

Ooma Office for Wealthbox



Ooma Office is the comprehensive cloud-based phone service that delivers 100+ advanced tools and features to elevate business communications, improve customer service and streamline operations. Maximize your productivity at a fraction of the cost of traditional phone carriers.

The Ooma Office Pro Plus service tier integrates with Wealthbox to deliver powerful collaboration tools that help financial advisors, enterprise firms, and brokers manage client relationships, streamline operations, and drive revenue growth directly from within their CRM.

Wealthbox Integration Features



Caller-ID Pops

Preview contact details in the Ooma Office Desktop app before making or receiving calls.



Complete Call Control

Mute, hold, or transfer calls; add participants; or instantly open the contact's CRM record with a single click.



Contact List Sync

Sync Wealthbox contacts directly into your Ooma Office personal address list.



Call Notes

Add notes for Contacts, Organizations, Leads, Opportunities, or Notes datasets directly from Ooma Office. Entries automatically sync with Wealthbox.



Call Logging

Automatically sync call details such as time and duration into Wealthbox for accurate recordkeeping.



Text Message Sync

Send and receive text messages through Ooma Office. Messages are automatically saved in Wealthbox as Activities under the matching contact.



Virtual Receptionist

Greet and direct callers without picking up the phone. Answer common questions like office hours and directions, and play hold music or promotional messages.



Advanced Call Management

Access next-level features like Multi Ring, Ring Groups, Auto Dialer, Call Queuing, Enhanced Call Blocking, Call Recording, Shift-to-Text, and more.



Desktop & Mobile Apps

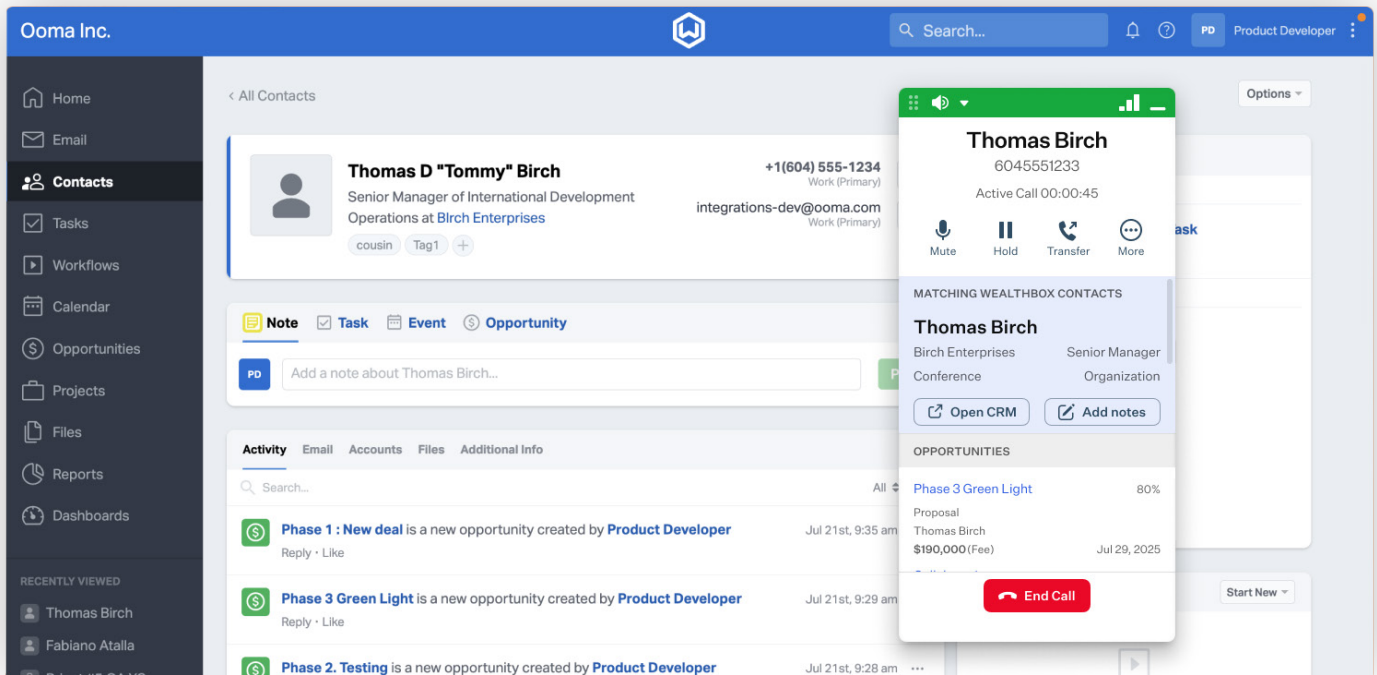
Make and receive calls, send texts and faxes, access voicemail (listen or read), and join audio or video conferences from your desktop, mobile phone, or tablet.



Videoconferencing

Host up to 100 participants anytime, anywhere. Enjoy simultaneous screen sharing, online whiteboarding, and video recording.

Preview Contact Data During Calls



Key Ooma Office Pro Plus Features

\$29.95 per month/per user. Applicable taxes and fees are not included.

- 911 Service
- Audio and videoconferencing
- Call Analytics
- Call Park
- Call Queuing
- Call Recording
- Call Screening
- Caller Info Match
- Shift-to-Text
- CRM Integrations
- Desktop App
- Digital Call Deflection
- Digital Fax
- Dynamic Caller ID
- Email Audio Attachments
- Enhanced Call Blocking
- Find Me, Follow Me
- Google and Office 365 Integrations
- Hot Desking
- Mobile App
- Music On Hold
- One-to-Many Messaging
- One Toll-free Number
- Online Bookings
- Ooma Meetings Recording
- Ring Groups
- Team Chat
- Text Messaging
- Transfer Music
- Virtual Fax
- Virtual Receptionist
- Voicemail Transcription

Please visit <https://www.ooma.com/small-business-phone-systems/plans/> to view the complete list of features.