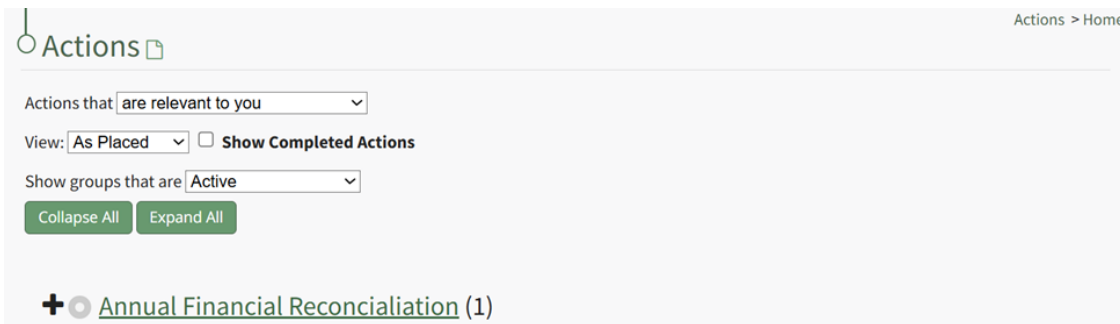
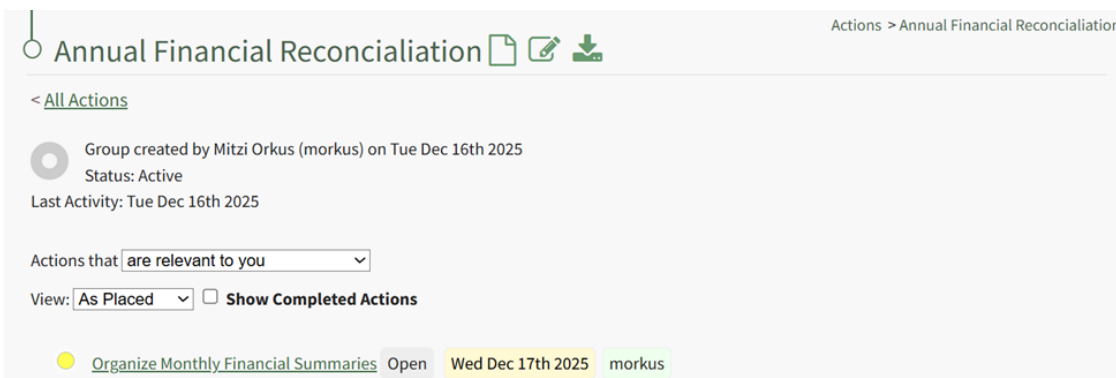


Add A Budget Alert for an Action Group

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.



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



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

Action Group Properties
✕

Title

Status

Workflow

Default Warn Before (Days)

Date

Description

Tags

Budget (\$)

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

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

Budget Alerts

Add Alert

Amount remaining falls below (\$)

Send Alerts To

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.

Revision #5

Created 2025-12-18 22:07:22 UTC by Mitzi Orkus

Updated 2026-06-06 03:13:37 UTC by Mitzi Orkus