



LOCKDOWN 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 Lockdown, and how to add or edit your own.

**Please note:** Admin access is required. Log in at [app.teamSOS.co.uk](https://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                                                                                                                              |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Title</b>             | The name staff see when choosing a template. Required.                                                                                    |
| <b>Description</b>       | The message text, filled in when the template is chosen. Required.                                                                        |
| <b>Visibility</b>        | Shown to the organisation, or hidden from lists.                                                                                          |
| <b>Behaviour</b>         | Whether the template replaces or adds to text already in the Description box.                                                             |
| <b>Urgent</b>            | 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. |
| <b>Desktop Alert</b>     | Triggers a teamSOS Desktop Alert by default.                                                                                              |
| <b>Silent</b>            | Sends silently by default – no sound or screen takeover.                                                                                  |
| <b>Default Group</b>     | Who receives the Announcement.                                                                                                            |
| <b>Announcement Type</b> | 'Confirm you're OK' or 'To be acknowledged'.                                                                                              |

## STEP 2

**Incident response templates**

When staff call for help, 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.

## INCLUDED

Four defaults, covering the situations staff are most likely to report:

Fire/smoke

Intruder on-site

Serious incident

Threat near site

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

| FIELD                | WHAT IT DOES                                                               |
|----------------------|----------------------------------------------------------------------------|
| <b>Title</b>         | The name staff see when choosing a template. Required.                     |
| <b>Notes</b>         | The message filled in when the template is tapped. Required.               |
| <b>Incident Type</b> | The incident type the template appears under – on Lockdown, Call for Help. |
| <b>Behaviour</b>     | Whether the template replaces or adds to text already entered.             |
| <b>Visibility</b>    | Shown to the organisation, or hidden from lists.                           |

## 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 the 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.

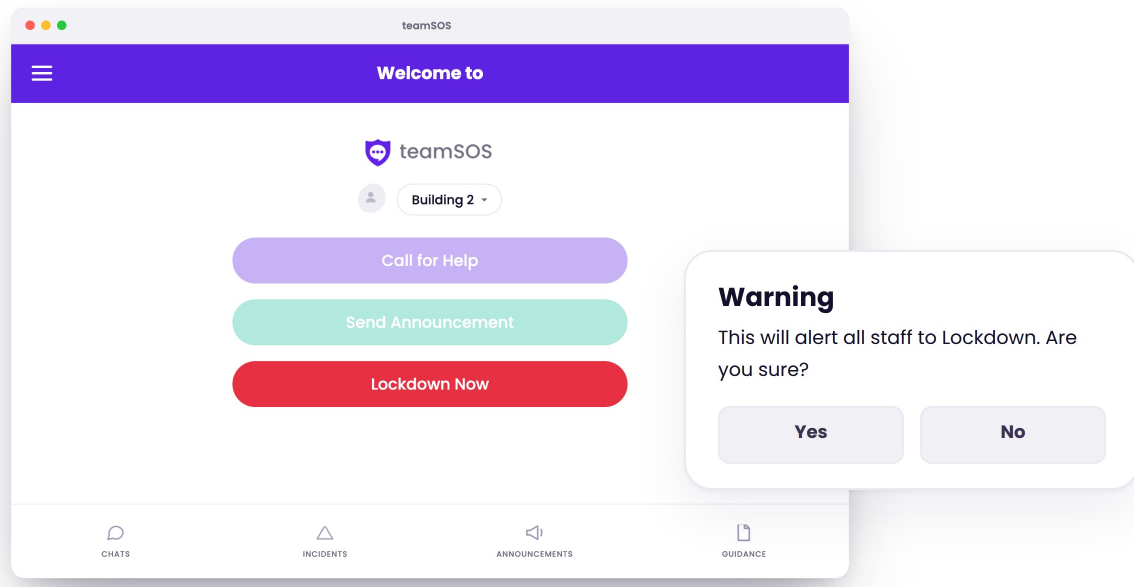
Go to **Admin > Configuration > Templates > Shortcuts** and click '**Create Shortcut**'. Open a Shortcut from the list to edit it.

**Please note:** set up Shortcuts last, once the Announcement templates they send are ready. On Lockdown you can create **two Shortcuts**.

## Shortcuts continued

### 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*

### Setting it up

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

**Shortcuts** continued

| ADVANCED SETTINGS                              | WHAT IT DOES                                                    |
|------------------------------------------------|-----------------------------------------------------------------|
| <b>Display Order</b>                           | Where it sits among other buttons – top, middle or bottom.      |
| <b>Visibility</b>                              | Shown to the organisation, or hidden from lists.                |
| THE INCIDENT IT STARTS                         |                                                                 |
| <b>Incident Type to Start</b>                  | The incident it starts – on Lockdown, Call for Help.            |
| <b>Incident Description</b>                    | Text added to the incident, e.g. "Lockdown has been initiated." |
| <b>Start Push-to-Talk</b>                      | Opens a Push-to-Talk channel when it runs.                      |
| THE ANNOUNCEMENT IT SENDS                      |                                                                 |
| <b>Announcement Template</b>                   | The Announcement it sends, e.g. Lockdown (Active incident).     |
| <b>Add Announcement Recipients to Incident</b> | 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.
- Add **incident response templates** for the situations staff report most often.
- 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](mailto:help@teamSOS.co.uk)