Tenant User Guide

Investa Connect

1300 996 888

investa connect
intelligent facilities management

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SYSTEM OVERVIEW

Investa Connect is a smart, integrated system that has been developed with our partner, Facilio. The system provides a centralised location for our Tenants to manage services requests, tenancy contacts and visitor registration.

Investa Connect can be accessed via web browsers and mobile applications, ensuring management of Tenant Service Requests can be accessed anywhere, anytime.

Tenant Service Requests

Contact & Escalation Support

Visitor Registration

PORTAL ACCESS

Desktop Portal

https://investa.faciliotenants.com
We recommend bookmarking the portal address on your device.

New users will receive a Welcome email from Investa Connect, allowing you to set a password and login to the vendor portal via the link provided.

Passwords can be reset by using the 'Forgotten Password' link on the sign in home screen. Additional users can be granted access to the portal via the Tenant Admin contact.
Note: After you have set your password, we recommend accessing the portal through the above link and not by using the link in the email.

Mobile Application

The Tenant mobile application is available to be downloaded on both Apple and Android devices.
1. Search 'Facilio Tenants'
2. Download to your device
3. Login using the same email and password as your desktop portal.

IT & Blocked Links

We strongly encourage you to let your internal IT team know about the new system and ask them to:
- Allow full access to https://investa.faciliotenants.com by whitelisting this as a safe site.
- Ensure emails are not blocked from noreply@facilioaccounts.com or noreply@investa.facilio-au.com.

Note: Microsoft Internet Explorer is being phased out, therefore please access using only Edge or Chrome.
Some users may experience issues with alternative browsers.

ROLES & RESPONSIBILITIES

Tenant Admin

Responsible for:

- Being the first point of call for any Tenant Service Requests (TSR).
- Managing contacts and users under your Tenant Profile
- Logging Tenant Service Requests, with the authority to approve any costs relating to a TSR.
- Acting as the central point of contact should a scenario occur which affects the ability of the building to operate.
- Coordinating with others in the organisation to coordinate effective communications/directions to all staff and management levels.

Tenant User

Responsible for:

- Logging a Tenant Service Request
- Seeing and receiving broadcasts

Roles for sites with Visitor Management Only

Tenant Administrator

Responsible for:

- **For use at 420 George and 60 Martin Place ONLY.**
- First point of call for any Tenant Service Requests (TSR).
- Managing contacts and users under your Tenant Profile
- Logging Tenant Service Requests, with the authority to approve any costs relating to a TSR.
- Visitor Registration capabilities for 420 George and 60 Martin Place

Tenant Limited

Responsible for:

- Registering guests and visitors to your tenancy

MANAGING CONTACTS

To create a NEW contact for your Tenant Profile:

1. Click on Contacts (Left menu bar)
2. Click NEW (top right corner)
3. Complete all fields noting contact numbers are mandatory, enabling site sign in.
4. Select contact type. Refer to Roles & Responsibilities on Page 5.
5. Hit Save.

To EDIT an existing contact:

1. Click on Contacts (Left menu bar)
2. Drill down into relevant contact or use the Search function to locate contact.
3. Click the ellipsis button (top right corner)
4. Select Edit.
5. Edit relevant fields
6. Hit Save.

Note:
The Primary Contact is responsible for managing their tenant contact lists. The Primary and Admin contacts have the ability to add or edit contacts.

SERVICE REQUESTS

To create a NEW Tenant Service Request (TSR)

1. Click on 'Service Requests' (Left menu bar)
2. Click NEW Service Requests (top right corner)
3. Add in a Subject e.g. 'Tap Leaking Level 31'
4. Select the relevant Unit from the drop down menu
5. Add a detailed description of the issue
6. Select the Site and Building
7. Select an Issue Category
8. Select Issue Sub Category
9. Hit Save

Note: Your TSR has now made its way to the building Facilities Manager who will respond or allocate to a contractor in due course.

The sub categories are driven by the category selected. If you don't see the relevant sub category, you may picked the wrong category.

You will only receive notifications for updates to the TSR if a comment is added by the FM.

Adding an attachment to a TSR.

1. Once you have saved your TSR, you can click into the TSR
2. Select the 'Comments & Information' tab.
3. Scroll to Attachments
4. Click the paperclip icon
5. Add attachment from the relevant file.

To REVIEW a Tenant Service Request (TSR)

1. Click on 'Service Requests' (Left menu bar)
2. Click onto the name of the TSR from the list or search using the search option in the top right corner
3. You can now see a summary of the TSR
4. To view any attachments, select the 'Attachments' tab
5. Add any additional notes by clicking 'Add Note'

VISITOR REGISTRATION

To REGISTER a single visitor to the building

1. Click on 'Visitor', then 'Invites' (Left menu bar)
2. Select 'New Invite' (top right corner)
3. Select 'Single' invite
4. Select Visitor - do not select worker
5. Complete all relevant fields
6. Hit Save

To REGISTER a group of visitors to the building

1. Click on 'Visitor', then 'Invites' (Left menu bar)
2. Select 'New Invite' (top right corner)
3. Select 'Group' invite
4. Select Visitor
5. Complete all relevant fields - all visitors must have a unique phone number. Please do not put one phone number for all guests as this causes difficulty with registering guests at concierge.
6. Hit Save

Note: This template works like an excel file so will try and validate data. If the cell appears yellow, the information in the cell is not recognised. Please type over the text for it to validate.

NOTE: The phone number entered for each visitor must be unique to that person. If you register multiple guests with the same phone number, each guest cannot be validated upon check in.

To view pending or past visits

1. Click on 'Visitor', then 'Visits' (Left menu bar)
2. Navigate to Todays visits, Currently Checked-In or All Visits
3. Select the visitors name to see more details

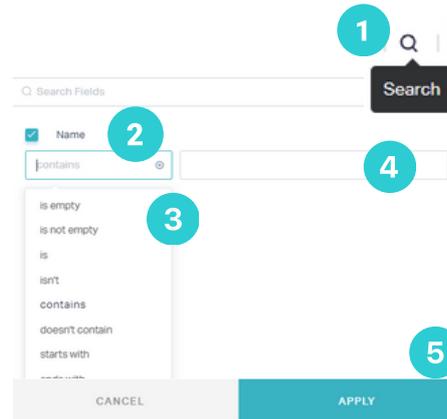This feature is only applicable to the following sites:
- 420 George St
- 60 Martin Place

SYSTEM NAVIGATION

Search Function

To Search within each screen:
1. Click on the magnifying glass (top right corner)
2. Click into the relevant field you wish to search via
3. Change the criteria using the drop down arrow
4. Search the key word or ID in the field
5. Hit Apply

Units & Suite Naming Conventions

Tenant unit and suite information is pulled into Investa Connect from our accounting system where your lease documentation is stored. You will notice that your unit information may appear as S0101 or CP0101. To understand what each of these means, please see below:

e.g S0101 = S = Suite, 01 = Floor/Level, 01 = Unit

CP = Carpark
STO = Storage
B = Basement

PV = Pavilion
M = Mezzanine
PD = Podium

Additional Fields

To find additional fields or modules within the system, click the ellipsis button and additional fields will appear.
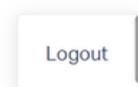
Drill Down

To drill down into an item, click through where the text is either bold or click within the 2nd column field.

Sign Out

Select the circle icon in the bottom Left corner.
Select Sign Out

BUILDING BROADCASTS

Keeping in touch with our Tenant contacts is an important part of our business operations and we often need to get in touch with important building information. Broadcasts look a little different in Investa Connect.

When a building broadcast is sent by the Investa team, you will receive:
- an email notification with a copy of the message.
- A notification on the 'Home' tab of Investa Connect.
- The ability to navigate into all announcements by clicking on 'Broadcasts' tab in the portal.

Note:
The broadcasts are sent from 'Notification' <noreply@investa.facilio-au.com>
We encourage you to ensure that any important messages are passed on to your colleagues by forwarding the email if required.
Please ensure your IT department have marked this as a safe sender.

AFTER HOURS SUPPORT

1300 996 888

The after hours number: 1300 996 888 should be called if there is an urgent after hours incident or situation.

The helpdesk operators will be available to:
- Log a Tenant Service Request on your behalf
- Escalate any urgent or serious requirements to the relevant contact in the Escalations List for each building.

The helpdesk operators are not available to manage service requests in non-urgent or emergency situations.

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