

# How ExactEstate **Streamlined** Heritage McDonough's Property Management



Heritage McDonough property manager Dayana Belen has **dramatically improved the service** she can give its residents by switching to ExactEstate.

## The Challenges

The property Dayana manages is primarily occupied by seniors and long-term residents who often struggle with unique lifestyle challenges. To be useful and functional, any PMS her building employs needs to be flexible and adaptable to a range of resident comfort levels. Information and requests need to be processed in a timely fashion and transmitted in easy-to-understand formats that allow for quick resolution of issues and accurate reporting. And because of the amount of information she handles, Dayana needs fast access to tech support for any issues with the software.

### CONFUSING CLIENT PORTALS

Because many of her residents are older, they have varying degrees of comfort with technology. Basic communication and maintenance requests are all handled through the client portal, and **previous systems tended to be confusing, inefficient, and required a significant learning curve.** These issues meant that residents had to contact Dayana directly, which interrupted her workflow and shifted the burden of inputting and communicating to her.

### INEFFICIENT COMMUNICATIONS

Maintenance requests are typically processed through a PMS, and the **original platform made it difficult for residents to articulate the nature of the problem they faced** so Dayana could transfer it to repair teams. Digital forms often weren't specific enough to tell maintenance crews exactly what might be wrong, and it often resulted in multiple expensive trips and longer waits for service technicians.

This not only had the potential to put Dayana's older residents

at risk if furnaces or air conditioners went out during inclement weather but additional visits and inefficiencies created a larger paper trail for her to follow. **Completing tasks within the platform was also confusing and required multiple steps to log and close.** It resulted in errors, lost productivity, and frustrating delays for tenants.

### REPORTING AND INTERNAL TROUBLESHOOTING DIFFICULTIES

As a property manager, Dayana is responsible for creating reports for expenses, and revenues, recording tenant information like background checks and residency status, and a host of other operations-related processes. **She often has to respond to clarification requests from regional managers and support her reports with additional information.**

Heritage McDonough's previous PMS made it difficult to find information, produced incomplete or inaccurate data lineages, and didn't offer of-the-moment accounting. **It was difficult for Dayana to submit accurate reporting that reflected a true and complete picture** of her property's status, and **regional managers couldn't access the information they needed through the PMS** to clarify any confusion.

### LIMITED CUSTOMER SERVICE

With Heritage McDonough's former systems, if Dayana needed tech support she often had to wait for hours or days to get in touch with the platform's customer service. This caused delays in every aspect of her property's operations and made it difficult to communicate with her residents and process payments in a timely fashion.

## The Solutions:

By switching to ExactEstate's PMS, Heritage McDonough provided Dayana with a property management platform that streamlined her duties, made interactions easier and faster for her residents, and allowed her to generate reporting that was accurate and easy for senior management at all levels of the company to track, understand, and verify.

### ✓ INTUITIVE MANAGER AND RESIDENT PORTALS

ExactEstate's manager and resident portals were far less confusing. They were mobile-friendly, accessible from a variety of devices, and automatically generated usernames and passwords so **senior residents didn't have to negotiate the hassle of inputting their information into the system and creating an account.**

### ✓ SIMPLE AND ACCURATE WORK ORDERS

ExactEstate allowed residents to easily submit work orders that accurately reflected the issue they needed assistance with. Because the **platform automatically included the brands of each unit's appliances, and their maintenance history, and provided intuitive boxes for common problems,** in-house staff and external contractors were consistently given the information they needed to fix the problem on the first visit rather than making multiple trips.

ExactEstate's software also **allowed Dayana to link external contractors into the system, so work orders and payments could be processed instantly.** Warranty information was included with all products in ExactEstate's database, and Dayana was able to keep track of exactly when work was completed, by whom, and monitor the results in real time.

Finally, by being able to quickly and efficiently log and close tasks on a single screen, ExactEstate's platform **streamlined the process, reduced errors, and cut Dayana's time at the computer by 30-40%** so she could focus more of her energy on her tenants.

*"Honestly, one of the biggest emergencies is having one of my senior resident's air conditioning go down when it's 100 degrees outside in Georgia,"* said Dayana.

*"With ExactEstate, I put my work orders in, the technicians tell me what we need, and we order it through the portal. It's fast, easy, and gets my residents out of the heat."*

### ✓ GENERATING UP-TO-DATE REPORTS

Because ExactEstate's software allowed for complete transactional transparency, the information Dayana needed to create and send reports to regional managers was easy to access and compile. **Financial data was always up to date, and all layers of management had access to the same information** she used to generate the reports in identical formats.

### ✓ FAST CUSTOMER SERVICE

If Dayana had a question about ExactEstate's PMS, customer service was never more than a phone call away. **Tech support was highly responsive,** and in many cases, she was able to communicate directly with Matt Hoskins, CEO and designer of ExactEstate's software.

*"Matt is great,"* said Dayana. *"He tells us, 'If you have a problem, call me'. I love that, because I know my residents never have to wait to get an answer with ExactEstate."*

### ✓ ROLE-BASED PERMISSIONS

ExactEstate protects sensitive data, providing certain levels of access only to those who need it. For example, a resident's social security number is kept hidden from staff.

## THE BOTTOM LINE

By switching to ExactEstate, Heritage McDonough has been able to reap the benefits of **an optimally designed, highly flexible platform that is adaptable to any business challenge,** but these benefits didn't come at an increased cost. In fact, because system conversion is simple and streamlined, ExactEstate was able to onboard in half the time of other systems and saved Heritage McDonough \$3000 over expected costs.

**Monthly costs with Exact Estate vs. other software systems is also approximately \$50 a month. In addition Merchant fees are down 75%, and application processing fees have been reduced by 35%.** In conjunction with saved productivity, workload reduction and simplification, and resident satisfaction, ExactEstate represents a complete solution to Heritage McDonough's property management challenges.

## MAKING PROPERTY MANAGEMENT EASY WITH EXACTESTATE

Transitioning to ExactEstate's platform has allowed Dayana to work more efficiently and accurately, and make sure their residents get their problems resolved in a timely fashion so they can enjoy their lifestyle on the property. It has reduced errors in reporting, work orders, and improved communications, and the investment has saved money and streamlined Heritage McDonough's operations.



To find out what ExactEstate can do for your property management business, [schedule your free demo](#) today.

