How to Send Trial Reminder Emails Before a Trial

Emails · https://a2bmanager.com/docs/trial-reminder-emails/

Embedded media: https://a2bmanager.com/wp-content/uploads/2026/10/trial-reminder-emails-walkthrough-v2.mp4

Video walkthrough: trial reminder emails before a trial

Remind families by email a set number of days before a trial (or on the day). The reminder is sent once while the child is still booked on that trial. Set it up in the Email Template Builder under Trial reminder for subscription groups, and the matching term trial reminder for term groups. This is not the trial booking confirmation or trial complete email.

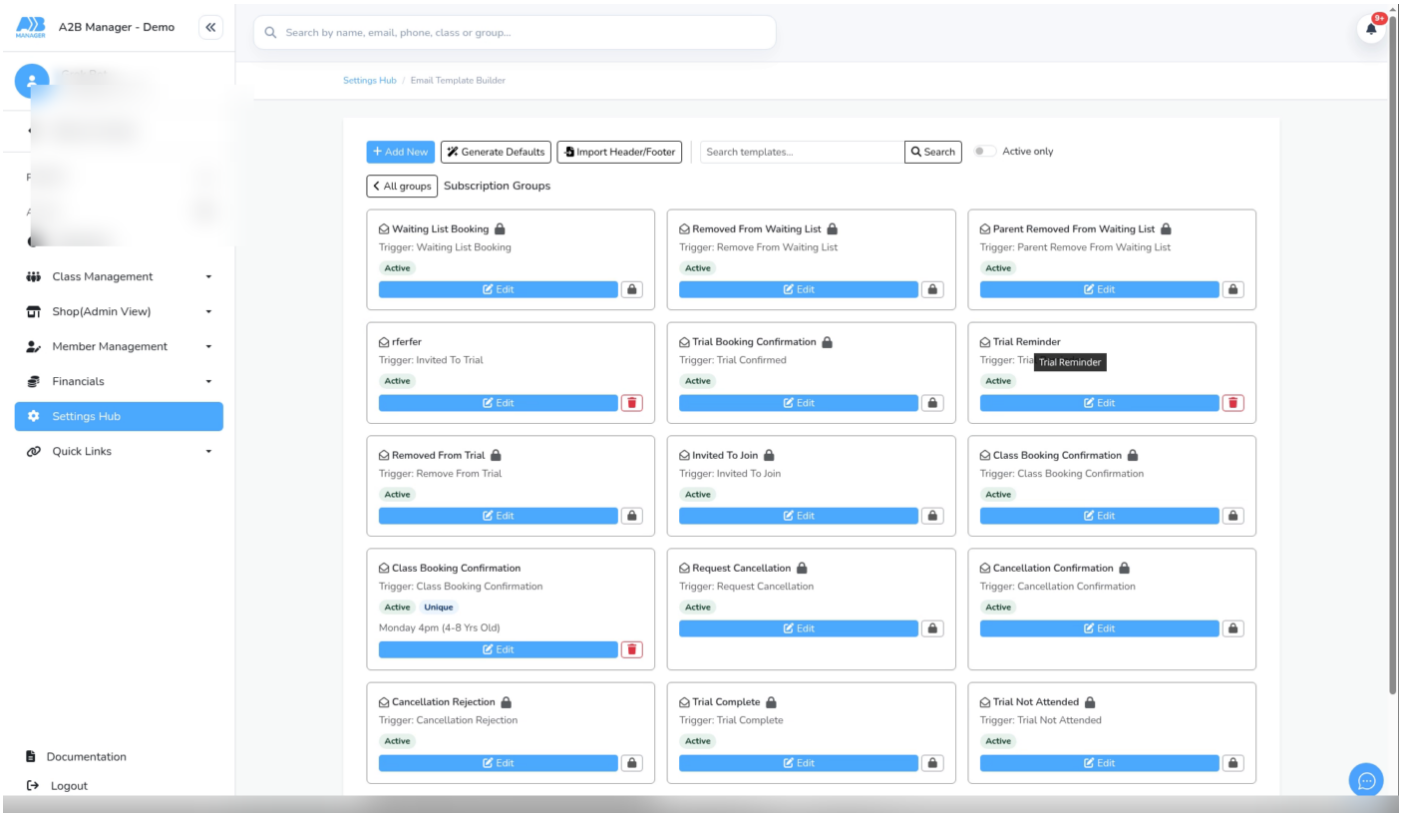
Before you start

- You need admin access to the Email Template Builder.
- Your club needs a from-address set up for email.
- Open **Subscription Groups** for recurring subscription trials, or **Term Groups** for term trials. If **Days before the trial** is empty on an older template, set it — a template with no days value will not send.

Setting up trial reminder emails

Step 1: Open the Trial reminder template

- Go to **Settings Hub** > **Communication** > **Email Template Builder**.
- Open **Subscription Groups**, then the **Trial reminder** template — or **Term Groups** for the term trial reminder.



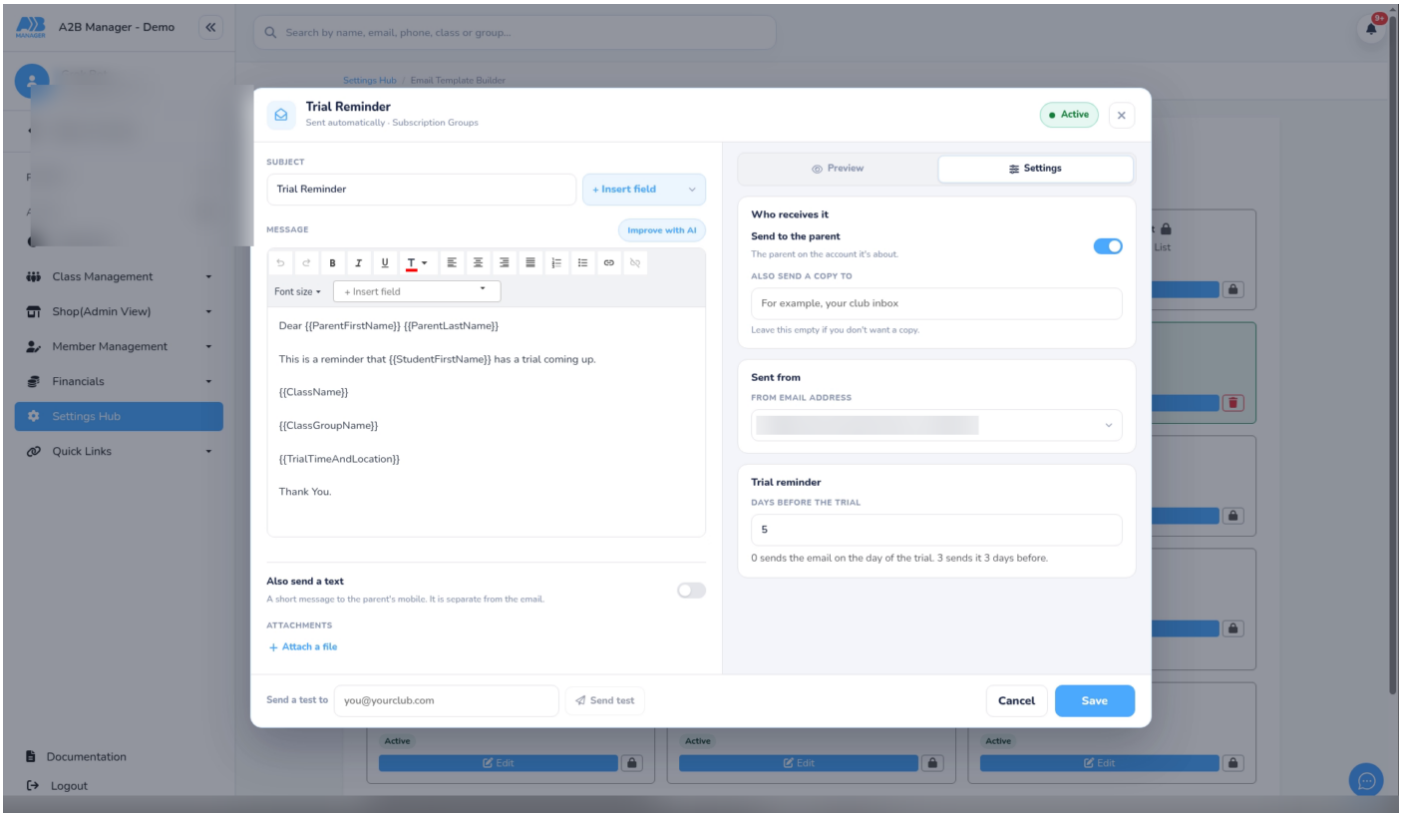
Step 1: Trial reminder under Subscription Groups

Step 2: Turn it on and choose who receives it

- Turn the template **Active**.
- Choose who receives it (parent and/or company email), the same way as other templates.
- Nothing is sent while the template is inactive.

Step 3: Set days before the trial

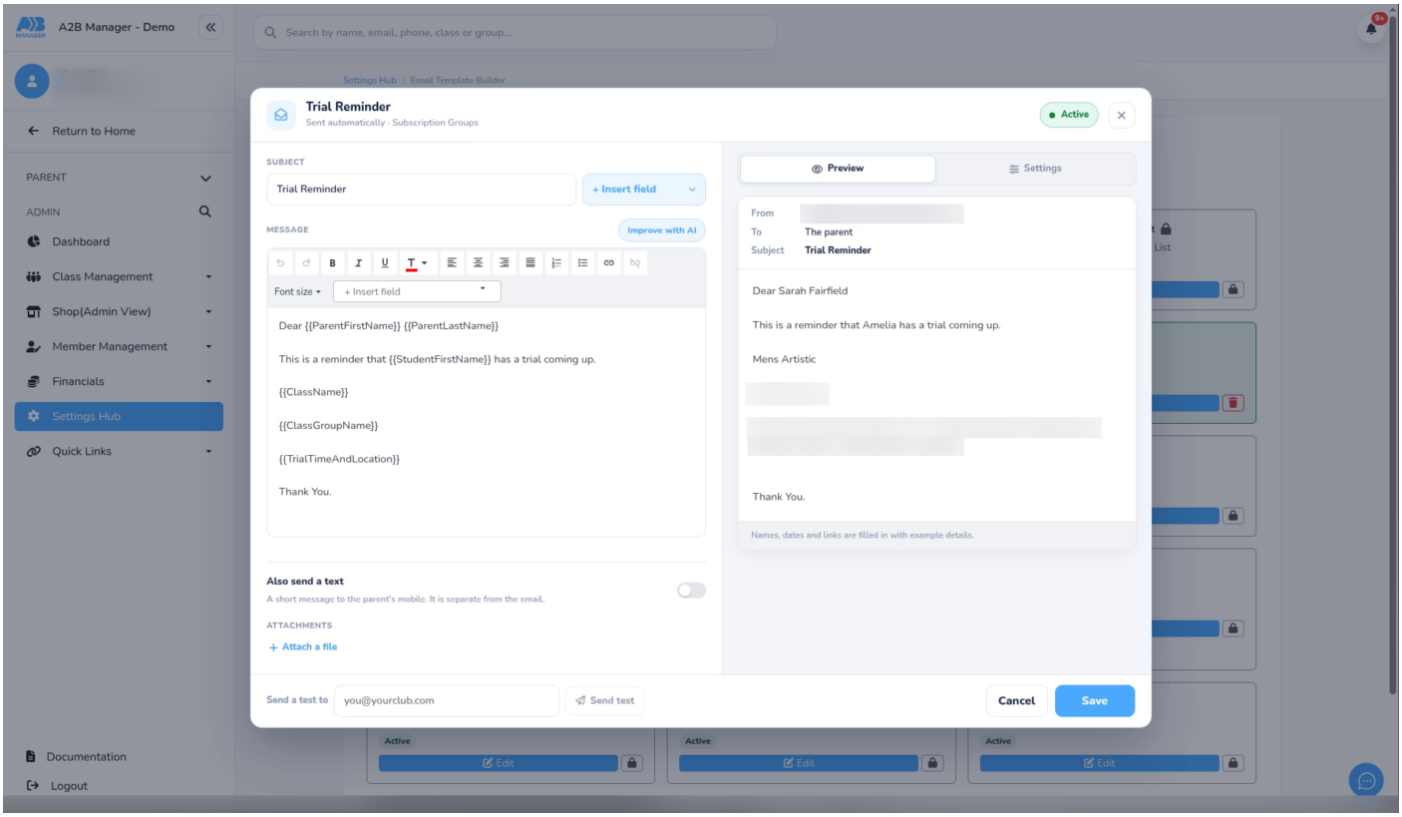
- Open the **Settings** tab.
- Under **Trial reminder**, set **Days before the trial**.
- Use **0** to send on the day of the trial. Use **3** to send three days before (and so on).
- You cannot save without a non-negative value. If days are left empty, the daily job will not send trial reminders for that template.



Step 3: Days before the trial on Settings

Step 4: Edit the message and tags

- Edit the subject and body as you like.
- Useful tags include parent and student names, class name, class group name, trial time and location, organisation name, and account link. Term templates also have term name and term dates.
- You can also turn on **Also send a text** on the same template if you use template texts.
- Save when you are happy with the copy.



Step 4: Trial reminder tags in the message editor, with the Preview tab filled in with example details

Step 5: When it sends

- A job runs daily at **06:20 UK**. Due trial reminders are scheduled for **08:00 UK** that day (or about a minute later if 08:00 has already passed).
- Only children still booked on a trial for an active subscription or term group are considered (no first lesson yet on that place).
- Each child gets at most **one** reminder for the same group and trial date.
- A template saved for one group is used for that group; everyone else uses the club template.

Good to know

- The template must be **Active** and have **Days before the trial** set, or nothing goes out.
- This is not the trial booking confirmation, invited-to-trial, or trial complete email — those are separate templates.
- New clubs get a default of **0** days (send on the day). Older templates may need days filled in once after this feature shipped.

> **Tip:** Set days to a few days before the trial if you want families to confirm arrangements in time — use 0 if you only want a same-day reminder.

Download the PDF guide (optional)