



INSIGHTS



User Guide:

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

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

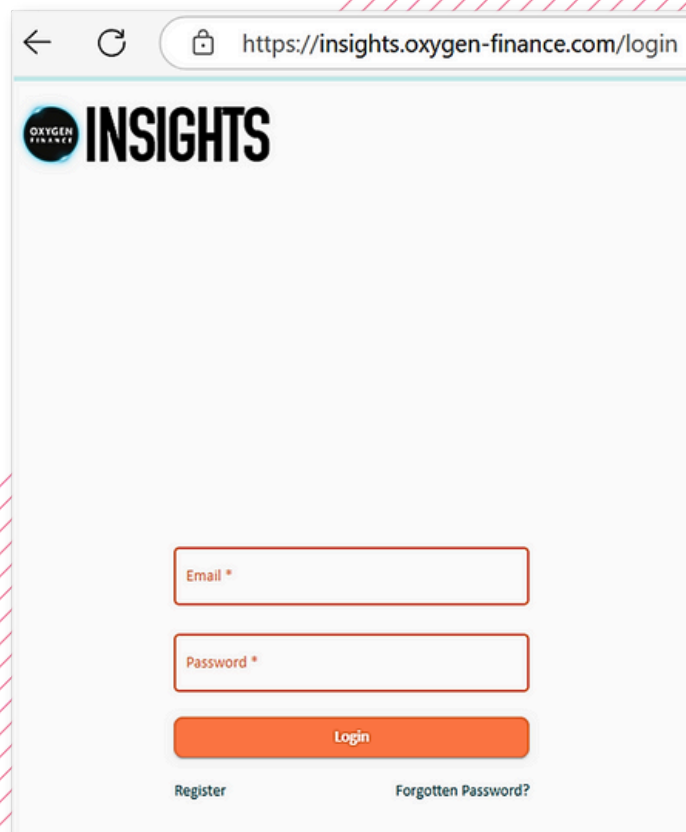


<https://insights.oxygen-finance.com/login>

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

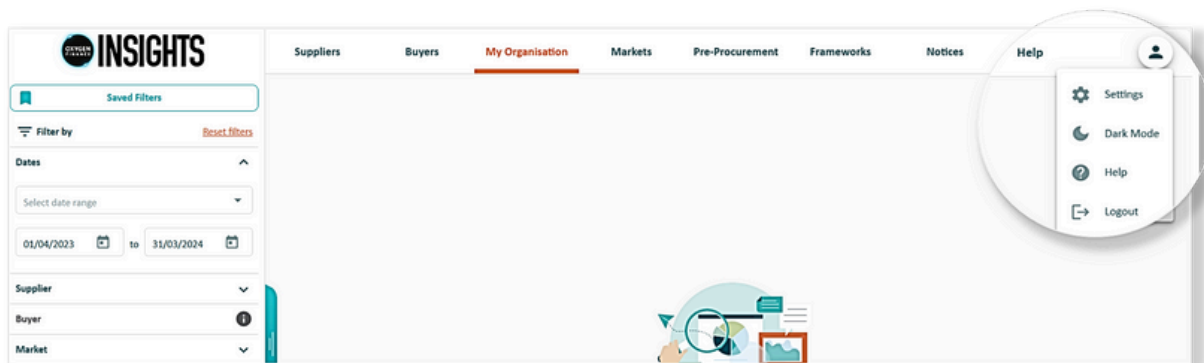
Step 1: Log in with your credentials

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" by Oxygen Finance. The browser's address bar displays "https://insights.oxygen-finance.com/login". The page has a light gray background. At the top left, there is a logo consisting of a dark blue circle with "OXYGEN FINANCE" inside, followed by the word "INSIGHTS" in large, bold, black letters. Below the logo, there are two input fields: "Email *" and "Password *", both with red borders. Below these fields is an orange button labeled "Login". At the bottom left, there is a link "Register", and at the bottom right, there is a link "Forgotten Password?". The entire screenshot is overlaid on a decorative background of red diagonal lines forming a circular shape.

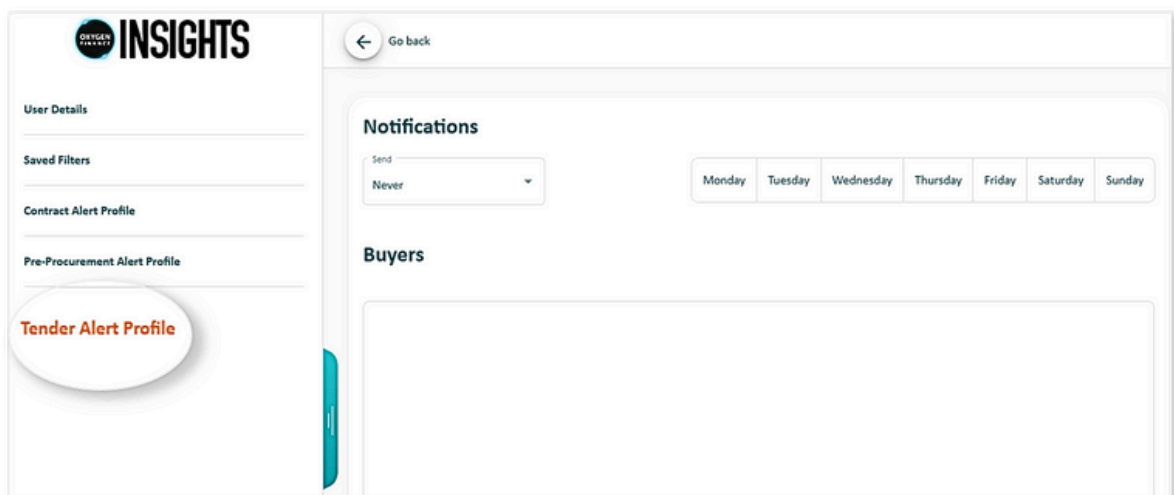
Step 2: Access the Profile Icon

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 Tender Alert Profile

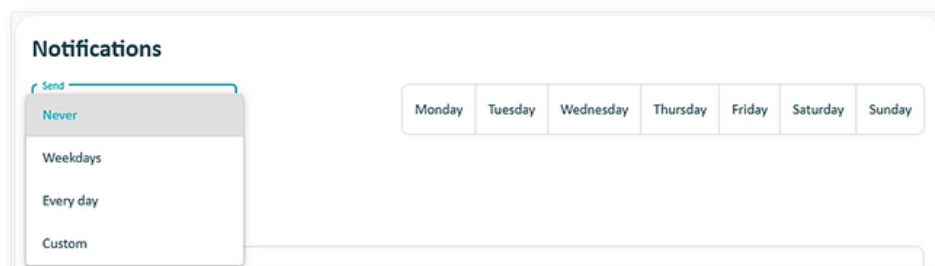
Within the **Settings** menu, navigate to the **Tender Alert Profile** section and a similar page will appear on your screen.



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

Step 4: Set Notification frequency

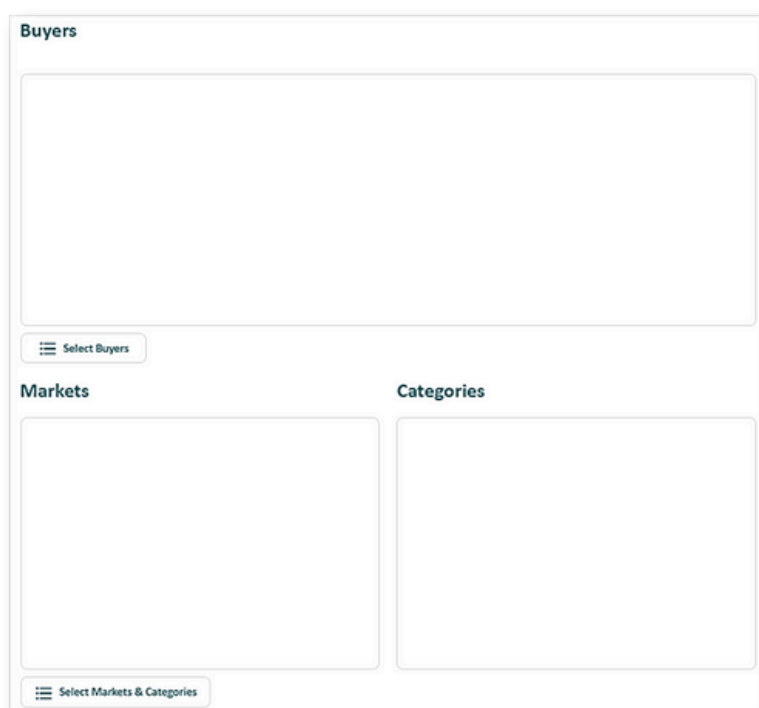
You can personalise your alert settings by choosing how often you'd like to receive your tender alerts.



The screenshot shows a 'Notifications' settings panel. On the left, there is a dropdown menu with options: 'Never', 'Weekdays', 'Every day', and 'Custom'. The 'Never' option is currently selected. To the right of the dropdown is a row of seven buttons representing the days of the week: 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and '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 5: Filter by Favourite Buyers, Markets and Categories



The screenshot shows a filter interface with three main sections. The top section is labeled 'Buyers' and contains a large empty rectangular box. Below this box is a button labeled 'Select Buyers'. The bottom section is divided into two columns. The left column is labeled 'Markets' and contains an empty rectangular box. The right column is labeled 'Categories' and also contains an empty rectangular box. At the bottom of the 'Markets' and 'Categories' section is a button labeled 'Select Markets & Categories'.

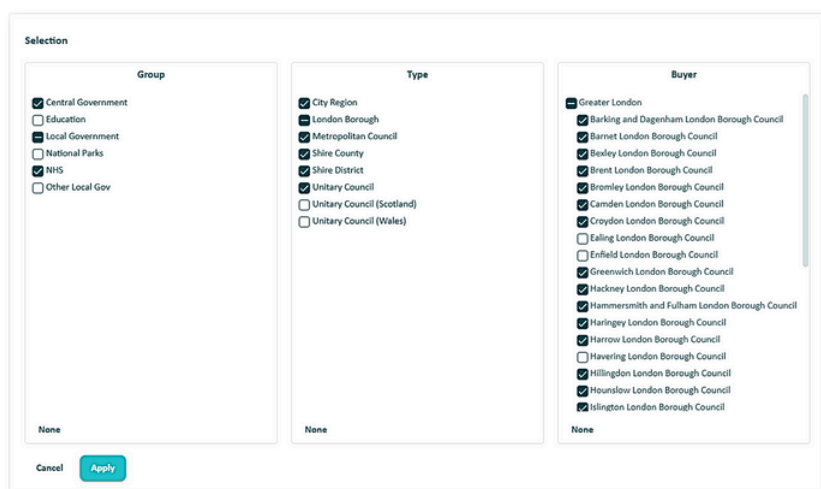
To refine your alerts even further, you can select your preferred buyers and choose specific markets and categories that match your needs and interests.

Favourite buyers

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

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.

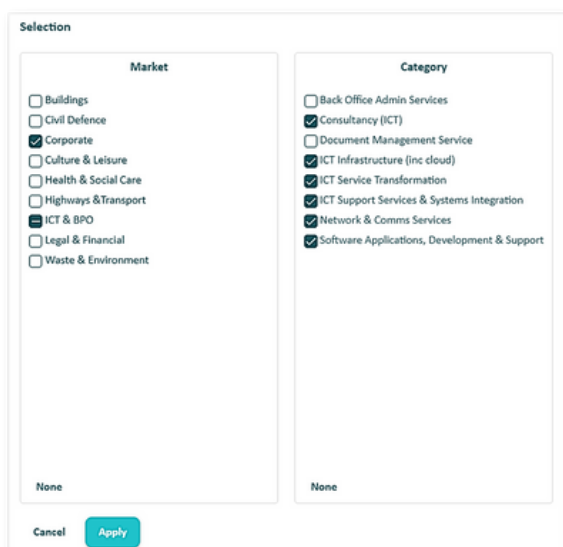


Important:
Once you've made your selections don't forget to click on **Apply** to save your choices.

Favourite Markets & 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 Health & Social Care.

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

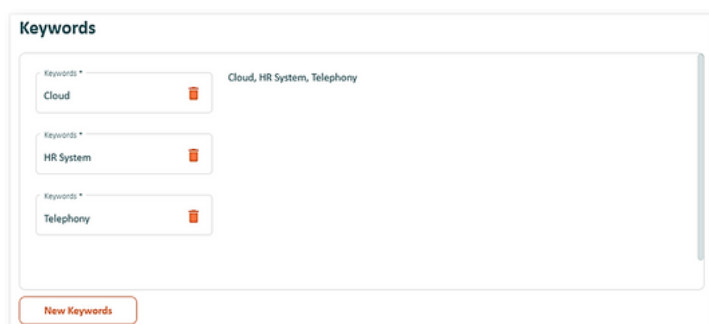


Important:
Once you've made your selections don't forget to click on **Apply** to save your choices.

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

Step 6: Refine alerts using Keywords 🔍

Use the Keywords section to add specific terms you want to track in the tender notifications (eg Cloud, HR System, Telephony). This will ensure you receive alerts about tenders 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 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 tender opportunities.





www.oxygen-finance.com



0121 295 4498



ariane.oliveira@oxygen-finance.com

1st Floor, Enterprise House, 115 Edmund Street, Birmingham, B3 2HJ