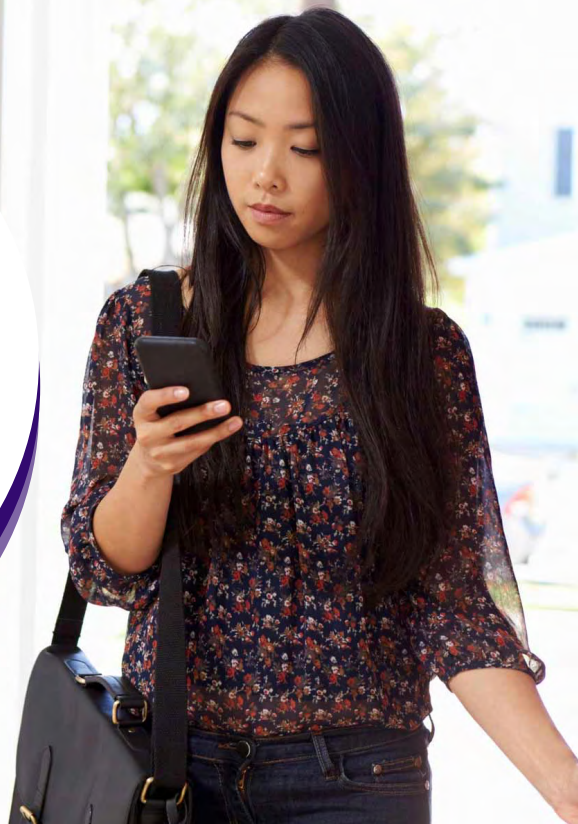# ButterflyMX

Self guided touring
How to set it up at your property

Your Client Success Manager is available to walk you through this process as well.

Overview

1. **Getting started**
   a. Enabling self-guided touring
   b. Tour settings
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2. **Tour link URL page**

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   a. Scheduling for prospects
   b. Modifying upcoming tours
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1. Getting started

This section walks you through the steps you need to take to enable self-guided touring. It also goes over the settings you can change regarding your touring preferences, scheduling features, and prospect notifications.

Jump to:
    a. Enabling self-guided touring
    b. Tour settings
    c. Notification settings

a. Enabling self-guided touring

1. Click on 'Tours' in the left-hand navigation area.

    Note: The first time you access this page, you will start in the 'Tour Settings' page.

    If instead you're on the main 'Self Guided Tours' page, find the 'Touring Overview' section and click on 'Edit Tour Settings.'
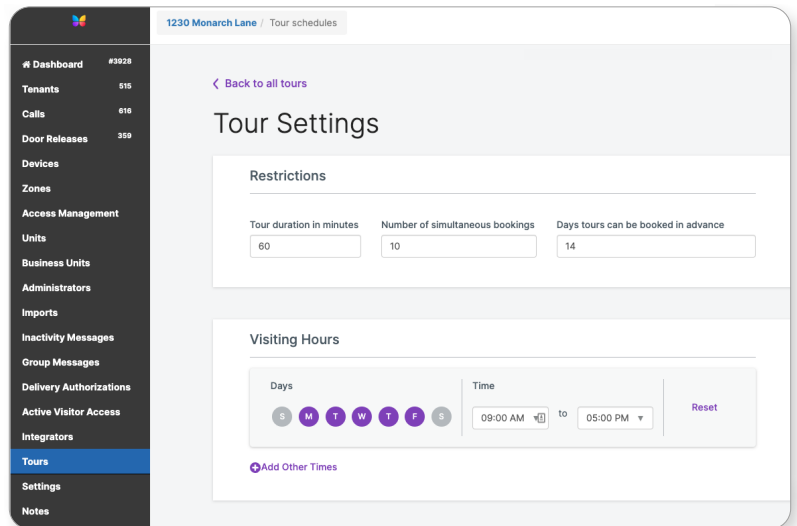
2. Scroll down to the 'Virtual key issued from:' dropdown menu. This is the name that the prospect will see as inviting them to tour.

3. Create a Tenant that you will use specifically for touring communications and access.

4. Navigate to 'Access Management' and create an access group for touring. We recommend you name the tenant 'Your Building Name - Touring.'

5. Add the tenant you created above to the group. Then select the ButterflyMX devices that the tour should be able to access. Save the user and select them in the dropdown in the touring configuration page.

b. Tour settings

Now that you're set up, here are all the settings you can edit:
- Restrictions and visiting hours
- Visitor information (optional)
- Units available for touring (optional)
- ID verification (optional)
- Enable credit card collection (optional)
- Enable Funnel leasing integration (optional)

RESTRICTIONS AND VISITING HOURS

Restrictions

Tour duration in minutes	Number of simultaneous bookings	Days tours can be booked in advance
60	10	14

Visiting Hours

Days

S M T W T F S

Time

09:00 AM ▾ to 05:00 PM ▾   Reset

⊕ Add Other Times

Tour duration in minutes	Sets how long the access window is in minutes. (between 30 and 60 minutes)
Number of simultaneous bookings	Limits the number of people who can book the same time slot. For example, if only 1 person should be able to tour at any given time, set this to 1. If unlimited, you can set this to a much higher number, like 100.
Number of days in advance a tour can be booked	Restricts how far in advance a tour can be booked. Capped at 90 days.
Visiting hours, days, and time	Sets the days of the week tours can happen on. Tours will be available between those times for all highlighted days.
Add Other Times	Allows you to set different hours for another period of time. For example, you may want to set different touring hours for weekends.

VISITOR INFORMATION (OPTIONAL)

Day of tour information

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Customizable instructions for the prospect. Useful for extra information, how to find the building or what to tour.

Preview

Terms of service

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Optional, customizable terms of service for the building.

Day of tour information	Any information you want a prospect to know when they are touring. This appears on the web page with their tour access, so it can serve as a digital brochure or instructions for the tour. **Note:** You can preview what this will look like to the end user before you save it.
Terms of service (optional)	This will appear before the prospect confirms their tour appointment, so if your building has stipulations, you can add them here.

UNITS AVAILABLE FOR TOURING (OPTIONAL)

These units will be selectable when a prospect schedules their tour. If you include this section, the prospect will be required to select one or more units they are interested in seeing.

Prospective resident's perspective:

ID VERIFICATION (OPTIONAL)

Require the user to verify themselves with their driver's license or other form of ID.

Through a partnership with Persona, you can add another layer of security. This happens at the end of the scheduling process. The user is prompted to take a picture of their ID as a complete liveness check. Persona will flag any irregularities with their ID, preventing anyone malicious from being able to access your property.

This is a paid service. It is turned on automatically once it is enabled.

ID Verification	Enabled 🟢
ID Verification enabled	

ENABLE CREDIT CARD COLLECTION (OPTIONAL)

Require the prospect to store their credit card information in case of damages.

Through a partnership with Stripe, you can require credit card information and place a hold on the prospect in case of damages.

Stripe is turned on automatically once it is enabled.

Enable credit card collection	Enabled 🟢
To charge a touree for damages or stolen keys, you should reach out to support@butterflymx.com with the amount, individual's information and tour date.	

ENABLE FUNNEL LEASING INTEGRATION (OPTIONAL)

Funnel is a leasing pipeline tool. If you are using it, our partnership syncs all scheduled tours to Funnel and then to your CRM.

Enable Funnel Leasing Integration	Off ⚪

Once you save the configuration, you will be redirected back to the management page. Unless you need to change the available units, it's unlikely you'll need to update these

There are several notifications you can automatically send to a prospect once they schedule a tour.

These include:
- Confirmation of the tour date and time
- Rescheduled confirmation
- Cancellation confirmation
- Reminder the day of the tour
- Tour follow-up for missed tours
- Tour follow-up for completed tours

You can customize the email version of these communications. Each is sent in a plain format so it looks like your leasing department sent it.

DELIVERY PREFERENCE

By default, communications are sent through both email and text messages. You can turn off one or the other.

Choose how your messages get sent to prospective residents:

- ● Both email and text message
- ○ Email only
- ○ Text message only

EMAIL OPTIONS

'Reply to' email address	This email won't be visible, but any responses will be sent to this address.
'CC' email address	Add this email address to every message to the prospect.
Signature	Automatically add a signature to emails.

EMAIL BODY

There is a text field for each email communication. You can modify each email's language here. The text inside of double brackets indicates information that is inserted automatically. The most important example is the {{tour_url}}. This inserts the personalized URL for each prospect.

Confirmation email body

Thanks for your interest in {{building_name}}!

You are confirmed for {{starts_at}}. Please see here for more information about your day of the tour.

{{tour_url}}

Please arrive within 30 minutes of your tour. Use the QR code in that link on the front door intercom then proceed to the elevator bank. Ride it to the second floor where our leasing office is located. We will give you the rest of the materials you'll need for your tour!

{{signature}}

Reset copy   Send email preview

Text Message Preview:
Hi {{first_name}}, thanks for scheduling a Self Guided Tour with {{building_name}}. You are confirmed for {{start_date}} at {{start_time}}. We look forward to showing you your new home!

Variables

{{building_name}}	The name of your building or property.
{{starts_at}}	The start time of the prospect's self-guided tour.
{{tour_url}}	Link to your building's scheduling page.
{{signature}}	Your signature or the signature of a member of your leasing office.

2. Tour link URL page

Once the tour settings are saved, a scheduling page is created for your building. It can be found in the 'Touring Overview' section as the 'Tour link URL.'

This is a standard URL and can be added on any web page of your choosing. Typically that would be a button on your website, though it could also be embedded as an element on your site. It can also be added to any descriptions you add to third-party sites.

Self Guided Tours

Manage your touring schedule for prospective residents and review upcoming and completed visits

Touring Overview

Edit Tour Settings

Tour schedules		Duration	Virtual Key Issued by
Mon, Tue, Wed, Thu, Fri	9:00 AM - 5:00 PM	1 hour	Jack Lewis
		Max Simultaneous Tours	Tour link URL
		10	https://selftours.butterflymx.com/pro... Copy

All Tours

Add New Tour

Scheduled   Pending   Completed

Search by name, email or phone   Tour date   Apply

No tour schedules found

Full Name	Email	Phone	Date	Time

ButterflyMX

3. Managing scheduled and completed tours

Once the tour settings are saved, you can create and manage upcoming tours or review past tours.

Here's how to:
   a. Schedule tours on behalf of prospects
   b. Modify tours on behalf of prospects
   c. Review flagged tours
   d. Review past tours

a. Scheduling tours on behalf of prospects

You can create a tour for a prospect by clicking on 'Add New Tour.' Either an email or phone number is required, though both are recommended. The prospect will receive a notification that their tour has been scheduled.

b. Modifying tours on behalf of prospects

A prospect can cancel and reschedule the tour using the link they receive. However, if they contact you to cancel it, you can do so in the Scheduled tab. You can also stop all automated communications to them.

Scheduled Pending Completed		Search by name, email or phone	Tour date		Apply
Displaying **all 5** tour schedules					
Full Name	**Email**	**Phone**	**Date**	**Time**	
Jack			14 Jul 2022	1:00 PM	Reschedule │ Cancel
Aaron Kraus	john.lewis@butterflymx.com		14 Jul 2022	2:00 PM	Reschedule │ Cancel
Jack Lewis	john.lewis@butterflymx.com	1234567890	14 Jul 2022	4:00 PM	Reschedule │ Cancel
Joseph		7039997077	14 Jul 2022	4:00 PM	Reschedule │ Cancel
Jack Full Test	john.lewis@butterflymx.com	7039997077	15 Jul 2022	4:00 PM	Reschedule │ Cancel

c. Flagged tours

Anyone using the ID verification service may have tours that are flagged as potentially fraudulent. In these cases, the user will be informed and can try again. If they aren't able to successfully validate themselves, their tour will be put into Pending and they will be told the building will need to approve them.

When that happens, the building admins will be notified. The tour entries will be found under Pending. Selecting the tour will show details about why the tour was rejected and allow you, a building admin, to approve or deny the tour.

Any approved tours will move to Scheduled. Denied tours will move to Completed.

d. Reviewing past tours

All past tours are listed in the Completed tab, along with their status of Completed, Missed, or Rejected.

	Scheduled	Pending	**Completed**	Search by name, email or phone	Tour date		Apply
Full Name		**Email**		**Phone**	**Date**	**Time**	**Status**
Brad Smith		brad.smith@butterflymx.com		(927) 939-7214	22 Oct 2021	3:00 PM	Missed
Jack Lewis		john.e.lewis12@gmail.com		(703) 999-7077	25 Oct 2021	9:00 AM	Completed