



ENTERPRISE EDITION

Creating Templates

Messages and actions set up in advance, ready in one tap

Templates do the thinking before an emergency: wording and settings prepared in advance, so staff can act in seconds and say the same thing every time. Each section covers what the template does, the defaults included with Enterprise, and how to add or edit your own.

Please note: Admin access is required. Log in at app.teamSOS.co.uk - all template types are managed from **Admin > Configuration > Templates**.

STEP 1

Announcement templates

Announcement templates are ready-written Announcements. Choose one when sending and the wording and settings fill in for you, ready to send as they are or adjust.

INCLUDED

Six defaults, from starting a lockdown to standing everyone down:

Lockdown (Active incident)

Lockdown (External threat)

Lockdown (Intruder on-site)

Evac (Fire/smoke)

Invac (Severe Weather)

All clear (Situation resolved/safe)

To add your own, go to **Admin > Configuration > Templates > Announcement Templates** and click '**Create**'. To edit or remove a default, open it from the same list.

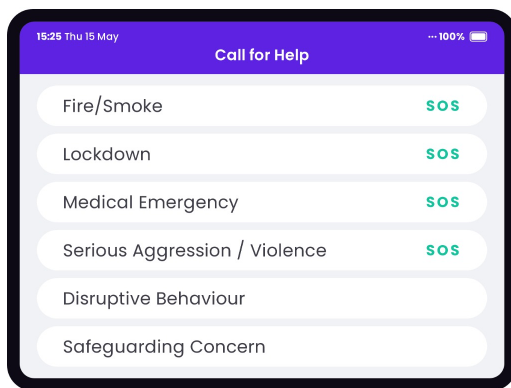
New: Desktop Alerts can now target specific **groups and devices** - see the How-to Guide: Send an Announcement.

Announcement templates continued

FIELD	WHAT IT DOES
Title	The name staff see when choosing a template. Required.
Description	The message text, filled in when the template is chosen. Required.
Visibility	Shown to the organisation, or hidden from lists.
Behaviour	Whether the template replaces or adds to text already in the Description box.
Urgent	Marks the Announcement as urgent by default – depending on your set-up, this can send an extra email or repeat the alert tone on Desktop.
Desktop Alert	Triggers a teamSOS Desktop Alert by default.
Silent	Sends silently by default – no sound or screen takeover.
Default Group	Who receives the Announcement.
Announcement Type	'Confirm you're OK' or 'To be acknowledged'.

STEP 2**Incident buttons and response templates**

On Enterprise, **Call for Help** opens a menu of incident buttons – one for each incident type, covering everything from emergencies to everyday requests. Each button routes straight to its own response team, and SOS buttons mark the emergencies.



The Call for Help menu with the six default buttons

INCLUDED Six default buttons

Four **SOS** buttons for emergencies and two for everyday incidents, each already routed to a response team.

Edit, remove or add buttons to suit your site. On the platform set-up page, each one shows its Group (SOS or Incident) and the Response Team it routes to.

Adding templates to a button

Once staff tap a button, they're asked to add a few words about what's happening. Incident response templates put that message one tap away: tap a template and it fills in the notes, which staff can still edit or add to. It's all about speed.

Incident buttons and response templates continued

Go to **Admin > Configuration > Templates > Incident Responses** and click '**Create**':

FIELD	WHAT IT DOES
Title	The name staff see when choosing a template. Required.
Notes	The message filled in when the template is tapped. Required.
Incident Type	The incident button the template appears under.
Behaviour	Whether the template replaces or adds to text already entered.
Visibility	Shown to the organisation, or hidden from lists.

Tip: with the **Wonde (MIS) integration** set up, add **[Student]** to the Notes and staff will be prompted to tag a student when they use the template.

STEP 3

Quick Messages

Quick Messages are one-tap replies for anyone in a live incident. Tapping the ⚡ **lightning button** in the incident chat opens your saved messages – no typing needed mid-emergency. Go to **Admin > Configuration > Templates > Quick Messages** and click '**Create**':

- **Message** – the text staff can send.
- **Visibility** – shown to the organisation, or hidden from lists.

STEP 4

Locations

Locations tell responders exactly where help is needed. Go to **Admin > Configuration > Templates > Locations**:

- **Location Name** – a clear name responders will recognise.
- **Location Code** – a short, unique code for quick reference.
- **Visibility** – who can see the location.
- **What3Words** – the three-word address for the exact spot (not yet fully functional).
- **Radius** – the area around the location, so responders know the boundaries.

Advanced settings

- **Elevation (m)** – height above sea level, useful for multi-storey buildings or uneven ground.
- **Latitude & Longitude** – exact coordinates to pin the location on a map.

STEP 5

Shortcuts

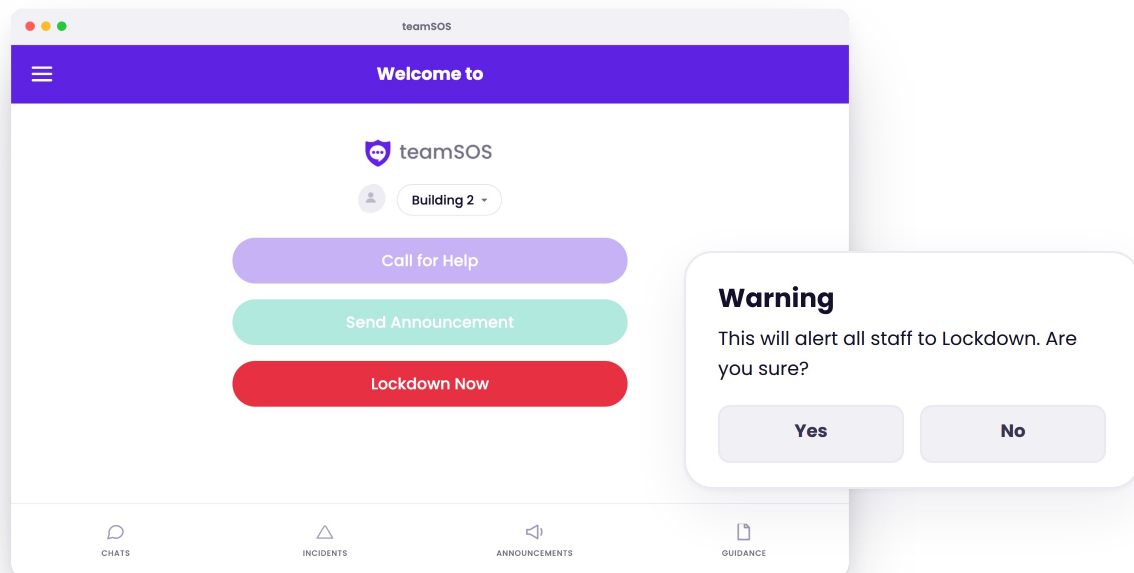
A Shortcut is a button on the app home screen that runs a set response in one press. Lockdown Now, for example, can start a Lockdown incident and send the lockdown Announcement to all staff at once. You decide what it does, who can use it and whether they confirm first.

Go to **Admin > Configuration > Templates > Shortcuts** and click '**Create Shortcut**'. Open a Shortcut from the list to edit it.

Please note: set up Shortcuts last, once the incident buttons and Announcement templates they use are ready.

What staff see

The Shortcut appears on the home screen for anyone with permission to use it. If you've added Warning Text, they confirm before it runs. Shortcuts can also be triggered from a Smart Button – see the How-to Guide: Setting up Smart Buttons.



Lockdown Now on the home screen, and the confirmation shown when Warning Text is set

Shortcuts *continued*

Setting it up

THE BUTTON	WHAT IT DOES
Shortcut Title	The label on the button.
Button Text Colour	The colour of the label.
Button Background Colour	The colour of the button.
Swipe to Execute	Staff swipe to confirm rather than press once – helps prevent accidental triggers.
Warning Text	Optional confirmation shown before it runs, e.g. "Initiating Lockdown – are you sure?"
Executed Text	Optional message shown once it has run.
Permission Required	Which roles or groups can use it.

ADVANCED SETTINGS	WHAT IT DOES
Display Order	Where it sits among other buttons – top, middle or bottom.
Visibility	Shown to the organisation, or hidden from lists.
THE INCIDENT IT STARTS	
Incident Type to Start	The incident button it starts, e.g. Lockdown.
Incident Description	Text added to the incident, e.g. "Lockdown has been initiated."
Start Push-to-Talk	Opens a Push-to-Talk channel when it runs.
THE ANNOUNCEMENT IT SENDS	
Announcement Template	The Announcement it sends, e.g. Lockdown (Active incident).
Add Announcement Recipients to Incident	Adds everyone who receives the Announcement to the incident.

Before you go live: pressing a Shortcut runs it for real, so its Announcement goes straight to staff. Check every setting carefully – and if you want to see it in action, run it as part of a planned drill so staff know to expect it.

CHECKLIST

What you should do

- **Review the defaults** in each section – edit or remove any that don't fit your site.
- Add **Announcement templates** for the messages you send most.
- Check each **incident button** routes to the right team, then add **incident response templates** for the ones staff use most.
- Set up **Quick Messages and Locations** so responders have what they need.
- Finish with **Shortcuts**, and check each one carefully before it goes live.

Need help?

If you encounter any issues, please contact help@teamSOS.co.uk