

Edit a Budget Alert

Budget alerts only exist for active budgets. To edit an existing budget alert, locate the budget whose alert you wish to edit on the Active Tab of the Budgets Page. Click the bell icon in the Actions column of the budget table.

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 which will show any existing alerts.

Edit Alerts: Marketing Supplies

Percent remaining falls below

Account or Role

Mitzi Orkus

Add An Alert

Save

Cancel

Make the desired changes to the alert. 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.

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