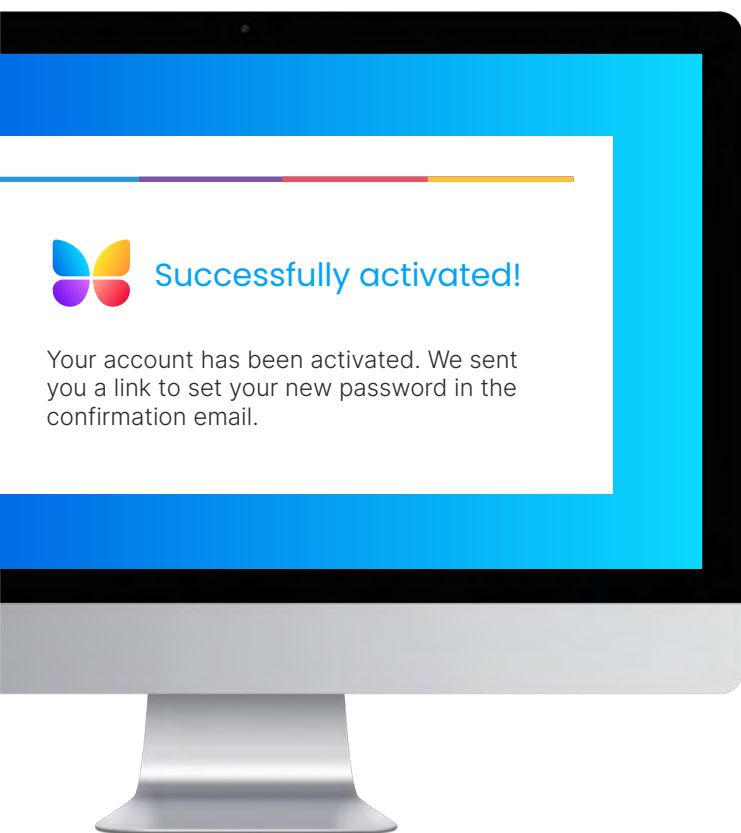# ButterflyMX

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 visitor passes sent out by tenants and administrators.

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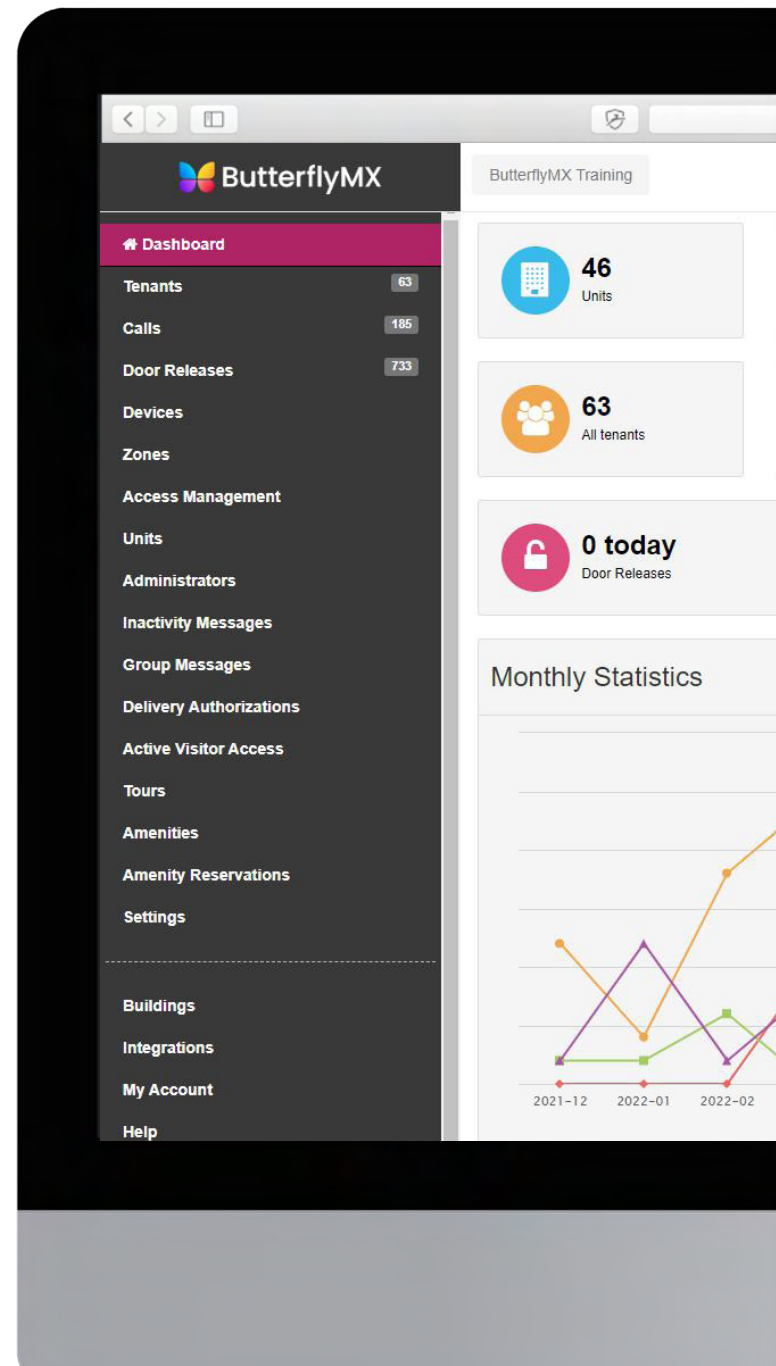
ADDING A TENANT

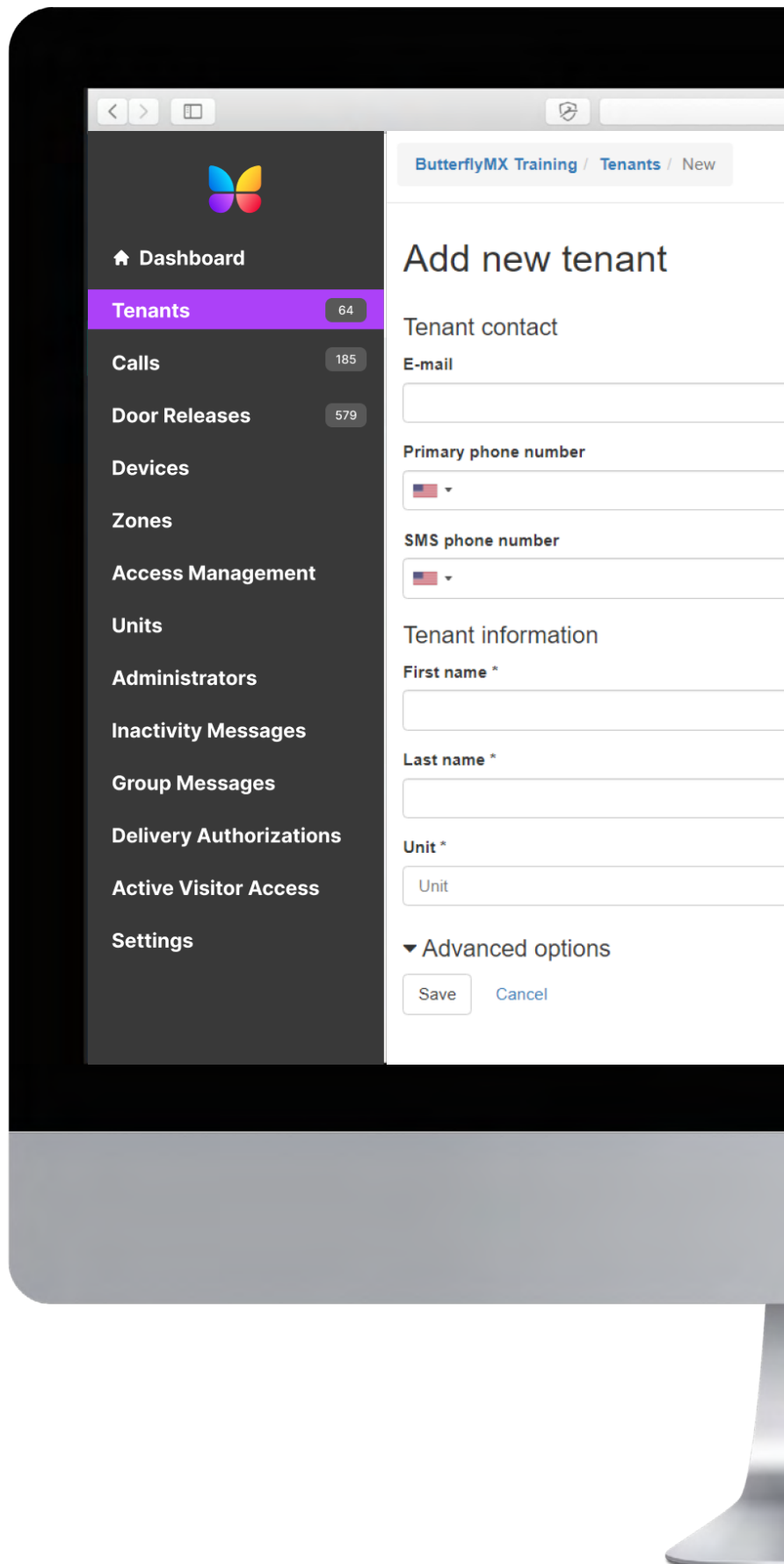Navigate to the Tenants tab of the admin dashboard. Then, follow the steps below to add a new tenant.
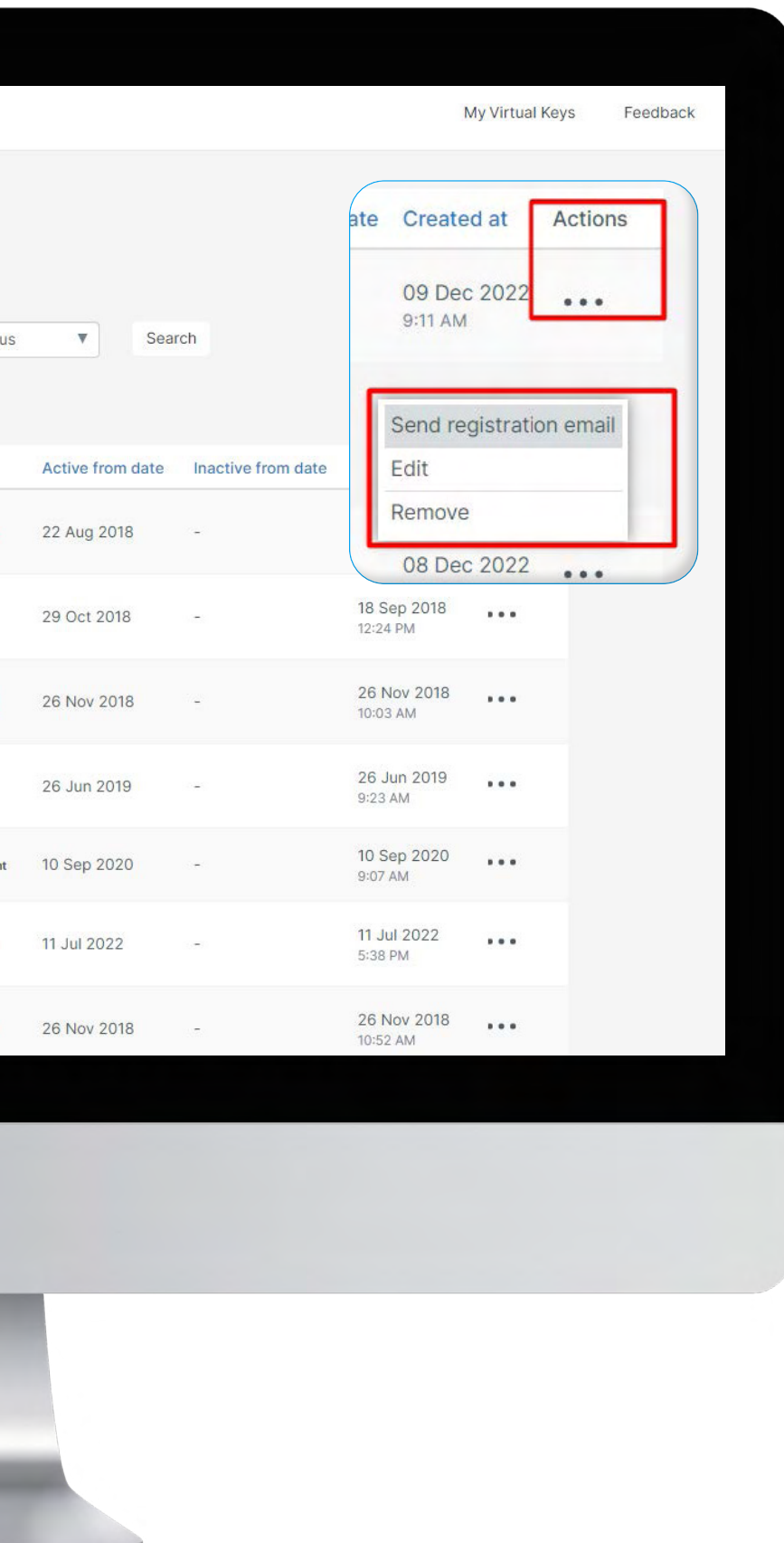
1. **Select Add Tenant**
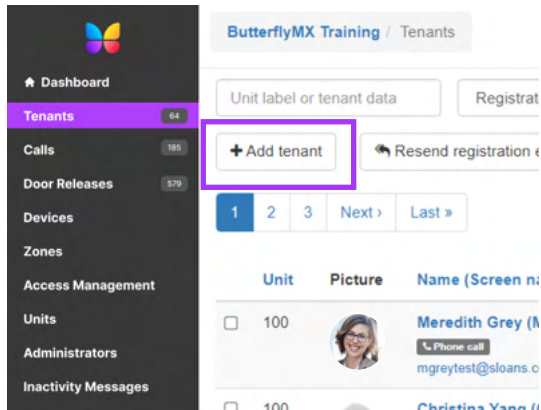
2. **Add tenant information:** first name, last name, email, phone number, and unit. Click **Save**.

   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

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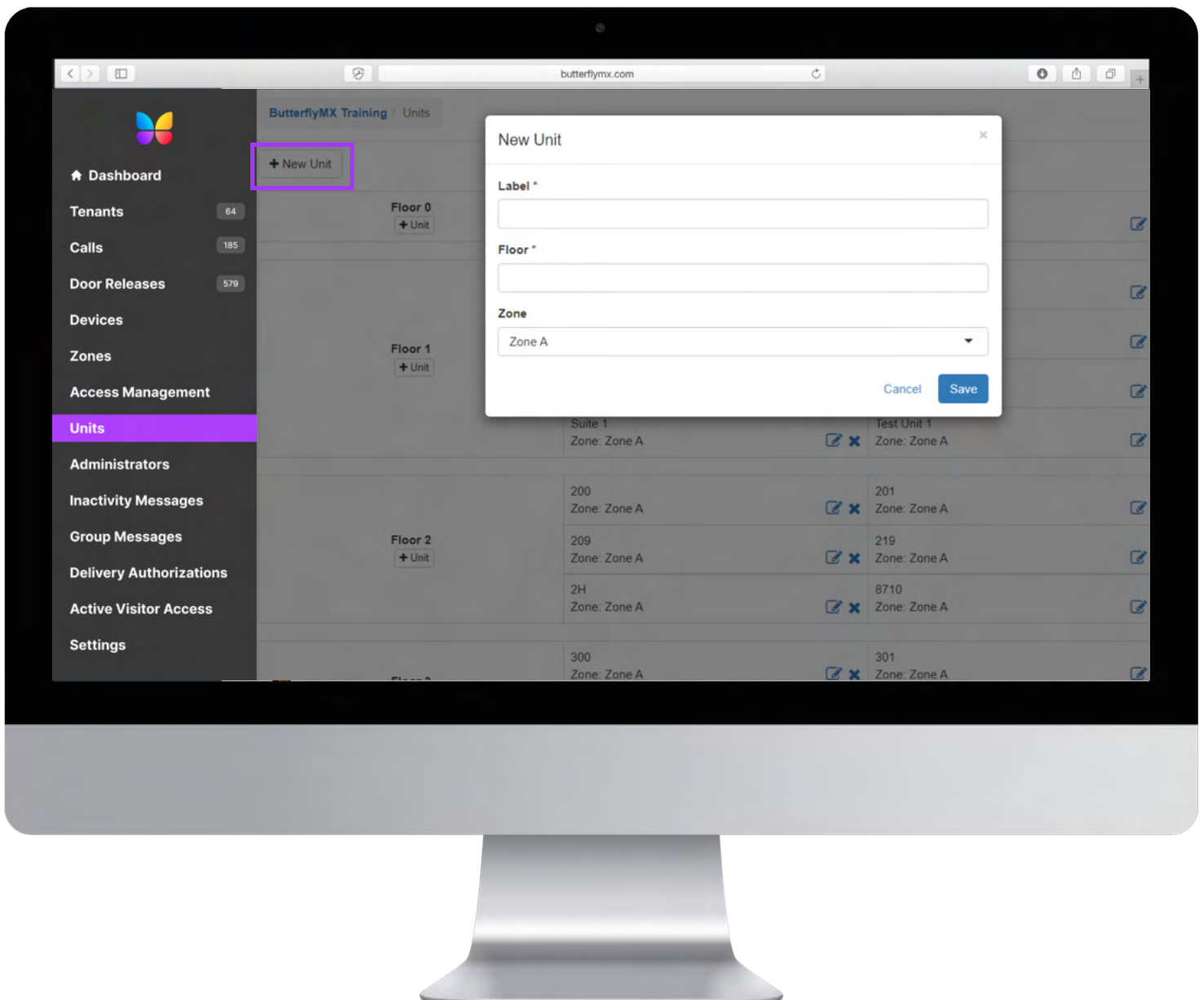
DELIVERY AUTHORIZATIONS
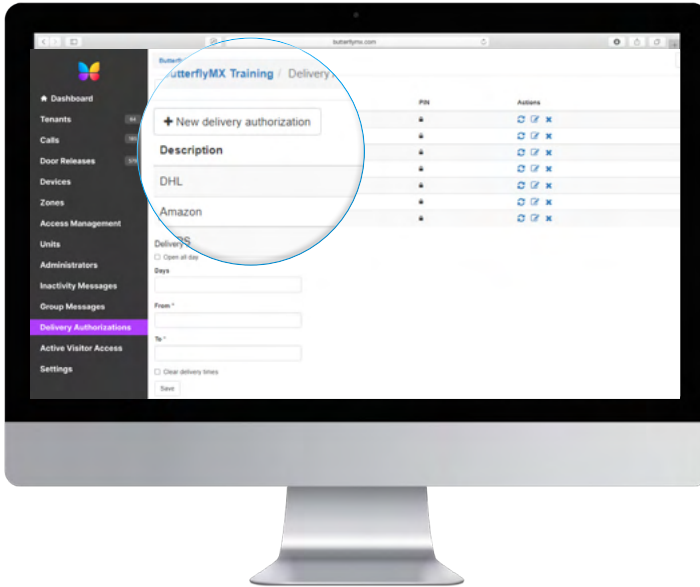
1. To create a delivery authorization, first press the **+ New Delivery Authorization** button.

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**.

VISITOR PASS

You can create Visitor Passes using your administrator account.

1. You can create a Visitor Pass 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 pass 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.