


Safety, security and admin controls

11/19/2024 9:47 am PST




Giving Back - To Mother Nature

📅 Jan 21 2024 @1:30 - 3:00 PST

📍 Camino de las Colinas a...

[Sign Up](#)




Group hike: Parents day off!

📅 Jan 24 2024 @1:00 - 5:00 PST

📍 Golden Gate Park

[Take attendance](#)



Giving Back - Trash Cleanup Day

📅 Jan 14 2024 @1:30 - 3:00 PST

📍 Boston Commons

[Join chat](#)

We strive to keep Heylo a safe and secure place for groups. On Heylo, [admins](#) have the ultimate control over their group. Admins can make anyone else an admin, or they can remove admin status from anyone, including themselves. There are no limits on the number of admins in a group. Admins can access controls of the group from the “Admin Settings” button on the group tab.

Group management

Admins have the authority to [create](#) and manage groups on Heylo. They can set group guidelines, [configure settings](#), and customize the group's appearance and branding:

- Customize the group link
- Change the group appearance
- Create new events, group chats, links
- [Invite](#) members
- Update [permissions](#)

Member management

Admins can [invite](#) and add new members or admins to the group, as well as remove or ban members or admins. They have control over membership and can ensure the group remains

inclusive and aligned with its purpose.

- Approve new members (if required in permissions)
- Designate another admin
- Invite admins
- Grant [leadership titles](#)
- Nominate [group reps](#)
- View member insights
- Remove admins or member
- Ban admins or members
- [Export member info](#)

Event hosts

Admins also have [host](#) rights over every event in the group. That means they can take attendance, edit, delete, or cancel any event, or export attendees, even if they aren't the host.

Communication controls

Admins have the ability to moderate group content, including [messages](#), [group chats](#), [events](#), and [links](#) shared within the group. They can delete any content that violates group rules or guidelines.

- [Delete any message](#), GIF, or image in any group chat or event chat
- Delete any event, group chat, or link

Note, admins do not have visibility into [private direct messages](#) they are not a part of.

Payment settings

When a group collects [payments](#) on Heylo, admins control the payment settings including [event tickets](#), [membership plans](#), and [linked bank accounts](#).

- Access payment and member analytics
- Change membership plans
- Create ticketed events
- Add, edit, or remove bank account info
- Refund member payments

On Heylo, admins have ultimate control over the group.

Group permissions

Permissions

We strive to keep Heylo a safe and secure place for groups. [Admins have the ultimate control](#) over their group. These permissions help maintain order, privacy, and the overall functioning of the group.

To edit group permissions, navigate to admin settings from the group tab, and then select "Permissions."

Permissions can be granted to all members, admins only, or specific [Roles](#).

Permission controls for onboarding new members

Admins control who joins their group and how their group appears on Heylo.

- **Discoverability.** Heylo can help promote your group by making it [discoverable](#). Discoverable groups appear in [Heylo Discover](#) and on the [profiles](#) of members. When they join other groups on Heylo, all the members in those groups can see the discoverable group. Furthermore, Heylo helps discoverable groups by indexing [group profiles](#) and surfacing them on the web and [search engines](#), like Google and Bing.
- **New member approval.** When set to manual, admins must approve [all new members](#) before they join the group on Heylo. This setting is agnostic of discoverability. Instead of seeing a "join" button on a group profile, new prospective members can "request to join". The request sends a [push notification](#) to admins, and the prospective member is listed at the top of the members screen. Admins can either accept or reject the member. If accepted, the member gets automatically added to the group, notified, and presented with an invitation on Heylo. If rejected, the pending request disappears, and no one is notified. An admin can always initiate a [direct message](#) with a prospective member as well if any additional information is needed.
- **Invitations.** Admins can restrict who can send [invitations](#) to the group. When restricted to admins, members must communicate directly with admins via in-person or chat to request new members to be invited to the group.

Permission controls for members

Group permissions on Heylo also determine the level of access and actions that members can perform within a group.

- [Group chats](#). New members can create new group chats from the chats screen
- [Links](#). New members can create new group chats from the group screen
- [Events](#). New members can create new group chats from the events screen
- [Event check-in counts](#). Admins can control who can see total check-in counts on other members' profiles.

It's critical for admins to carefully consider and configure group permissions to strike a balance between collaboration and privacy. By setting appropriate permissions, admins can create a safe and productive environment for group members to interact and engage according to the group's culture and values.

Waiver signatures

PRO ⓘ Waiver signature collection requires a Heylo Pro subscription. [Learn more here.](#)

Waivers, or liability releases, can provide members with context on the group's activities and risks associated with them. Furthermore, when legally sound, they can serve as a release of liability from the leaders of the group.

Heylo can help group leaders get waivers signed. By uploading the waiver language to Heylo, members must sign the waiver in order to participate in the group's activities by digitally signing with a check mark: "I have read, understand, and agree to..." on the waiver. If the member does not sign, they are not allowed to join the group. Members only need to sign the waiver once, not for every single event.

Launch waiver signatures

To launch your waiver:

1. Head to the admin settings under the group tab and select "Waiver Collection"
2. Copy and paste your waiver language into the text section on Heylo. Note, rich text is not supported
3. Save and select who should sign. The selected recipients must sign the waiver in order to continue to participate in the group. Note, a waiver IS NOT required to [request to join](#) a group

Update waiver

Admins can add new text to the form and select save. Admins can select who should sign the new waiver - all members or just new members.

View waiver status

An admin can view waiver status anytime:

1. [Member insights](#)
2. During [event attendance](#), admins can see who has not yet signed a waiver
3. [Member CSV export](#)

When a waiver is signed, a timestamp and version of the document are marked in Heylo's databases and recoverable if ever required by either party. To recover a signed waiver document,

[contact the Heylo team.](#)

Group leaders should give members adequate time to read and accept the waiver. While seemingly complex, waivers can help members understand the potential risks associated with joining the group and attending events. Heylo handles the friction by collecting waiver signatures and providing sufficient time for members to read and accept the terms of the group before joining.

Member insights

[Group admins](#) on Heylo can access insights into their members. From the profile of the member, admins can select the three-dot more menu, and then “member insights”.

There, admins can see analytics about members on a granular level including:

- Date joined
- Waiver sign date
- [Total events hosted and attended](#)
- Total [payments](#) collected
- [Membership plan](#), if set
- Private info

Ultimately Heylo is a comprehensive space for admins to control and lead the groups according to their own culture and values.

Reports, analytics, exports

Heylo provides reporting on both individual members and consolidated views visible only to [admins](#). Plus, admins can export member info from their group at anytime.

Payments reports

Once there is a [bank account linked](#) to the group, admins can see a dashboard of paid members and member payments. The dashboard is automatically maintained and kept up to date real-time. Admins can control the data range of the dashboard by pressing the top date range.

Individual member reports

An admin can view a member's individual history with the group including waiver and payments. Visit any members profile to see [member insights](#) and individual member reporting.

Event export

An admin or [host](#) can export event attendee [information from an individual event](#).

Member roster export

Admins can export their member info into a CSV file from Heylo, anytime. The CSV file can be opened in Google Sheets, Microsoft Excel, or any other spreadsheet software.

When selecting the export option, admins will receive an email with all member's info. The info includes:

- Member name
- Join date
- [Profile](#) details
- [Icebreaker](#) responses
- [Email](#)
- [Waiver](#) signature date
- [Event attendance](#)
- Private info
- Last active date, or the last time they visited your group

Note, member passwords and payment information are encrypted and not available for export

Payments export

Paid groups get a special payments dashboard at the top of their admin settings. Any admin in the group can view the dashboard. The dashboard is updated in real-time.

The dashboard contains two views: first, a chronological feed of member payment status including new members, canceled members, and members past due. Second, a list of payment history.

The dashboard can be sorted across various comparison times by selecting the date on the top left.

Payment details can be exported into a CSV file from the group admin settings as well. Payment exports include all payments, fees, and payment sources by payment, all time

Custom export

If an admin needs a custom report, [get in touch with the Heylo team](#), and we'll see if we can help!

Integrations

Heylo serves as the place for your members to access the info they need to belong to your group

and communicate with other members. However, Heylo doesn't do everything! Where there are missing gaps, we strive to integrate Heylo with other software platforms to keep groups operating as seamlessly as possible.

Integrations include:

- **Google and search engines.** Groups and events can be listed on Google and [search engines](#). Admins can make their group discoverable in their [admin settings](#), and their [group profile](#) indexed on web and available for search on Google and search engines. It is optimized for search engine discovery to enable easy discoverability. Event pages can be indexed as well. As always, group and event pages can be controlled and disabled by a group admin.
- **Google and Apple calendar.** When a host creates an event, or a member signs up for an event, they can add the event details directly to their [personal calendar](#) (mobile app only). However, they must check Heylo for any changes in the event status.
- **Google Maps.** An event host can integrate a specific [location](#) for their event for easy navigation. Members can tap the navigation button, and the location automatically opens to Google Maps.
- **Mailchimp.** Admins can automatically pass a member's name, email, and associated tag to an existing [Mailchimp](#) account. To set up Mailchimp integration, admins need their Mailchimp API key.
- **Instagram.** Events on Heylo can be [published to Instagram stories](#) with one tap. Heylo will automatically generate an event promo card, and hosts and members can seamlessly share.
- **Shopify.** Admins can automatically pass member emails from Heylo to a Shopify store to verify discount codes (see stores for more info).

Reporting inappropriate behavior

Everyone has access to reporting tools to flag inappropriate behavior on Heylo. Inappropriate behavior can include unwanted [messages](#), unacceptable actions, or inappropriate photos.

There are two ways to report a member:

1. Navigate to a member's [profile](#), select the three-dot menu and then select "report". Reports from profiles are best for issues with that specific person.
2. Open the chat details, and select "report". Reports from [group chats](#) or [private direct messages](#) are best for issues with that specific conversation.

When a report is submitted, the Heylo team first reviews the behavior. Anyone sending spam is removed entirely from the Heylo platform. Other issues are escalated to the specific [group leaders](#). Only with permission from the reporter, details of the case are shared with the leaders of the group, and the leaders are encouraged to help resolve the issue with the support of the [Heylo team](#).

Block and restrict direct messages

On Heylo, members have control over who can send them direct messages. Any member can block another member.

Blocked members

- Any existing direct message conversation is deleted when blocked, and no new direct message conversation can be initiated.
- Blocks do not apply to group activities. For example, members can still see messages and event attendance in the group.
- Blocked members cannot direct messages.
- No notifications are sent to the person who was blocked.
- For further unwanted or inappropriate activity, consider selecting Report.

How to block and unblock

- To block a member, navigate to their profile and select “Block”
- To unblock a member, navigate to their profile and press the three-dot menu to select “Unblock”

Remove member

[Admins](#) can remove any member from the group.

When a member is removed, they cannot contribute to [group chats](#) or [event chats](#), nor can they [sign up for new events](#) or view [members](#), [stores](#), or [pages](#) in the group. They are also no longer visible in the member list to members and cannot initialize [direct messaging](#) or [private chats](#) with other members. Removed members are not included in member counts. However, admins can still see and direct message removed members under “past members” at the bottom of the members tab.

Removed member’s history is not altered, however. The following are not deleted:

- [Messages](#) in group chats and event chats
- [Attendance data](#)

Leave group

Anyone can leave a group anytime. No one is notified when you leave.

To leave a group

1. Navigate to your account by pressing the photo on the top right

2. Scroll to the group and press the gear icon
3. Select "Leave"

Members can rejoin the group at any time and the profile will remain intact. However, joined [group chats](#) and [event sign-ups](#) will reset.

Members can continue to use any existing [private communications](#) on Heylo.

Delete group

A group is automatically deleted when there are no members in the group. An [admin](#) can remove members, and then leave the group themselves.

If there are many members, admins can [get in touch with the Heylo Team](#) to assist with group deletion.

Data and payments storage, privacy, and encryption

In order for groups to build community, they must be safe. On Heylo, we strive to help groups have a safe space to organize and connect with each other.

Data storage and security

With exception to payments, data inputted into Heylo is stored securely using [Google Cloud](#).

All Heylo team members do not have access to all messages or information shared; a handful may retain access to handle disputes or serve legal requests. Learn more details in Heylo the [privacy policy](#).

[Messages](#) are not encrypted. They are stored in a secure database and are not associated with the name of any specific person.

Payments security

Heylo partners with Stripe to process member payment information. Payment information is encrypted and stored securely by Stripe. Heylo and group [admins](#) do not have access to the payment information but can charge the card according to the terms of the group. Learn more about Stripe Security [here](#).
