



INSIGHTS



User Guide:

How To Set Up E-mail Alerts For Contracts in Insights

A step by step guide to help you create automated email alerts for new contract awards based on your criteria



<https://insights.oxygen-finance.com/login>



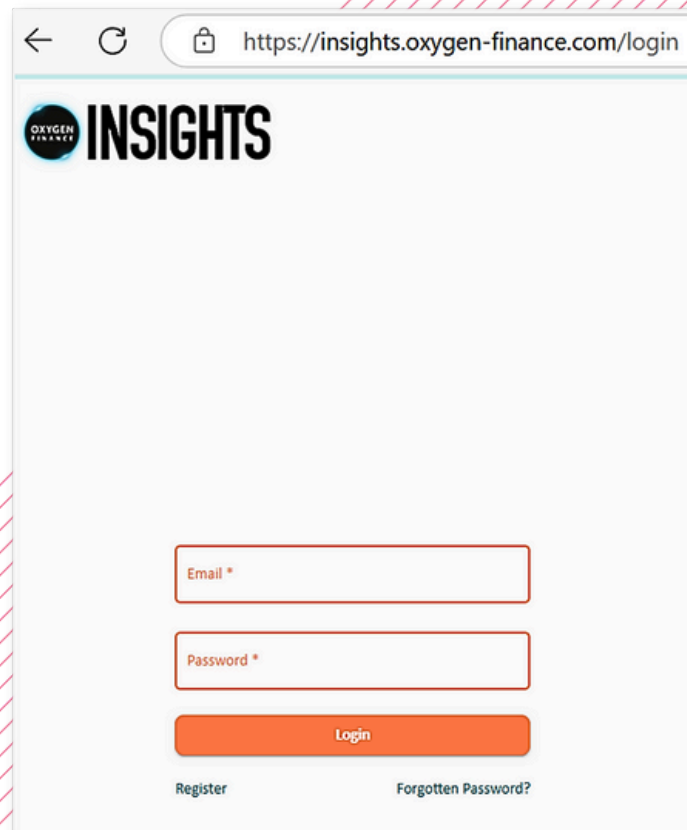
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ALERTS

How to set up E-mail Alerts for Contracts in Insights

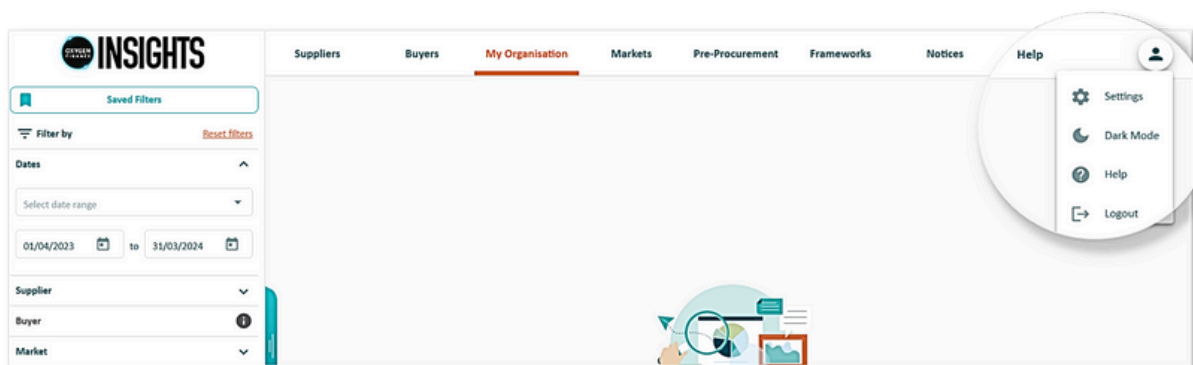
Step 1: Log in with your credentials

First things first, use your login details to sign in to your account. This ensures you can access all the amazing features we have for you.

A screenshot of a web browser showing the login page for Oxygen Finance Insights. The browser's address bar displays "https://insights.oxygen-finance.com/login". The page features the Oxygen Finance Insights logo at the top left. Below the logo, there are two input fields: "Email *" and "Password *", both with red borders. Below these fields is an orange "Login" button. At the bottom of the page, there are two links: "Register" and "Forgotten Password?". The entire screenshot is set against a background of red diagonal lines.

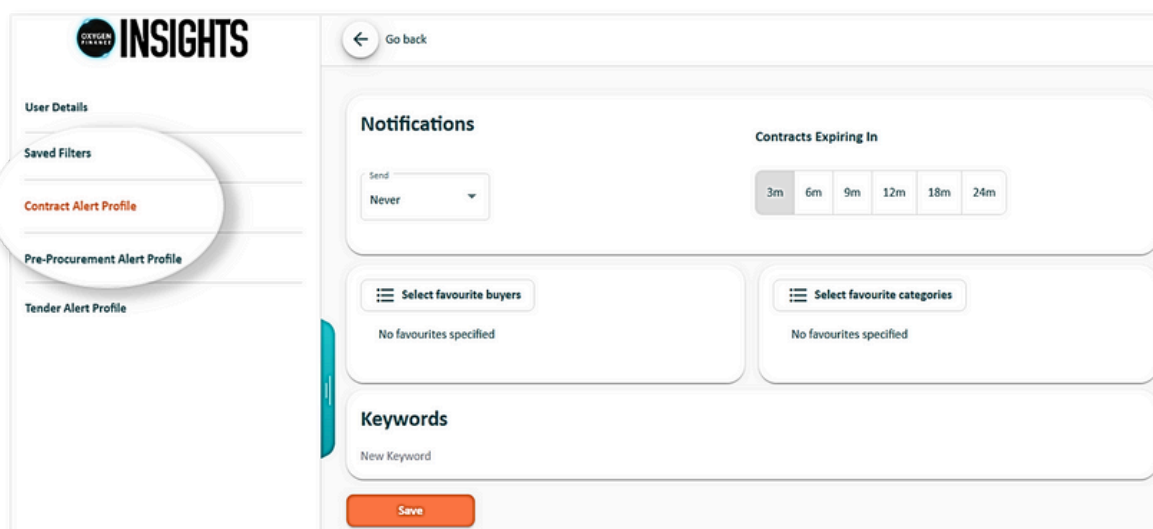
Step 2: Access the Profile Icon

Once logged in successfully, click on the **Profile icon** in the top-right corner of the page. From the dropdown menu, select **Settings** to open your preferences.



Step 3: Go to Contract Alert Profile

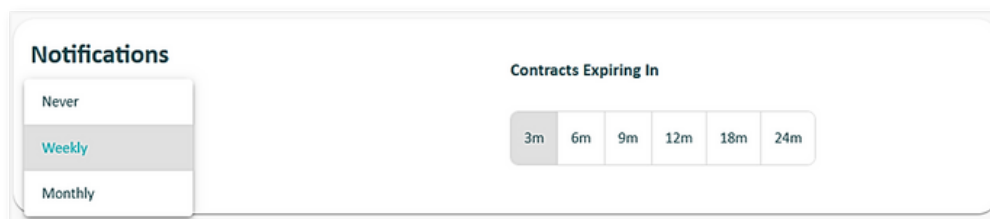
Within the **Settings** menu, navigate to the **Contract Alert Profile** section and a similar page will appear on your screen.



This is where you'll be able to configure your e-mail notifications for contracts that match your preferences.

Step 4: Set Notification frequency and Expiry alerts

You can personalise your alert settings by choosing how often you'd like to receive notifications and selecting the expiration timeframe for the contracts.



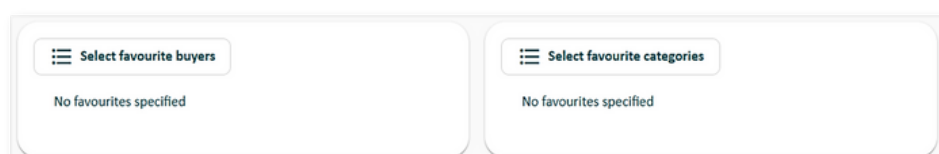
The interface shows two settings sections. The 'Notifications' section has a dropdown menu with three options: 'Never', 'Weekly' (which is selected and highlighted in blue), and 'Monthly'. The 'Contracts Expiring In' section has a row of six buttons: '3m', '6m', '9m', '12m', '18m', and '24m'. The '3m' button is selected and highlighted in grey.

Notification frequency: Decide if you'd prefer to receive alerts on **weekly** or **monthly** basis.

Contracts expiring in: Select the expiry date from contracts due to end in the next 3, 6, 9, 12, 18 or 24 months. This ensures you're notified well in advance of the current contract's end date, helping you stay informed and plan accordingly.

Step 5: Filter by Favourite Buyers and Categories

To narrow down further your alerts, you can select your favourite buyers and choose specific categories based on your needs and interests.



The interface shows two side-by-side filter boxes. The left box is titled 'Select favourite buyers' and contains the text 'No favourites specified'. The right box is titled 'Select favourite categories' and also contains the text 'No favourites specified'. Both boxes have a hamburger menu icon in the top left corner.

Favourite buyers

Group: Filter by specific groups like Local Government, NHS or Central Government to focus on particular buyer groups.

Types: Choose the type of buyer, such as London Borough, Ministerial Department or other relevant buyer types to refine your results.

Buyer: Select the specific name of buyer you're interested in. You can select multiple buyers, based on your areas of focus.



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Selection

| Group | Type | Buyer |
|--|---|--|
| <input checked="" type="checkbox"/> Central Government <input type="checkbox"/> Education <input checked="" type="checkbox"/> Local Government <input type="checkbox"/> National Parks <input checked="" type="checkbox"/> NHS <input type="checkbox"/> Other Local Gov | <input checked="" type="checkbox"/> City Region <input checked="" type="checkbox"/> London Borough <input checked="" type="checkbox"/> Metropolitan Council <input checked="" type="checkbox"/> Shire County <input checked="" type="checkbox"/> Shire District <input checked="" type="checkbox"/> Unitary Council <input type="checkbox"/> Unitary Council (Scotland) <input type="checkbox"/> Unitary Council (Wales) | <input checked="" type="checkbox"/> Greater London <input checked="" type="checkbox"/> Barking and Dagenham London Borough Council <input checked="" type="checkbox"/> Barnet London Borough Council <input checked="" type="checkbox"/> Bexley London Borough Council <input checked="" type="checkbox"/> Brent London Borough Council <input checked="" type="checkbox"/> Bromley London Borough Council <input checked="" type="checkbox"/> Camden London Borough Council <input checked="" type="checkbox"/> Croydon London Borough Council <input type="checkbox"/> Ealing London Borough Council <input type="checkbox"/> Enfield London Borough Council <input checked="" type="checkbox"/> Greenwich London Borough Council <input checked="" type="checkbox"/> Hackney London Borough Council <input checked="" type="checkbox"/> Hammersmith and Fulham London Borough Council <input checked="" type="checkbox"/> Haringey London Borough Council <input checked="" type="checkbox"/> Harrow London Borough Council <input type="checkbox"/> Havering London Borough Council <input checked="" type="checkbox"/> Hillingdon London Borough Council <input checked="" type="checkbox"/> Hounslow London Borough Council |
| None | None | None |

[Cancel](#) [Apply](#)

Important:

Once you've made your selections don't forget to click on **Apply** to save your choices.

Favourite categories

Market: Choose one or multiple markets that your subscription covers and is related to your area of expertise. For example, you can select Corporate and ICT & BPO together or focus on a single market like Waste & Environment.

Categories: Filter by specific categories within those markets for a more targeted overview of services.

Selection

| Market | Category |
|--|--|
| <input type="checkbox"/> Buildings <input type="checkbox"/> Civil Defence <input checked="" type="checkbox"/> Corporate <input type="checkbox"/> Culture & Leisure <input type="checkbox"/> Health & Social Care <input type="checkbox"/> Highways & Transport <input checked="" type="checkbox"/> ICT & BPO <input type="checkbox"/> Legal & Financial <input type="checkbox"/> Waste & Environment | <input type="checkbox"/> Back Office Admin Services <input checked="" type="checkbox"/> Consultancy (ICT) <input type="checkbox"/> Document Management Service <input checked="" type="checkbox"/> ICT Infrastructure (inc cloud) <input checked="" type="checkbox"/> ICT Service Transformation <input checked="" type="checkbox"/> ICT Support Services & Systems Integration <input checked="" type="checkbox"/> Network & Comms Services <input checked="" type="checkbox"/> Software Applications, Development & Support |
| None | None |

[Cancel](#) [Apply](#)

Important:

Once you've made your selections don't forget to click on **Apply** to save your choices.

You can always find detailed explanations of markets and categories in the **Help Hub** section, including how categories are defined and organised.

Step 6: Refine alerts using Keywords 🔍

Use the **Keywords** section to add specific terms you want to track in the contract notifications (eg Cloud, WAN, Cyber Security). This will ensure you receive alerts about contracts related to or containing these keywords.



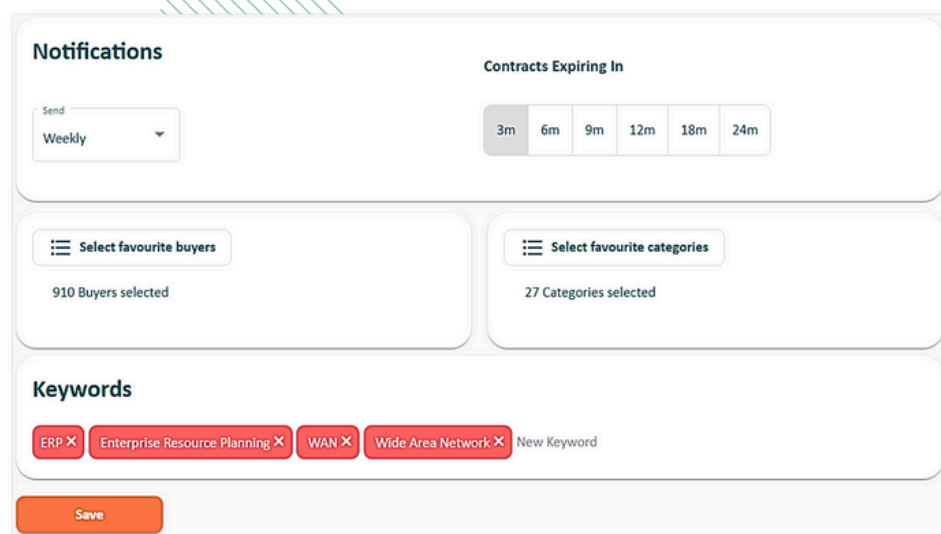
The screenshot shows a 'Keywords' section with a search bar. Below the search bar, there are three red tags with white text: 'Cloud', 'WAN', and 'Cyber Security'. To the right of these tags is a 'New Keyword' button.

Pro Tip: Add as many relevant keywords as possible to ensure you receive comprehensive alerts tailored to your interests.

For any abbreviations like “ERP” and “WAN”, make sure to include both the abbreviation and full term (“enterprise resource planning” & “wide area network”) to avoid missing any opportunities.

Step 7: Save your preferences 💾

Once you’ve customised all your alert settings, click **Save** to activate your e-mail alerts. You’ll now start receiving notifications directly in your e-mail inbox based on the criteria you’ve set, keeping you informed about the latest contract opportunities.



The screenshot shows the 'Notifications' and 'Keywords' sections. The 'Notifications' section has a 'Send' dropdown set to 'Weekly' and a 'Contracts Expiring In' section with radio buttons for 3m, 6m, 9m, 12m, 18m, and 24m. Below this are two sections: 'Select favourite buyers' with '910 Buyers selected' and 'Select favourite categories' with '27 Categories selected'. The 'Keywords' section has a search bar and four red tags with white text: 'ERP', 'Enterprise Resource Planning', 'WAN', and 'Wide Area Network'. To the right of these tags is a 'New Keyword' button. At the bottom of the 'Keywords' section is an orange 'Save' button.



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