

Financial Services Cloud

Transforming financial services organisations with data and AI

- Purpose-built for Banking, Wealth, and Insurance growth
- Flexible, low-code platform for rapid business agility
- AI embedded in every workflow to drive revenue and enhance productivity



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

Financial Services Cloud - Sales Drive front-office productivity with a single space to grow trusted relationships	Enterprise Edition \$325	Unlimited Edition \$500	Financial Services Cloud - Service Everything needed to provide service that customers love, at scale	Enterprise Edition \$325	Unlimited Edition \$500
Financial Services Cloud - Sales & Service Get a complete view of the customer across sales and service	Enterprise Edition \$350	Unlimited Edition \$525	Financial Services Cloud Agentforce 1 Everything available in Unlimited edition plus	Sales Edition \$750	Service Edition \$750

	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	✓	✓	✓	✓	✓	✓

✓: Included in base SKU | \$: Add-on or additional license required



	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						
Actionable Relationship Center	✓	✓			✓	✓
Financial Goals and Plans	✓	✓			✓	✓
Interest Tags	✓	✓			✓	✓
Actionable Segmentation	✓	✓			✓	✓
Interaction Summaries	✓	✓			✓	✓
Tear Sheet Generation	✓	✓			✓	✓
Financial Deal Management	✓	✓			✓	✓
Compliant Data Sharing	✓	✓			✓	✓
Branch and Practice Management	✓	✓			✓	✓
Onboarding Console Application	✓	✓			✓	✓
Einstein Activity Capture for Financial Services	✓	✓			✓	✓
Business Relationship Planning (B2B)	✓	✓			✓	✓
Cashflow Trends and Insights	\$ Data Cloud & \$ FSC Intelligence					
Income and Expense Trends and Insights	\$ Data Cloud & \$ FSC Intelligence					
Contextual Alerts and Actions	\$ Data Cloud & \$ FSC Intelligence					
Forecast Management	✓	✓			✓	✓
Advanced Pipeline Management	✓	✓			✓	✓
Deliver premium service						
CSR Console			✓	✓	✓	✓
Engagement Timeline			✓	✓	✓	✓
Audit Trail			✓	✓	✓	✓
Caller Identity Verification			✓	✓	✓	✓
Service Process Studio			✓	✓	✓	✓

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	Financial Services Cloud - Sales		Financial Services Cloud - Service		Financial Services Cloud - Sales and Service	
	Enterprise	Unlimited	Enterprise	Unlimited	Enterprise	Unlimited
Action Launcher			✓	✓	✓	✓
Service Process Library			✓	✓	✓	✓
Complaint Management			✓	✓	✓	✓
Service Process Studio			✓	✓	✓	✓
Compliant Management Analytics			\$	\$	\$	\$
Transaction Dispute Management			✓	✓	✓	✓
Banking & Policyholder Self-Service Portal			\$	\$	\$	\$
Case Management			✓	✓	✓	✓
Omni-Channel Routing			✓	✓	✓	✓
Knowledge Management			✓	✓	✓	✓
Service Contracts and Entitlements			✓	✓	✓	✓
Insurance Policy Self-Service Portal			\$	\$	\$	\$
Einstein Next Best Action			5k requests PUPM	5k requests PUPM	5k requests PUPM	5k requests PUPM
Customize and Automate Process						
Discovery Framework	✓	✓	✓	✓	✓	✓
Stage Management (calls per org per month)	100K	1M	100K	1M	100K	1M
Lightning Platform	✓	✓	✓	✓	✓	✓
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

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	Financial Services Cloud - Sales		Financial Services Cloud - Service		Financial Services Cloud - Sales and Service	
	Enterprise	Unlimited	Enterprise	Unlimited	Enterprise	Unlimited
OmniStudio (calls per org per month)	100K	1M	100K	1M	100K	1M
Document Generation	✓	✓	✓	✓	✓	✓
Data Processing Engine	✓	✓	✓	✓	✓	✓
Flex Cards	✓	✓	✓	✓	✓	✓
Flow Builder	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
Flow Orchestration	600 runs per year	600 runs per year	600 runs per year	600 runs per year	600 runs per year	600 runs per year
AppExchange	✓	✓	✓	✓	✓	✓
Customizable Profiles and Page Layouts	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
Integrate seamlessly						
Data Consumption Framework	✓	✓	✓	✓	✓	✓
Integration Definitions	✓	✓	✓	✓	✓	✓
Data Foundation	\$	\$	\$	\$	\$	\$
Integration Orchestration	✓	✓	✓	✓	✓	✓
Business APIs	✓	✓	✓	✓	✓	✓
MuleSoft Direct for Financial Services Cloud	\$	\$	\$	\$	\$	\$
Available Add Ons						
Data Cloud for Financial Services and Insurance	\$	\$	\$	\$	\$	\$
Financial Services Cloud Intelligence	\$	\$	\$	\$	\$	\$
Experience Cloud	\$	\$	\$	\$	\$	\$
Financial Insights Usage Add-On	\$	\$	\$	\$	\$	\$
Einstein Relationship Insights	\$	\$			\$	\$
Einstein for Sales	\$	\$			\$	\$
Einstein for Service			\$	\$	\$	\$
Scheduler	\$	\$	\$	\$	\$	\$

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 Agentforce for Financial Services Cloud	Agentforce for Financial Services	
	Financial Services Cloud Agentforce 1 Sales	Financial Services Cloud Agentforce 1 Service
Financial Services Cloud Agentforce 1 Edition		
Customer Community Plus for Financial Services - UE - Logins (Per Month)		✓
Digital Engagement - Unlimited Edition	✓	✓
Sales Planning - Unlimited Edition	✓	
Salesforce Maps - Unlimited Edition	✓	
Spiff Platform	✓	
Service Cloud Voice - Unlimited Edition		✓
Einstein Conversation Insights - Unlimited Edition		✓
Agentforce for Financial Services Cloud	✓	✓
Feedback Management - Growth - Unlimited Edition		✓
Customer Experience Intelligence - Unlimited Edition		✓
Additional Customer Experience Intelligence Signals (100)		✓
Salesforce Scheduler - Unlimited Edition	✓	✓
Asset Scheduling - Unlimited Edition	✓	✓
Salesforce Foundations	✓	✓
Data Cloud Provisioning - Einstein 1 Edition	✓	✓
Customer Data Cloud - Data Services Card (100K Credits)	✓	✓
Flex Credits for Agentforce	✓	✓
Tableau Next Creator	✓	✓
Additional Einstein Requests (1,000)	✓	✓
Slack Enterprise Grid	✓	✓
Revenue Cloud Events	✓	✓

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Other Available SKUs -

- [Digital Lending](#)
- [Collections & Financial Recovery](#)
- [Insurance Brokerage for Service](#)
- [Insurance Brokerage for Sales & Service](#)
- [Insurance Product Administration](#)
- [Insurance Policy Administration](#)
- [Insurance Claims Management](#)