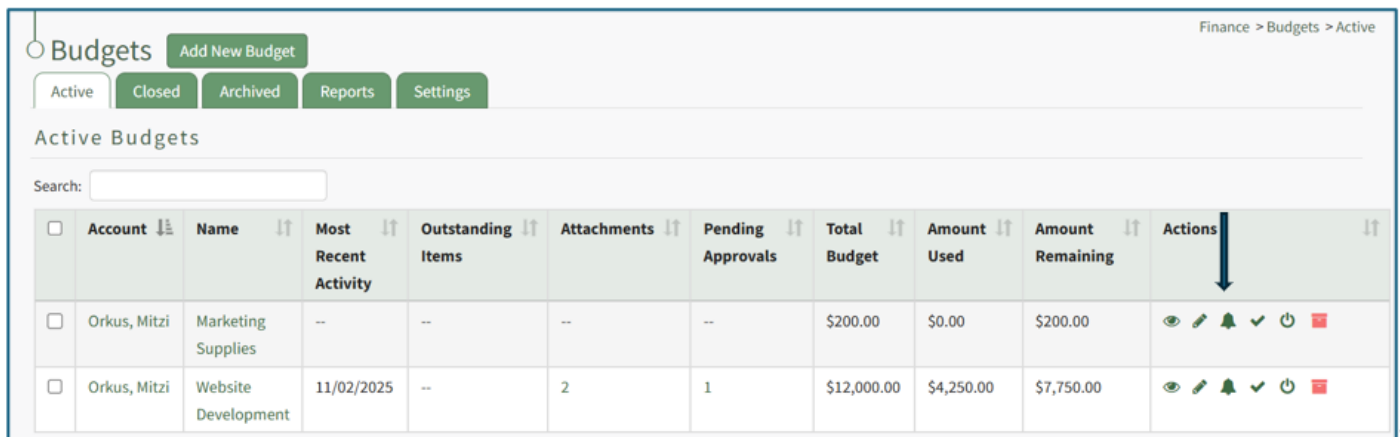


Add a Budget Alert

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

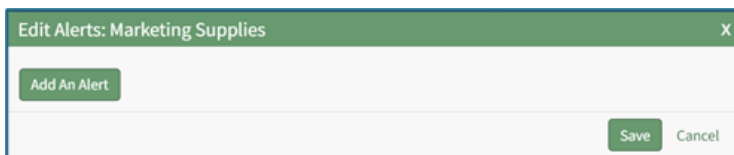
Active Closed Archived Reports Settings

Active Budgets

Search:

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

This opens the Edit Alerts Modal.

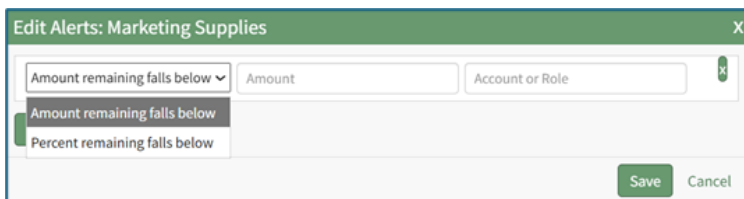


Edit Alerts: Marketing Supplies X

Add An Alert

Save Cancel

Select the “Add an Alert” button and the modal expands.



Edit Alerts: Marketing Supplies X

Amount remaining falls below X

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.

Edit Alerts: Marketing Supplies

X

Percent remaining falls below

10.00

Account or Role

X

Mitzi Orkus

Add An Alert

Save

Cancel

Revision #1
Created 2025-12-05 22:10:43 UTC by Mitzi Orkus
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