



# INSIGHTS



## User Guide:

## How To Analyse SME and Regional Suppliers in Insights



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



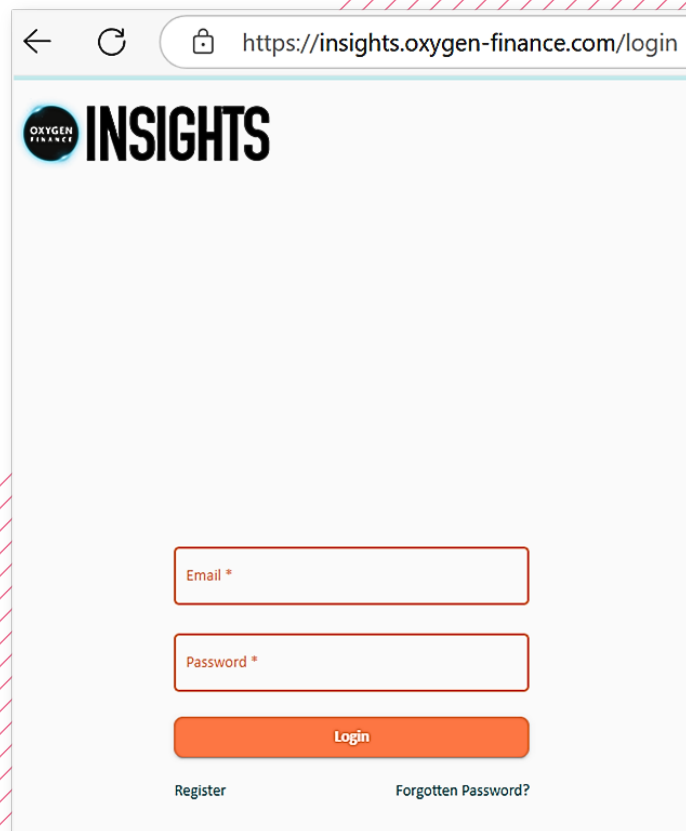
# INSIGHTS

## SME & REGIONAL SPEND

## How to analyse SME and Regional Suppliers in Insights

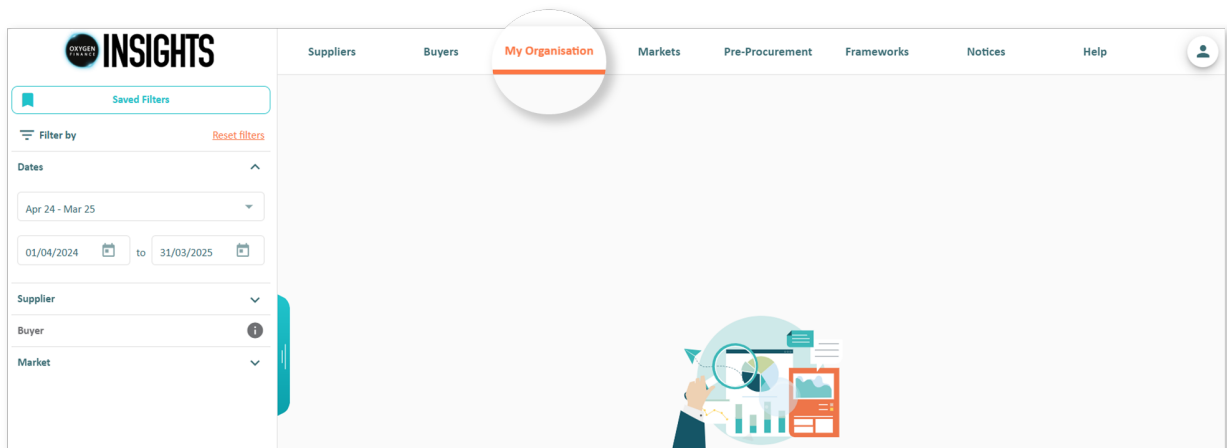
### Step 1: Log in with your credentials

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 the URL "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 overlaid on a background of red diagonal lines.

## Step 2: Look for My Organisation tab

Once logged in successfully, look for the **My Organisation** tab at the top of the page in the navigation menu.

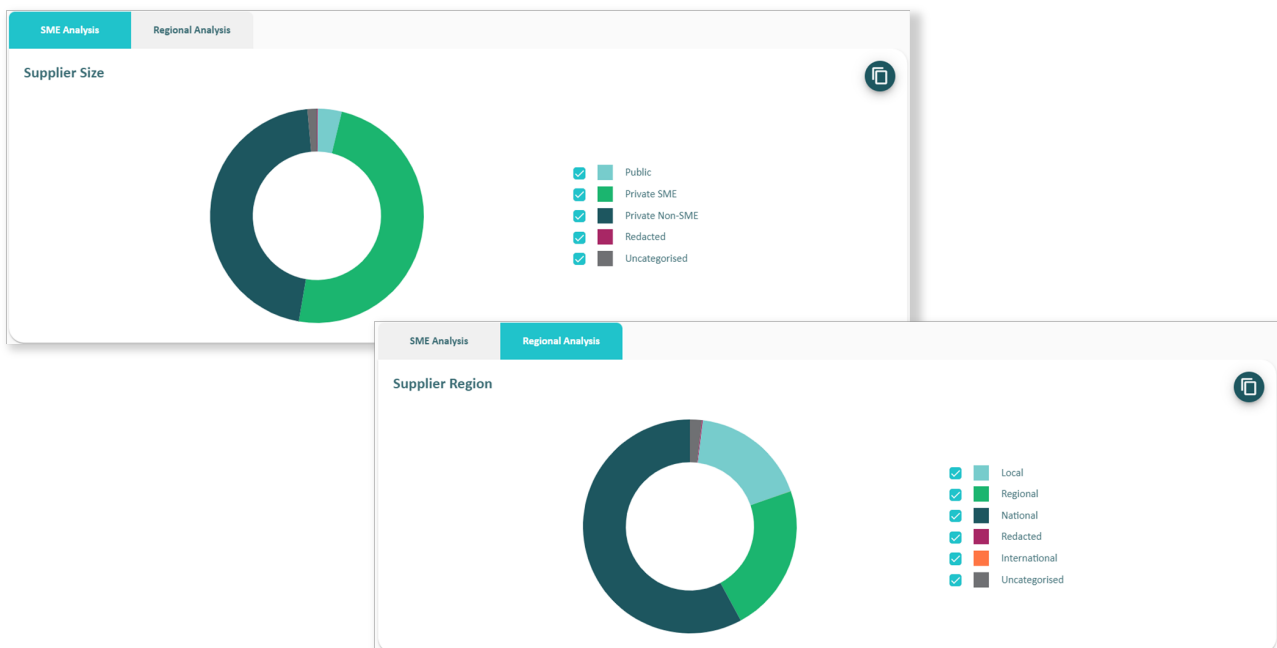


## Step 3: Select SME Analysis or Regional Analysis

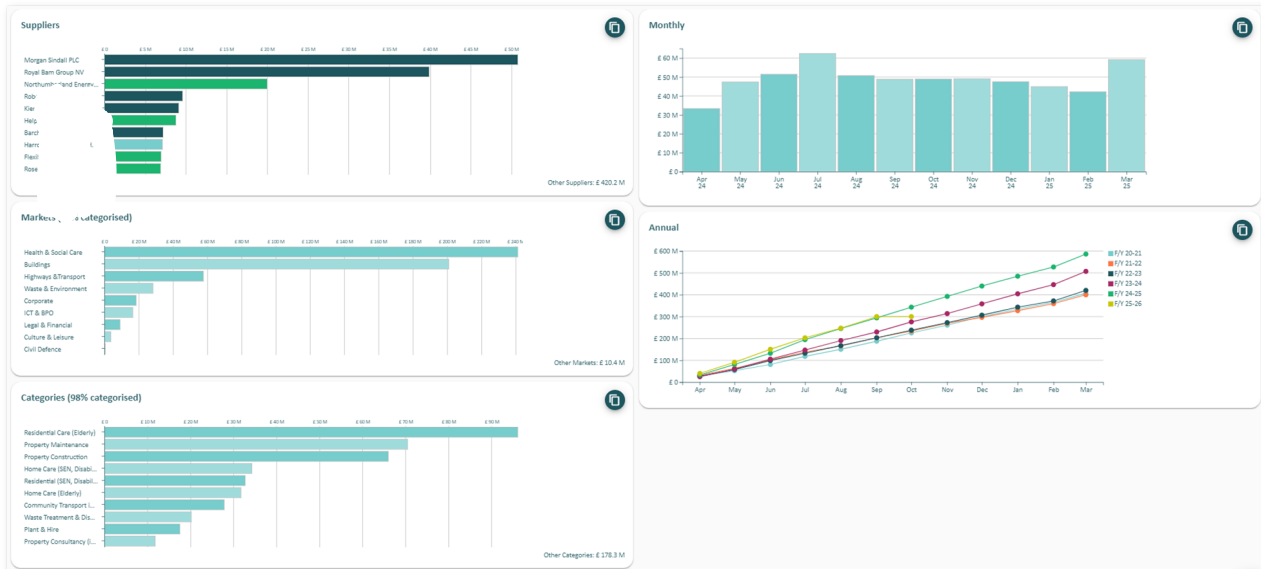
Within your organisation's dashboard, choose either SME Analysis or Regional Analysis. Each view includes a graphic showing supplier classification:

**SME Analysis:** Public, Private SME, Private Non-SME, Redacted, Uncategorised

**Regional Analysis:** Local, Regional, National, Redacted, International, Uncategorised



Based on your selection, the graphic will display supplier classifications, and below it you'll find detailed insights including supplier lists, categories, markets, and monthly / annual spend breakdowns.



## Step 4: Understanding SME Analysis

Our SME process classifies companies as Micro, Small, Medium, or Large using the Government's latest monetary company size thresholds.

Where data is limited, we infer size using account types (e.g. micro-entity or filleted accounts) and exemption claims. Dormant companies are flagged separately. This method enables effective size and risk assessment even with limited public data.

## Step 5: Understanding Regional Analysis

Regional analysis categorises suppliers' Head Office postcodes based on their alignment with the buying authority.

**Local:** Same district/authority.

**Regional:** Same county (but different district).

**National:** UK-based but outside Local / Regional.

**International:** Outside the UK.

Redacted and uncategorised postcodes are handled separately. This consistent approach ensures accurate location-based supplier analysis.

## Step 6: Benefits of SME/Regional Analysis

SME and Regional analysis provides a clear understanding of spend with SMEs and local suppliers through a live dashboard. It helps identify local suppliers by category and visualise spend across different supplier types.

**Note:** The classifications used for SMEs and regional suppliers are based on the Government's latest monetary company size thresholds and postcode mapping, ensuring the analysis is both reliable and consistent.

|                                                     | MICRO    |       | SMALL    |       | MEDIUM   |      |
|-----------------------------------------------------|----------|-------|----------|-------|----------|------|
|                                                     | Previous | New   | Previous | New   | Previous | New  |
| Turnover not more than:                             | £632k    | £1m   | £10.2m   | £15m  | £36m     | £54m |
| Balance sheet total* not more than:                 | £316k    | £500k | £5.1m    | £7.5m | £18m     | £27m |
| Monthly average number of employees, not more than: | 10       | 10    | 50       | 50    | 250      | 250  |
| *i.e. total assets                                  |          |       |          |       |          |      |

Need help staying ahead of your analysis? Check out our Insights Guides 



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