Create a New Template

Last Modified on 10/29/2021 3:28 pm EDT

Templates are designed to save time by auto-completing fields for common or time-sensitive dispatches. Templates are also used for dispatches that are created from or Connect.

Once a template is saved, a dispatcher can search by its name or code and once selected, the fields from the template are automatically entered into the new dispatch.

The Template settings displaying a previously created template.

To create a new template:

1. Click **Settings >** **Templates**.

2. Click the **Create** icon in the pane to the left.

A new blank template.

3. Enter a name for the template (e.g., Alarm) in the **Name** field.

4. Enter a code in the **Code** field. The code may contain letters, numbers, or special characters and can be used to search for the template when creating a new dispatch.

5. Select the operational zone(s) for this template.

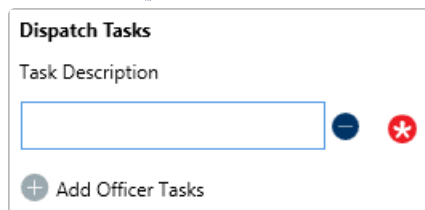> ⚠️ If no operational zone is selected, the template will remain inactive.

6. **Optional:** Select the **Available on mobile** checkbox if officers will use this template to create new dispatches via the Officer Mobile app.

The Name, Operational zones, Code, and Available on mobile fields.

7. Enter search terms in the **Call Category** field or use the dropdown menus below this field to select an activity type. Ensure that you select all three levels for it to dispatch properly.

8. Select a priority from the **Priority** dropdown menu.

9. **Optional:** Enter a description of the dispatch or any notes in the **Description** field.

10. **Optional:** Enter any notes about the dispatch in **Initial Notes** field to create the first

message that will appear in the dispatch-related conversation. Dispatch-related conversations are created automatically for new dispatches and appear in the **Messages** panel.

11. **Optional:** Select a call source in the **Call Source** dropdown menu.

12. **Optional:** Enter search criteria to select the user who will initiate the dispatch in the **Initiated By Person** field and/or enter a phone number for that person in the **Contact Number** field.

13. **Optional:** Select an officer callsign from **Default callsign** dropdown menu. When a default call sign is selected, the on-duty officer with that call sign is automatically assigned to any tasks when the dispatch is created, but dispatchers can override this selection, if needed. If the dispatch has no tasks, the officer is automatically assigned to a **Respond and assist** task. If no officers with that call sign are currently on duty, dispatchers can select an officer with a different callsign.

14. **Optional:** To create officer tasks:

      a. Click the ⊕ icon beside **Add Officer Tasks** to show the **Dispatch Tasks** section.

      b. Enter a description in the **Task Description** field.

      c. Click the ⊕ icon to create more tasks as needed.

The Dispatch Tasks section.

> ✅ Any information entered or tasks created in a template may be overwritten by the dispatcher as needed.