OXYGEN FINANCE

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

OXYGEN FINANCE INSIGHTS
ALERTS

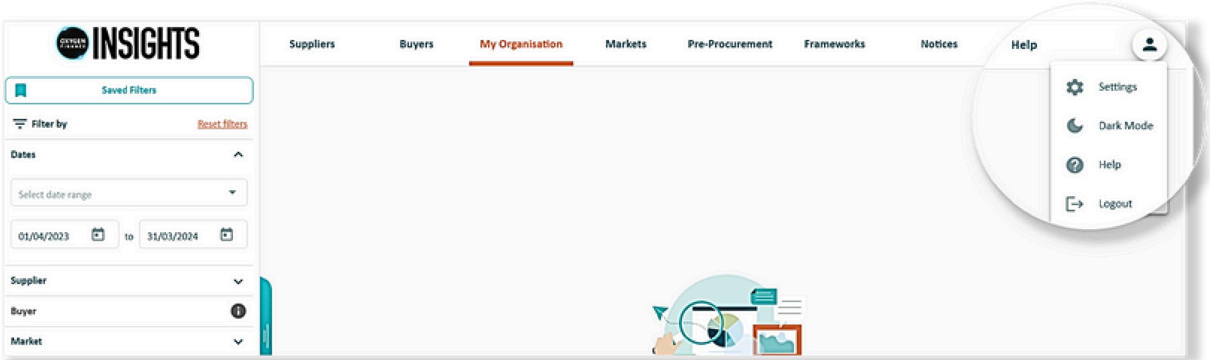
How to set up e-mail alerts for pre-procurement in Insights

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.

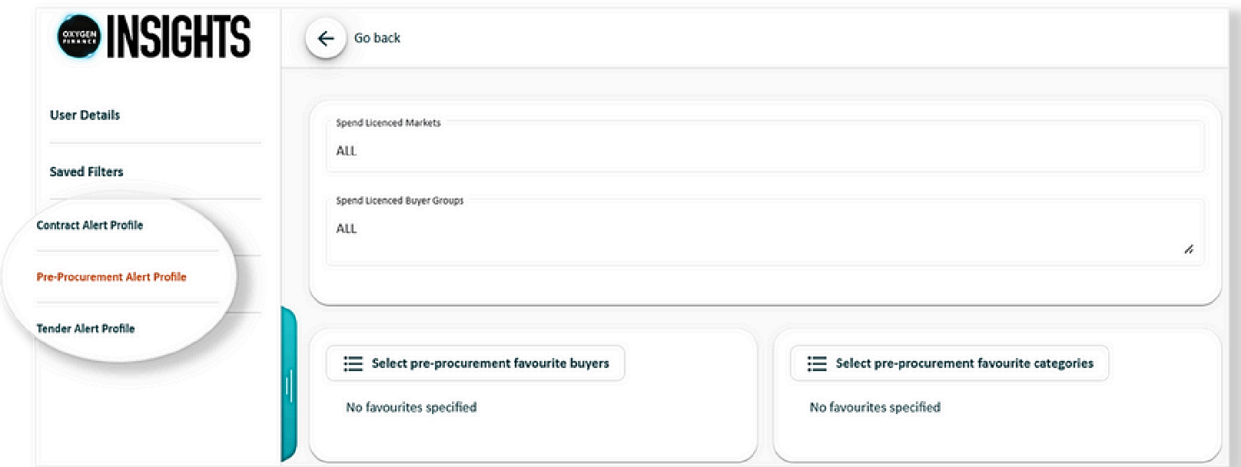
Step 2: Access the Profile Icon 👤

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 📋

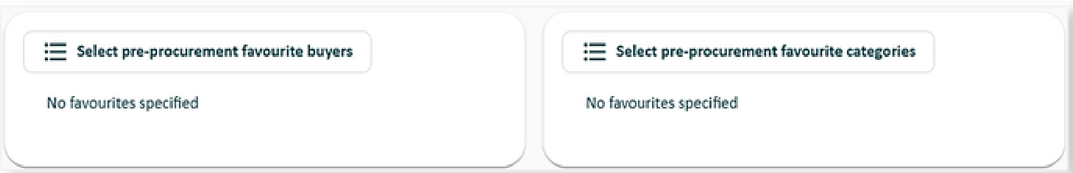
Within the **Settings** menu, navigate to the **Pre-Procurement Alert Profile** section and a similar page will appear on your screen.



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

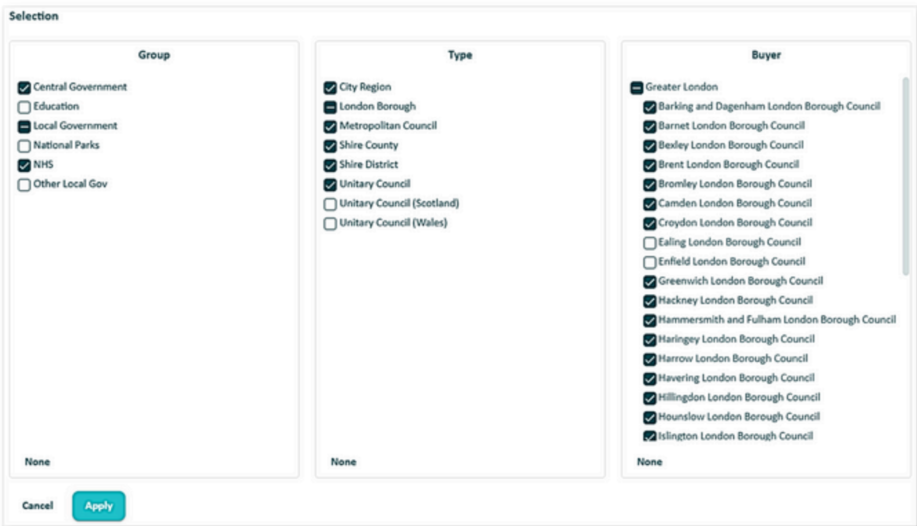
Step 4: Filter by Favourite Buyers and Categories 🏢

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



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.



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

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Favourite categories

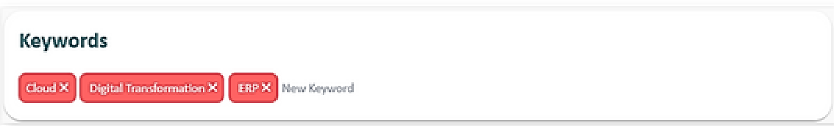
Market: Choose one or multiple markets that your subscription covers and is related to your area of expertise. For example, you can select Health & Social Care and ICT & BPO together or focus on a single market like Health & Social Care.
Categories: Filter by specific categories within those markets for a more targeted overview.

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.

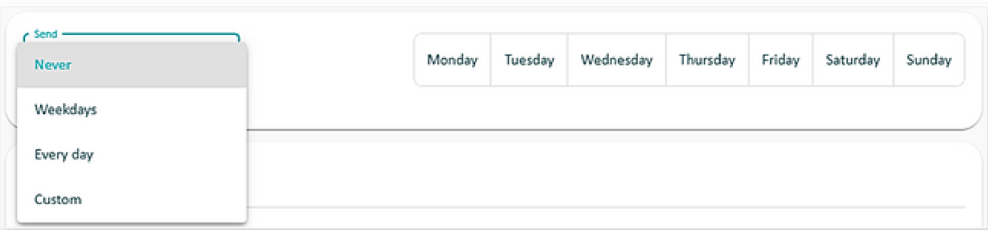


Pro Tip: Add as many relevant keywords as possible to ensure you receive comprehensive alerts tailored to your interests.

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 📅

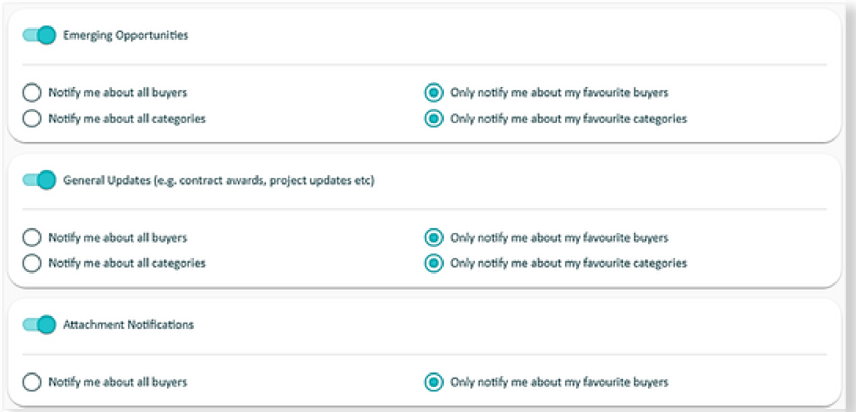
You can personalise your alert settings by choosing how often you'd like to receive your pre-procurement alerts.



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 🔔

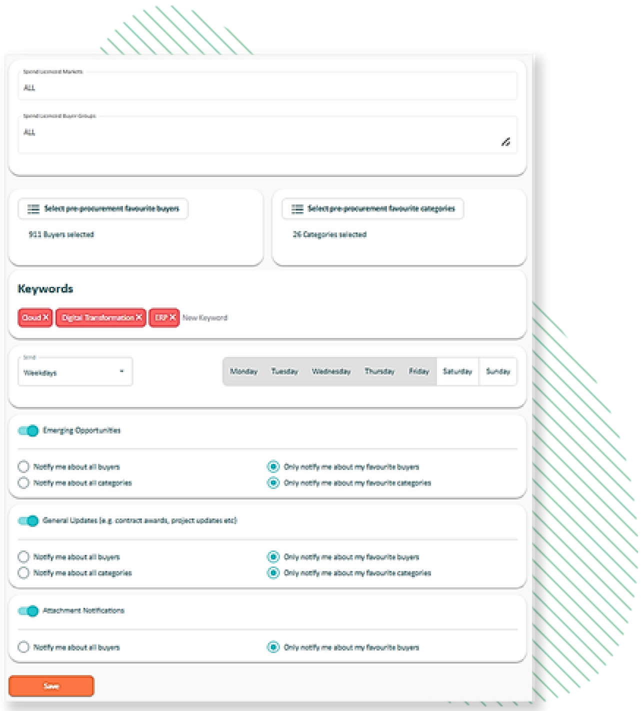
Finally, make sure to tick the boxes for **Emerging Opportunities**, **General Updates and Attachment Notifications** and then select **Only notify me,** to receive tailored notifications based on your preferences.



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.



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