



# Creating Templates

Pre-build announcements, incident responses, quick messages and locations

This guide takes you through **creating templates in teamSOS**. You'll learn how to build templates for Announcements and Incident Responses, and how to set up Quick Messages and Locations — all of which streamline your incident management and keep communication consistent.

**Please note:** Admin access is required to use this feature. Log in at [app.teamsos.co.uk](https://app.teamsos.co.uk) to get started. All template types are created from **Admin > Configuration > Templates**.

## Announcement Templates

Announcement templates let you quickly select a pre-made format when creating a new announcement, saving time and keeping wording consistent. Go to **Admin > Configuration > Templates** and choose **Announcement Templates**. Click 'Create' and complete the following fields.

The screenshot shows a web form titled "Create Announcement Template". In the top right corner, there is a green button with a left arrow and the text "Back". The form contains the following fields:

- Title:** A single-line text input field.
- Silent:** A toggle switch, currently turned off.
- Urgent:** A toggle switch, currently turned off.
- Announcement Text:** A large multi-line text area.
- Default Recipients Group:** A dropdown menu with the placeholder text "Select default group (optional)".
- Announcement Type:** A dropdown menu with the placeholder text "Select announcement type (optional)".

*Creating an Announcement Template*

### Field

### What it does

|                          |                                                                                                |
|--------------------------|------------------------------------------------------------------------------------------------|
|                          |                                                                                                |
| <b>Title</b>             | The template name shown to users when they select a template. Required.                        |
| <b>Description</b>       | The text automatically populated when a user selects the template. Required.                   |
| <b>Visibility</b>        | Whether the template is shown to the organisation or hidden from lists.                        |
| <b>Behaviour</b>         | Whether selecting the template replaces or appends to existing content in the Description box. |
| <b>Urgent</b>            | When enabled, also sends an email to users.                                                    |
| <b>Desktop Alert</b>     | When enabled, triggers a teamSOS Desktop Alert.                                                |
| <b>Silent</b>            | When enabled, sets the announcement to send silently by default — no sound or screen takeover. |
| <b>Default Group</b>     | The group of users that will receive the announcement.                                         |
| <b>Announcement Type</b> | 'Confirm you're OK' or 'To be acknowledged'.                                                   |

**New:** You can now do **Desktop Alert group targeting** so the template alerts only the right groups/devices. We have a separate guide for this.

## Incident Templates

Incident Response templates let you create predefined responses for quickly setting up incidents, which are then assigned to specific incident types. Once set up, users can select a response when calling for help, automatically pre-populating the relevant fields and saving valuable time. Go to **Admin > Configuration > Templates** and choose **Incident Responses**.

Edit Incident Template

Title:

Intruder Seen

Message:

I've seen a man jump over the fence, he is carrying a bag

Incident Type:

Call for help

### Creating a Quick Incident Response

| Field                | What it does                                                                  |
|----------------------|-------------------------------------------------------------------------------|
| <b>Title</b>         | The template name shown to users when selecting a template. Required.         |
| <b>Notes</b>         | The notes automatically populated when a user selects the template. Required. |
| <b>Incident Type</b> | The incident type the template is assigned to.                                |
| <b>Behaviour</b>     | Whether selecting the template replaces or appends to existing content.       |
| <b>Visibility</b>    | Whether the template is shown to the organisation or hidden from lists.       |

**Tip:** Add **[Student]** within the Notes and the incident response will prompt the user to enter a student tag when the template is selected.

## Quick Messages

Quick Messages let users involved in an incident select predefined messages quickly and efficiently. Go to **Admin > Configuration > Templates** and choose **Quick Messages**. Click '**Create**' to define your Quick Message.

The screenshot shows a modal form titled "Create Quick Message". At the top right is a teal "Back" button. The form contains a "Message:" label followed by a large text input area. Below this is a "Visibility:" label with two radio button options: "Shown to organisation" (which is selected) and "Hidden from lists". At the bottom left of the form is a teal "Save" button.

### Creating a Quick Message

- **Message:** the Quick Message that users will be able to choose.
- **Visibility:** whether the Quick Message is shown to the organisation or hidden from lists.

## Locations

Create locations that can be added to an incident, helping responders identify where assistance is needed. Go to **Admin > Configuration > Templates** and choose **Locations**.

The screenshot shows a 'Create Location' form. At the top, there's a title 'Create Location' and a green 'Back' button. Below this, there are two input fields: 'Location Name' and 'Location Code'. Underneath these is a 'Visibility' section with two radio buttons: 'Shown to organisation' (selected) and 'Hidden from lists'. Below that is a 'What3Words' section with an input field, and a 'Radius' section with an input field. A purple button labeled 'Hide advanced settings' with an upward arrow is positioned below these. Underneath this button are three input fields: 'Elevation (m)', 'Latitude', and 'Longitude'. At the bottom left of the form is a green 'Save' button.

*Creating a Location*

- **Location Name:** a clear, specific name that responders can identify easily.
- **Location Code:** a unique identifier or code for quick reference.
- **Visibility:** controls who can see the location within the system.
- **What3Words:** the three-word address to pinpoint the exact location. (Please note: currently, it's not fully functional)
- **Radius:** the area of focus around the location, so responders know the boundaries.

### Advanced settings

- **Elevation (m):** the height above sea level — helpful in multi-storey or varying terrain.
- **Latitude & Longitude:** precise geographic coordinates to pinpoint the location on a map.

### What you should do

- Build Announcement templates for messages you send regularly, setting Silent or Desktop Alert defaults as needed.
- Create Incident Response templates for your common incident types to speed up calling for help.
- Set up Quick Messages and Locations so responders can act with clear, consistent information.

## Need help?

If you encounter any issues, please contact [help@teamsos.co.uk](mailto:help@teamsos.co.uk)