

SWIFT



Automated migration of your
revenue management data & metadata

At the heart of the journey to Agentforce Revenue Management is **SWIFT**: a purpose built migration tool developed by LEAP to do the heavy lifting of moving your Salesforce CPQ environment into ARM.

From products, pricing, bundles, and configuration data to legacy fields, field mappings, and field-level permissions, SWIFT automates critical elements of the migration that would otherwise require extensive manual effort.

The Salesforce logo, which is a blue cloud shape with the word "salesforce" in white lowercase letters inside it.

salesforce

By preserving both the structure and governance of your existing environment, SWIFT helps organizations modernize faster while protecting the investment they have made in Salesforce CPQ.

Whether you're planning a full transition or a phased modernization strategy, SWIFT provides a secure and repeatable approach that simplifies implementation and helps realize value from Agentforce Revenue Management.

PRICING, DISCOUNTING & MORE

Pricing is rarely simple and SWIFT is built to handle that complexity. One-time and recurring products, discount schedules, block pricing with volume and override rules, contracted pricing, and even usage-based consumption pricing are all migrated automatically into ARM's corresponding pricing structures.

What took years to build in CPQ does not need to be rebuilt from scratch. Utilizing SWIFT reduces implementation effort, lowers migration costs, and accelerates time-to-value for Revenue Lifecycle Management initiatives.

AUDIT TRAIL & REPORTING

Every step of the migration is traceable: Built-in validation checks, migration diagnostics, and visual error reporting help identify issues early, enabling corrective action before production deployment.

Comprehensive reporting and audit capabilities provide Legal, Finance, and Compliance teams with the transparency and confidence required before go-live.

WHAT SWIFT HANDS OFF TO THE PROCESS

SWIFT is powerful, but it is one part of a broader migration journey led by LEAP. Some elements require expert hands-on configuration as part of the overall process:

- **Product Rules** migrate into ARM's Business Rules Engine and Constraint Rules Engine, with guidance and documentation provided at every step.
- **Price Rules** are translated into ARM's Pricing Procedure framework by LEAP's team.
- **MDQ Products** (currently supporting Annual frequency) require manual steps, with a clear process for other frequencies.
- **Quote Document Templates** are rebuilt in ARM's document management framework with LEAP's support.

LEAP's migration specialists work alongside your team to ensure business-specific requirements are addressed as part of a structured and governed migration approach.

PRODUCT CATALOGUE MIGRATION

SWIFT takes your entire product catalogue with it.

From straightforward catalogues to complex enterprise-scale product environments, SWIFT delivers an enterprise-ready solution designed to support future growth and evolving business requirements.

Configuration attributes, the logic that drives how your products behave, are carried across into ARM's Dynamic Attributes framework, preserving the intelligence you've built into your catalogue over the years.

SWIFT also preserves critical relationships between products, bundles, pricing structures, and configuration data, helping maintain data integrity and reducing post-migration rework.

BUILT FOR EVERYONE IN THE ROOM

SWIFT is designed with all stakeholders in mind. RevOps professionals can see exactly how their legacy data model maps into the new lifecycle. Architects and Admins benefit from a clean, repeatable, and well-documented process. Legal and Finance teams get the audit trail and reports they need to sign off with confidence. Business leaders benefit from greater predictability, lower implementation costs, and a smoother modernization journey with minimal operational disruption.

THE BOTTOM LINE

SWIFT does not just move data. It translates your commercial logic, your pricing intelligence, and your product architecture into a platform built for the future. With LEAP guiding the process end to end, your transition to ARM is structured, safe, and scalable.

SWIFT delivers an enterprise-ready solution that protects years of CPQ investment, simplifies the transition to Agentforce Revenue Management, and enables organizations to achieve business outcomes more quickly and with greater confidence. The result is a lower-risk migration, improved business continuity, and a faster path to Revenue Lifecycle Management transformation.

DATA MODEL & SECURITY MIGRATION

SWIFT goes beyond migrating business data by automating key elements of the underlying data model.

SWIFT migrates field definitions, maps legacy fields to ARM-compatible objects, and carries forward field-level permissions, reducing manual data-model configuration while helping maintain the required security model in the target environment.

This helps organizations accelerate configuration, improve consistency, and reduce the risk of errors associated with manually rebuilding fields, mappings, and permissions during migration.

BENEFITS

- Automate the transition from Salesforce CPQ to Agentforce Revenue Management, reducing manual effort and project costs.
- Review and validate product structures, bundles, and configuration data before deployment.
- Identify and resolve issues early through built-in validation and visual error reporting.
- Maintain data quality, integrity, and critical commercial relationships throughout the transition.
- Reduce project risk and minimize disruption to day-to-day operations.
- Gain full visibility through progress tracking, reporting, and comprehensive audit trails.
- Accelerate adoption and achieve business value faster.
- Support both enterprise-wide transformations and phased modernization initiatives at scale.

