



# INSIGHTS



## User Guide:

# How To Set Up E-mail Alerts for Pre-Procurement Opportunities in Insights

A step by step guide to help you create email alerts for pre-procurement opportunities based on your criteria



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



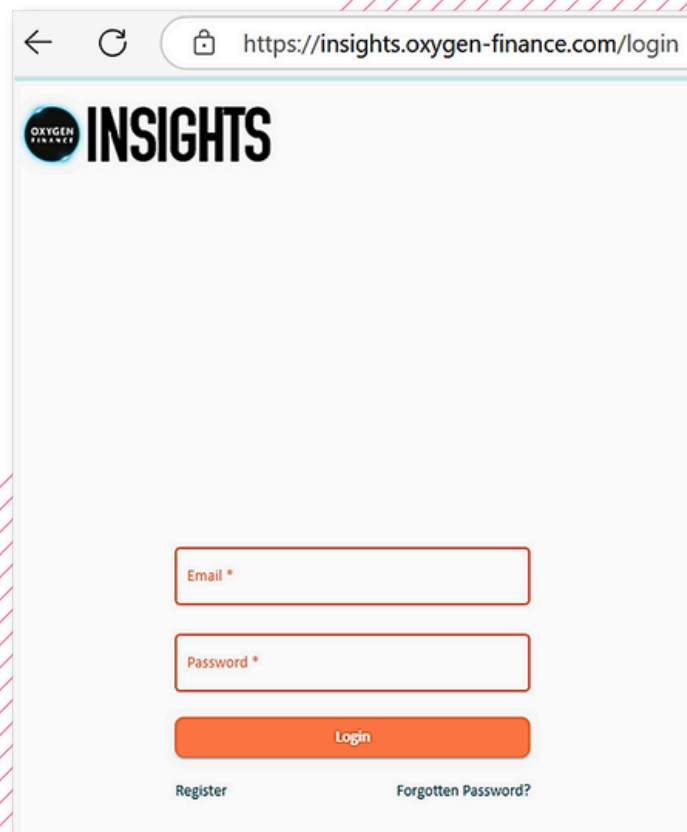
# INSIGHTS

## ALERTS

## How to set up e-mail alerts for pre-procurement in Insights

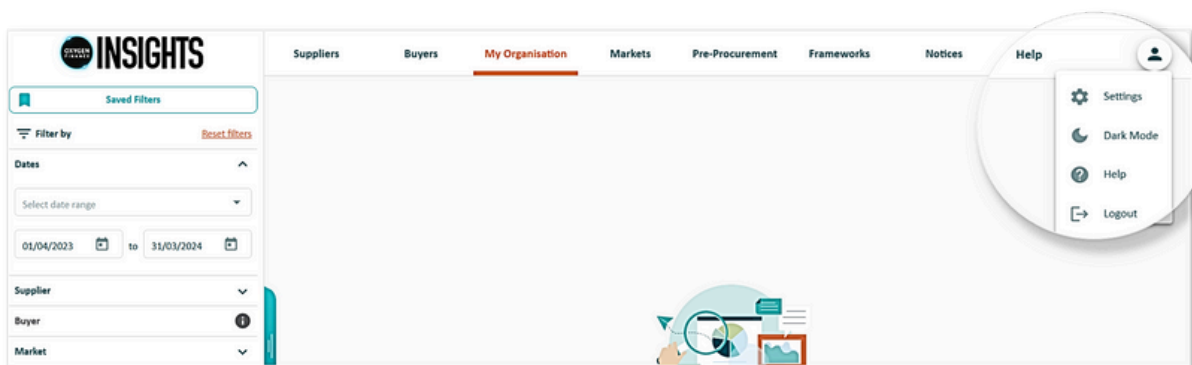
### Step 1: Log in with your credentials

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 Insights. The browser's address bar displays "https://insights.oxygen-finance.com/login". The page features the Oxygen Finance logo and the word "INSIGHTS" in large, bold letters. Below the header, there are two input fields: "Email \*" and "Password \*". An orange "Login" button is positioned below these fields. At the bottom of the page, there are links for "Register" and "Forgotten Password?". The entire screenshot is set against a background of red diagonal lines.

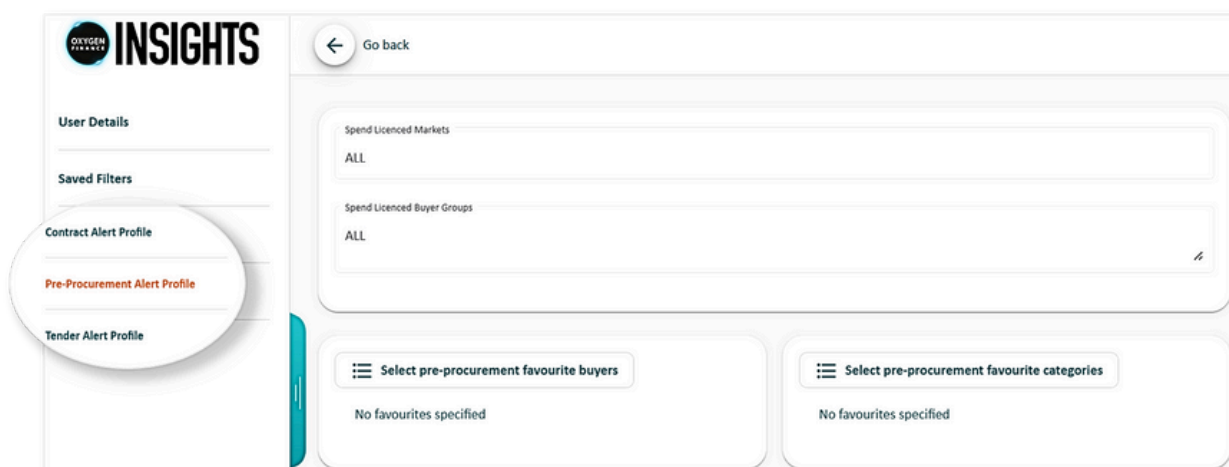
## Step 2: Access the Profile Icon

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 Pre-Procurement Alert Profile

Within the **Settings** menu, navigate to the **Pre-Procurement 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 pre-procurement opportunities that match your preferences.

## Step 4: 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.

Select pre-procurement favourite buyers

No favourites specified

Select pre-procurement favourite categories

No favourites specified

### 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.

Selection

Group

☒ Central Government  
☐ Education  
☒ Local Government  
☐ National Parks  
☒ NHS  
☐ Other Local Gov

Type

☒ City Region  
☒ London Borough  
☒ Metropolitan Council  
☒ Shire County  
☒ Shire District  
☒ Unitary Council  
☐ Unitary Council (Scotland)  
☐ Unitary Council (Wales)

Buyer

☒ Greater London  
☒ Barking and Dagenham London Borough Council  
☒ Barnet London Borough Council  
☒ Bexley London Borough Council  
☒ Brent London Borough Council  
☒ Bromley London Borough Council  
☒ Camden London Borough Council  
☒ Croydon London Borough Council  
☐ Ealing London Borough Council  
☐ Enfield London Borough Council  
☒ Greenwich London Borough Council  
☒ Hackney London Borough Council  
☒ Hammersmith and Fulham London Borough Council  
☒ Haringey London Borough Council  
☒ Harrow London Borough Council  
☒ Havering London Borough Council  
☒ Hillingdon London Borough Council  
☒ Hounslow London Borough Council  
☒ Islington 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.

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## 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 Health & Social Care and ICT & BPO together or focus on a single market like Health & Social Care.

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

Selection

Market

☐ Buildings
 ☐ Culture & Leisure
 ☒ Health & Social Care
 ☐ Highways & Transport
 ☒ ICT & BPO
 ☐ Waste & Environment

None

Category

☒ Acute/Clinical Services
 ☒ Children's Health & Social Care
 ☒ Community Care Equipment
 ☐ Dermatology
 ☒ Domestic & Sexual Abuse
 ☒ Drug, Alcohol & Addiction
 ☒ Eye Care
 ☒ GP & Primary Care
 ☒ Health & Care Service Transformation
 ☒ Home Care (Elderly)
 ☒ Home Care (SEN, Disabilities, MH etc)
 ☒ Homeless Services
 ☒ Mental Health (general)
 ☒ Orthopedics, MSK & Physio
 ☐ Patient Diagnostics & Imaging
 ☒ Public Health (general)
 ☒ Residential (SEN, Disabilities, MH etc)
 ☒ Residential Care (Elderly)
 ☒ SEN & Learning Disabilities (general)

None

Cancel

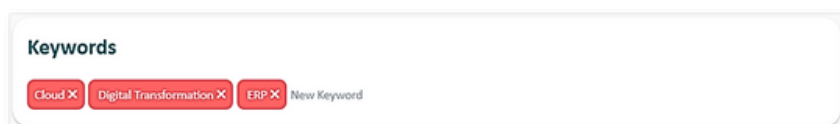
Apply

**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 5: Refine alerts using Keywords

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



Keywords

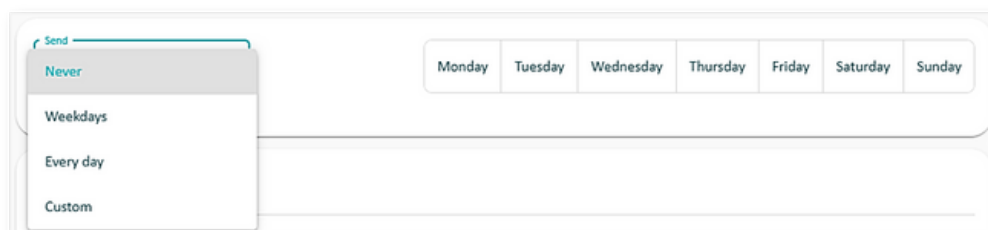
Cloud X Digital Transformation X ERP X New Keyword

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

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

## Step 6: Set Notification frequency

You can personalise your alert settings by choosing how often you’d like to receive your pre-procurement alerts.



Send

Never

Weekdays

Every day

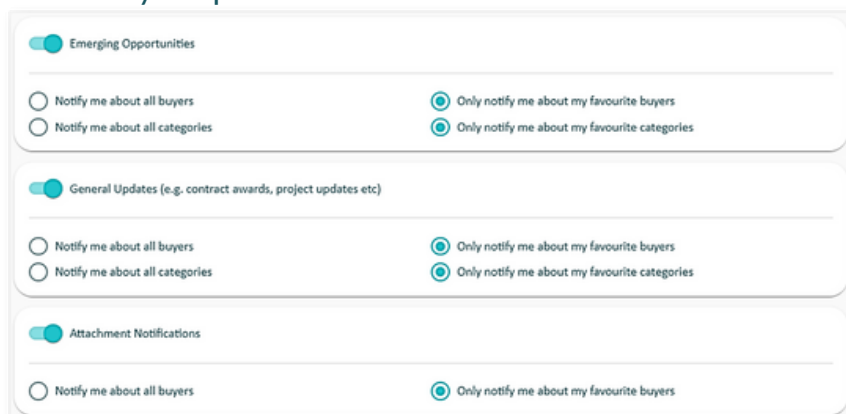
Custom

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

**Notification frequency:** Decide if you’d prefer to receive alerts on **weekdays**, **every day** or set a **custom** frequency, giving you the ability to select days that work best for you.

## Step 7: Tailor your notification preferences

Finally, make sure to tick the boxes for **Emerging Opportunities**, **General Updates** and **Attachment Notifications** and then select **Only notify me**, to receive tailored notifications based on your preferences.



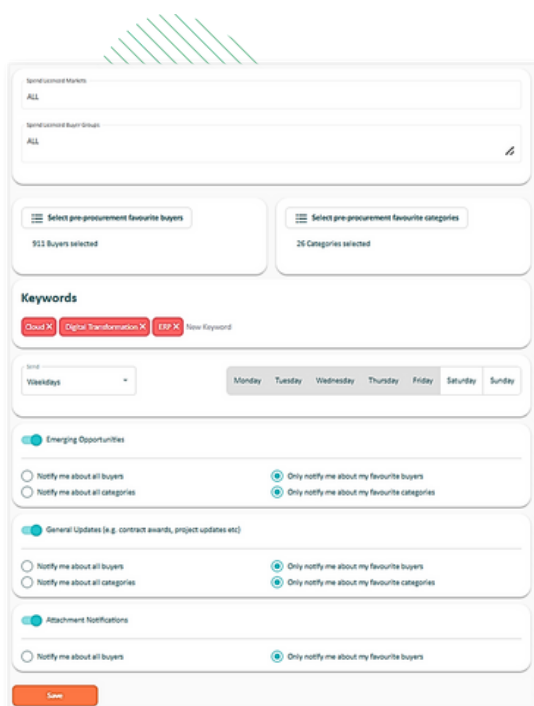
The screenshot shows a form with three sections, each with a toggle switch and two radio button options:

- Emerging Opportunities** (toggle on):
  - ☐ Notify me about all buyers
  - ☒ Only notify me about my favourite buyers
  - ☐ Notify me about all categories
  - ☒ Only notify me about my favourite categories
- General Updates (e.g. contract awards, project updates etc)** (toggle on):
  - ☐ Notify me about all buyers
  - ☒ Only notify me about my favourite buyers
  - ☐ Notify me about all categories
  - ☒ Only notify me about my favourite categories
- Attachment Notifications** (toggle on):
  - ☐ Notify me about all buyers
  - ☒ Only notify me about my favourite buyers

This will ensure you get the most relevant and specific alerts.

## Step 8: 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 pre-procurement opportunities.



The screenshot shows the full alert settings form with various filters and a 'Save' button at the bottom:

- Specialised Markets:** ALL
- Specialised Buyer Group:** ALL
- Select pre-procurement favourite buyers:** 911 Buyers selected
- Select pre-procurement favourite categories:** 26 Categories selected
- Keywords:** Cloud X, Digital Transformation X, ERP X, New Keyword
- Send:** Weekdays (dropdown), Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday
- Emerging Opportunities** (toggle on):
  - ☐ Notify me about all buyers
  - ☒ Only notify me about my favourite buyers
  - ☐ Notify me about all categories
  - ☒ Only notify me about my favourite categories
- General Updates (e.g. contract awards, project updates etc)** (toggle on):
  - ☐ Notify me about all buyers
  - ☒ Only notify me about my favourite buyers
  - ☐ Notify me about all categories
  - ☒ Only notify me about my favourite categories
- Attachment Notifications** (toggle on):
  - ☐ Notify me about all buyers
  - ☒ Only notify me about my favourite buyers
- Save** button



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