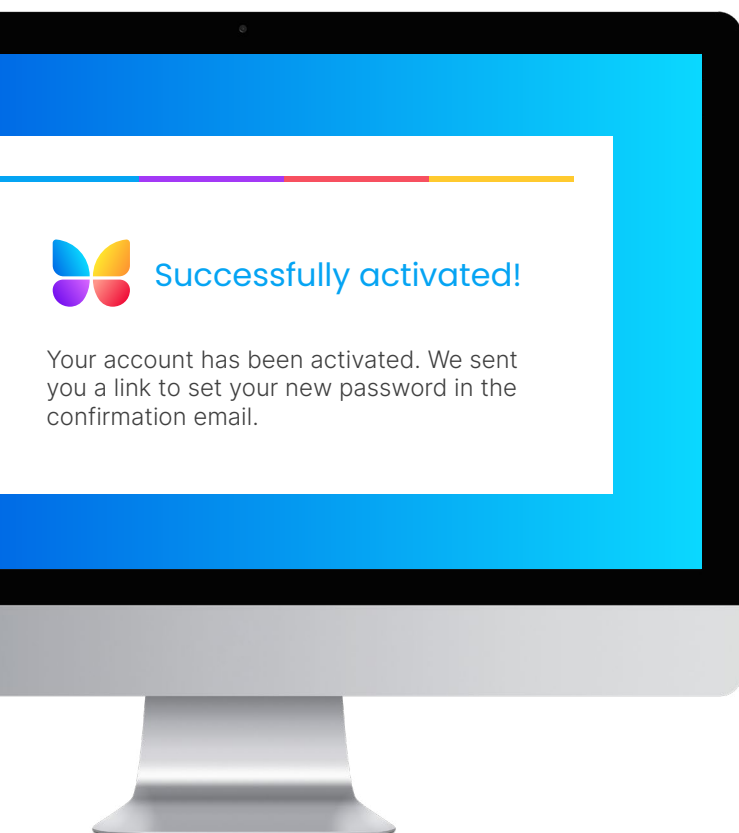




# Commercial Directory Training Guide

Property access made simple



## REGISTRATION

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

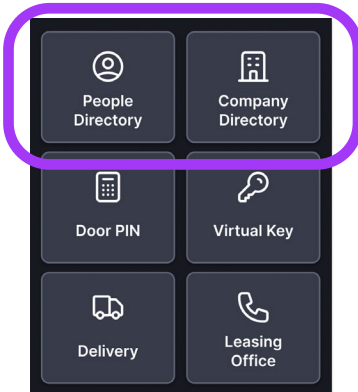
**Email:** [support@butterflymx.com](mailto:support@butterflymx.com)

**Phone:** (800) 398-4416 ext. 2

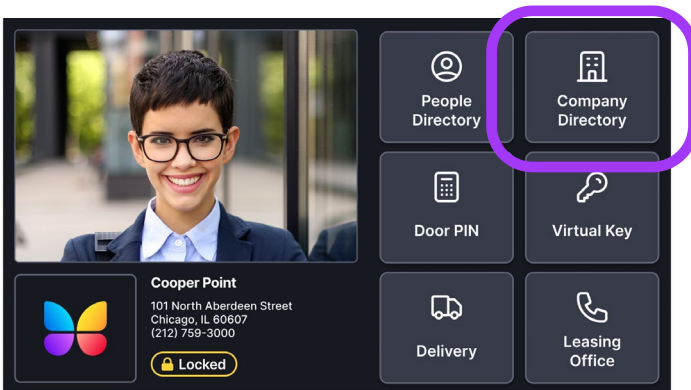
*To log into your account after activation, visit our website [butterflymx.com](https://butterflymx.com) and select 'LOGIN' and enter the credentials you created when registering.*

## VISITOR EXPERIENCE

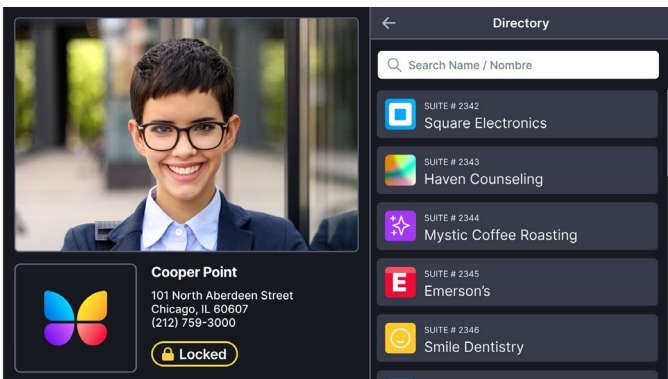
Your office building can opt to have a “company directory,” “individual directory,” or both. You can change the language to best reflect your property.



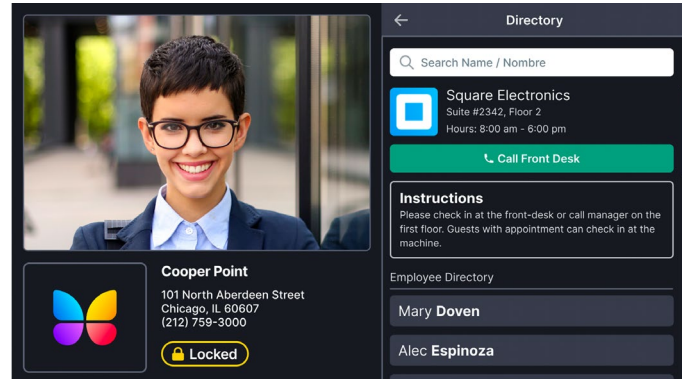
Visitor selects “Company Directory”



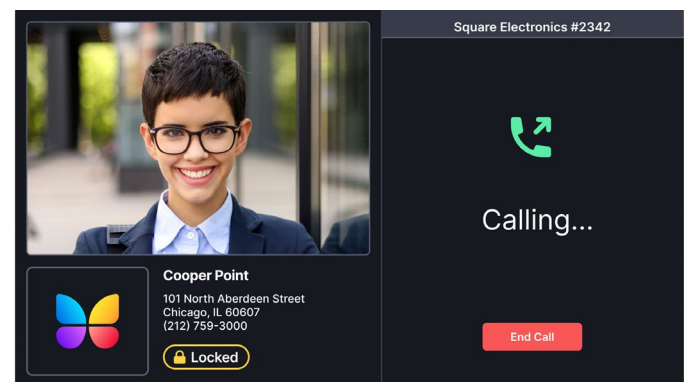
An alphabetical list of the companies in the building appear, including their suite number and logo (if available).



When they select a company, they will see a ‘Call Front Desk’ option and the information of the designated tenant assigned to that company - including their name, suite, & floor.



Tapping a specific employee will immediately start a call. The “Call Front Desk” button will also call the individual that the company designated.



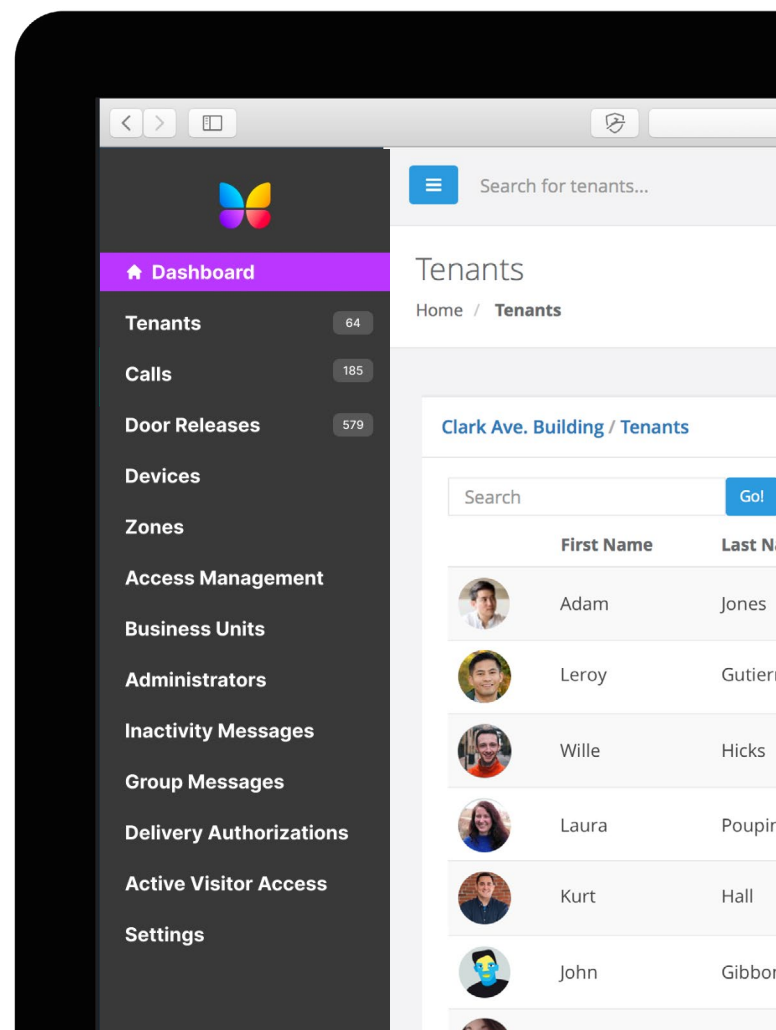
*To convert your building into a commercial directory, please reach out to your Client Success Manager.*

## ADMIN DASHBOARD

The tabs on the left side of your dashboard are where you manage data related to tenant access, security, records, and other administrative 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:** Allows you to see and manage which tenants and staff have access to different parts of your property and at what times.
7. **Business Units:** Displays a list of all the business units in the 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:** Set 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 and Delivery Pass pins sent out by tenants and administrators.
13. **Settings:** Basic property information, like your building’s name, address, and phone number, can be configured here. You can also turn Delivery Pass on/off from this screen.



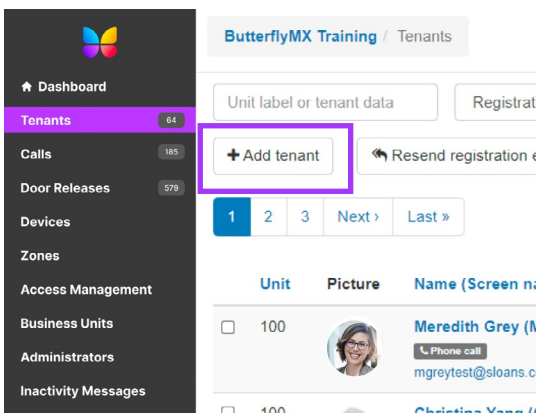
## SETTING UP THE BUILDING

Once your building is converted to commercial, you must add each business if they don't exist, add a User Admin for each business, and educate each admin on how to create their entries.

### ADDING A TENANT

Navigate to the Tenants tab of the admin dashboard. Then, follow the steps below to add a new tenant.

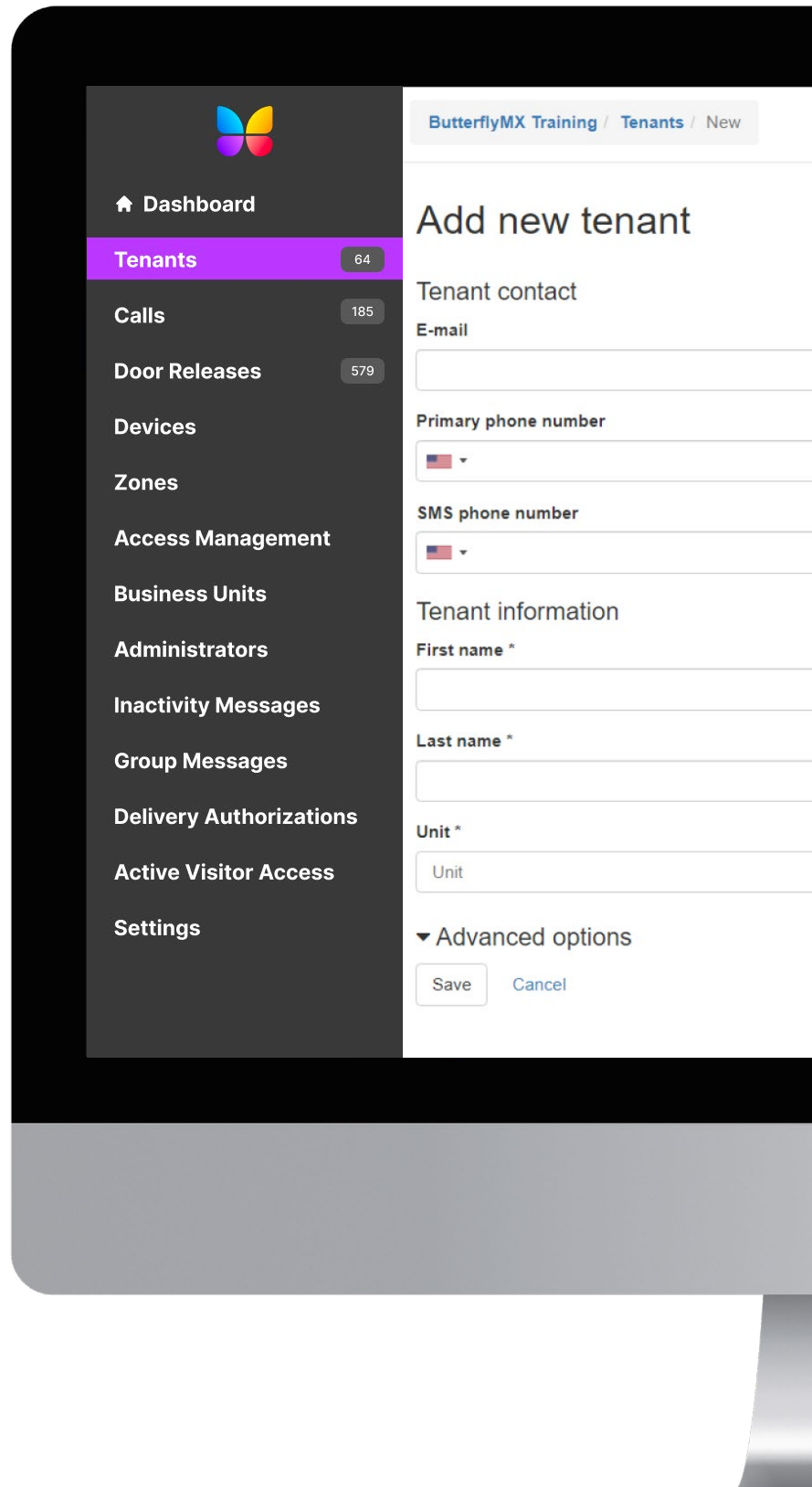
#### 1. Select Add Tenant



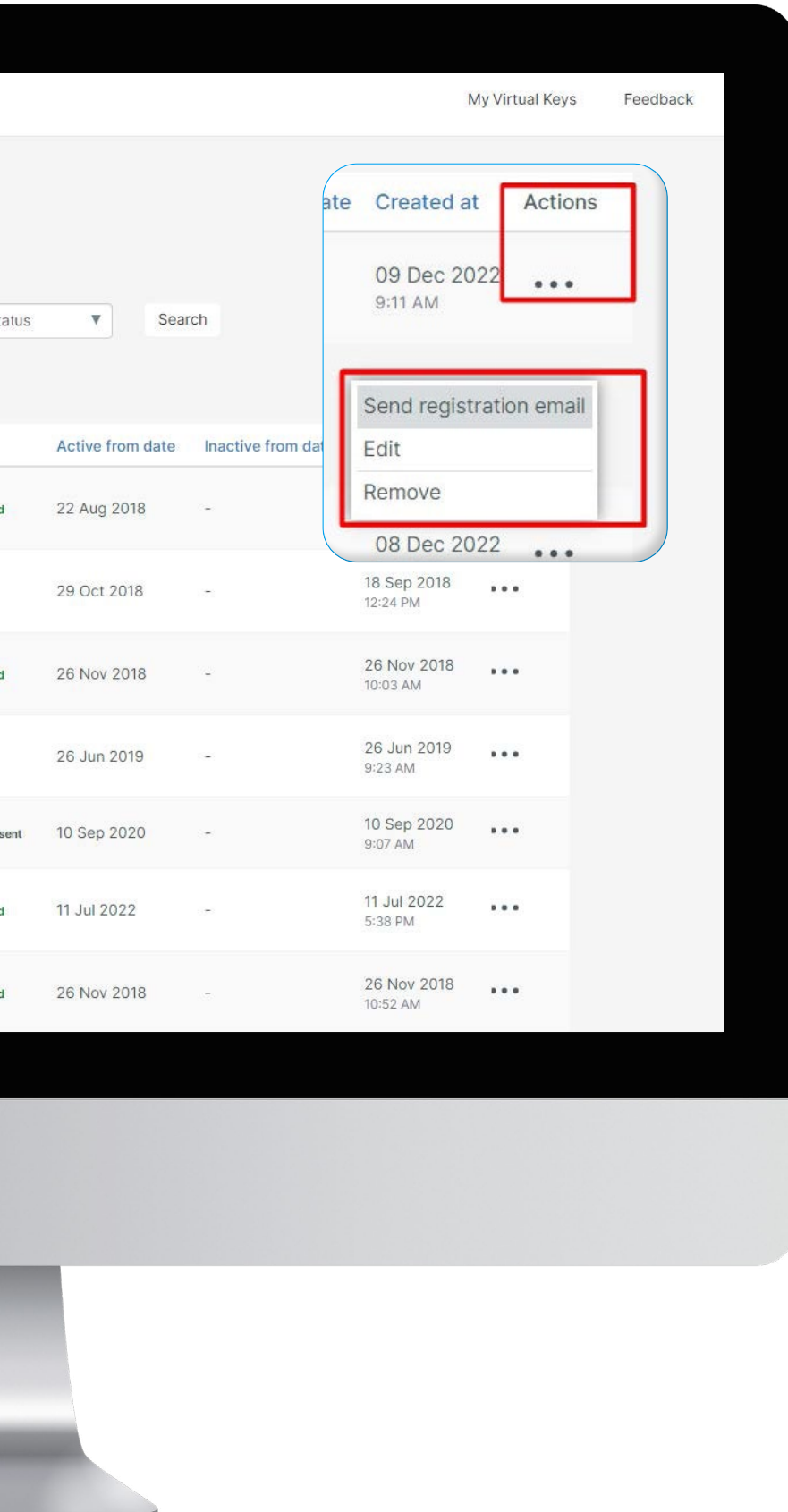
2. **Add tenant information:** first name, last name, email, phone number, and unit. Click **Save**.

*Note: Unit numbers 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 virtual keys, and view tenant devices.

*Note: If you need to edit a tenant's email address, please contact [support@butterflymx.com](mailto:support@butterflymx.com)*

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



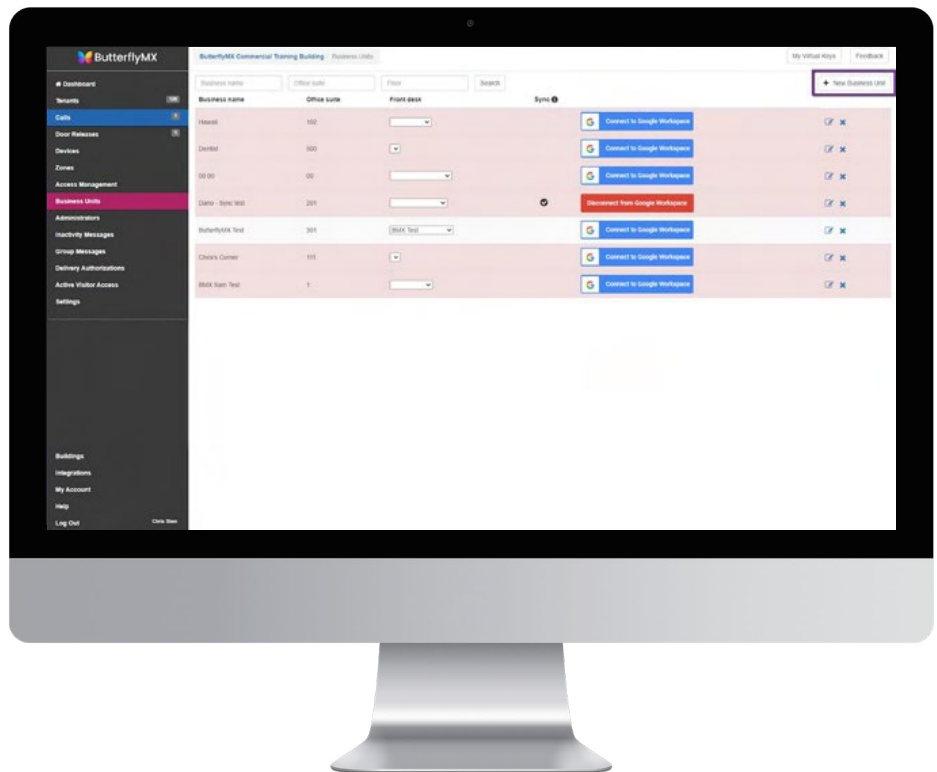
## ADDING AND DELETING A BUSINESS UNIT

All business units for your building are listed in the Business 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 business unit and floor manually, select **+ New Business Unit**. Fill in the name of the office under **Business name**, the suite # under **Unit label**, the floor level under **Floor**. To add a zone to a unit, select one from the dropdown menu under **Zone**. At the bottom you will assign a front desk tenant under **Front desk**.

Optional fields you can add include the **Company logo** (best logo dimensions are a square), the company's office hours to display on the intercom under **Office hours**, and any instructions for visitors under **Display text**.

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



ButterflyMX Commercial Training Building / Business Units

Company logo

Upload new image  
or  
Select file

☐ Remove logo

Business name \*

Office suite \*

Floor \*

Zone  
default

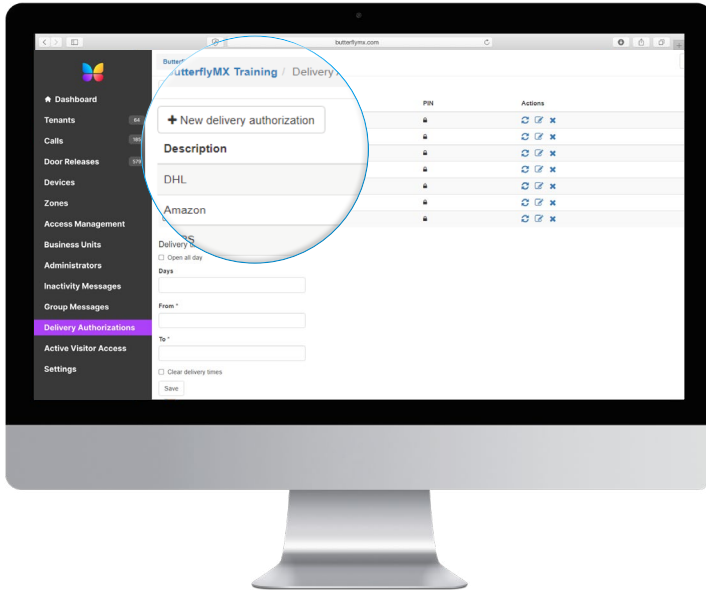
Office hours

Display text

Front desk

Save Cancel

## DELIVERY AUTHORIZATIONS

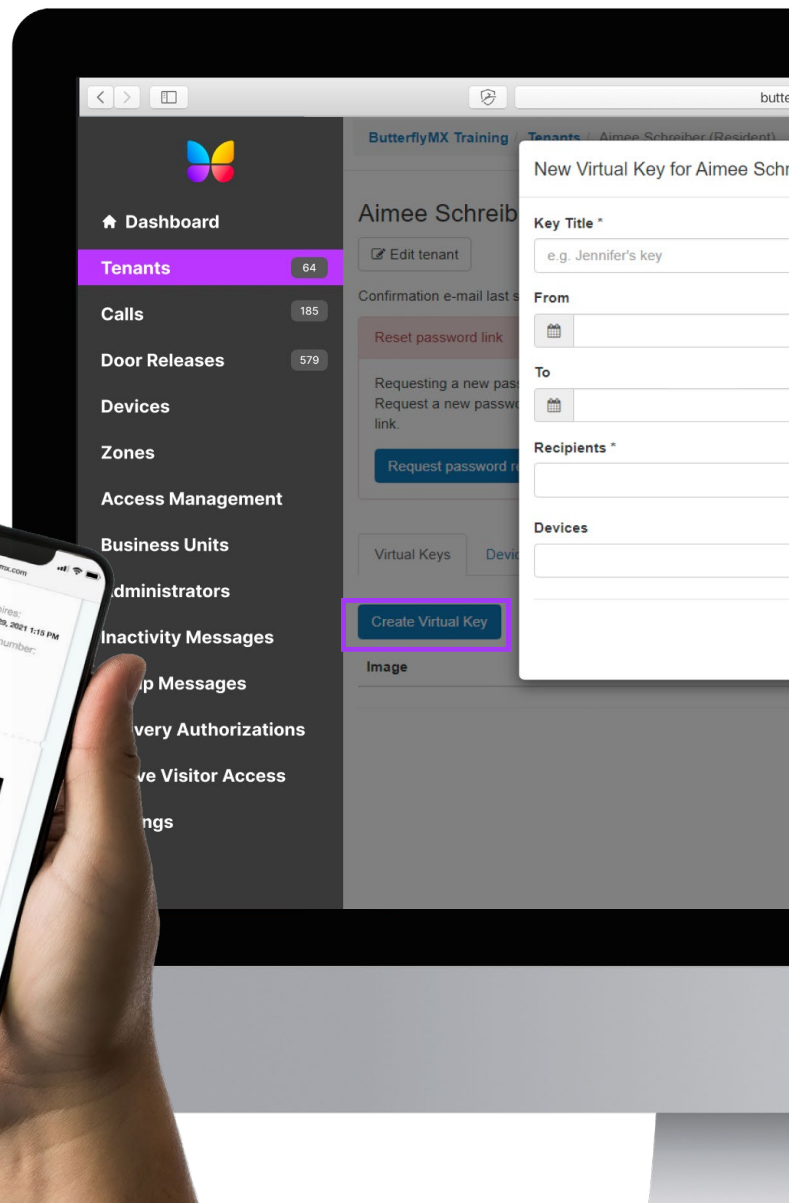
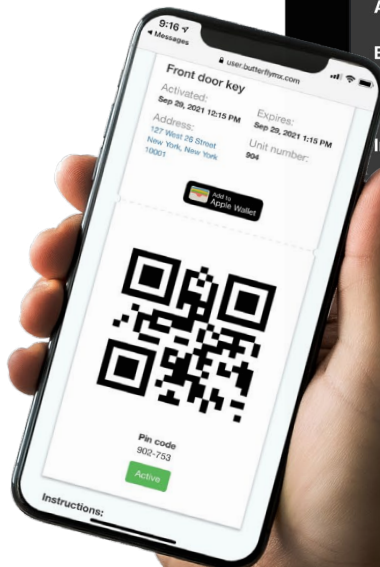


1. To create a delivery authorization, first press the **+ New Delivery Authorization** button.
2. Type in the package carrier name or vendor name, then create a 4-10 digit PIN you'd like to assign to the carrier. Click **Save**.

## VIRTUAL KEYS

You can create Virtual Keys using your administrator account for yourself, or one of your tenants.

1. You can create a Virtual Key for a specific tenant (including yourself) 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.



## DELIVERY PASS

You can create Delivery Pass pins through the ButterflyMX mobile app.

1. Click the “+ Delivery Pass” button on the home screen
2. Copy the instructions, or just the pin number, and put the information into the delivery instructions for your delivery driver.
3. You can also create multiple pins to save for later, and give out as needed.

