

CASE STUDY

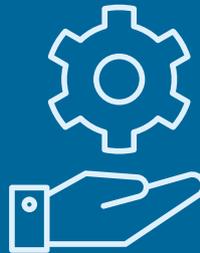


Consolidating Technology for a Sustainable, Long-Term Solution



ABOUT HERITAGE

Heritage is a premier property management company in Atlanta, GA providing services and tools that protect and enhance the quality of life for their communities.



SERVICES OFFERED

- Closing Services
- Collections (Magnum)
- Community Management
- Construction & Maintenance
- Leasing Administration

OVERVIEW

SOFTWARE CHALLENGES

- Rigid technology that slows down processes and efficiencies
- Getting financials delivered in time
- Limited potential for business growth and expansion
- Lack of transparent communication with managers, communities, and vendors

SOLUTIONS NEEDED

- Clear communication with customers and employees at every touch point
- Work remote and have access wherever needed
- Improve accounting efficiencies
- Increase operational efficiencies while reducing costs

CHALLENGES

Prior to using Vantaca, Heritage Property Management utilized three separate technologies for community management. Heritage was originally content with their set-up. It was familiar and they had their routine down, but as more bolt-on solutions needed to be added, they could see how having a Frankenstein-like approach would impact processes and efficiencies down the road.

As a result, Heritage set out on a search for a sustainable solution to work with their business as they continued to grow. Specifically, there were looking for a software solution that was coded well and had an accessible support staff.

INTRODUCTION TO VANTACA

Heritage heard about Vantaca every time they attended yearly conferences, and after hearing high praises from leaders within the industry, they decided to begin implementation and went live with Vantaca in November of 2018.





Heritage knew and understood that a lot of work would go into the transition, especially since they had to change out three major technologies.

However, with the help of Vantaca's implementation team, and open discussions with the development team, they never lost confidence that they made the best decisions for their business.

Heritage COO Mike Wallace stated, "Everyone I met when going through the process was so professional and down-to-earth. Vantaca's leadership takes hiring the right people very seriously, which plays a large role in the quality of their software."

HERITAGE'S SUCCESS

Since Heritage Property Management completed their transition, they have been able to utilize numerous features that were not offered with previous technologies. One of these features included having a cloud-based system.

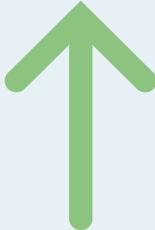
When the corporate office had to shut down in March of 2020, their software system had zero negative impact on both a personnel and business level. Having Vantaca while going through COVID-19 has been a saving-grace solution for their team, with more than 100 employees able to work fully remote.

Heritage also gained access to a much more efficient banking process with automatic bank reconciliations. This feature was not an option with their former technology. It was previously a manual process that required matching every single transaction.

Because of these capabilities, property accountants have a streamlined process that allows them to take on more communities. In fact, the number of communities that property accountants now have has increased by 35%.

In addition to automatic bank reconciliation and improved financial processes, Heritage values the option to measure KPIs in



 **95%**
**Remote
Flexibility**



 **35%**
**Accounting
Efficiencies**

Vantaca's system and have access to a complete audit trail. They can track everything from the efficiencies of their comprehensive workflows to seeing whenever users are logging in and the tasks they are performing.

Mike Wallace said, "We couldn't say enough about how happy we are with Vantaca. It goes beyond the system itself. The people at Vantaca make a huge difference, and they continue to do so." ■

[See it in action](#)



We genuinely believe in Vantaca. We want to see their customer base expand because I know it can only lead to better things for everyone using their software system.

*Mike Wallace, COO
Heritage Property Management*



THE INDUSTRY'S LEADING
COMMUNITY MANAGEMENT SYSTEM

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