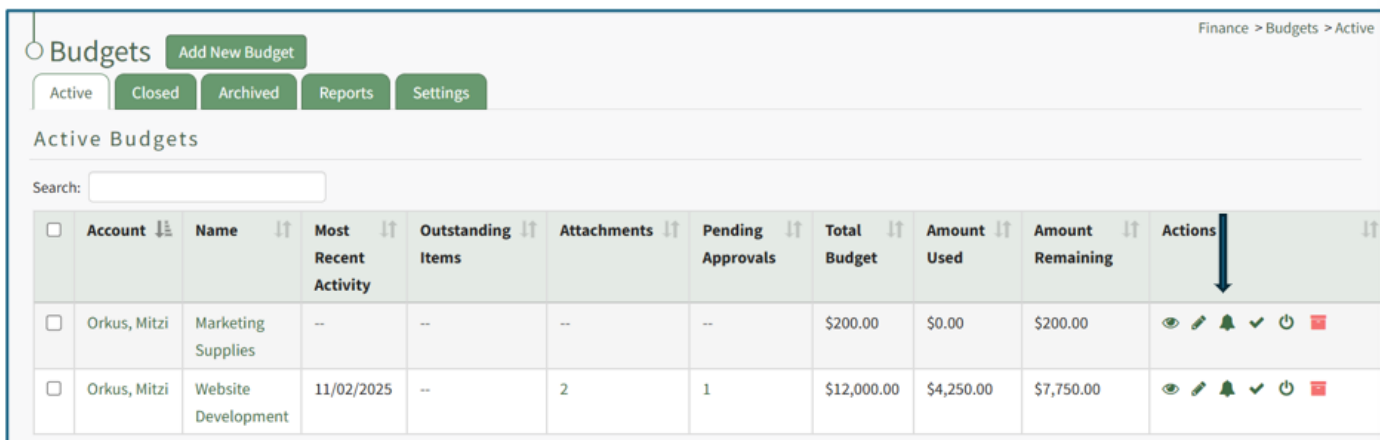


# Understanding Budget Alerts

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.

## How To: Add a Budget Alert

Budget alerts can only be added to active budgets. To add a budget alert, locate the budget you wish to add an alert to on the Active Tab of the Budgets Page. Click the bell icon in the Actions column of the budget table.



Finance > Budgets > Active

Budgets Add New Budget

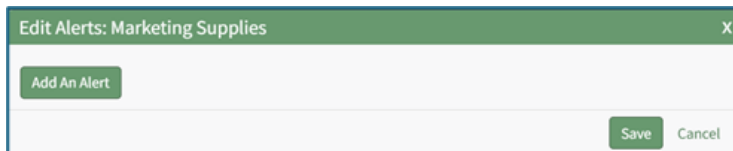
Active Closed Archived Reports Settings

Active Budgets

Search:

<input type="checkbox"/>	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
<input type="checkbox"/>	Orkus, Mitzi	Marketing Supplies	--	--	--	--	\$200.00	\$0.00	\$200.00	
<input type="checkbox"/>	Orkus, Mitzi	Website Development	11/02/2025	--	2	1	\$12,000.00	\$4,250.00	\$7,750.00	

This opens the Edit Alerts Modal.

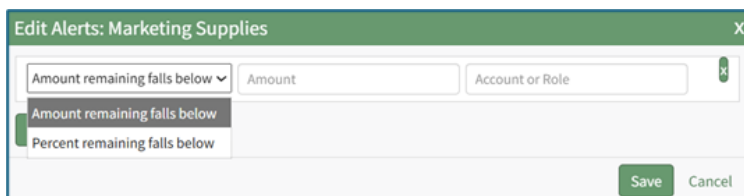


Edit Alerts: Marketing Supplies

Add An Alert

Save Cancel

Select the "Add an Alert" button and the modal expands.



Edit Alerts: Marketing Supplies

Amount remaining falls below  Amount  Account or Role

Amount remaining falls below

Percent remaining falls below

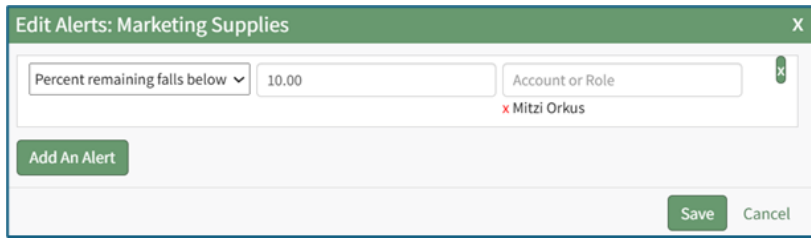
Save Cancel

An alert can be based on when the amount remaining in the budget falls below a specified amount or when the amount remaining in the budget falls below a specified percent.

Input the percentage or amount for the alert threshold as well as the individual account or certification role to receive the alert. Multiple accounts and / or roles can be selected to receive the alert.

Select the "Save" button and return to the Active Tab of the Budgets Page.

Additional alerts can be added if desired. Existing alerts will show on the Edit Alert Modal.



The screenshot shows a modal window titled "Edit Alerts: Marketing Supplies". At the top right of the modal is a close button labeled "X". Below the title bar, there are two input fields: a dropdown menu labeled "Percent remaining falls below" with the value "10.00" selected, and a text input field labeled "Account or Role" containing the text "Mitzi Orkus". Below these fields is a green button labeled "Add An Alert". At the bottom right of the modal are two buttons: "Save" and "Cancel".

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Revision #2

Created 2025-12-05 21:09:55 UTC by Mitzi Orkus

Updated 2026-01-22 21:31:54 UTC by Mitzi Orkus