



**CASE STUDY**

**Client:** *Barnett Interests, Inc.*

Barnett Interests, Inc. was founded in 1989, and is headquartered in Plano, Texas. They are a retail property management company who generate a healthy revenue annually.

**Number of Employees:** 100+

**Headquarters:** Plano, TX

**Industry:** Real Estate Investment/Financial Planning

**Objective:**

Barnett Interests' Finance and Accounting department needed assistance with their new Property Management System, Yardi Genesis 5.5.05. They were not familiar with the latest Yardi system nor did they have experience with utilizing the system to its fullest potential. Consequently, they were forced to perform several functions manually. Their team was tasked with setting up CAM Recovery Cost Pool details as well as tenant sales data within Yardi. Additionally, Barnett Interests Inc. was faced with potential security protocol breaches, in the event remote access to the system was granted. With limitations set on their protocol, their need for onsite consultation and implementation became the top priority.

**Solution:**

Retransform had already been selected to help facilitate the project in Yardi Genesis 5.5.05, however, they were tasked to resolve the potential security breach as well. First, Retransform's Senior IT Consultant and our offshore CAM Reconciliation team derived a game plan for the setups within Yardi Genesis 5.5.05. This led to the creation of a Yardi Genesis 5.5.05 Help Manual. This manual provided step-by-step (screen shot visuals) instructions on how to use the system which was retained by Barnett Interests Inc. for future reference. Retransform's CAM reconciliation team was able to replicate the Yardi CAM Recovery template and develop a custom template for Barnett Interests' use. To avoid a Security Breach, the Senior IT Consultant went to the Barnett offices and used the templates and manual created to implement and update the recovery setup and tenant sales data in Barnett Interests' Yardi system.

**Results:**

The Senior IT Consultant implemented the setups, completed the data entry and ultimately finished the project on-time and without issue. This resulted in the elimination of several manual processes, an increased efficiency in the CAM Recovery billing process for Barnett Interests Inc., an increased confidence in the accuracy of their data and ultimately, a greater working knowledge of their Yardi system.

"I am very happy with the setup and data entered by Retransform's IT Support team. Their lead came on-site without any hiccups and made this project a success!"

—Linda Williams  
from Barnett Interests, Inc.

**For more information,  
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