Groups.io
Getting Started Guide
for
Group Owners

Contents

Introduction to Groups.io for Group Owners

Groups.io provides people who share common interests with an ad-free platform for communicating with each other through email groups and group websites.

Three levels of plans are available in Groups.io: Free, Premium (paid; however, a free trial is available), and Enterprise (paid). Free groups provide only basic functions related to sending, storing, and managing messages. Premium and Enterprise groups provide additional collaboration features such as calendars, databases, and wikis.

Those who want to create and run a group in Groups.io can:

- Have a free group with basic message functions or opt for a paid plan that provides additional features.
- Create an announcement-only, moderated, or restricted group, or a group with other combinations of settings.
- Customize member notices such as welcome, goodbye, and pending member messages as well as monthly reminders and guidelines.
- Designate multiple owners and moderators using Groups.io's full permissions system.
- Monitor the group through an activity log, and receive email or web/app notifications (or both) about group activity.
- Track email delivery to group members.
- Approve or reject messages from moderated members either through the group's website or by email.
- Automatically moderate or lock individual group topics after a set number of days.
- Set up hashtags to control and organize messages in the group's archive.
- In paid groups, create a wiki for storing group knowledge.
- In paid groups, control access to and use of the group's web-based collaboration features:
  - Calendar
  - Chats (similar to chat rooms on other platforms)
  - Databases
  - Files
  - Photos
  - Polls
  - Wiki

For more information about the features and benefits of Groups.io, see the [Features page on the Groups.io website](#).

Note: If you are looking to move content to Groups.io from another platform, refer to the [Moving to Groups.io wiki page](#) in the [GroupManagersForum](#) group on Groups.io. That group's wiki and message archive are open for anyone to read—even those who do not have a Groups.io account.

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Step 1: Sign up with Groups.io and create an account

After you have decided you want to create a group on Groups.io, the first thing to do is sign up with Groups.io and create an account . For instructions, see *Creating a Groups.io account* in the Group Members Manual.

Note: If you already have a Groups.io account, skip to Step 2: Decide which plan you want.

For more information about Groups.io accounts in general, see *Understanding Groups.io accounts* in the Group Members Manual.

Tip: If you set a timezone in your Groups.io account preferences, groups you create will have that timezone by default. Otherwise, your new groups will have a default timezone of U.S./Canada Pacific Time (UTC–08:00 or UTC–07:00 depending on whether Daylight Saving Time is in effect).

Now go to Step 2: Decide which plan you want.

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Step 2: Decide which plan you want

Groups.io provides three levels of plans:

- Free, for groups of up to 100 members; per-member pricing applies after 100 members
- Premium, which has a monthly or annual fee but also has a free trial
- Enterprise, which has a monthly or annual fee (this plan is intended primarily for large organizations)

See the Pricing page on the Groups.io website for a feature summary and current prices. You can click or tap the **See A Complete Plan Comparison** button near the bottom of the page and review the resulting feature comparison page to help you decide what plan you want to have. Free groups provide only basic functions related to sending, storing, and managing messages. Premium and Enterprise groups provide additional collaboration features such as calendars, databases, and wikis.

Note: This guide focuses on Free and Premium groups. Because Enterprise groups typically are tailored to meet the specific needs of particular organizations and, for that reason, have some extra features, they are outside the scope of this guide.

If you are completely new to Groups.io, the easiest way to start is by creating a Free group. You can always upgrade to a paid level later. That said, you can try most Premium features for free for 30 days. With a trial Premium group:

- You have access to all Premium features except the ability to add members to the group directly and the ability to change group members' email addresses.
- You can upgrade to a paid Premium plan at any point during the trial, and it will start at the end of the 30 days.
- One week before the end of your trial, you will get an email reminder.
- If you opt not to continue with a paid plan, your group will automatically be downgraded to a Free group at the end of the 30 days. Any subgroups you created during your trial will be locked and other Premium features will become inaccessible. (Nothing will be deleted in case you decide to upgrade the group in the future.)

Now go to Step 3: Create the group and specify initial settings.

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Step 3: Create the group and specify initial settings

Restriction: You must use a desktop browser or a mobile browser to create a group. Due to rules imposed by the Apple App Store and Google Play, it is not possible to create a group using the Groups.io mobile app.

For instructions, see *Creating a group* in the Group Owners Manual.

When your group is created successfully, Groups.io displays the Promote page with a banner at the top stating that your group has been created, along with some introductory information. You will receive an email notification when the group is approved by Groups.io. which could take a few hours. If you opted to include your group in the directory of publicly listed groups, it will take some time for the directory to be updated to include your group.

Now go to Step 4: Customize the group's settings.

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Step 4: Customize the group's settings

While you wait for the email notification that your new group has been officially approved, you can customize the group's settings. First, display the Settings page:

- Desktop browser: In the left menu that appears on all pages in your group's website, click **Admin** and then, in the dropdown menu, click **Preferences** and then **Settings**.
- Mobile device: Tap the **More** icon at the bottom of a page. When the More menu appears, tap **Admin**, then **Preferences**, then **Settings**.

Group settings

The Settings page is organized into panels that contain related settings. Each panel has a gray title bar. Click or tap the panel's name or the arrow at the far right of the title bar to expand or collapse that panel.

The list below provides basic information about some of the settings on each panels.

! Important: When you finish customizing settings on the Settings page, make sure you scroll all the way to the bottom of the page and click or tap the **Update Group** button. Your changes will not take effect or be remembered until you click or tap that button.

- General panel

  The General panel contains the email address and description that you entered when you created your group. You can revise those elements here, if desired. You can also enter a title for your group that will be displayed on the group's home page as well as in the directory of publicly listed groups (if you opted to list your group there). As with the description, make sure you include appropriate keywords in the title if you want to promote your group.

  In this panel, you can enter a subject tag to be included on the subject line in group emails. You can also enter the URL of a website to be included on the Groups.io home page for your group. The URL will be listed in the Group Information section on the group's home page and will be a clickable link.

  Additional settings on this panel include an Allow Sponsorships checkbox and an Additional Payment Information field. See the Group Owners Manual for information about those settings.

  Tip: If you decide you want to change your group's email address, now is the time. It is possible to rename a group after it is well established, but doing so has some ramifications. See *Renaming a group* in the Group Owners Manual.

- Privacy panel

  In the Privacy panel, you can change the visibility setting you selected when you created the group—however, if you selected a "private messages" setting at that time, the "publicly viewable messages" settings will not be available.

  You can also specify:

  - Who can view the group's member list
    If you want to allow group members to view the member list, you must first scroll down to the Group Type and Moderation panel and select the **Restricted Membership** checkbox there. Only a group that has restricted membership can allow its members to see the member list. For more information, see Member list in the Group Members Manual.
  - Whether email addresses in the group's archive are fully visible to group members or are masked (hidden)
    Be aware that even if you selected a "publicly viewable messages" visibility setting for your

group, email addresses in the archive will always be hidden from nonmembers who view the archive.

- **Group Type and Moderation panel**

Groups.io does not have any setting that will allow someone to join your group without approval and immediately post an unmoderated message, but you still must select at least one of the settings in the Group Type and Moderation panel to help prevent spam. You can select more than one setting.

If you want to restrict the membership in your group to only people whose memberships you or designated moderators approve, select the **Restricted Membership** checkbox. If you want to have a group in which only you and designated moderators can post messages, select the **Announcement-Only Group** checkbox.

Tip: If you want to screen prospective members before allowing them to join your group, select the **Restricted Membership** checkbox. After you save your group's settings, you can create a Pending Subscription notice (see the Group Owners Manual) that requests prospective members to provide additional information before you approve their membership requests. That notice will be sent automatically to anyone who applies to join the group.

- **Message Policies panel**

The settings on this panel that you should be particularly aware of are:

- Disable No Email: In their individual group subscriptions, group members can select a No Email option if they do not want to receive a group's messages by email (for example, they prefer to keep up with the group online through its website, or they are going away and want to temporarily suspend email delivery of group messages). If for some reason you want to prevent members of your group from selecting the No Email option, select the **Disable No Email** checkbox. This setting makes the No Email option unavailable in members' individual subscription settings. However, be aware that members will still be able to select a Special Notices Only email delivery option in their subscription settings, which means the only messages they will receive by email will be those that are sent as special notices.
- Hashtag Permissions: This setting controls whether group members can create new hashtag s by including them in message subject lines. It also controls how messages are handled if members are not allowed to create new hashtags but include new hashtags in a message anyway. If you do not want anyone other than yourself and designated moderators to be able to create hashtags, select one of the "Messages from members can only be tagged with existing hashtags" options.
- Reply To: This setting controls who is initially set to receive replies to messages that are posted to the group. Select the option you want to apply. Be aware that members will still see additional reply options in messages on the group's website and in email digests (if they are using that delivery option) unless you use the Remove Other Reply Options setting to remove those additional reply options.
- Remove Other Reply Options: When you select this checkbox, links to reply options other than the one you selected in the Reply To list above are removed from messages on the group's website and from email digests.
- Storage Limit Reached: Select the option you want to use to handle attachments when the group's storage space limit is reached. For more information, see *Managing a group's storage space* in the Group Owners Manual.

- **Message Formatting panel**

In this panel, you can add some custom text—for example, a disclaimer or a link to the group's guidelines—to the system-generated footer that Groups.io includes in all email messages automatically.

In addition, you can select the format that emailed group messages will have as well as how to handle attachments to messages. If you do not select a specific message format option, emailed messages will have the format used by their senders.

Be aware that the footers in plain text messages look different from the footers in HTML-formatted messages . Therefore, you might want to consider selecting a specific message format so the footers in all your group's email messages will be consistent.

- Premium & Enterprise Features panel

Restriction: The features listed in this panel are available in Premium (trial or paid) and Enterprise groups. They are not available in Free groups that were created on or after August 24, 2020.

In the Premium & Enterprise Features panel, you can specify whether these Groups.io features are available in your group and who has access to them (some features have additional settings):

  - Message reposting
  - Member directory visibility
  - Subgroups
  - Calendar
  - Chats
  - Databases
  - Files
  - Photos
  - Polls
  - Wiki

Default email delivery options and other settings for group members

You can set default email delivery options, the default language, and default time and date display settings, including the timezone, that will apply to new members of the group. To display the page that contains these settings:

- Desktop browser: In the left menu that appears on all pages in your group's website, click **Admin** and then, in the dropdown menu, click **Membership** and then **Defaults**.
- Mobile device: Tap the **More** icon at the bottom of a page. When the More menu appears, tap **Admin**, then **Membership**, then **Defaults**.

The resulting page contains a Default Subscription Settings panel with email delivery options and a Default User Settings panel with language, time, and date display settings. For detailed descriptions of all the settings, see the applicable help topics.

In the Default User Settings panel, review the Timezone field. The timezone displayed here matches the timezone that is set in your Groups.io account preferences. If you intend to use the calendar in your group and everyone in your group will be located in the same timezone, ensure that the timezone in this panel is accurate so that group members will receive calendar reminders at the correct time.

! Important: Before you leave this page, remember to click or tap the **Update Settings** button at the bottom of the page to save any changes you made.

Note: Be aware that group members will be able to override the default email delivery and user settings individually by changing their personal email delivery and account settings. Also, the settings in the Default User Settings panel apply to the accounts of people who are entirely new to Groups.io at the time they join your group (that is, they have not joined any other group at the same email address or otherwise set the time and date preferences in their own account settings).

Now go to Step 5: Create a Group Guidelines notice and other member notices.

Step 5: Create a Group Guidelines notice and other member notices

You can create customized, prewritten notices for your group that can be sent to group members for various reasons. These notices make it convenient for you and designated moderators to send commonly used messages to group members for different situations without having to rewrite the text each time. Some notices can be sent automatically for certain events, such as when someone joins an unrestricted group or when someone leaves a group.

Groups.io provides a number of notice types that you can create or customize for different uses. For a full list, see *Managing group and member notices* in the Group Owners Manual.

To create a member notice:

1. Go to the Notices page:
   - Desktop browser: In the left menu, select **Admin** > **Preferences** > **Notices**.
   - Mobile device: Tap the **More** menu at the bottom of a page, then select **Admin** > **Preferences** > **Notices** on the More menu.
2. On the Notices page, click or tap the **New Notice** button.
3. On the New Notice page, from the Notice Type list, select the notice that you want to create.
4. Complete the rest of the page.

   Note: For most notice types, you will see an Active Message checkbox. When the checkbox is selected, the notice is sent automatically at the time its corresponding event occurs. Select this checkbox if you want to make the notice you are creating the Active Message for that notice type.
5. Click or tap the **Add Notice** button at the bottom.

In your new group, consider creating or customizing these notices before you invite or add any members:

- Invite
  In an Invite notice, you can provide a personalized message to include in all invitations to join the group.
- Welcome
  A Welcome notice is always sent to people who join the group. When the group is created, the system generates a default, "canned" Welcome notice. You can edit the default notice to personalize it for your group. If desired, you can create multiple Welcome notices.
- Group Guidelines
  You could create a Group Guidelines notice to document the rules of conduct and best practices for your group. You can set the Group Guidelines notice to be sent automatically to new members when they join the group as well as automatically to the entire group every month. It will also be accessible on the group's website through a Guidelines entry in the left navigation menu (for an example, see the GroupManagersForum group).

  Tip: Some sample Group Guidelines notices are available in the wiki in the GroupManagersForum group. Feel free to use those samples as a basis for your group's guidelines.
- Monthly Reminder
  You could create a Monthly Reminder notice to remind your group's members about the basics of using the group, such as how to change their subscription settings, update their email address, post messages to the group, use hashtags in the group, and so on. Consider including a link to the Groups.io Help Center.
- Pending Subscription
  If your group is a restricted group and you want to screen potential members before approving their

requests to join the group, create a Pending Subscription notice containing the questions that you want potential members to answer.

Tip: Some templates that you can base your group's Pending Subscription notice on are available in the wiki in the GroupManagersForum group.

- Direct Add
If your group is a paid Premium or Enterprise group, you can create a personalized Direct Add notice to be sent to anyone you add to the group directly.

Restriction: Direct adding is not available in Free groups or in Premium trial groups.

Now go to Step 6: Change the group's cover photo and icon.

Step 6: Change the group's cover photo and icon

You can personalize your group's home page by changing the default Groups.io image (cover photo) to an image that reflects your group. You can also change the group icon that appears on members' Feed home pages and in the mobile version of Groups.io. For instructions, see *Changing the group's cover photo and icon* in the Group Owners Manual.

Now go to Step 7: Set your moderator notification preferences.

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Step 7: Set your moderator notification preferences

Groups.io provides the ability for group owners and moderators to receive system-generated notifications when certain activities occur in the group. You can receive those notifications by email or as web/app notifications, or both, and you can specify what activities you want to receive notifications about.

To receive web/app notifications, you must first enable them in your Groups.io account settings. You set moderator notification preferences for a specific group in your subscription settings for that group. For details and instructions, see *Moderator notifications about group activity* in the Group Owners Manual.

Now go to Step 8: Create some hashtags.

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Step 8: Create some hashtags

If you intend to use hashtags in your group, consider creating some before your group is fully active. You certainly can create hashtags later and then apply them to existing topics, but at this stage you might want to create any standard hashtags you plan to use in the group (for example, an #admin hashtag for topics that are related to group administration). For more information, see *Hashtag uses and notes* in the Group Owners Manual.

In addition, Groups.io creates specific system hashtags automatically the first time certain types of notices are sent or certain activities occur. For details, see *System hashtags and associated notifications* in the Group Members Manual.

Tip: If you want to apply specific properties to any system hashtags (such as allowing only moderators to use them or setting them to No Email so messages tagged with those hashtags will not be emailed to members), you can create the hashtags yourself—before they are generated by the system—and apply the desired properties. Make sure the hashtags you create have the same names as the system-generated ones.

Now go to Step 9: Try the group's features.

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Step 9: Try the group's features

At this point, you will be the only member of your new group (unless you sent invitations to others to join the group when you were creating it). Before the group has many more members, consider "test driving" some group features so you can check that they are working as expected, and to help you get familiar with them if you are new to Groups.io overall. You might want to ask one or two other people to join your group now and help you test it.

> **Tip:** If you have an additional email address, consider joining your group at that email address as well. It will have a separate Groups.io account. Through that other account, you can be a regular member of the group in addition to being the group's owner through the account you used to create it. Having a way to experience the group as a regular member can be helpful if you need to do any troubleshooting to help members of your group. Sometimes it can be challenging for members to accurately describe issues they are having, especially if they are new to Groups.io. If you have a separate "regular member" account, you might be able to see the issues from those members' perspectives and more easily determine how to help them.

Note: In Free groups, only topic and message functions are available. Additional features are available in Premium (trial or paid) and Enterprise groups. If you created a free Premium trial group but opt not to continue with a paid plan at the end of the trial period, any subgroups you created during your trial will be locked and other Premium features will become inaccessible. (Nothing will be deleted in case you decide to upgrade the group in the future.)

Suggestions for some features to try before your group gets fully up and running include:

- Experiment with topics and messages. For example:
    - Send test messages to the group by email, and post test messages using the group's website. If you created hashtags for your group, include hashtags in some topics.
    - Edit the content of messages in the archive .
    - Edit the properties of topics (such as subject line and hashtags) in the archive.
    - Pin a topic (make it sticky) on the Topics page.
    - Delete test messages from the archive.
- In the calendar, add, modify, and delete some test events. Try the RSVP feature.
- In the Files section, create folders and upload some files. Update and delete files and folders. Check that the #file-notice system hashtag behaves as you expected, especially if you created it before it was generated systematically.
- In the Photos section, create albums and upload some photos. Edit and delete photos and albums. Check that the #photo-notice system hashtag behaves as you expected, especially if you created it before it was generated systematically.
- If you plan to use databases in your group, create a table in the Databases section.
- In the Wiki section, create, edit, and delete some wiki pages. Check that the #wiki-notice system hashtag behaves as you expected, especially if you created it before it was generated systematically. Try pinning a wiki page (making it sticky) on the Topics page.
- Create a subgroup.

Now go to .

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Step 10: Invite or add members to your group

When you are satisfied with your group's initial setup, invite people to join the group. For instructions as well as information on tracking invitations, see *Inviting people to join a group* in the Group Owners Manual.

In a restricted group, you can screen prospective members before you allow them to join the group. See the [Screening New Members Using the Pending Subscription Notice](#) wiki page in the GroupManagersForum group.

If you created a paid Premium or Enterprise group, you can add people to your group directly without going through the invitation process. For instructions, see *Adding members directly* in the Group Owners Manual.

Note: Free groups and Premium trial groups must use the invitation process. Only paid groups can add members directly.

Now go to [Step 11: Designate a backup owner and some moderators](#).

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Step 11: Designate a backup owner and some moderators

It is a good idea to have at least one additional owner for your group as backup in case you become un-available or incapacitated. You also might want to have additional moderators, depending on your group's size and activity level, to help you manage the group. Moderators can have different sets of permissions, so you can assign specific permissions to different people if you want them to handle only certain moderation activities.

> **! Important:** Moderators cannot change anyone's role to owner, and they cannot delete groups. If you are the sole owner of your group and something happens to you, the group might have difficulty contin-uing without you and have to be abandoned or completely reestablished under a new owner. Therefore, if you want to ensure that the group will continue, you should designate a trusted backup owner or co-owner.

Before someone can be a moderator or additional owner, they must be a member of the group. After your group has some members, you can pick those you trust to have owner or moderator roles. For instructions on changing a group member's role to owner or moderator, see *Making a member an owner or moderator* in the Group Owners Manual.

Now go to Step 12: Manage the group.

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Step 12: Manage the group

Understand the controls for moderating messages

As the group owner, you can determine whether messages must be moderated—that is, approved by you or designated moderators before they are posted to the group. Groups.io provides controls for moderating messages at group, hashtag, topic, and individual member levels. This flexibility allows groups to moderate messages using the means that make the most sense for their particular needs.

This table summarizes the moderation control levels and settings and where to find them.

Note: On a mobile device, tap the **More** icon at the bottom of a group page to access the Admin menu.

Control level	Location	Settings related to moderation
Group	Admin > Preferences > Settings > Group Type and Moderation panel	- Message Moderation (list) - New Members Moderated (checkbox) - Unmoderate After (checkbox that appears only when New Members Moderated is selected)
Group	Admin > Preferences > Settings > Message Policies panel	- Allow Nonmembers to Post (checkbox) - Automatically Moderate Topics Older Than [n] Days (checkbox) - Virus Handling (list that has a Moderate option)
Group	Admin > Preferences > Settings > Message Formatting panel	Attachments (list that has a Moderate option)
Individual member	Admin > Members > an individual member's page > Posting Privileges panel	- Use Group Moderation Setting - Override: not moderated - Override: moderated - Override: new member moderated - Override: not allowed to post - Override: moderate the first message of every topic this person starts - Override: moderate all messages of every topic this person starts For descriptions, see *Moderating individual members* in the Group Owners Manual.
Hashtag	Create Hashtag page or Edit Hashtag page	- Topic Duration (list) in conjunction with Lock Topic (checkbox) - Moderated (checkbox) - Replies Unmoderated (checkbox) - Locked (checkbox) - Use by Mods Only (checkbox) For descriptions, see *Creating a hashtag* in the Group Owners Manual.
Topic	Topic Properties page or menu	- Moderate Topic - Lock Topic

	(See *Editing the properties of topics in the archive* in the Group Owners Manual.)	

In Premium (trial or paid) and Enterprise groups, Groups.io provides an Integrations feature that you can use to connect your group with outside services, which allows those services to send outside content to your group. Those integrations can also be moderated. For details, see *About integrations with outside services* in the Group Owners Manual

For instructions on approving or rejecting pending messages as well as information on other message management tasks such as splitting or merging topics, locking or deleting topics, and editing topic properties or message content in the archive, see the applicable help topics.

Become familiar with the member list

To display your group's member list:

- Desktop browser: Select **Admin** > **Members** in the left menu on the group's website.
- Mobile device: Tap the **More** icon at the bottom of a group's page, then select **Admin** > **Members** on the More menu.

The member list is where you can see the subscription preferences, moderation status, and other information about your group's members. The list contains members' display names, email addresses, email delivery methods, and the dates they joined (or were approved to join) the group. Click or tap in a member's row to display their individual membership record, which contains additional details.

At the top of the member list is a Filter button that you can use to display only the members who are in certain categories or who have a certain email delivery setting, moderation status, or message selection setting. In the Filter dropdown menu, select the checkbox or checkboxes for the members you want to see, then scroll to the bottom of the menu and click or tap **Apply**.

Certain colored badges might appear in entries in the member list to indicate a member's email delivery status, email delivery setting, or moderation status. See *Member badges* in the General Information for a list of these badges and their descriptions.

For instructions on approving or rejecting pending members as well as information on other member management tasks such as moderating individual members, removing members, and banning members, see the applicable help topics.

Make use of the group's activity log

Groups.io records all activity that occurs in the group in an activity log. You and designated moderators can use the activity log to review various types of group activity, research email delivery errors, and so on.

For more information, see *Displaying the activity log* in the Group Owners Manual.

Join the Beta group to keep up with changes to Groups.io

To keep up with changes to Groups.io, join the Groups.io [Beta group](). This group discusses the Groups.io service and how it can be improved. You can also post suggestions and bug reports in that group. The Beta group is monitored by the Groups.io team.

Use Help Center resources when you have questions

When you have questions about managing your group—and no doubt you will—see the additional topics and resources in the Groups.io Help Center.