

Deal Win



LEVELSHIFT
A PreludeSys Company

For Salesforce
Internal Use Only

#WinningWithPartners



LevelShift Wins Q4 Manufacturing Deal for Revenue Cloud Advanced (RCA) to Modernize Quoting & Invoicing



Customer Profile

FLEXRACK by Qcells is an integrated solar company that offers custom-designed, fixed tilt ground mount and single-axis solar tracking systems in the commercial and utility-scale solar mounting industries. FLEXRACK also offers full services, including engineering, geotechnical, pullout testing, field, and layout design services to address the actual site conditions of a project site. FLEXRACK has completed over 4 GW of solar racking installations in over 40 U.S. states and across the

Challenge

- FLEXRACK faced several operational and commercial challenges that hindered efficiency and scalability:
 - Fragile Excel BOM, version drift
 - Manual quoting and data re-entry
 - Email-based approvals, margin risk
 - No fulfillment visibility
 - Cultural resistance to change
 - Fragmented document storage

Partner Value

- LevelShift demonstrated a tailored RCA solution aligned to FLEXRACK's engineering and billing workflows — showing clear paths to reduced rework, faster quoting, and accelerated time-to-value.
- Led onsite cross-functional discovery to capture real operational processes, ensuring a solution design that minimizes implementation risk and drives faster, cleaner adoption.
- Showcased strong ETO and BOM-heavy manufacturing expertise, including future-ready MES/ERP integration—positioning FLEXRACK to optimize production flow, enhance material planning, and lower long-term operational costs.
- Team LevelShift's expertise and understanding of features on DRO/ERP and supply chain established trust in both the Salesforce product and solutioning.

Products sold



Revenue Cloud Advanced & Billing

Q4 Closure

Accelerated End of Year Win

On-Site Exposure

Discovery and Leadership Alignment

Technical Credibility

Demo Secured IT Confidence

COUNTRY

USA

INDUSTRY

Renewable Energy Semiconductor Manufacturing

ROLE OF PARTNER

IN CUSTOMER LIFECYCLE STAGE

Co-Sell

Deal Win



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**MGC
DIAGNOSTICS®**

LevelShift Closes Revenue Cloud Advanced Deal Sourced by Salesforce



Customer Profile

MGC Diagnostics is a medical device manufacturer focused on diagnostic technologies for healthcare providers. The engagement centers on transforming quoting and contracting through Salesforce Revenue Cloud Advanced and Salesforce Contracts (CLM).

Challenge

- Legacy quoting relied on Excel-based product configuration and manual processes, limiting scalability and efficiency
- Lack of a scalable framework to manage GPO-specific pricing and product catalogs
- Need to support complex product configurations with rules, tiers, and dependencies within a modern quoting experience
- Business requirement to better handle price book/GPO changes without rework of quotes

Partner Value

- Led structured discovery and stakeholder alignment, covering product catalogs, pricing logic, CLM, and quoting lifecycle
- Delivered an early working Revenue Cloud prototype (POC) to validate solution design and accelerate stakeholder confidence
- Demonstrated configurable product modeling, dynamic pricing, and guided quote creation within Salesforce
- Supported onboarding through security alignment, environment setup, and access enablement to ensure delivery readiness

Why LevelShift Won: Strong Salesforce partnership, a compelling proof of concept, effective lead-to-close opportunity management, and no competitive displacement throughout the sales cycle.

Products sold



Revenue Cloud Advanced & Salesforce
Contracts

Q1 Closure

New win



\$101K Project Value

3-Month Implementation Engagement

COUNTRY

USA

INDUSTRY

Manufacturing

Technology

Salesforce Revenue Cloud Advanced + Salesforce
Contracts (CLM)

ROLE OF PARTNER

IN CUSTOMER LIFECYCLE STAGE

Sales Cycle Support



Deal Win



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MUELLER

Mueller Discovers Revenue Cloud Advancements with LevelShift



Customer Profile

Mueller Co. is a leading manufacturer of water infrastructure products, providing valves, fire hydrants, pipe fittings, and smart water technologies for utilities and municipalities. For more than 150 years, the company has helped deliver safe, reliable, and efficient water distribution systems across North America.

Challenge

- Legacy Configure One limitations created the need for a scalable Salesforce Revenue Cloud Advanced implementation.
- The client needed to migrate 30% of its business to Revenue Cloud Advanced for complex, made-to-order products.
- The Revenue Cloud Advanced migration required expertise in complex product configuration and BOM modeling.
- Low AI confidence paused Agentforce investments.

The client needed a Salesforce partner to deliver a phased Revenue Cloud Advanced implementation and enable future Agentforce capabilities.

Products sold



Revenue Cloud Advanced

Partner Value

With our deep Revenue Cloud Advanced (RCA) expertise, we helped the client replace Configure One with a scalable, future-ready solution while laying the foundation for Agentforce adoption.

- Enabled a scalable Revenue Cloud Advanced transformation to replace Configure One for complex engineer-to-order products.
- Leveraged deep RCA expertise to build a future-ready configuration and quoting foundation.
- Delivered a phased RCA roadmap for product configuration, BOM management, quoting, and future Agentforce capabilities.
- Restored confidence in AI adoption with a strong Revenue Cloud Advanced foundation.
- Demonstrated Revenue Cloud expertise through a detailed Configure One assessment and transformation strategy.

Q2 Opportunity

Partner Sourced Win

Competitive Intel

Discovery and Expertise

Technical Credibility

Demo Secured IT Confidence

COUNTRY

USA

INDUSTRY

Manufacturing

ROLE OF PARTNER

IN CUSTOMER LIFECYCLE STAGE

Partner Sourced Opportunity

Deal Win



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From Spreadsheet Complexity to Intelligent Quoting: JST Power's Revenue Cloud Journey



Customer Profile

JST Power Equipment is a global manufacturer of transformers and power equipment, delivering reliable electrical solutions for utilities, renewable energy, industrial facilities, and data centers. The company helps customers build resilient, efficient, and future-ready power infrastructure.

Challenge

- Manual spreadsheet-based pricing and gross margin calculations increasing operational complexity
- Quote generation dependent on disconnected Excel, Word, and email-based processes
- Limited visibility and control across the quote-to-cash lifecycle
- Time-consuming management of transformer configurations, pricing variations, and shipping calculations
- Lack of a scalable platform to support growth, reporting, and future ERP integration

Products sold



Revenue Cloud Advanced & Billing

Partner Value

With our Salesforce Revenue Cloud Advanced expertise, we enabled business transformation by:

- **Driving platform modernization** through the establishment of a centralized quoting and pricing platform as a Proof of Concept (POC) for one Transformer product.
- **Enhancing operational efficiency** by automating Transformer configuration, pricing, margin calculations, and quote generation processes.
- **Creating data consistency and transparency** with a single source of truth for products, pricing, quoting, and customer-facing documents.
- **Laying the foundation for future scalability** by enabling an architecture ready for expansion into order management, billing, and SAP integration.

Our expertise helped establish a scalable revenue foundation designed to adapt to changing business needs.

Q2 Closure

Joint Sales Win

RCA

Expertise of Revenue Outputs

Technical Credibility

Proof of Concept Showcase

COUNTRY

USA

INDUSTRY

Manufacturing

ROLE OF PARTNER

IN CUSTOMER LIFECYCLE STAGE

Partner Supported Sales Engagement

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