

Import Members into Heylo

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If you have your member roster or directory with member emails or phone numbers from another platform, Heylo has personalized onboarding for your members! Share your member roster with the Heylo team via support chat or support@heylo.co, and Heylo onboards each member individually and automatically uploads all the applicable existing information from the roster. It's easiest for your members - they only need to accept!

[See all member onboarding best practices and sample communications.](#)

How it works:

1. Gather member info. It can include everything from their email, name, attendance, and emergency contact to their membership plan, renewal date, and payment info; however, only name and email are required.
2. Add member info to a Google Sheet or CSV file([see sample - make a copy!](#))
3. Submit to the Heylo team at support@heylo.com, Heylo Support chat or [here](#) and include a launch date. The Heylo team reviews the submission and replies within 24 hours
4. Upon launch, members info is imported and members receive a personalized email. The email contains a custom link unique to that member with all their information from the member roster
5. When members accept the invitation and click the link, the information is automatically added to their account. They can confirm their information is correct when they join. Existing members in the group are automatically matched and require no action.

[See a sample member info fields for import.](#)

Benefits:

- Members do not need to complete information when onboarding - their details are already completed!
- Any existing paid membership renewal dates will remain intact
- All members receive announcements and event updates by email, even if they have not yet joined your group on Heylo
- Add or remove any members from your member directory before members accept their invitation

- Export your member roster with all your member info, before members accept their invitation

When members join Heylo, not only do they confirm their info, but they also see all the group's [events](#), [communications](#), and [members](#)! Heylo de-duplicates multiple accounts automatically.
