

PIN Set Pro-Admin Guide

THIS WIKI HAS BEEN UPDATED FOR VERSION 13 OF YOUR PBX GUI

Commercial Module

Note

This wiki is for the **Pro** version of the Pin Sets module. For the standard version, see [Pin Sets-Admin Guide](#).

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Overview

The Pin Set Pro module is used to create and manage lists of PINs (numerical passwords) that can be used to access restricted features such as outbound routes. The PIN can also be added to the CDR record's "accountcode" field.

This module also gives you the power to enable pinless dialing on a per route basis for any extension.

Additionally, you can generate downloadable reports that include call details and summaries of billable hours.

Logging In

- In the top menu go to **Settings**
- In the drop-down menu go to **PIN Sets**

Creating a PIN Set

In the PIN Sets home screen, click the **Add PIN Sets** button.

PIN Sets are used to manage lists of PINs that can be used to access restricted features such as Outbound Routes. The PIN can also be added to the CDR record's 'accountcode' field.

PIN Set

Actions

+ Add PIN Sets

New PIN Set

PIN Set Description ?

0/50

Record in CDR ?

Yes

No

PIN List ?

PIN Set Description

A description of the PIN Set to help you identify it. (Max 50 characters)

Record in CDR

Yes/No: Whether to record the PIN in the call detail records. If **Yes**, PIN numbers dialed will be recorded in CDRs so you can view them in the CDR Reports module.

PIN List

A list of one or more PINs. Enter one PIN per line.



Save

Click the **Submit** button, then click the **Apply Config** button.

Your new PIN Set will show up in the list on the module's home screen.

In our example, we have created a PIN Set that we will use in conjunction with an international outbound route.

PIN Sets are used to manage lists of PINs that can be used to access restricted features such as Outbound Routes. The PIN can also be added to the CDR record's 'accountcode' field.

| PIN Set | Actions |
|---------------------|---|
| International Route |   |


[+ Add PIN Sets](#)

Linking a PIN Set to an Outbound Route

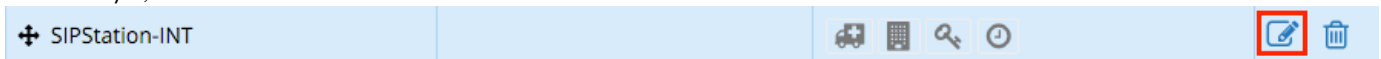
Now that you have created a PIN Set, you can link it to an outbound route. This wiki assumes you have created an outbound route. For more information on outbound routes, please see the [Outbound Routes Module User Guide](#).

Navigate to the Outbound Routes module:

- In the top menu go to **Connectivity**
- In the drop-down menu go to **Outbound Routes**

Click the edit button  for the outbound route you wish to edit.

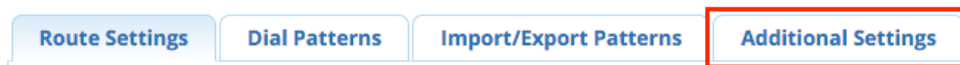
In our example, we will edit our SIPStation International route.



Click the **Additional Settings** tab for the route.

Outbound Routes

Edit Route




Look for the **PIN Set** option. The default is **None**. Select a PIN Set from the drop-down menu.

This tab may look different for you, depending upon whether Class of Service is enabled. Look for PIN Set at the bottom.


Outbound Routes

Edit Route

Route Settings Dial Patterns Import/Export Patterns Additional Settings


Call Limit 


Note that the meaning of these options has changed. Please read the wiki for further information on these changes.


Call Recording  Force Yes Don't Care No Never

Class Of Service is enabled

Please use CoS to manage your routes.

T38-Gateway Enabled  Yes No

Notifications 

PIN Set 


In our example, we will choose our International Route PIN Set.

PIN Set 

Click the **Submit** button, then click the **Apply Config** button.

Now, any time someone dials out via this outbound route, the system will prompt the user to enter a PIN number. The system will match the entered PIN against this PIN Set. If it does not match, the call will not be completed, and the user will be prompted to enter a PIN again.

Editing a PIN Set

From the module home screen, click the edit button  for the PIN Set you wish to edit.

When finished making changes, click the **Submit** button, and then click the **Apply Config** button.

Deleting a PIN Set

From the module home screen, click the trash button for the PIN Set you wish to edit. **Or**, if already viewing the PIN Set, click the **Delete** button.

Click the **Apply Config** button.

Note that any outbound routes that were using the deleted PIN Set will no longer use a PIN Set.


Configuring Pinless Dialing

By default, if you link an outbound route to a PIN set, all extensions will be required to enter a PIN in order to use that route. However, you may wish to allow certain users, such as your CEO, to dial out a route without entering a PIN. Pin Set Pro allows you to edit the settings of an individual extension in the Extensions module to enable pinless dialing on a per route basis. An extension with pinless dialing enabled for a route will **not** be prompted to enter a PIN number for that route.

This wiki assumes you are familiar with the Extensions module. For more information on Extensions, please see the [Extensions Module](#) wiki.

Navigate to the Extensions module:

- In the top menu go to **Applications**
- In the drop-down menu click **Extensions**

Click the edit button  for the extension you wish to edit.

Click the **Other** tab for the extension.



Look for the **Pinless Dialing** section. This section will contain a list of outbound routes as well as **Yes/No** switches.

We have three routes in our example. Your list may differ.

– Pinless Dialing

| | |
|--------------------|---|
| E911-Leave-First ? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| SIPStation-Out ? | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |
| SIPStation-INT ? | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Click the **Yes** button for the route(s) for which you would like to enable pinless dialing for this extension.

For example, we have selected Yes (dark blue) for the SIPStation-INT route. This means this extension will NOT need to enter a PIN to access the international route.

SIPStation-INT ?

| |
|---|
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |
|---|

Click the **Submit** button, then click the **Apply Config** button.

PIN Sets Code Reports

Pin Set Pro makes it simple to generate detailed call reports and billable time summaries that can be exported to your favorite spreadsheet application. You can filter this report data by date, duration, and account code (PIN) as well as source and destination DIDs.

To navigate to PIN Sets Code Reports:

- In the top menu go to **Reports**
- In the drop-down menu go to **Pinsets Code Reports**

Account Code Reports

| | |
|------------------------|------------------------|
| Date Range ? | From: |
| | November ▾ 01 ▾ 2015 ▾ |
| | To: |
| | November ▾ 30 ▾ 2015 ▾ |
| Source ? | <input type="text"/> |
| Destination ? | <input type="text"/> |
| Duration ? | <input type="text"/> |
| Billable Time ? | <input type="text"/> |
| Account Code ? | All ▾ |

No data for current selection
No data for current selection

Define Filter Criteria

Date Range

Select a date range (to and from) to narrow your search results.

Source

(Optional) Filter by the source DID.

Destination

(Optional) Filter by the destination DID.

Duration

(Optional) Filter by the call duration.

Billable Time

(Optional) Filter by the billable time.

Account Code

Filter by account code (PIN). Default = **All**. To limit the report to only a certain PIN, select a PIN from the drop-down menu. Note: only one PIN may be selected at a time.

Generate the Report

After you have entered your filter criteria, click the **Submit** button to generate the report.

If results are found matching your filter criteria, they will be displayed at the bottom of the page.


Summary Report


| Account Code | Duration | Billable Time |
|--------------|----------|---------------|
| 1234 | 0:02:26 | 0:02:26 |
| 4321 | 0:01:48 | 0:01:48 |
| 7890 | 0:01:12 | 0:01:12 |

Detailed Report

| Date/Time | Account Code | Source | Destination | Duration | Billable Time |
|---------------------|--------------|------------|-------------|----------|---------------|
| 2015-11-05 16:04:18 | 1234 | 9203831234 | 9208868130 | 0:01:19 | 0:01:19 |
| 2015-11-05 16:06:13 | 1234 | 9203831234 | 9209449990 | 0:01:07 | 0:01:07 |
| 2015-11-05 16:05:25 | 4321 | 9209449990 | 9208322597 | 0:00:42 | 0:00:42 |
| 2015-11-05 16:07:46 | 4321 | 9209449990 | 9204861989 | 0:01:06 | 0:01:06 |
| 2015-11-05 16:06:54 | 7890 | 9209449997 | 9208868130 | 0:01:12 | 0:01:12 |

Download the Summary Report or Detailed Report

To download either the Summary Report or Detailed Report, click the spreadsheet button  next to the type of report you wish to download.

Summary Report 

Detailed Report 

This will download a CSV file to your computer, which you can open in a spreadsheet application.