



# Helio Setup Guide

A plain-language walkthrough — install Helio, complete first-run setup, and understand every setting and option. No technical background needed.

For operators & administrators

The open-source growth platform · [github.com/achref-soua/helio](https://github.com/achref-soua/helio)

## WHAT THIS GUIDE IS

# Before you begin

Helio is software you run yourself — on a laptop, a server, or a cloud machine — so your customer data stays with you. This guide takes a non-technical person from nothing to a fully working Helio, and then explains every setting in plain words. You don't need to know how to code.

The one thing your computer needs first is **Docker Desktop** — a free, normal app install from [docker.com](https://www.docker.com/). On Windows, the Helio installer will even offer to set it up for you. Everything else, Helio handles.

## STEP 1

# Install Helio

Pick the box for your operating system, open the terminal it names, and paste the one line. The installer does the rest — it checks your machine (and on Windows even offers to install Docker Desktop for you), downloads Helio, generates its secrets, and starts everything.

## Windows 10 / 11

Open **PowerShell** (press Start, type “PowerShell”, press Enter) and paste:

```
irm https://github.com/achref-soua/helio/releases/latest/download/install.ps1 | iex
```

If Windows asks to restart after installing Docker Desktop, allow it, then run the same line again.

## macOS (Intel or Apple Silicon)

Open the **Terminal** app (Spotlight → “Terminal”) and paste:

```
curl -fsSL https://github.com/achref-soua/helio/releases/latest/download/install.sh | sh
```

Install Docker Desktop for Mac first if you don't have it — it's a free, normal app.

## Linux

Open your terminal and paste the same command:

```
curl -fsSL https://github.com/achref-soua/helio/releases/latest/download/install.sh | sh
```

You need Docker Engine (or Docker Desktop) installed — your distribution's package manager or [docker.com](https://www.docker.com/) both work.

When the installer says **“Helio is up,”** open your browser to `http://localhost:3000`.

**Two install sizes.** By default the installer sets up **core** (the dashboard, API, and AI copilot — lighter, ~2.5 GB of memory), which is right for most people. The **full** stack (~8 GB) adds email sending, event tracking, and analytics; to choose it, add `--full` to the command. You can move up later; nothing is lost.

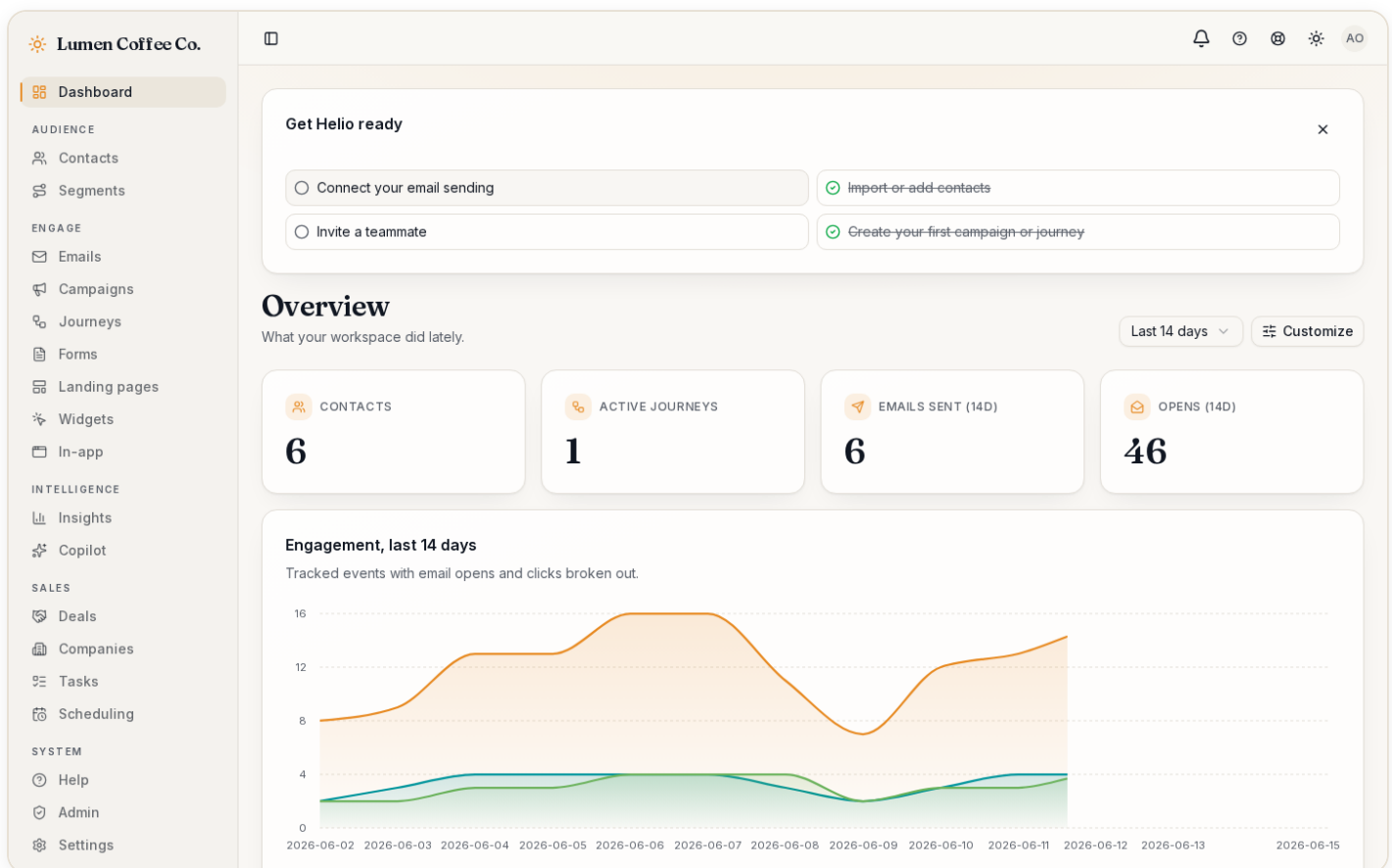
## STEP 2

# First-run setup

The very first time you open Helio, it shows a one-screen welcome wizard. Fill in:

- 1 **Your name** — how you'll appear in the app.
- 2 **Email and password** — your administrator login. Choose a strong password; the button stays disabled until it's strong enough.
- 3 **Organization name** — your company or team.
- 4 **Sample data** — leave this ticked the first time. It fills your workspace with realistic demo contacts, campaigns, journeys, and charts so nothing looks empty while you explore. You can delete it later.

Click **Create & enter Helio**. That's it — you're in, and you're the owner. After this, the instance is invite-only: no one else can sign up unless you invite them.



Your dashboard after setup — KPIs, an engagement chart, and a getting-started checklist.

## STEP 3

# Find your way around

The left sidebar groups everything the way you'll actually use it:

- **Audience** — your Contacts and the Segments you build from them.
- **Engage** — Emails, Campaigns, Journeys, Forms, Landing pages, Widgets, and In-app messages.
- **Intelligence** — Insights (funnels, cohorts, attribution) and the AI Copilot.

- **Sales** — Deals, Companies, Tasks, and the meeting Scheduler.
- **System** — Help, the Admin area, and Settings.

The top bar has your workspace switcher, alerts, help, a feedback button, the light/dark theme toggle, and your account menu. A small **back-to-top** button appears when you scroll down a long page.

The screenshot shows the 'Contacts' page for 'Lumen Coffee Co.'. The sidebar on the left contains a navigation menu with categories: AUDIENCE (Contacts, Segments), ENGAGE (Emails, Campaigns, Journeys, Forms, Landing pages, Widgets, In-app), INTELLIGENCE (Insights, Copilot), SALES (Deals, Companies, Tasks, Scheduling), and SYSTEM (Help, Admin, Settings). The main content area is titled 'Contacts' and shows a list of 6 total contacts. Above the list are buttons for 'Recompute predictions', 'Scoring rules', 'Export CSV', 'Import CSV', and '+ Add contact'. A search bar is also present. The contact list has columns: EMAIL, NAME, SCORE, CHURN RISK, STATUS, and ADDED. The contacts listed are: Radia Perlman (Score 71), Edsger Dijkstra (Score 8), Katherine Johnson (Score 22), Alan Turing (Score 35), Grace Hopper (Score 64), and Ada Lovelace (Score 86). All contacts are marked as 'Active' and were added on 6/15/2026.

Contacts —each person’s profile, traits, score, and AI predictions in one place.

## STEP 4

# Settings, one panel at a time

Everything below lives under **Settings** (and a few under **Admin**). You only need the ones relevant to you — a fresh Helio works out of the box, and you add capabilities as you go. Each panel says who can use it and what every option does.

## 1. Members & invitations

**Who can use it:** Admins and owners

Invite teammates and set what each person can do. Everyone you invite gets an email with a link to join your workspace.

- **Email** — where the invitation is sent.
- **Role** — *Viewer* can look but not change; *Editor* runs the day-to-day (contacts, emails, campaigns, journeys); *Admin* also manages settings and teammates; *Owner* can do everything, including backups and billing-level actions. Pick the least powerful role that lets someone do their job.

## 2. Security (your account)

**Who can use it:** Everyone, for their own account

Turn on two-factor authentication and see the devices signed in to your account.

- **Two-factor authentication** — adds a 6-digit code from an authenticator app (Google Authenticator, 1Password, Authy) on top of your password. Click *Enable*, scan the QR code with your phone, save the backup codes somewhere safe, and enter a code to confirm. If your organisation requires it, a banner will walk you straight here.
- **Active sessions** — every device signed in to your account; sign out any you don't recognise.

### 3. Password policy

**Who can use it:** Admins and owners

Set the password rules for everyone in your organisation.

- **Require two-factor for everyone** — when on, members can't use the app until they've set up 2FA. The strongest single switch you can flip.
- **Password rotation** — optionally force everyone to choose a new password after a set number of days.

### 4. Provider credentials

**Who can use it:** Admins and owners

Connect the outside services Helio uses to actually send things and to power AI. Helio ships with nothing connected — you add only what you need. Every key you paste is encrypted and only ever shown masked.

- **Email sending** — choose SMTP (works with any mail relay), or a one-click provider: Amazon SES, Postmark, Resend, or Mailgun. Paste the credentials your provider gave you; Helio sends a test to confirm before you rely on it. *Without this, Helio can't send email.*
- **SMS** — connect Twilio or Vonage with your account SID and token to send text messages from journeys.
- **WhatsApp** — connect the WhatsApp Cloud API with your phone-number id and access token.
- **AI copilot** — pick your AI provider (OpenAI, Anthropic, Groq, Ollama, or any local OpenAI-compatible server), choose a model, and paste your key. A local model means your data never leaves your network. *Until you connect one, the copilot will say "No AI connected yet."*

## 5. Churn prediction model

**Who can use it:** Admins and owners

Optionally bring your own machine-learning model that scores how likely each contact is to leave. Helio works fine without it.

- **Upload a model** — an ONNX or XGBoost file you trained yourself. Helio maps its own contact features to your model automatically — there's nothing to configure. Download the training-data CSV first, train on that, and your model plugs straight in.
- **Or connect a model server** — give an HTTPS URL and an optional auth header instead of uploading a file.

## 6. Single sign-on (SSO)

**Who can use it:** Admins and owners

Let your team sign in with your company identity provider (Okta, Azure AD, Google Workspace, ...) instead of a separate password.

- **Provider details** — the issuer URL, client id, and client secret from your identity provider. Once connected, people who use an email on your domain are routed to your provider to sign in.

## 7. SCIM provisioning

**Who can use it:** Admins and owners

Automatically create and remove Helio accounts when people join or leave, driven by your identity provider.

- **SCIM token** — generate it here and paste it into your identity provider's provisioning settings. Keep it secret; treat it like a password.

## 8. API keys

**Who can use it:** Admins and owners

Create keys so your own software (or scripts) can talk to Helio's API.

- **Name & scopes** — name the key for where it's used, and grant only the permissions it needs. The key is shown once at creation — copy it then. Revoke any key instantly if it leaks.

## 9. Webhooks

**Who can use it:** Admins and owners

Have Helio call your own URL whenever something happens — a contact is created, a deal moves, a task is completed.

- **Endpoint URL** — where Helio sends the event.
- **Events** — which happenings to subscribe to. Each delivery is signed so you can verify it really came from Helio, and a *test ping* lets you check your endpoint before going live.

## 10. Integrations

**Who can use it:** Admins and owners

Stream data in from the tools you already use.

- **Shopify** — connect a store with its domain and webhook secret; new and updated customers and orders flow into your contacts, tagged so you can segment on them.
- **Salesforce** — connect an org with its instance URL and access token; new Helio contacts are pushed to Salesforce as Leads.

## 11. Branding (white-labeling)

**Who can use it:** Admins and owners

Make Helio look like your company across the app and your hosted pages.

- **Display name** — replaces “Helio” in the sidebar and on hosted pages.
- **Accent colour** — your brand colour; it drives the highlight colour everywhere, and Helio picks a readable text colour automatically.
- **Logo** — paste an image URL *or click “Upload from device”* to use a file from your computer (Helio stores and serves it for you — no external host needed). A live thumbnail confirms it before you save.

## 12. Deliverability

**Who can use it:** Admins and owners

Set up email authentication so your messages reach the inbox, not spam.

- **Sending domain** — add the domain you send from; Helio generates a DKIM key and shows you the exact SPF, DKIM, and DMARC records to add at your DNS host, then verifies them by live lookup. Authenticated mail is both a deliverability and a compliance requirement.

## 13. Analytics

**Who can use it:** Admins and owners

Controls for the analytics engine.

- **Behavioural analytics** — when your full stack is running, this powers the dashboard timeline, funnels, cohorts, and attribution. On the lighter “core” install it’s simply off, and the rest of Helio works normally.

## 14. Backups

**Who can use it:** Owners

Protect your data. Helio backs up on a schedule, and you can run one any time.

- **Back up now** — starts a backup immediately; you’ll see it appear in the list within a few seconds.
- **Download** — pull any backup file to keep off the server.
- *Tip: rehearse a restore once so you know it works before you ever need it.*

## 15. Support

**Who can use it:** Admins and owners

The in-app feedback inbox. Anyone can click the bug/feedback icon in the top bar to report something (it captures which page they were on); admins triage and resolve the reports here.

### DAY TO DAY

## Keeping Helio healthy

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### Updating (every operating system)

When a new version is available, the *About* panel shows a notice. Updating is the same one command everywhere — open the terminal you installed from (PowerShell on Windows, Terminal on macOS/Linux) and run:

```
helio update
```

It takes a safety backup first, pulls the new version, runs any database upgrades, and restarts. Your data and settings are kept. If `helio` isn't found, the installer added it during setup — close and reopen the terminal, or re-run the install line for your system from Step 1, which always fetches the latest.

### Backups & restore

Helio backs up automatically on a schedule. Run one any time with **Back up now** in Settings, or `helio backup` from the terminal. To restore, use `helio restore` — and it's worth rehearsing once so you're confident it works.

### Uninstalling

To stop Helio but keep your data, run `helio down`. To remove it completely, `helio uninstall` (add `--purge-data` to erase the databases too). These commands are identical on Windows, macOS, and Linux.

**You're in control.** Helio collects nothing about your deployment — no telemetry, no analytics, no accounts with us. The only thing it ever checks online is whether a newer version exists, and you can turn even that off. Your customers' data lives only on the machines you run.