



Pin Set Pro

User Guide

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Overview

The Pin Set Pro module is used to create and manage lists of pins that can be used to access restricted features such as outbound routes.

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

- Log into the Pin Set module and you should see a screen like this. On the right will be a list of all your pin set groups that you have setup. You can edit or delete any of these entries or add new ones.

Add PIN Set

Add Password Set
test

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.

New PIN Set

PIN Set Description:

Record In CDR?: 

☐

PIN List: 

Submit Changes

Creating a Pin Set Group

- PIN Set Description-** We will give this pin set group a name. In our example, we are going to call this "International Pins," since we are going to link this pin set group to our international routes.

New PIN Set

PIN Set Description:

- Record In CDR-** Select this option if you want the pin number dialed to be recorded in the CDR's so you can view them in the Call Reports module.

Record In CDR?:  ☒

- **PIN List**- Here is where you define the actual pin numbers that can be used with this pin group. You can enter as many pin numbers as you want with one number per line like shown below.

PIN List: ?

```
678243
2829
1920
4929
```

- Don't forget to press the submit button when done.

Submit Changes

Linking a Pin Set to an Outbound Route

- Now that we have created a pin set called “International Pins,” we will link this to our outbound route that we use for international calls. For more information on creating outbound routes, please see the Outbound Route user guide.
- As we can see in the outbound route below, there is a drop down called “Pin Set.”

Route Settings

Route Name: ?	<input type="text" value="International"/>
Route CID: ?	<input type="text"/> <input type="checkbox"/> Override Extension
Route Password: ?	<input type="text"/>
Route Type: ?	<input type="checkbox"/> Emergency <input type="checkbox"/> Intra-Company
T38-Gateway Enabled: ?	<input type="button" value="Yes"/> <input type="button" value="No"/>
Music On Hold? ?	<input type="text" value="default"/> ▾
Time Group: ?	<input type="text" value="---Permanent Route---"/> ▾
Route Position: ?	<input type="text" value="---No Change---"/> ▾

Additional Settings

PIN Set: ? ▾

- Using the drop down, we can pick the “International Pin” pin set we created. Now anytime someone dials out this outbound route, the system will prompt them to enter a pin number. This will match the entered pin against this pin set. If it does not match, the call will not be completed and the caller will be prompted to enter a pin again.

Additional Settings

PIN Set: 

International Pins 

- Don't forget to press the “Submit Changes” button when done.

Submit Changes

Pinless Dialing

- Now that we linked an outbound route to a pin set, we have one other option we can set. Our “International Routes” pin set now forces all callers to enter a pin number to complete a call, but you may have some users that you don't want to force to enter a pin number, such as your CEO.
- You can go into the settings of an individual user extension in the Extension module and enable the pinless dialing on a per route basis. By enabling pinless dialing for a user, they will not be prompted to enter a pin number for a route that is linked with a pin set.

- Pinless Dialing

International 

☐

Fax 

☐

Integrity 

☐

Cell-Phones 

☐

Schmooze 

☐

- In our example, we will enable pinless dialing for the international route by checking the box next to “International” for this extension. When this user dials out the international route, they will not be required to enter a pin, but all other extensions that do not have this option set will still be required to enter a pin.

- Pinless Dialing

International [?]	<input checked="" type="checkbox"/>
Fax [?]	<input type="checkbox"/>
Integrity [?]	<input type="checkbox"/>
Cell-Phones [?]	<input type="checkbox"/>
Schmooze [?]	<input type="checkbox"/>

- Don't forget to press the “Submit Changes” button when done.

Submit Changes

Pinsets Code Reports

- The Pin Set Pro module makes it simple for you to generate detailed call reports and billable summaries that can be exported to your favorite spreadsheet application.

Account Code Reports

From:	January ▾	07 ▾	2013 ▾	To:	January ▾	07 ▾	2013 ▾
Source:	<input type="text"/>			Destination:	<input type="text"/>		
Duration:	<input type="text"/>			Billable Time:	<input type="text"/>		
Account Code:	All ▾						
<p>Submit</p>							

No data for current selection
No data for current selection

- This report includes the ability to filter data by dates, duration and account code as well as source and destination DID's.

Account Code Reports

From: To:

Source:

Duration:

Account Code:

No data for current selection
No data for current selection

- Simply Press the “Submit” button and download your report.

Account Code Reports

From: To:

Source:

Destination:

Duration:

Billable Time:

Account Code:

Summary Report

Account Code	Duration	Billable Time
1234	0:00:37	0:00:04

Detailed Report

Date/Time	Account Code	Source	Destination	Duration	Billable Time
2013-03-13 09:51:52	1234	2003	3479882008	0:00:11	0:00:04
2013-03-13 09:59:08	1234	4002	8435550656	0:00:21	0:00:07
2013-05-24 13:33:37	1234	4005	0115025699443	0:00:05	0:00:03



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