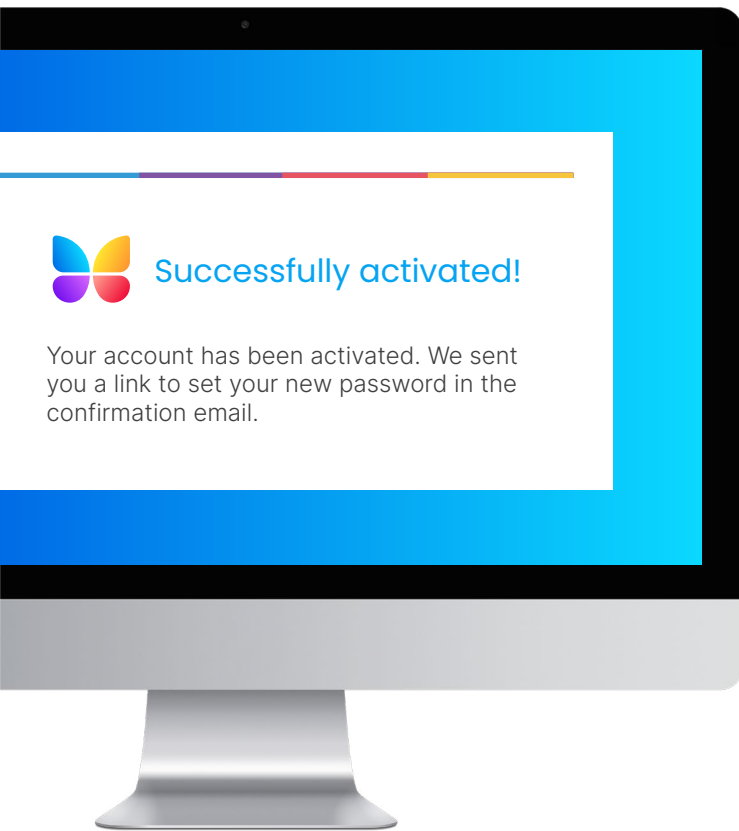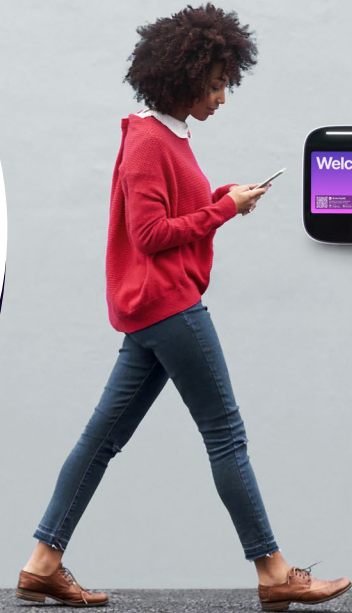# ButterflyMX

Property Management Training Guide

Property access made simple

REGISTRATION EMAIL

After you've been added as a property administrator, you will receive a registration email with a link to activate your account.

Once you've activated your account, you will receive another email with a link to create your password.

If you did not receive the activation or password set-up emails, please contact our support team and they will send you a direct link.

Hours: 6am - 10pm | Monday - Sunday

Email: support@butterflymx.com

Phone: (800) 398-4416 ext. 2

To log into your account after activation, visit our website butterflymx.com and select LOGIN using your email and password created during activation.

Successfully activated!

Your account has been activated. We sent you a link to set your new password in the confirmation email.

ADMIN DASHBOARD

The tabs on the left side of your dashboard are where you manage data related to tenant access, security, records, and other property administration tasks.

1. **Tenants:** Displays tenant data. Add and remove tenants and edit current tenant information.

2. **Calls:** Lists all calls made through the intercom, along with a photo of the visitor and a time and date stamp of when the call was made.

3. **Door Releases:** All transactions resulting in the intercom opening the door are listed here, including a time- and date-stamped photo of the visitor and the name of the tenant who released the door.

4. **Devices:** Displays connected devices, including video intercoms, keypads, key lockers, and elevator controls.

5. **Zones:** Displays zoned access privileges for visitors and tenants. Useful in mixed-use buildings and cases where tenants should have access to some areas of a property but not others. Contact your client success manager to manage zones.

6. **Access management:** Displays and allows you to manage property access privileges.

7. **Units:** Displays a list of all units in your building. Add or remove units.

8. **Administrators:** Lists everyone with administrator access. If you need to add or delete an administrator, please contact your client success manager.

9. **Inactivity Messages:** Displays a custom "pop-up" message on the intercom after 60 seconds of inactivity.

10. **Group Messages:** Messaging platform for admins to send messages to tenants. Tenants receive these messages through text, email, or both. Tenants can also view messages from the ButterflyMX mobile app.

11. **Delivery Authorizations:** Create 4-10 digit delivery PINs for package carriers and vendors, like USPS, UPS, or FedEx.

12. **Active Visitor Access:** View all active virtual keys sent out by tenants and administrators.

13. **Settings:** Basic property information, like your building's name, address, and phone number, can be configured here.
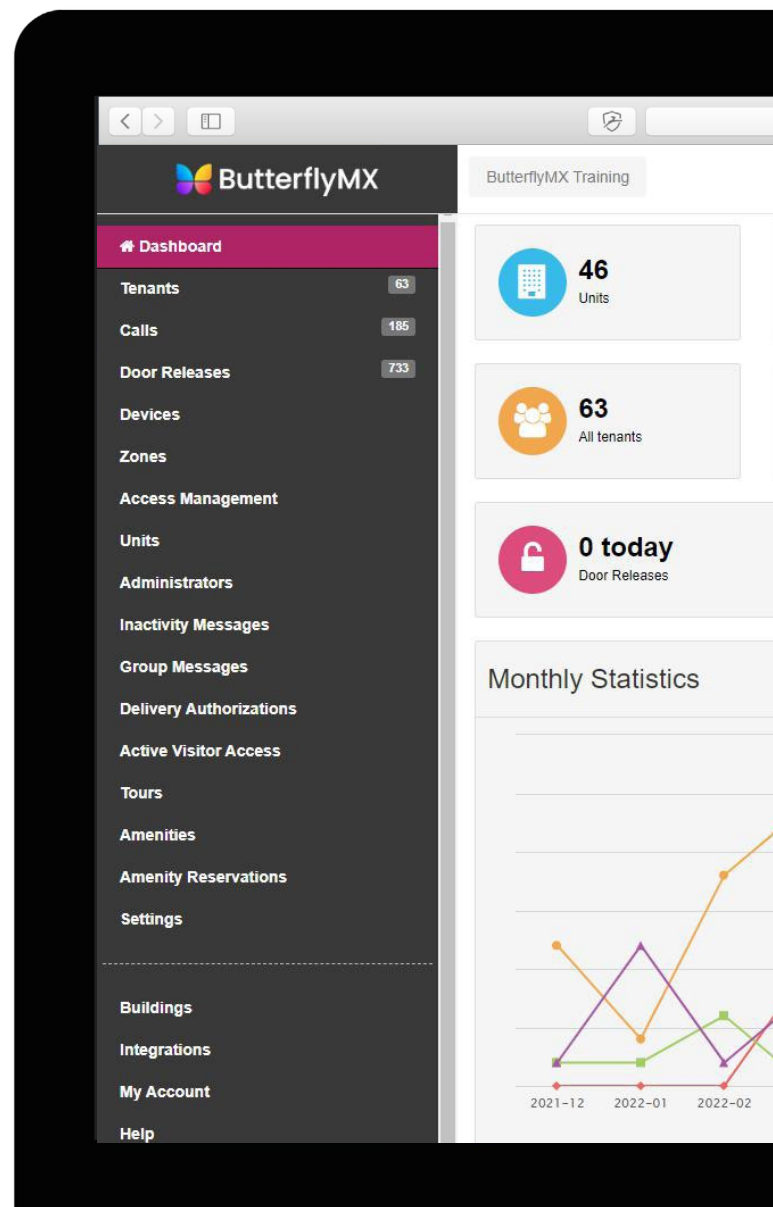
ADDING A TENANT

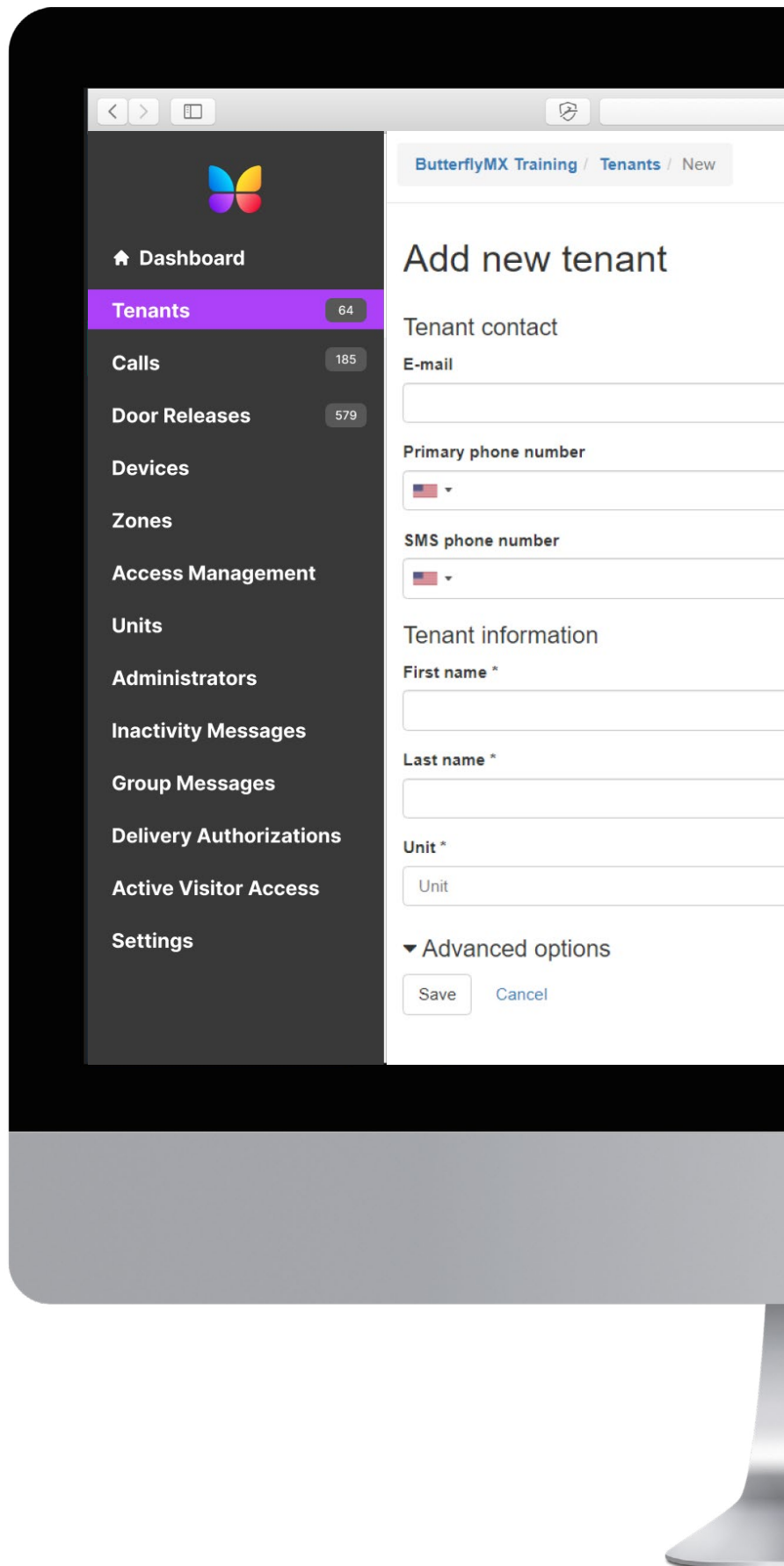Navigate to the Tenants tab of the admin dashboard. Then, follow the steps below to add a new tenant.
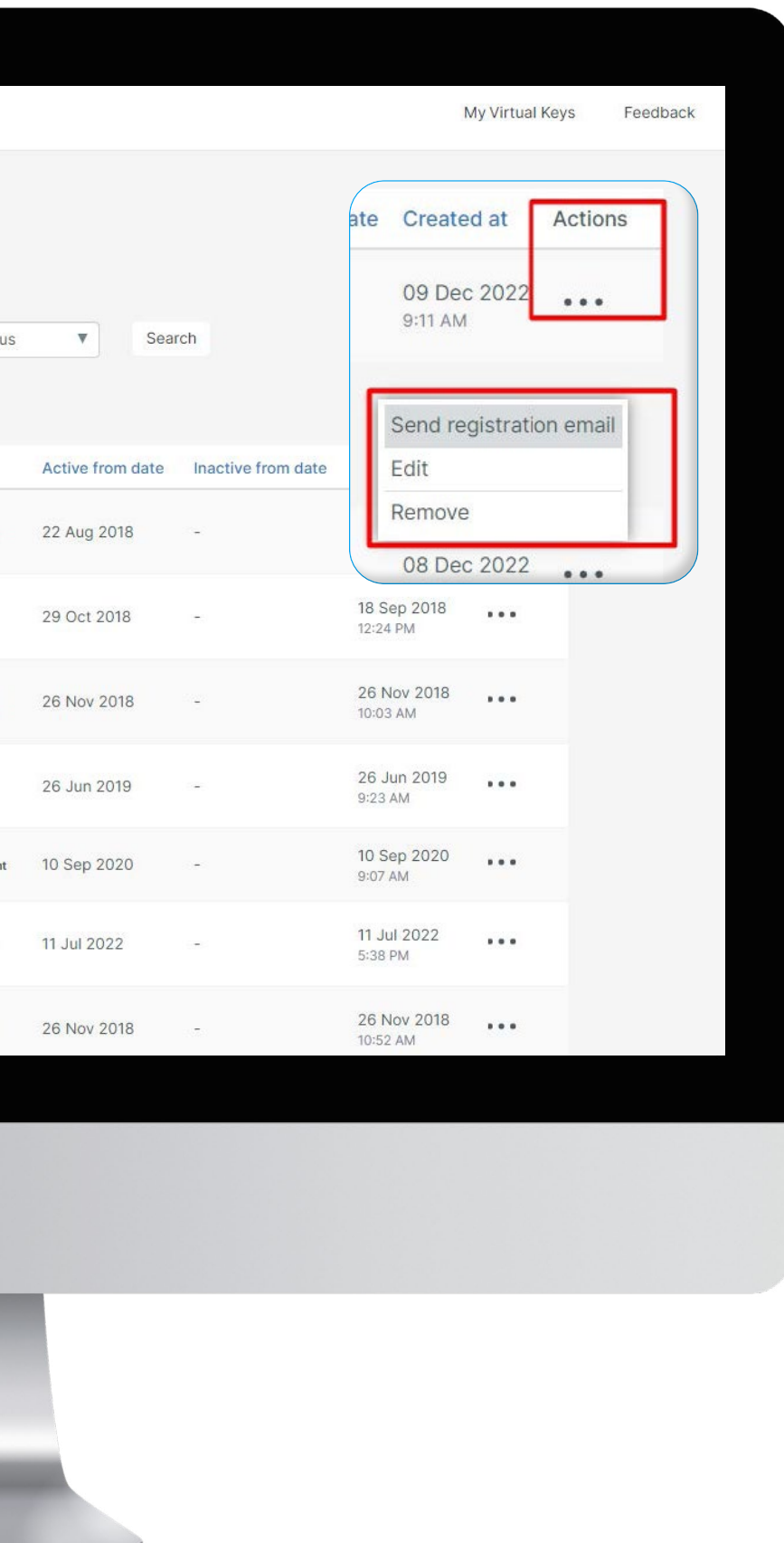
1. **Select Add Tenant**
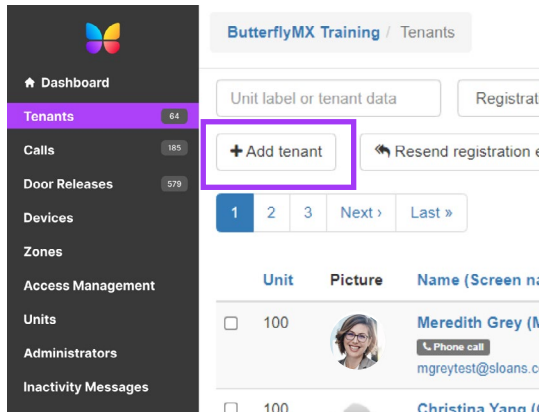
2. **Add tenant information:** first name, last name, email, phone number, and unit. Click **Save**.

> *Note: Unit number can be added manually if not present in the drop-down menu.*

3. **Click the arrow next to Advanced Options to customize how tenants' names are displayed.**

EDITING TENANT INFORMATION & RESENDING REGISTRATION EMAILS

My Virtual Keys   Feedback

ate   Created at   Actions

09 Dec 2022
9:11 AM   • • •

Search

Send registration email

Edit

Remove

Active from date   Inactive from date   08 Dec 2022   • • •

22 Aug 2018   -

29 Oct 2018   -   18 Sep 2018   • • •
                               12:24 PM

26 Nov 2018   -   26 Nov 2018   • • •
                               10:03 AM

26 Jun 2019   -   26 Jun 2019   • • •
                               9:23 AM

10 Sep 2020   -   10 Sep 2020   • • •
                               9:07 AM

11 Jul 2022   -   11 Jul 2022   • • •
                               5:38 PM

26 Nov 2018   -   26 Nov 2018   • • •
                               10:52 AM

Click the three dots icon (•••) under the Actions header next to each tenant to edit their information, remove them from the system, or send them a registration email.

Send registration email: Click to resend the registration email to that specific resident.

Edit: Click to edit tenant information, send a tenant their confirmation link or password reset link, create virtual keys, and view tenant devices.

Note: If you need to edit a tenant's email address, please contact support@butterflymx.com

**Remove:** Click to remove resident from your building account

ADDING AND DELETING A UNIT

All units for your building are listed in the Units tab of the admin dashboard. For larger buildings, send a unit list to your client success manager (listed under the **Settings** tab) and we will perform a group import.

To add a new unit and floor manually, select **+ New Unit.** Add the unit number under **Label** and the floor number to the **Floor Number** box. To add a zone to a unit, select one from the dropdown menu under **Zone**.
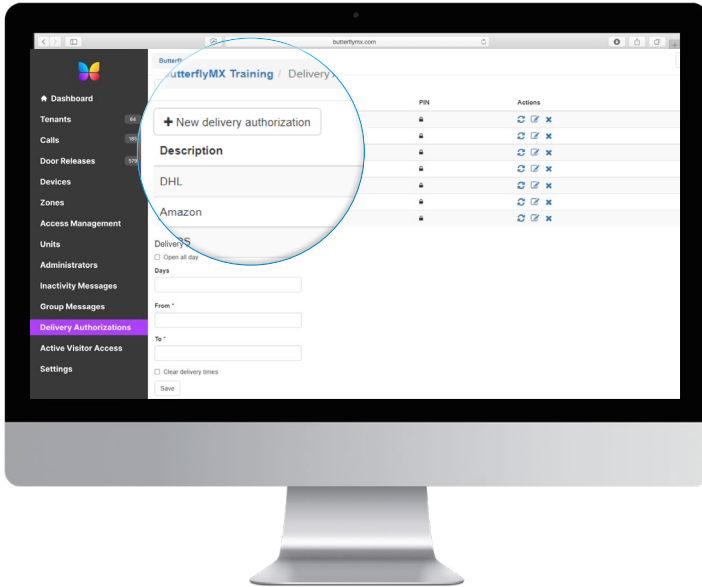
Add a new unit to an existing floor by selecting **+ New Unit** under the necessary floor and type in the unit number in the **Label** box.

To delete a unit, select the blue **X** icon in the unit box.
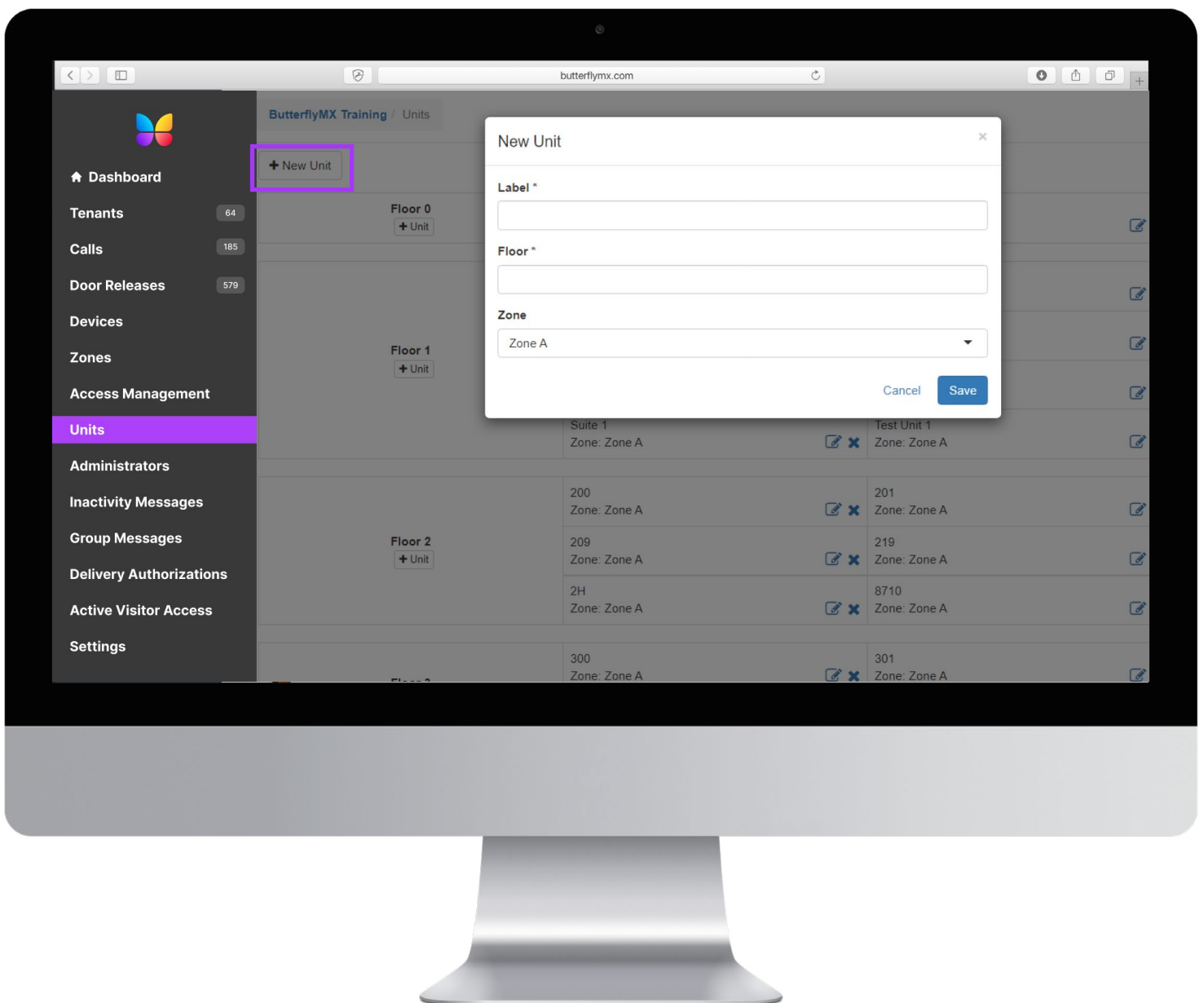
DELIVERY AUTHORIZATIONS

1. To create a delivery authorization, first press the **+ New Delivery Authorization** button.

2. Type in the package carrier name or vendor name, then create a 4-10 digit PIN you'd like to assign to the carrier. Click **Save**.

VIRTUAL KEYS

You can create Virtual Keys using your administrator account.

1. You can create a Virtual Key for your leasing office profile, or create one for a specific tenant by navigating to the **Tenants** tab of your admin dashboard and clicking on the tenant's name.

2. Type in the visitor's name and select the date you want the key to become active. Then, select the expiration time (caps out at 48 hours) and choose the delivery method.

3. Visitors will receive a QR code and PIN to gain access into the building.
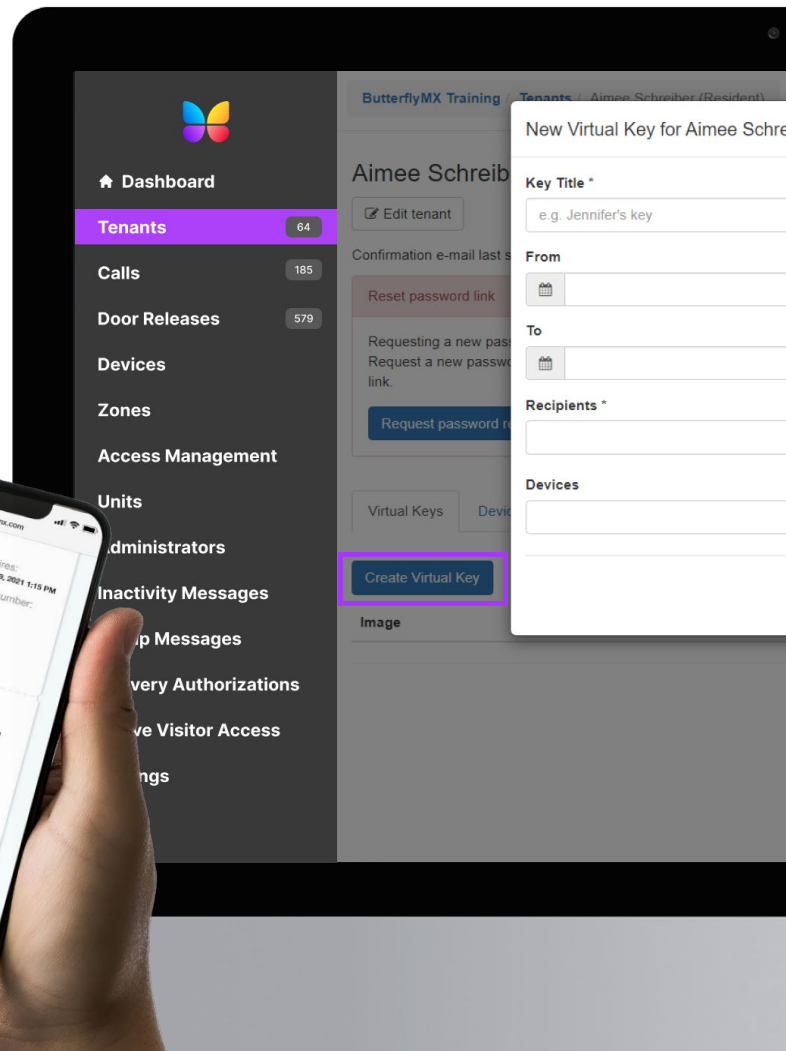
ButterflyMX Tenant User Guide

Property access made simple
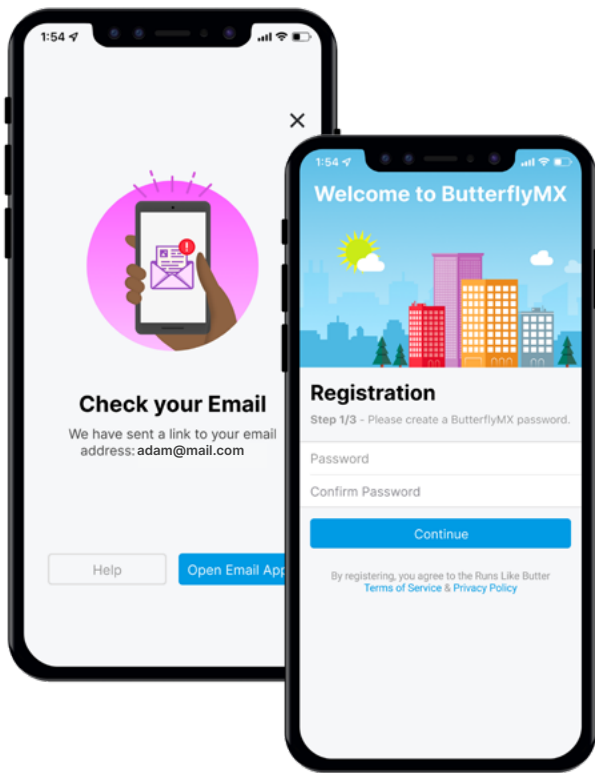
1. Registering for ButterflyMX

REGISTRATION EMAIL

Welcome to ButterflyMX!

To access all of our features, you'll need to finish your registration. You should have received a registration email (and a text message if you provided your SMS number) from ButterflyMX. If you have not received this email or text message, please contact your property manager or our support team at support@butterflymx.com.

CHOOSING A PASSWORD

After pressing the "Get Started" button in the registration email, you will be asked to create a password. Make sure the passwords match in both text fields.

2. Using the Mobile App

Now that you are registered, download the mobile app from the App Store or Google Play and sign in with the email and password that you created earlier.

The app will prompt you to enable notifications and access to your phone's camera and microphone. You can update all notification settings later from your account.
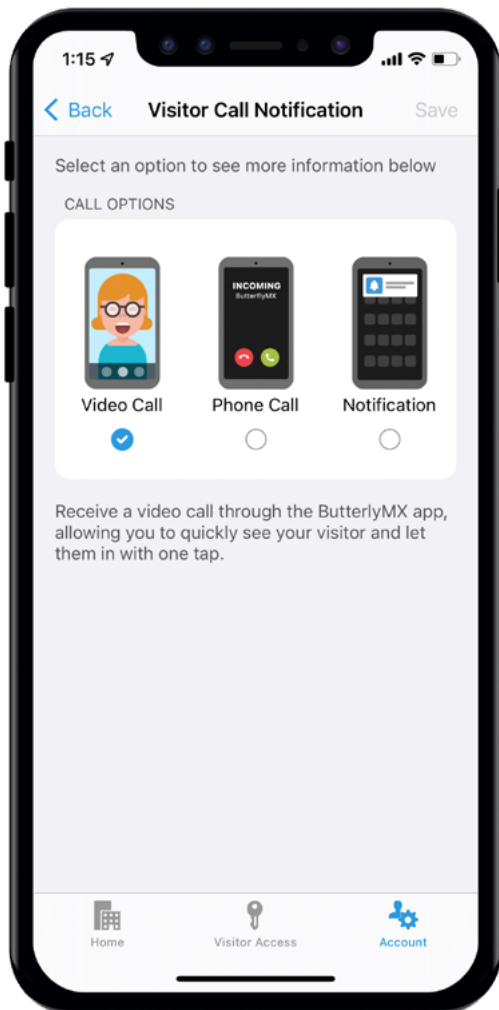
CHOOSING YOUR NOTIFICATION PREFERENCE

After signing into the app, choose how you'd like to be notified of visitors. You can choose to take calls through either the mobile app or through a telephone call.

Option 1: Mobile App

Calls that come through the app will be video calls. You can also use the app to open the door. If you miss a call from the app, it will roll over as a phone call to the phone number on your account.

> *Important: Select "Mobile app" in the dropdown menu for "Contact preference" if you plan to use the app on an Android. On iOS, you can choose "Video Call," "Phone Call," or "Notification."*

Option 2: Phone Calls

Using this option, calls from the intercom will come in as a regular phone call. After you accept the call, you can open the door by dialing "9."

KEY MOBILE APP FEATURES

Now that you've signed into the app, you can use all of our convenient features, including:

- Swipe to Open
- Building Contact
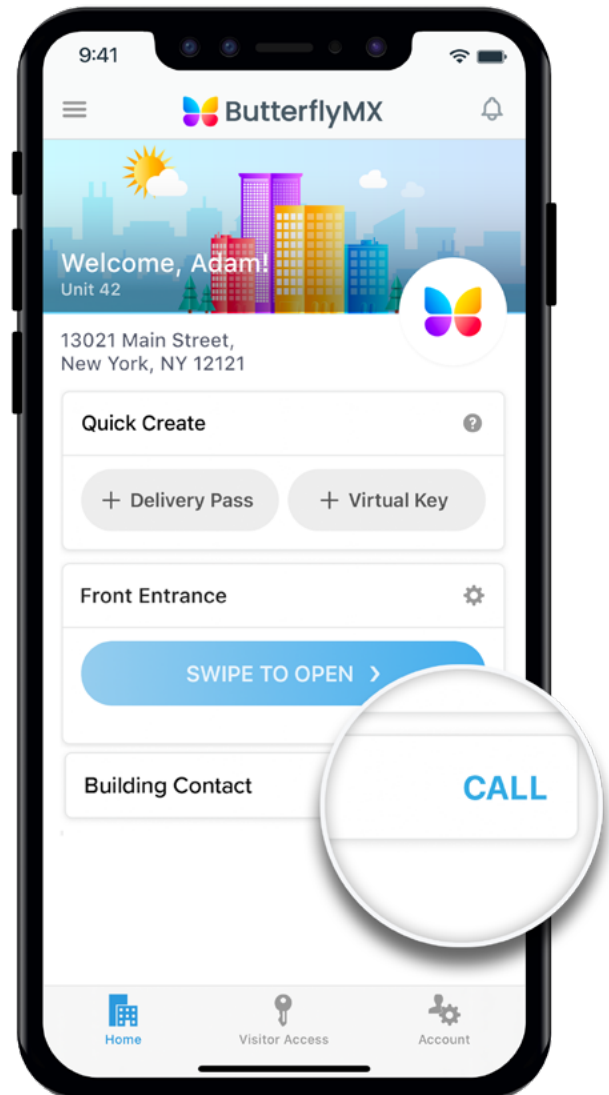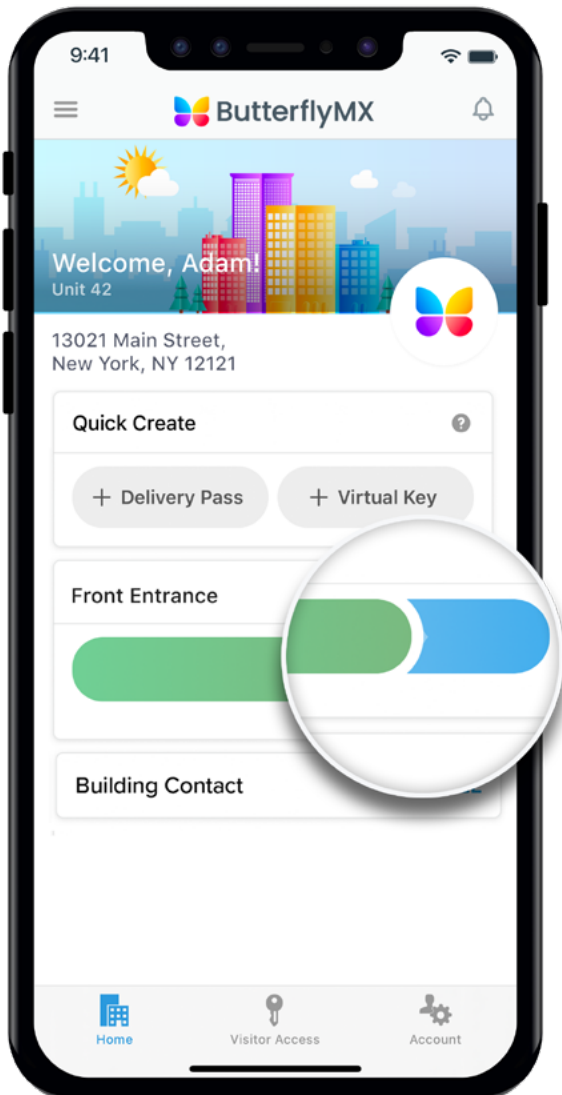- Activity Tracking
- Account Page
- Visitor Access

Please note: all features may not be available at your property

Swipe to Open

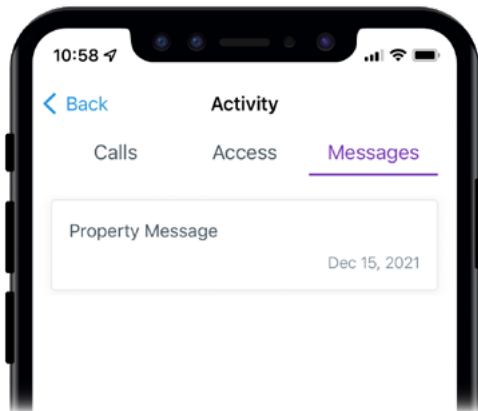Swipe your finger across the "Swipe to Open" button on the Home tab of the app to open the door.

Building Contact

The Building Contact button calls a dedicated on-site team member as provided by your property manager.
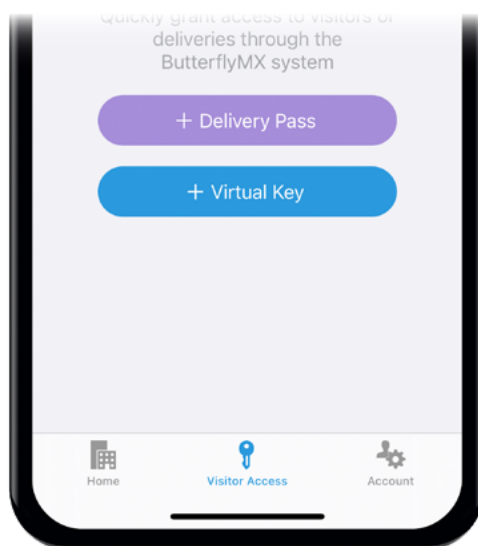
Activity Tracking

At any point, you can access a comprehensive list of the visitors and deliveries you've received. Also, if a visitor comes while you are gone, you can find any voice or text message they left for you. Access these features from the "Activity" tab on Android, or the bell icon in the upper right corner on iOS.
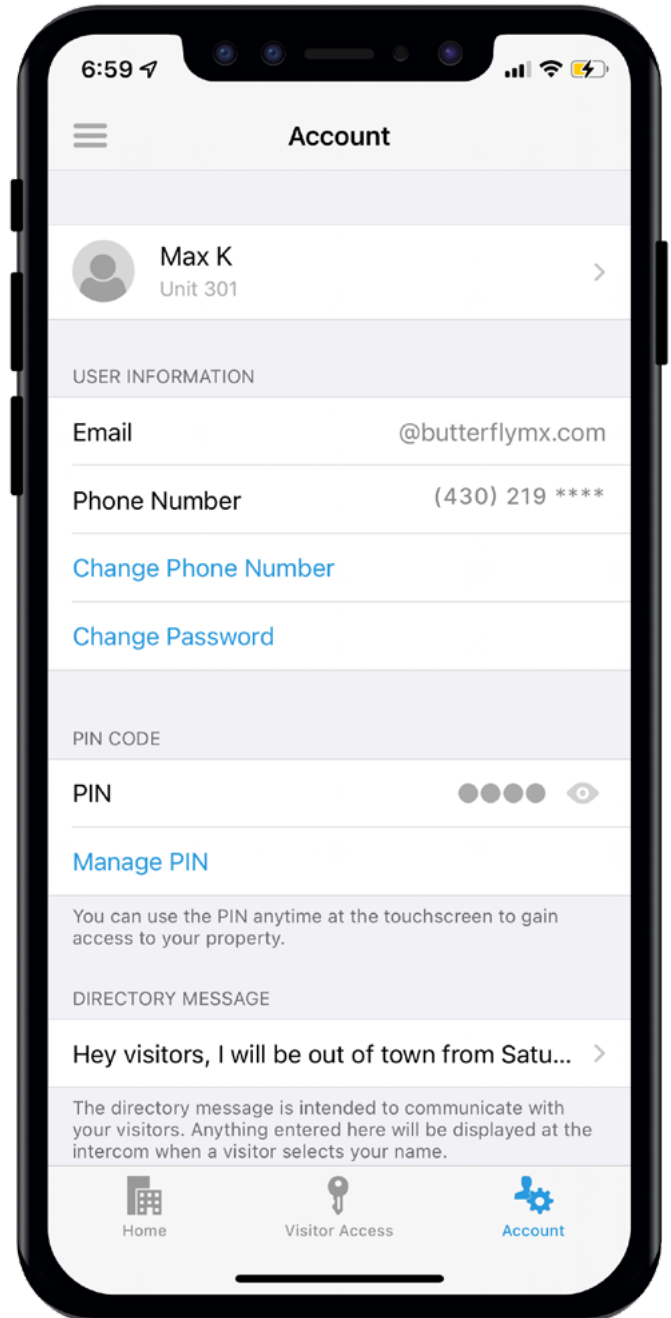
Account Page

Update your profile information, PIN code, directory messages, and more. You can also change your notification settings and send an email to our support team by clicking on the "Help" button.

Visitor Access

ButterflyMX offers two convenient ways to enable access for visitors and delivery carriers: virtual keys and delivery passes.

VIRTUAL KEYS

If enabled by your property, virtual keys are digital access credentials you can send to guests or service providers. With a virtual key, visitors can access the building without having to contact you first. You can configure these keys to work only on specific days or at certain times.

How to create a virtual key:

1. Tap the "Quick Create" button labeled "+ Virtual Key" in the mobile app.

2. Choose a preset: Custom Duration, Recurring Access, Business Hours, Full-Day Use, One-Time Use.

3. Name the key, choose the doors it will provide access to, and select start/end times.

4. You'll be taken to a "Key Created!" screen. Review your virtual key details and click "SHARE KEY."

5. Enter the recipient's SMS phone number or email.

6. If you're not ready to share the key now, you can share it at a later time by choosing the key under "Active" in the Visitor Access section.

7. The recipient will receive a QR code and PIN number to unlock the doors you've granted them access to.
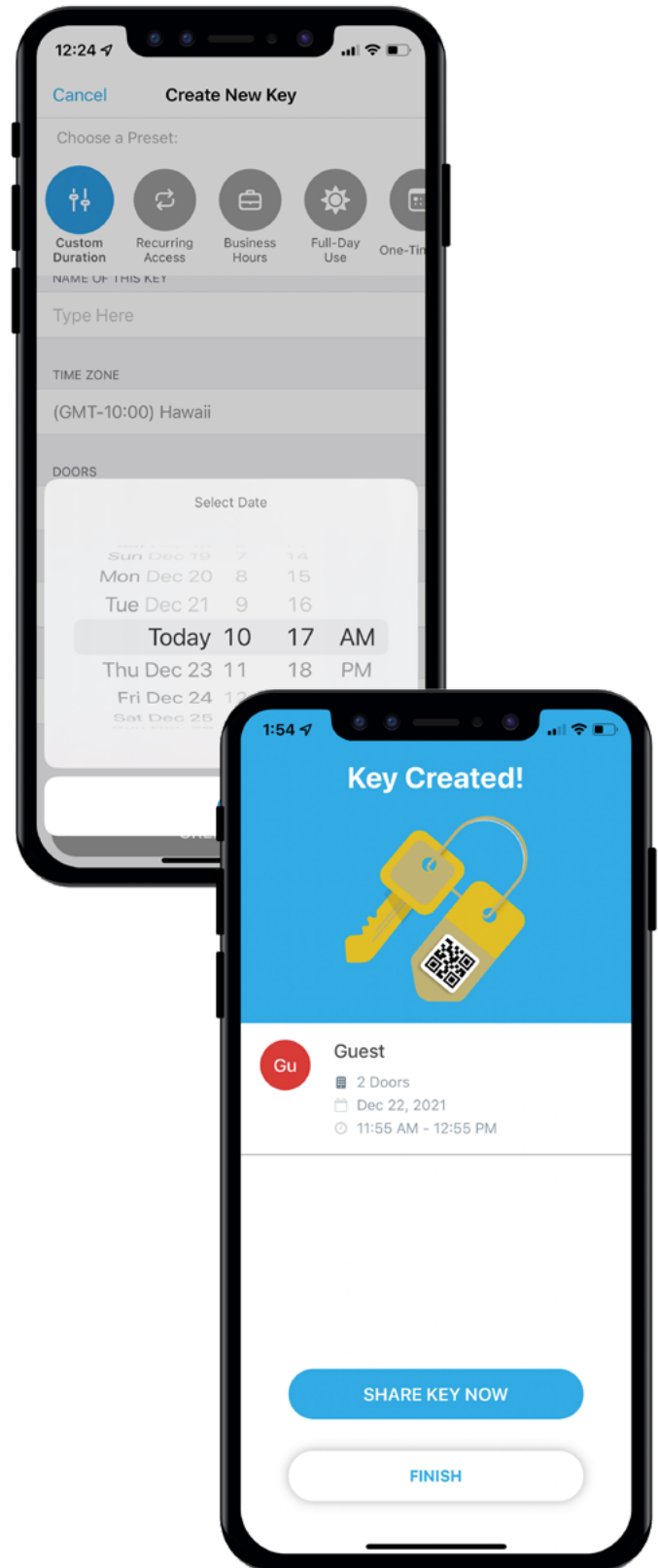
DELIVERY PASS

If enabled by your property, delivery passes are single-use, six-digit PIN codes that you can create and send to a delivery carrier. This allows couriers to access your building and complete deliveries even when you aren't home.

How to create a delivery pass:

1. Open the ButterflyMX app

2. Click 'New Delivery Pass'

3. Copy and paste the automatically generated code into the e-commerce provider's "delivery instructions" box at check-out