Add new email templates

Emails · https://a2bmanager.com/docs/how-to-add-new-email-templates/

Embedded media: https://a2bmanager.com/wp-content/uploads/2026/10/email-templates-walkthrough-v3.mp4

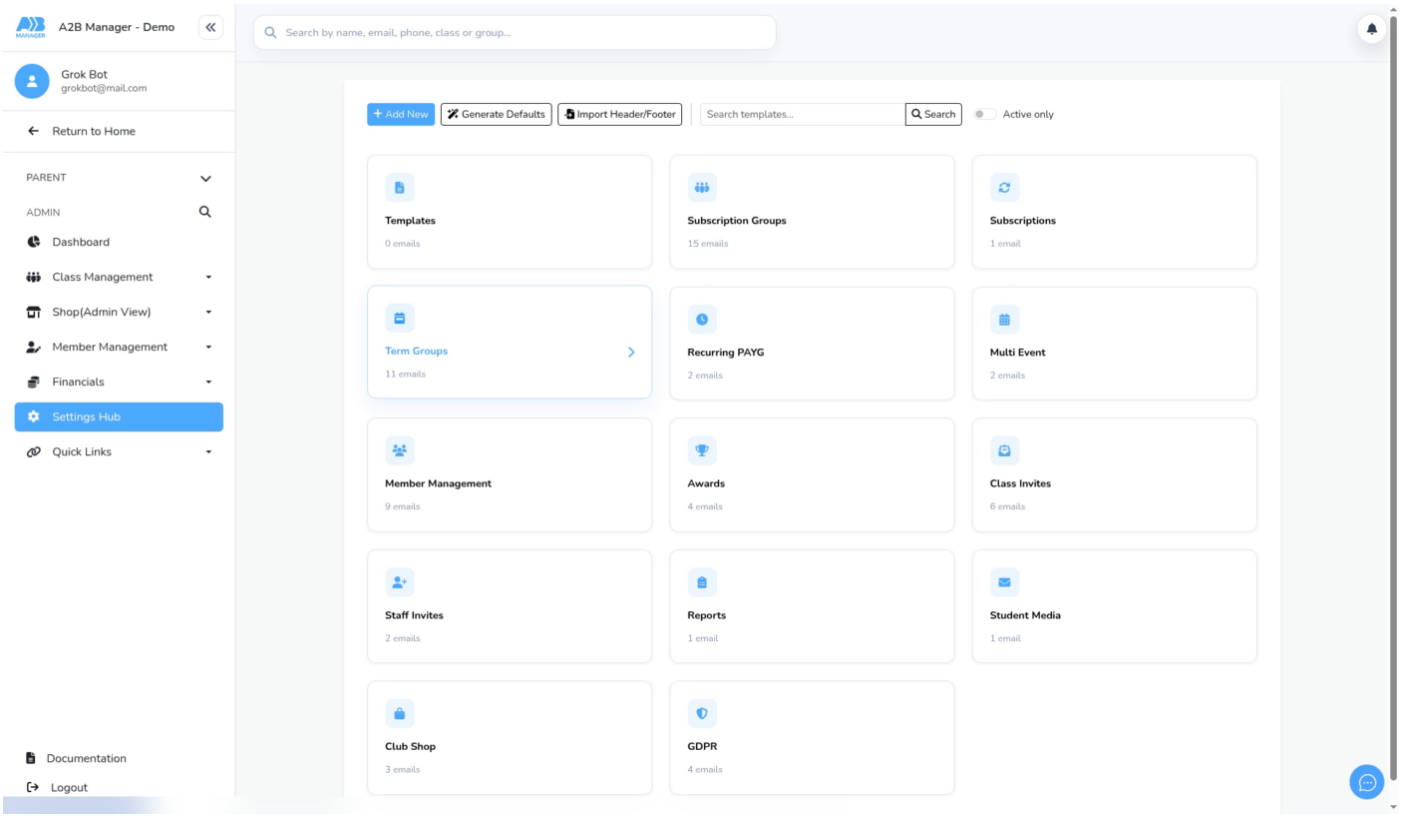
Video walkthrough: working with email templates

Email templates control the emails A2B Manager sends for you. Automatic emails go out when something happens, such as a waiting list booking. Reusable templates are ones you can pick whenever you send an email yourself.

Working with email templates

Step 1: Open the Email Template Builder (0:00)

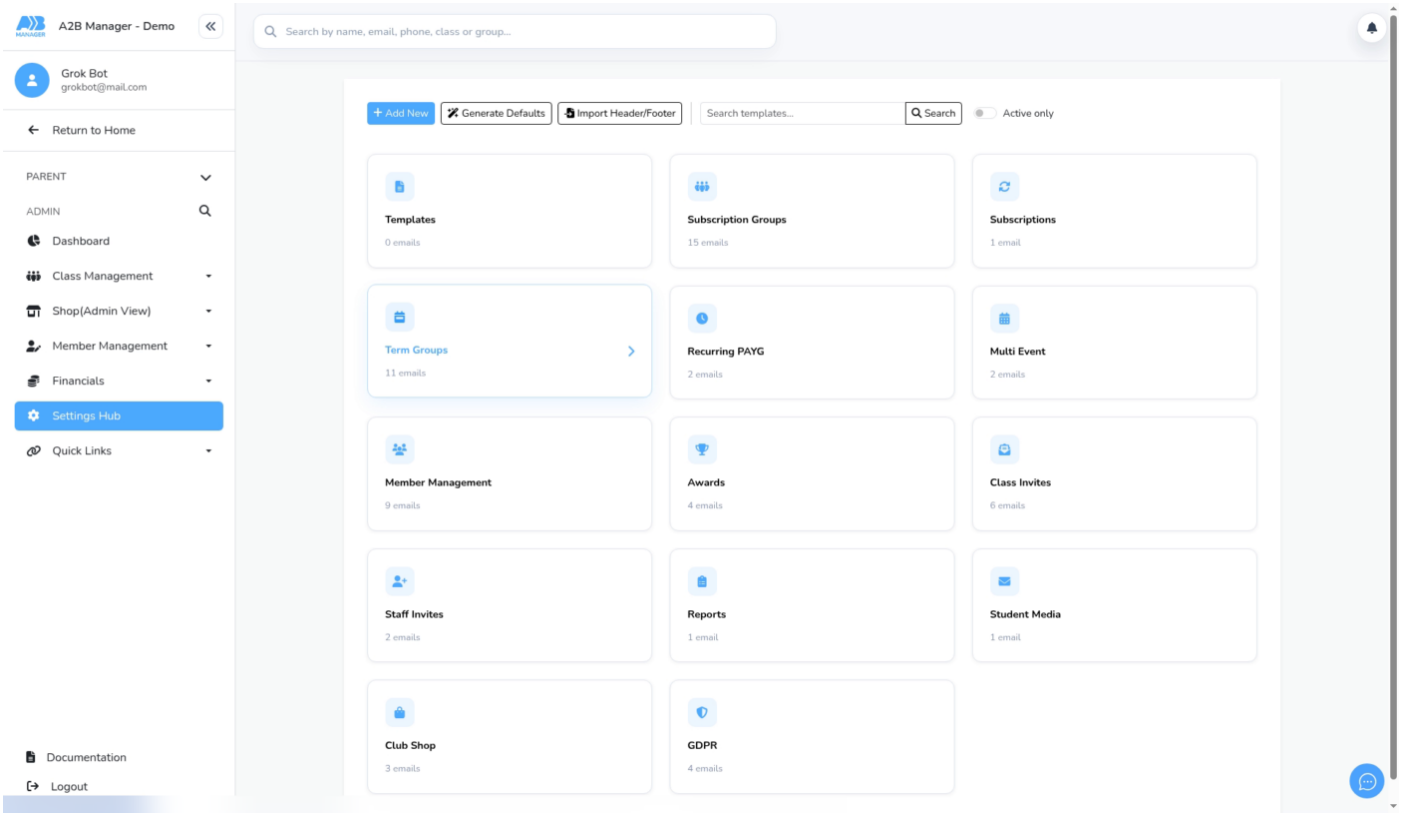
- Go to **Settings Hub** > **Email Template Builder**.
- Your emails are grouped into tiles, such as Templates, Subscription Groups, Term Groups, Recurring PAYG, Awards, Club Shop and GDPR. Each tile shows how many emails it holds.



Step 1: The Email Template Builder tiles

Step 2: Find your way around (0:15)

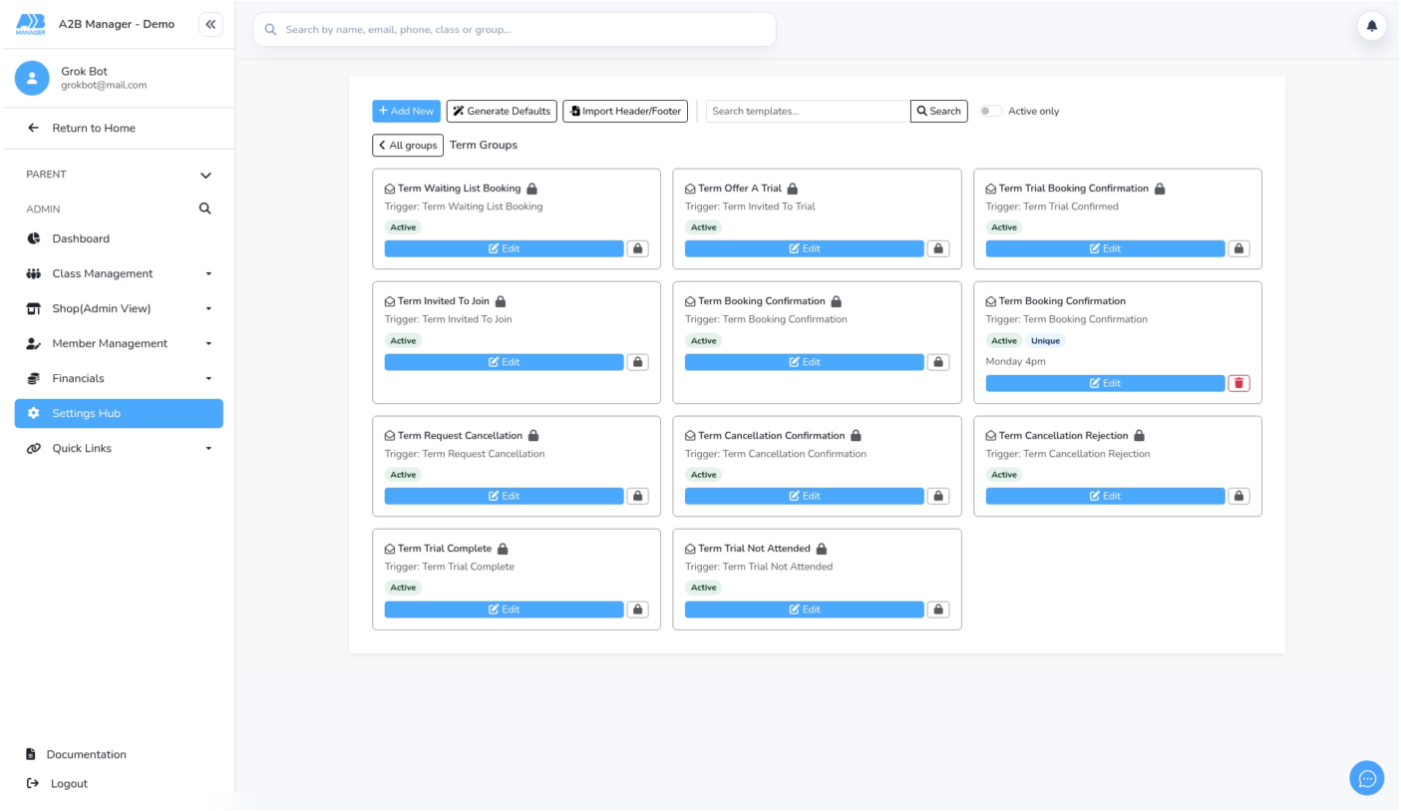
- **Add New** starts a new email. Use **Search templates** to find one, and **Active only** to hide inactive emails.
- **Generate Defaults** adds the standard set of emails.
- **Import Header/Footer** adds your club's email header and footer to every template. Both buttons run as soon as you click them.



Step 2: The toolbar

Step 3: Open a group of emails (0:42)

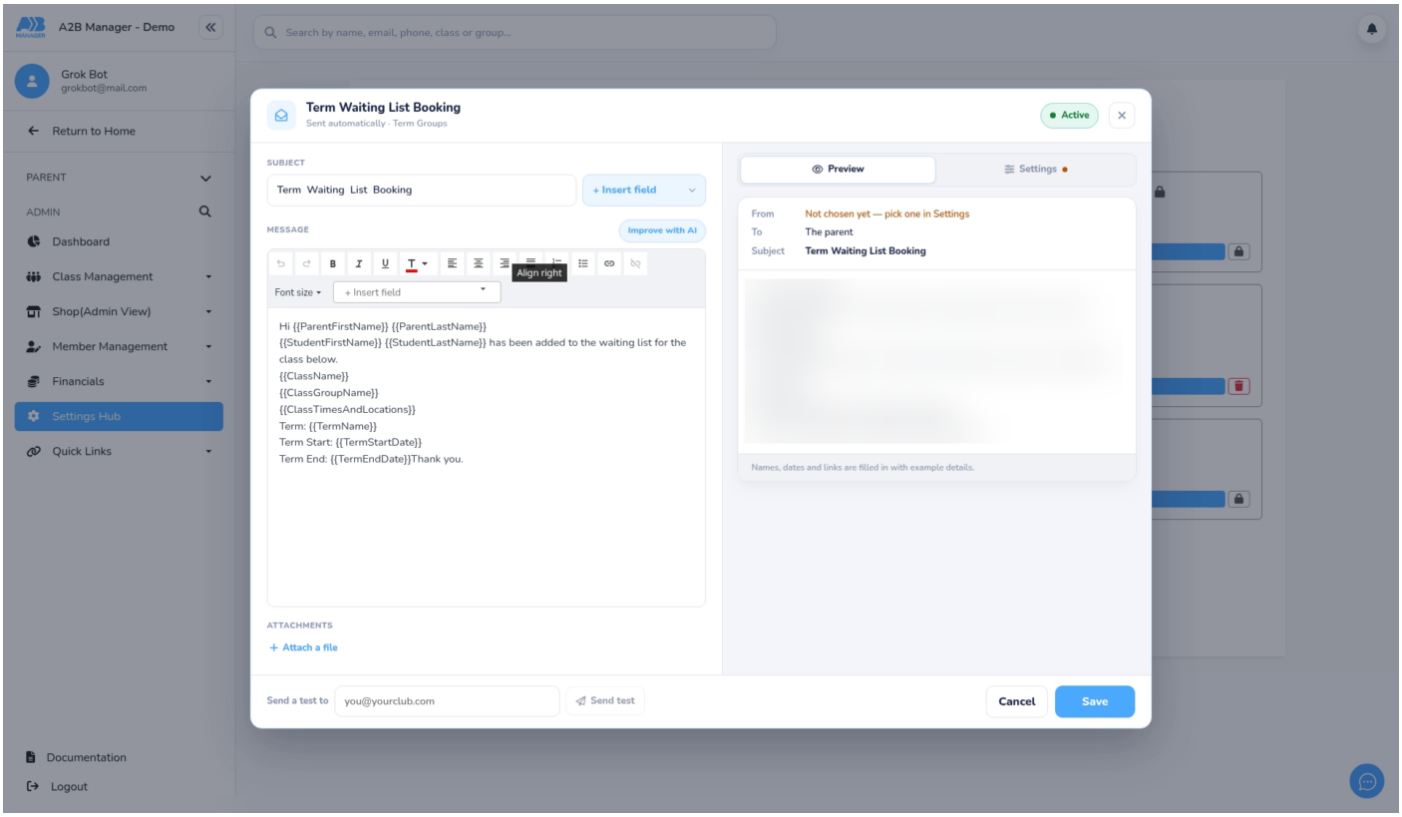
- Click a tile, for example **Term Groups**. Each card shows the email's trigger (the event that sends it), whether it's **Active**, and an **Edit** button.
- A padlock means the email can't be deleted. A **Unique** badge means it's a version for one class group only.
- Use **All groups** to go back to the tiles.



Step 3: Term Groups emails

Step 4: Edit an automatic email (0:57)

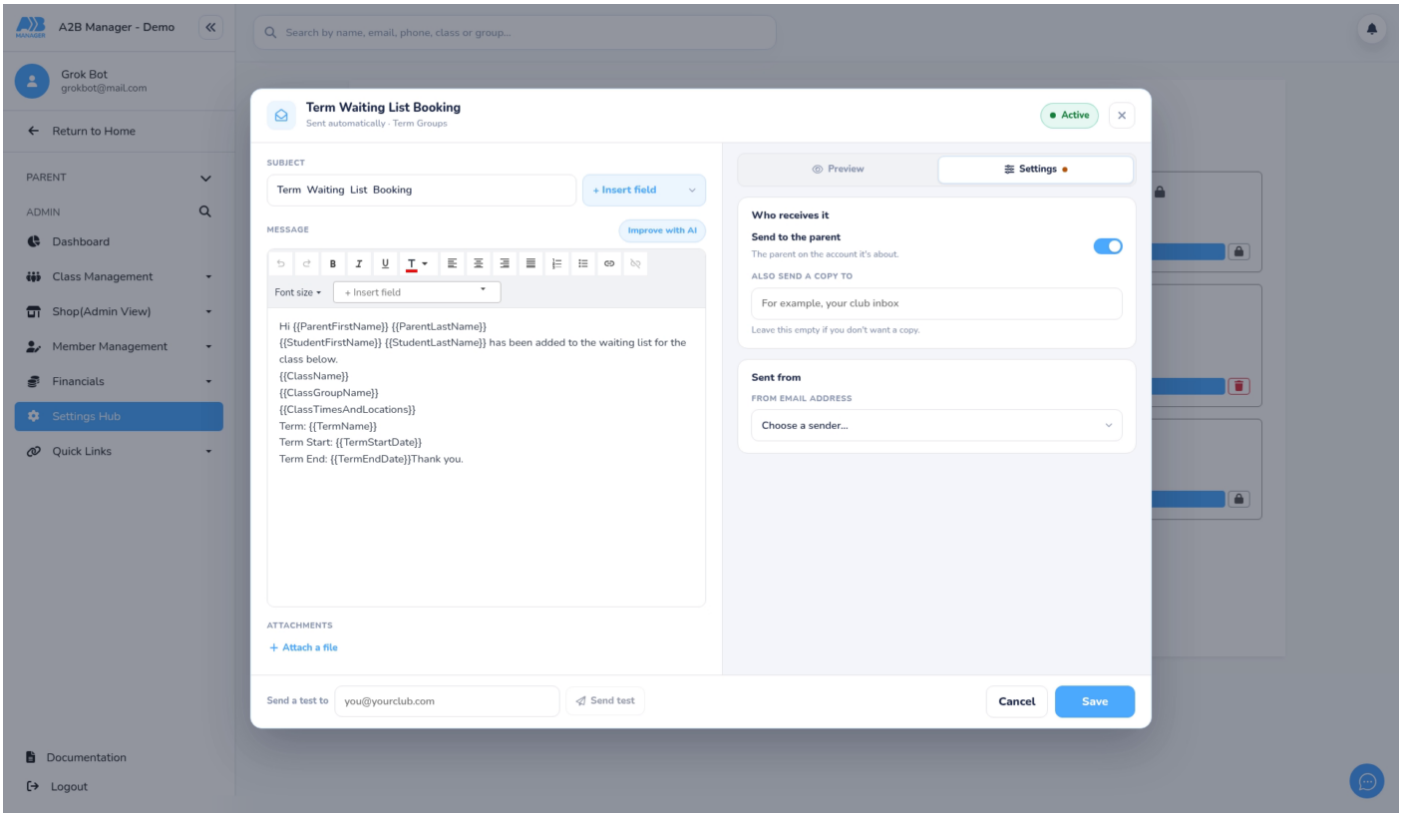
- Click **Edit**. Change the **Subject** and **Message**.
- Use **Insert field** to add details that fill in automatically, such as the parent's or child's name, the class and the term dates.
- **Improve with AI** can tidy up your wording, and **Attach a file** adds an attachment.
- The **Preview** tab shows how the email will look, filled in with example details. The **Active** badge at the top shows whether the email is switched on.



Step 4: Editing an automatic email

Step 5: Choose who receives it (1:09)

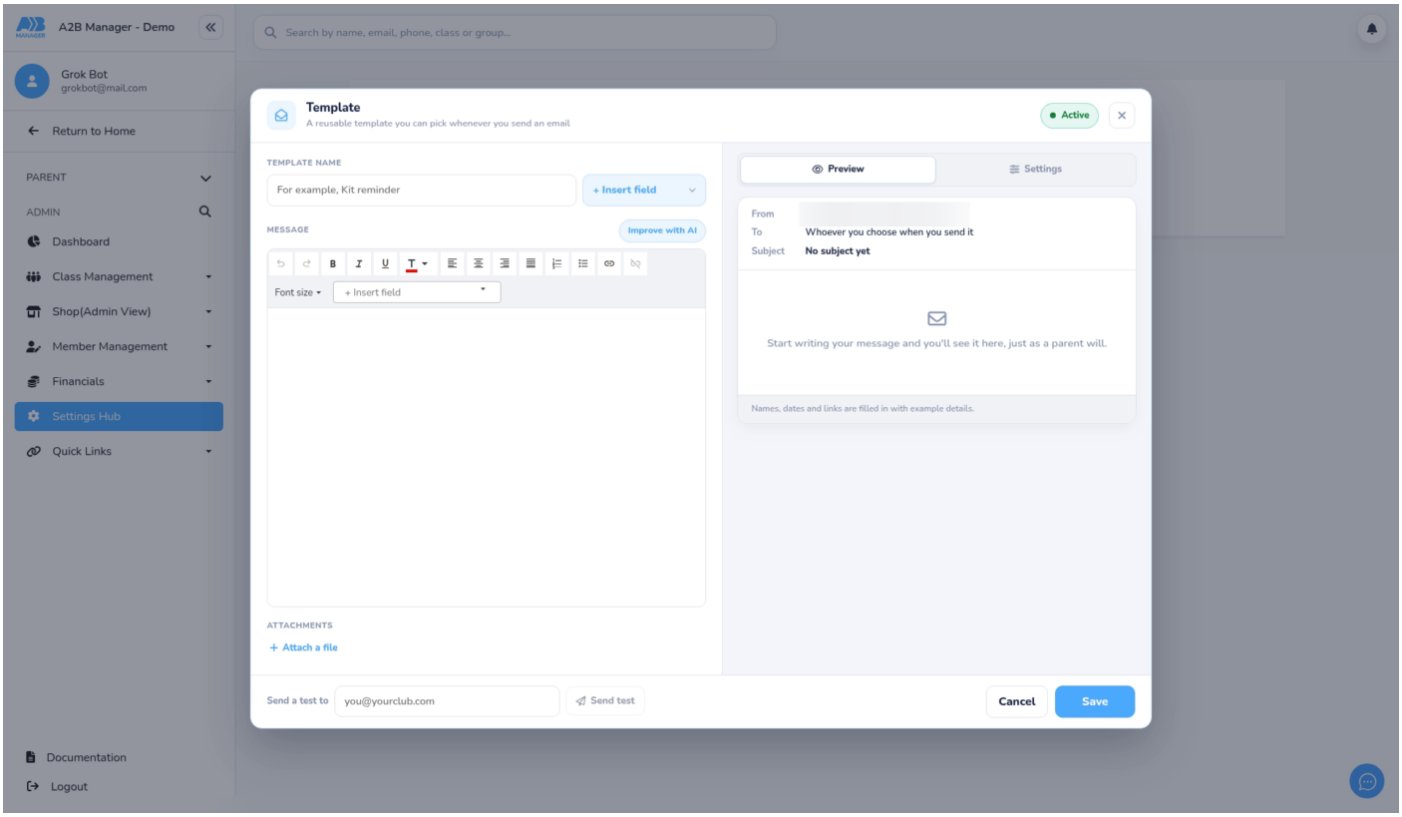
- Open the **Settings** tab.
- **Send to the parent** sends the email to the parent on the account. Under **Also send a copy to**, add an address (for example your club inbox) if staff should get a copy. Leave it empty if you don't want one.
- Under **Sent from**, choose the From email address. Only verified addresses are listed. See Add new email sender address.
- To check it, enter your address in **Send a test to** and click **Send test**. Click **Save** to keep your changes, or **Cancel** to close without saving.



Step 5: The Settings tab

Step 6: Create a reusable template (1:25)

- Click **All groups**, open the **Templates** tile and click **+** (or use **Add New**).
- Enter a **Template name**, for example Kit reminder, and write your message. Then click **Save**.
- When you email members, choose it from the **Template** list and the email fills in for you.



Step 6: A new reusable template

Good to know

- Each trigger has one email, which can go to the parent and send a copy to your club at the same time. You don't need a second email for staff.
- A class group can have its own version of an email, shown with the Unique badge.
- Deleting a template happens immediately. There's no confirmation and it can't be undone, so check before you click the bin.

Download the PDF guide (optional)