

Financial Services Cloud

Reimagine the future of personalized financial services

- Purpose-built for Banking, Wealth Management, and Insurance
- Flexible low-code platform designed for agility
- Built on the #1 AI CRM



Choose the Financial Services Cloud option that's right for your business

Financial Services Cloud - Sales		Financial Services Cloud - Service		Financial Services Cloud - Sales & Service	
Drive front-office productivity with a single space to grow trusted relationships		Everything needed to provide service that customers love, at scale		Get a complete view of the customer across sales and service	
Enterprise Edition	Unlimited Edition	Enterprise Edition	Unlimited Edition	Enterprise Edition	Unlimited Edition
\$420	\$665	\$420	\$665	\$455	\$700

Financial Services Cloud is also available in **Einstein 1 Edition for Sales** and **Einstein 1 Edition for Service**. You can learn more about these Editions [here](#).

	Financial Services Cloud - Sales		Financial Services Cloud - Service		Financial Services Cloud - Sales and Service	
	Enterprise	Unlimited	Enterprise	Unlimited	Enterprise	Unlimited
Financial Services Customer 360						
Industry Specific Data Models	✓	✓	✓	✓	✓	✓
Client Financial Profile	✓	✓	✓	✓	✓	✓
Banker, Advisor, and Insurance Producer Consoles	✓	✓	✓	✓	✓	✓
Household and Relationship Groups	✓	✓	✓	✓	✓	✓
Financial Accounts & Transactions	✓	✓	✓	✓	✓	✓
Life Events & Business Milestones	✓	✓	✓	✓	✓	✓
Referral Management	✓	✓	✓	✓	✓	✓
Actionable Relationship Centre	✓	✓			✓	✓



	Financial Services Cloud - Sales		Financial Services Cloud - Service		Financial Services Cloud - Sales and Service	
	Enterprise	Unlimited	Enterprise	Unlimited	Enterprise	Unlimited
Grow revenue with trusted relationships						
Financial Goals and Plans	✓	✓			✓	✓
Interest Tags	✓	✓			✓	✓
Actionable Segmentation	✓	✓			✓	✓
Interaction Summaries	✓	✓			✓	✓
Einstein Activity Capture for Financial Services	✓	✓			✓	✓
Tear Sheet Generation	✓	✓			✓	✓
Marketing Cloud Engagement for Financial Services	\$	\$			\$	\$
Financial Deal Management	✓	✓			✓	✓
Compliant Data Sharing	✓	✓			✓	✓
Branch and Practice Management	✓	✓			✓	✓
Onboarding Console Application	✓	✓			✓	✓
Deliver premium service						
CSR Console			✓	✓	✓	✓
Engagement Timeline			✓	✓	✓	✓
Audit Trail			✓	✓	✓	✓
Caller Identity Verification			✓	✓	✓	✓
Service Process Studio			✓	✓	✓	✓
Action Launcher			✓	✓	✓	✓
Service Process Library			✓	✓	✓	✓
Complaint Management			✓	✓	✓	✓



Financial Services Cloud - Sales		Financial Services Cloud - Service		Financial Services Cloud - Sales and Service	
Enterprise	Unlimited	Enterprise	Unlimited	Enterprise	Unlimited

Deliver premium service

Complaint Management Analytics		\$	\$	\$	\$
Transaction Dispute Management		✓	✓	✓	✓
Insurance Policy Self-Service Portal		\$	\$	\$	\$
Banking Self-Service Portal		\$	\$	\$	\$
Einstein Studio: Banking Prompts for Service		\$	\$	\$	\$
Einstein Copilot: Banking Actions for Service (Beta)		\$	\$	\$	\$
Einstein Studio: Insurance Prompts for Service (Beta)		\$	\$	\$	\$

Drive productivity with automation

Discovery Framework	✓	✓	✓	✓	✓	✓
Stage Management (calls per org per month)	100K	1M	100K	1M	100K	1M
Integration Orchestration	✓	✓	✓	✓	✓	✓
Record Alerts	✓	✓	✓	✓	✓	✓
Action Plans	✓	✓	✓	✓	✓	✓
Document Matrix	✓	✓	✓	✓	✓	✓
Disclosure and Consent Management	✓	✓	✓	✓	✓	✓
Document Tracking and Approvals	✓	✓	✓	✓	✓	✓
KYC Data Model	✓	✓	✓	✓	✓	✓
Business Rules Engine (calls per org per month)	10K	50K	10K	50K	10K	50K
OmniStudio (calls per org per month)	100K	1M	100K	1M	100K	1M
Document Generation	✓	✓	✓	✓	✓	✓
Data Processing Engine	✓	✓	✓	✓	✓	✓



	Financial Services Cloud - Sales		Financial Services Cloud - Service		Financial Services Cloud - Sales and Service	
	Enterprise	Unlimited	Enterprise	Unlimited	Enterprise	Unlimited
Integrate seamlessly						
Data Consumption Framework	✓	✓	✓	✓	✓	✓
Integration Definitions	✓	✓	✓	✓	✓	✓
Business APIs	✓	✓	✓	✓	✓	✓
MuleSoft Direct for Financial Services Cloud	\$	\$	\$	\$	\$	\$

Financial Services Cloud - Sales delivers the applicable Financial Services functionality on top of a Sales Cloud license of the same edition.
Financial Services Cloud - Service delivers the applicable Financial Services functionality on top of a Service Cloud license of the same edition.
Financial Services Cloud - Sales and Service delivers the applicable Financial Services functionality on top of a Sales and Service Cloud license of the same edition.
Financial Services Cloud - Sales and Service is also available in Professional Edition and Einstein 1 Edition.
All three Financial Services Cloud products are available in Performance Edition for those customers already on Performance Edition.
Prices quoted require an annual contract.
This page is provided for information purposes only and subject to change. Contact a sales representative for detailed pricing information.