

CASE STUDY

**Altavista** Streamlines  
Operations with  
**ProjectManager +**  
**Acumatica** Integration



**PM** ProjectManager

# About Altavista

Altavista Instruments & Controls is a systems integrator specializing in electrical design, engineering, and controls for industrial and municipal sectors, including water and wastewater. Based in South-Central Virginia, the company helps clients automate processes and integrate new systems to boost efficiency. It collaborates with mechanical integrators to provide programming and hardware solutions, along with strategic consulting. Altavista has seen rapid expansion, driving the need for scalable tools to manage resources, projects, and finances within their growing firm.

Jordan Maddy, Vice President at Altavista, leads the company and oversees accounting, project management, operations, and sales. With a background in electrical engineering and deep automation expertise, he focuses on identifying and removing bottlenecks to keep the team running efficiently.



**Company**  
Altavista



**Industry**  
Industrial Automation  
& Controls



**Challenge**  
Scaling operations and  
optimizing capacity

## The Challenge

As Altavista grew, existing systems and processes couldn't support the rising volume and complexity of projects. Their tech stack included QuickBooks, a homebuilt ERP, ClickUp for task management, and a separate time-entry tool. With critical information spread across disconnected platforms, managing projects and resources became increasingly time-consuming and often required duplicating effort across systems.



“Bringing it down to two systems that actually sync together was a big win — it cut down a lot of management overhead.”

**Jordan Maddy, Vice President**

## | Key challenges included:

- **Duplicate Work Across Systems:** Project and financial data often had to be entered more than once across tools. That added administrative overhead and reduced confidence in reporting accuracy.
- **Operational Strain:** The homebuilt ERP worked well when the team was smaller, but it required ongoing maintenance and support, pulling the team away from higher-value responsibilities. QuickBooks and Clickup lacked the structure Altavista needed for more advanced project accounting as the business scaled.
- **Complex Resource Scheduling:** Resource planning became difficult to coordinate due to changes in project length and complexity. Project managers needed clearer visibility into workload, availability, and potential scheduling conflicts.
- **Disconnected Systems:** With multiple tools in play, time entry and project tracking lived in separate places, and there wasn't a clean flow of information for budgeting, forecasting, or performance analysis.
- **Cybersecurity Disruption:** A cyber attack damaged existing integrations and accelerated the need to move toward a more secure, cloud-based ecosystem.

## | Why ProjectManager?

ProjectManager stood out for its intuitive interface and native integration with Acumatica. With robust project planning tools at its core, ProjectManager connects task management, resource scheduling, and time entry in one streamlined workflow, while keeping financials aligned in Acumatica. By automating the flow of project data into the ERP, ProjectManager reduces manual overhead and improves forecasting, cost tracking, and real-time visibility into project performance and profitability.



## ProjectManager enables:

- **Project Planning:** Build and manage project schedules, timelines, and task lists so work stays organized from kickoff through closeout.
- **Resource Scheduling with Workload Visibility:** Assign shared resources, manage capacity, and resolve conflicts during weekly scheduling.
- **Time Entry (Including Mobile):** Capture time quickly from anywhere, supporting both office and field teams.
- **ERP-Connected Project Visibility:** Review project performance and activity in Acumatica with fewer gaps between execution and accounting.
- **Automated Bi-Directional Sync:** Projects, tasks, budgets, resources, and actuals flow automatically to keep both systems aligned.
- **Task-to-Budget Alignment:** Connect work back to budgeted deliverables so teams know exactly where to charge time, and PMs can track progress with confidence.

## How ProjectManager + Acumatica Work Together at Altavista

Altavista's team uses ProjectManager primarily for resource scheduling and time entry, while Acumatica serves as the hub for project accounting and performance visibility.

Together, the systems create a clear separation between day-to-day execution and financial oversight—without duplicate entry.

- **Project Managers + Team Members:** Project managers rely heavily on the Workload view to schedule shared resources and coordinate weekly planning. Everyone on the team enters their own time directly in ProjectManager, including team members using the mobile app for remote or field entry.
- **Finance + Leadership:** Once time is synced into Acumatica, leadership can review activity and project performance, including slicing projects by manager and other reporting views they've built, with fresh data available each morning.
- **Integration:** Altavista runs a nightly sync, so project and time data stays aligned across both systems helping the team start each day with accurate, current information.

Because Altavista runs a mix of short-duration and multi-year projects, resource coordination is a constant challenge. The Workload view in ProjectManager provides real-time visibility into capacity and assignments across the team, making it easier to manage handoffs, avoid conflicts, and keep the team fully utilized across simultaneous jobs.

# ProjectManager's Acumatica Integration Provides Ongoing Value

With ProjectManager + Acumatica, Altavista has streamlined processes and boosted efficiency.

- **Time Savings:** Eliminated manual data entry and reconciliations, freeing Maddy from constant ERP updates.
- **Accuracy:** Activities and time flow directly into Acumatica, enabling easy slicing by project, manager, or branch—far beyond QuickBooks' capabilities.
- **Visibility:** Quick access to fresh data for daily issue resolution and performance analysis.
- **Stronger Controls:** Budgets tie to tasks, helping estimators and managers align time entry with deliverables.
- **Scalable Growth:** Reduced systems from three to two, which automatically sync, supporting expansion without added complexity.
- **Continuously Supported and Improved Integration:** The integration is actively maintained, updated with the latest releases, and enhanced over time.



“When the project manager builds the budget and deliverables in Acumatica, having that structure show up in ProjectManager is a big deal.”

Jordan Maddy, Vice President

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