



TRIPS

Group Messages vs. Community Chat — broadcasting to the group

The two different messaging surfaces on a Group: Messages (agent-authored broadcasts sent as email) and Community Chat (real-time back-and-forth between agents, group members, and the Group Lead). What each is for, delete permissions, and the live presence indicator.

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Groups have two separate messaging surfaces because they solve two different problems. This article explains which one to use when.

Messages — one-way broadcast

The **Messages** tab is for agent-authored broadcasts that go out as email to some or all group members. Think: *"Pre-trip packing list attached", ""Change to Day 3 itinerary — read this.", ""48-hour ETA reminder."*

- Agent writes the message in a rich editor (Tiptap)
- Pick recipients — every member is pre-selected; untick to exclude
- Optional attachments (PDFs, images, etc.)
- Sends as email through the org's sending transport (Gmail OAuth if connected, Postmark fallback otherwise)
- Each message row shows deliver status per recipient (sent / bounced / delivered)

ADVISOR TIP

Messages persist — Chat can be moderated. Messages are the durable record ("we sent everyone the pre-trip PDF on May 3"). Community Chat can have messages deleted by leads or agents. Use Messages when you need a paper trail.

Community Chat — real-time back-and-forth

The **Chat** tab is a live-ish group thread. Anyone in the group (agents, members, the lead) can post; everyone sees everyone else's messages. Polls every 3 seconds while the tab is open.

What Community Chat is FOR:

- Members asking pre-trip questions ("what's the tipping guidance?")
- The Group Lead coordinating with everyone ("hotel meetup at 6pm")
- Agents dropping in with real-time updates ("flight delayed 30 min")
- Community feel — members getting to know each other before travel

What it's NOT for:

- Anything the client legally needs a record of — Messages instead
- Individual client-agent conversations — those live on the Trip's Messages tab
- Attachments (chat doesn't handle uploads today)

Delete permissions

Agents

Can delete any message on Community Chat — their own, members', the lead's. Deletion soft-tombstones the row (body cleared, "Removed by advisor" placeholder). Historical evidence is preserved.

Group Leads

Can delete member messages (never agent messages). Same soft-tombstone treatment; label reads "Removed by group lead."

Members

Can delete their OWN messages. Cannot delete anyone else's.

Never deletable

Agent messages by anyone other than an agent. That ceiling is enforced server-side — leads cannot moderate agent posts even if they tried.

ADVISOR TIP

Deletion leaves a tombstone. The row stays in the thread with a "Removed by..." placeholder. This is deliberate — a message that vanishes silently reads as a UI bug and confuses everyone. If the client needs the message truly gone (GDPR request, etc.), that's a support ticket.

Live presence — the "N online" chip

The Chat tab shows a small green **N online** chip in the header. It counts distinct viewers with an open chat tab in the last 40 seconds. Agents and members both count; both sides see the same number.

Implementation detail: each open Chat tab pings a heartbeat endpoint every 20 seconds. Rows older than 40s are dropped on read. If you close the tab or navigate away, you're gone from the count within ~40s.

ADVISOR TIP

Chat is a portal-first feature. Members interact with it from their trip portal (or the Group Lead landing). Agents interact with it from the internal Group's Chat tab. Both write to the same message stream.

Notifications

- **Messages** — recipients get an email (their inbox behaves like any other email). The email's Reply-To routes back to the trip's inbound address so replies land on the Trip's Messages tab, not back in the group broadcast.
- **Chat** — no email notifications by design (would spam the group). Unread count appears as a rose pill on the Chat sub-tab of the Group tab in the client portal. Once the member opens the tab, unread clears.
- **Agent side** — no unread badge on the agent Chat tab today. That's a roadmap item.

Frequently asked

Can I schedule a broadcast Message to send later?

Not today — Messages send immediately. Workaround: draft the message body in a Notes app, paste when you're ready to send.

Do Messages count toward the client's "unread" indicator on their portal?

Yes. Broadcasts land on the recipient's Trip Messages tab with an unread pip, same as any other email in the thread.

A member is being disruptive on Chat. Can I mute them?

Not natively today — delete their message + follow up personally is the current workflow. Mute / kick is on the roadmap.

What happens to Chat when the group ends (past dates)?

The chat stays live indefinitely. Past groups still show the Chat tab on the client portal so members can reminisce or share photos. Archive the group to hide it from the portal entirely.

Related

- [Members and roles](#)
- [Client portal: Hosted Trips](#)
- [Trip Messages \(per-trip email thread\)](#)