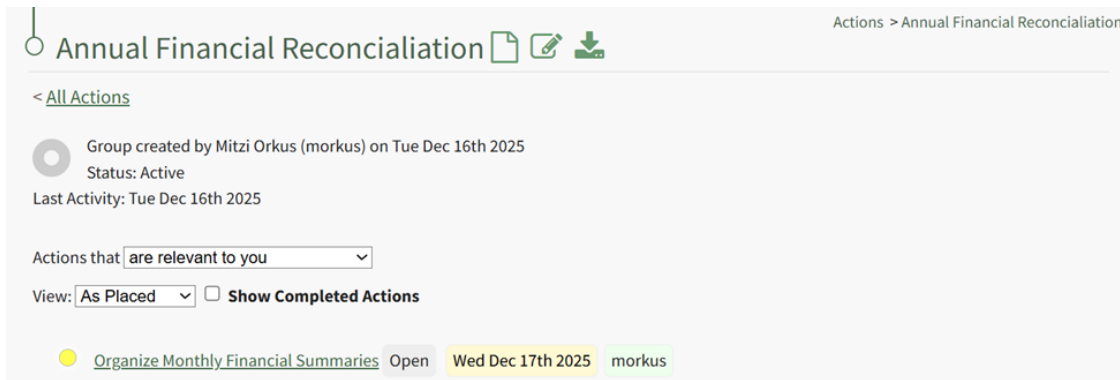
Actions that

View:   Show Completed Actions

Show groups that are

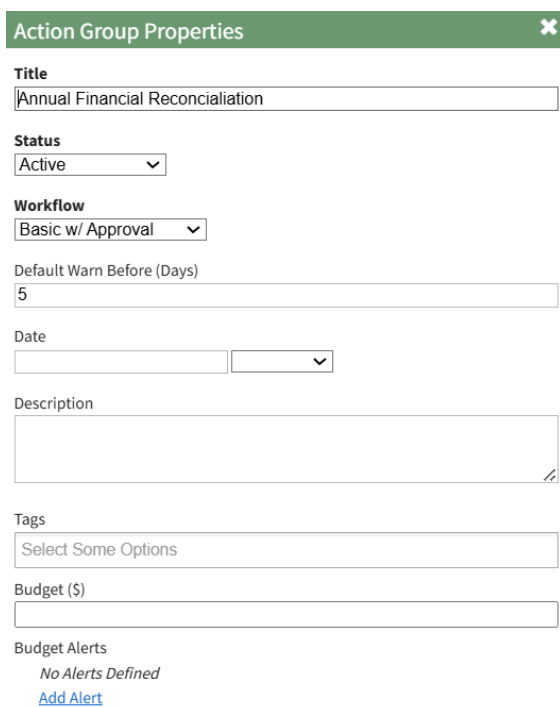
+ [Annual Financial Reconciliation](#) (1)

This opens the specific action group page. The second icon to the right of the action group header is the edit action group icon.



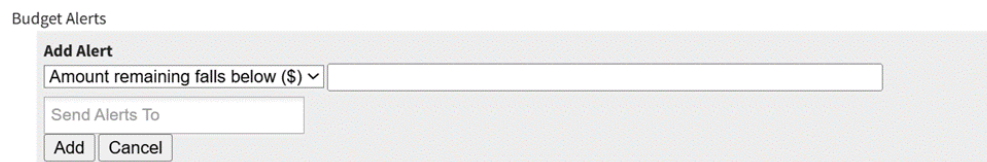
The screenshot shows the 'Annual Financial Reconciliation' page. At the top right, it says 'Actions > Annual Financial Reconciliation'. Below the header, there are icons for a document, edit, and download. A breadcrumb link '< All Actions' is visible. The main content area shows: 'Group created by Mitzi Orkus (morkus) on Tue Dec 16th 2025', 'Status: Active', and 'Last Activity: Tue Dec 16th 2025'. There is a dropdown menu for 'Actions that are relevant to you' and a 'View: As Placed' dropdown with a 'Show Completed Actions' checkbox. At the bottom, there is a yellow tag for 'Organize Monthly Financial Summaries' with an 'Open' button, and another yellow tag for 'Wed Dec 17th 2025' with the user 'morkus'.

Select the Action Group Properties Icon, opening the Action Group Properties Modal.



The screenshot shows the 'Action Group Properties' modal. It has a green header with a close button. The fields include: 'Title' (Annual Financial Reconciliation), 'Status' (Active), 'Workflow' (Basic w/ Approval), 'Default Warn Before (Days)' (5), 'Date' (empty), 'Description' (empty), 'Tags' (Select Some Options), 'Budget (\$)' (empty), and 'Budget Alerts' (No Alerts Defined, Add Alert link).

Select the clickable "Add Alert" link, expanding the modal to include new fields.



The screenshot shows the expanded 'Budget Alerts' modal. It has a title 'Add Alert' and a dropdown menu for 'Amount remaining falls below (\$)' with an empty input field. Below that is a 'Send Alerts To' input field and two buttons: 'Add' and 'Cancel'.

The alert can be triggered by the amount remaining in the budget falling below a specified amount, or if the percentage remaining falls before a specified percentage. Budget alerts can be sent to users or roles.

Input the preferred alert specifics and select add. The newly saved budget alert will show as saved in the modal.

## Budget Alerts

  Percent remaining falls below 15 : Alert Mitzi Orkus (morkus)

[Add Alert](#)

Multiple budget alerts can be customized within the action group.

Please refer to the Finance Module Book in the User Manual for a better understanding of budgets, budget items, and the budget item approval process.

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