How to Invite Members to a Coach’s Trial

Actions · https://a2bmanager.com/docs/how-to-invite-members-to-a-coachs-trial/

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Video walkthrough: inviting a recreational gymnast to a Coach's Trial in a more advanced group

Class Management > **Classes** > **By Class**

A **Coach's Trial** lets you invite existing members to try a different group for a set period, for example a gymnast from a recreational group trialling a more advanced group or squad, or a preschool gymnast trialling a recreational group. You send it as a **Class Invitation** and switch on Coach's Trial at the review step. Once the parent accepts, the child is labelled **Coach's Trial** so your coaches can decide whether they stay in the group after the date you choose. This is separate from the first-time trial that parents book on your website.

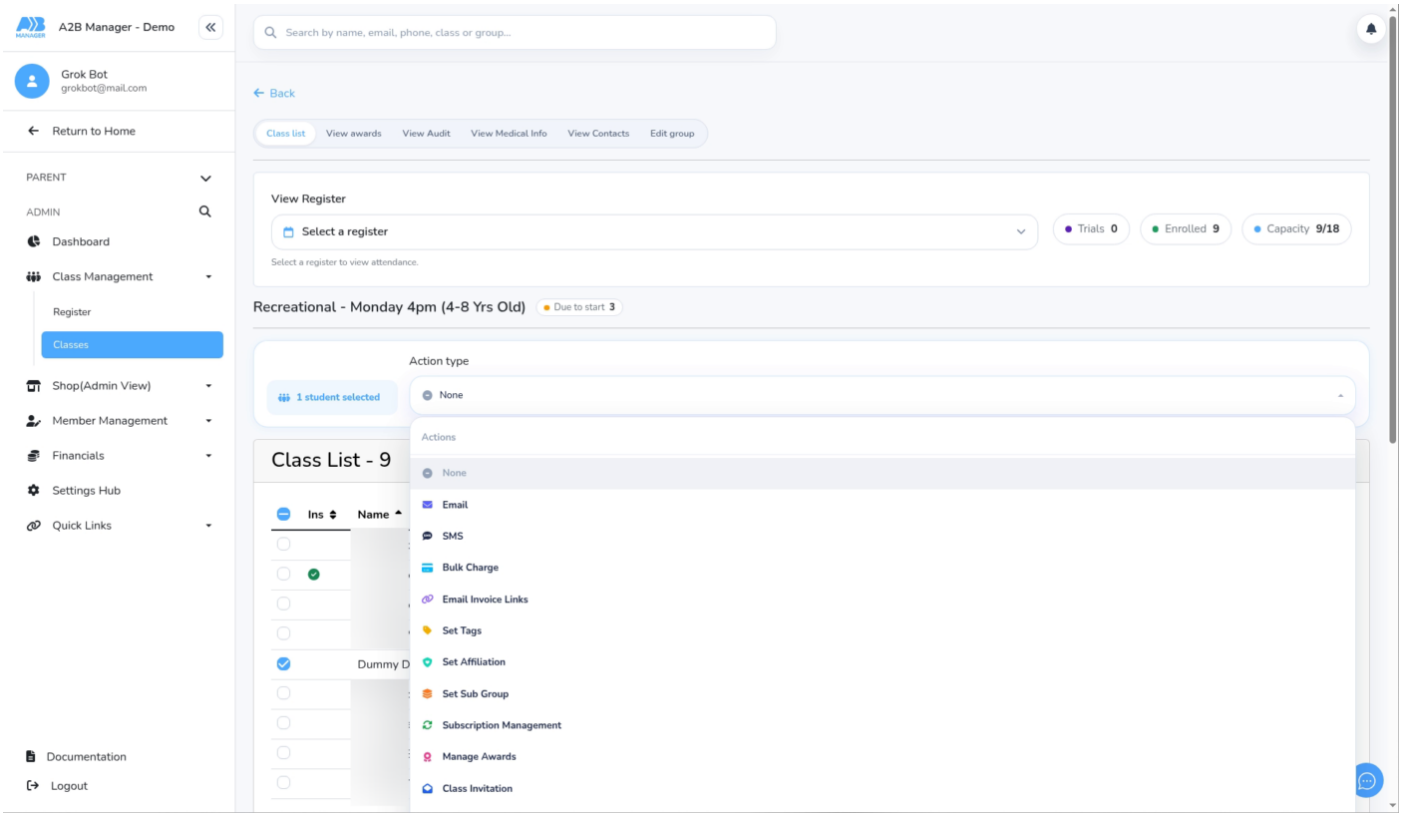
How a Class Invitation works

- A Class Invitation moves the child: when the parent accepts, the child moves from the group you opened to the new group.
- Their last session in the current group and the date their current class subscription ends are shown on the review step, and the new group's payment starts from the date shown there.

Sending a Coach's Trial invitation

Step 1: Choose the members (0:00)

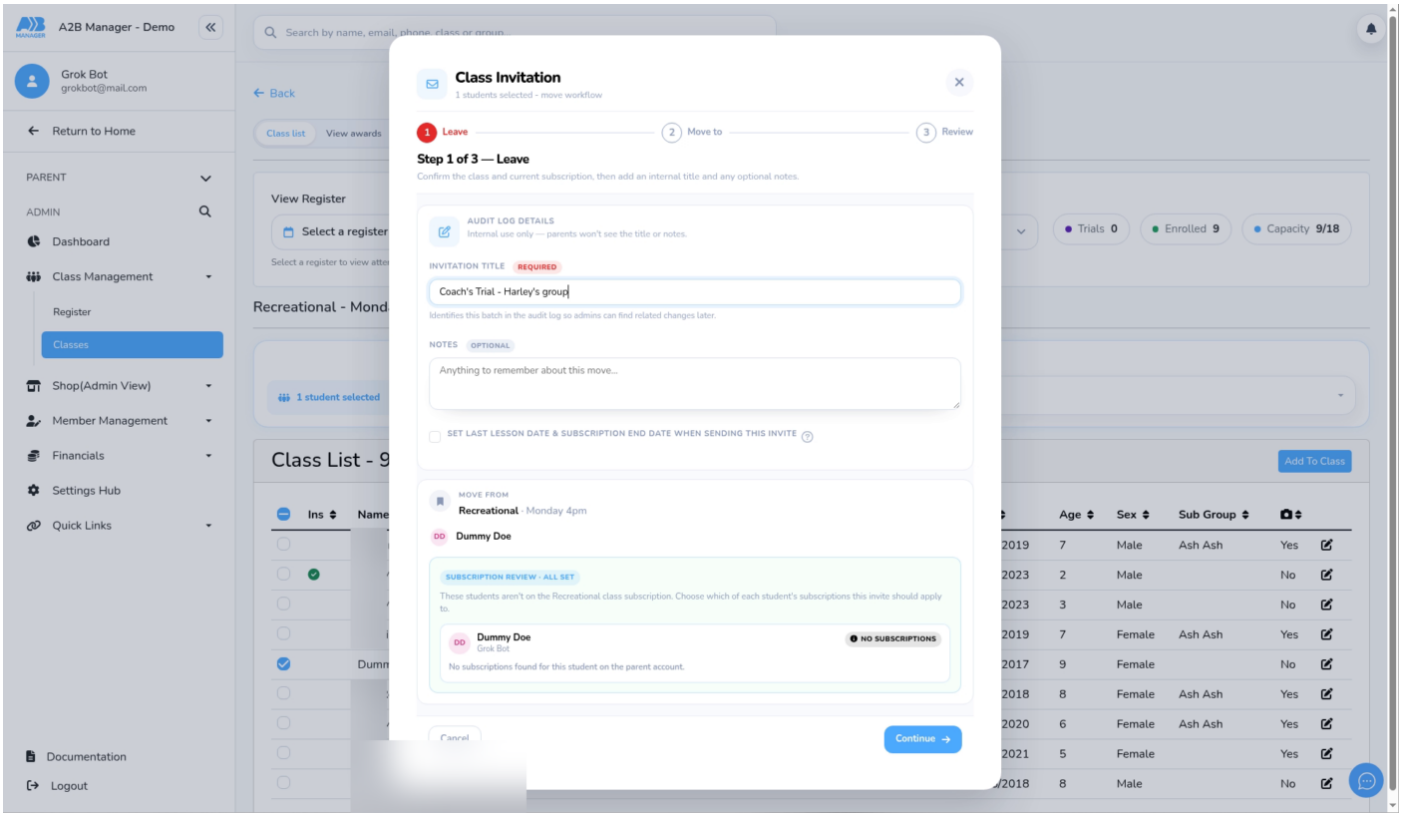
- Go to **Class Management** > **Classes**, click **By Class**, expand the class and click the group the child is in now.
- On the **Class List**, tick the members you want to invite.
- Open **Action type** and choose **Class Invitation**. It isn't on the main Members list.
- You can also start a class invitation from the classes section of a child's profile.



Step 1: Choosing Class Invitation from Action type

Step 2: Leave (0:17)

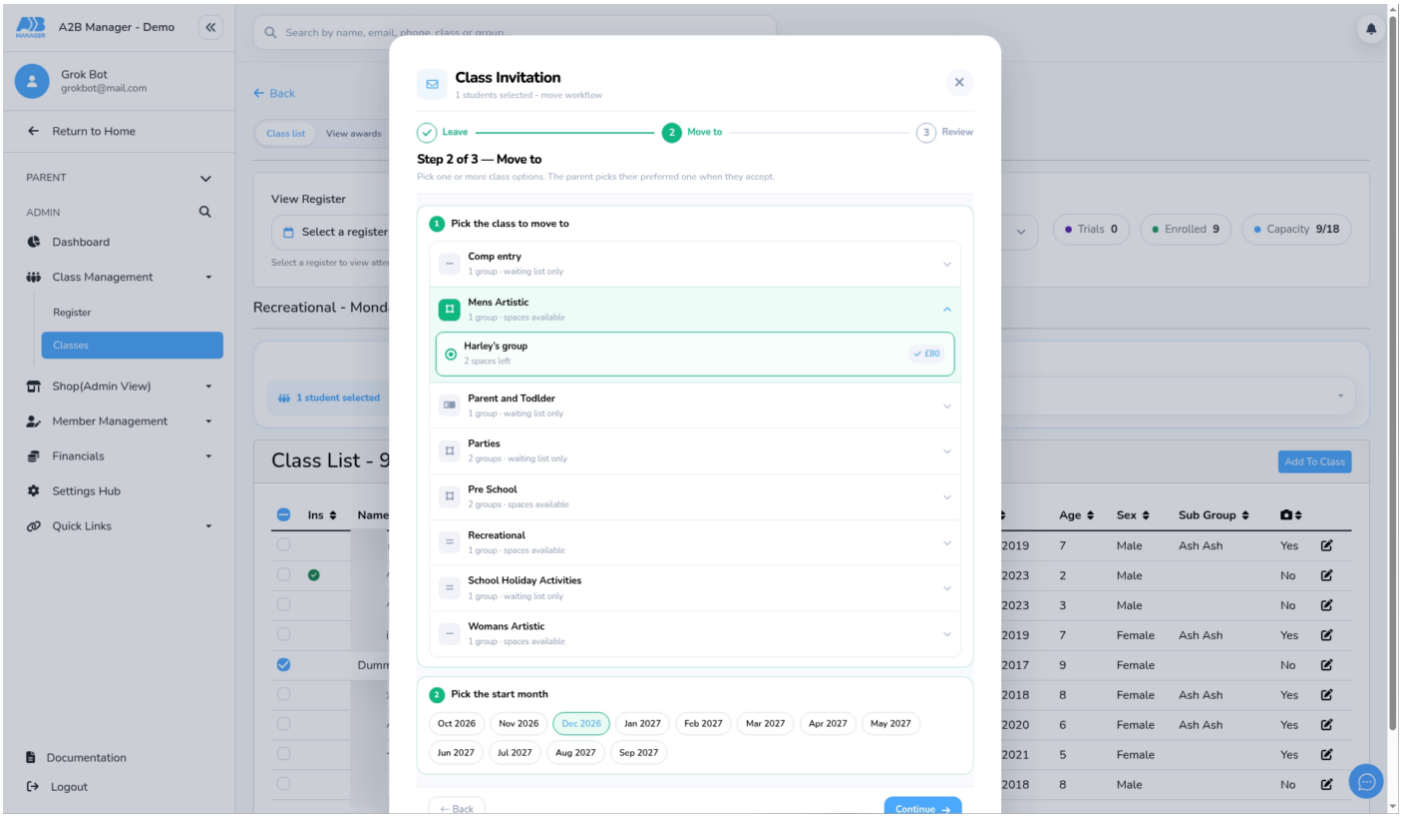
- The **Class Invitation** window opens on the **Leave** step.
- Enter an **Invitation title** (required), for example "Coach's Trial - Harley's group". **Notes** are optional. Parents won't see the title or notes; they're for your audit log.
- Tick **Set last lesson date & subscription end date when sending this invite** if you want the current group's last lesson and subscription end dates set when you send the invitation. Click the question mark for details.
- **Move from** is fixed to the class you opened. Click **Continue**.



Step 2: The Leave step

Step 3: Move to (0:24)

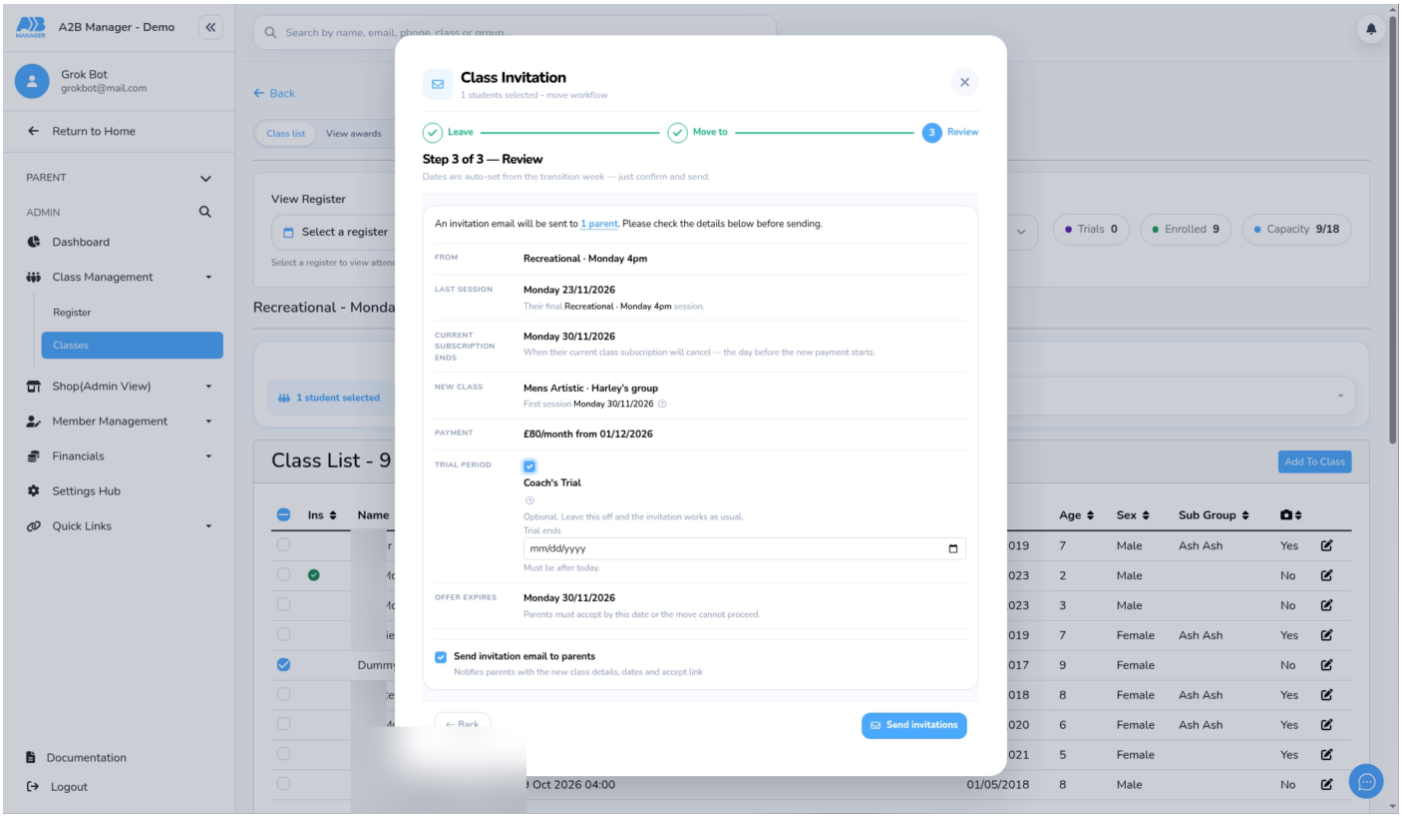
- Under **Pick the class to move to**, expand the class and choose the group they're trialling.
- Under **Pick the start month**, choose the month, then click **Continue**.



Step 3: Picking the group and start month

Step 4: Review and switch on Coach's Trial (0:33)

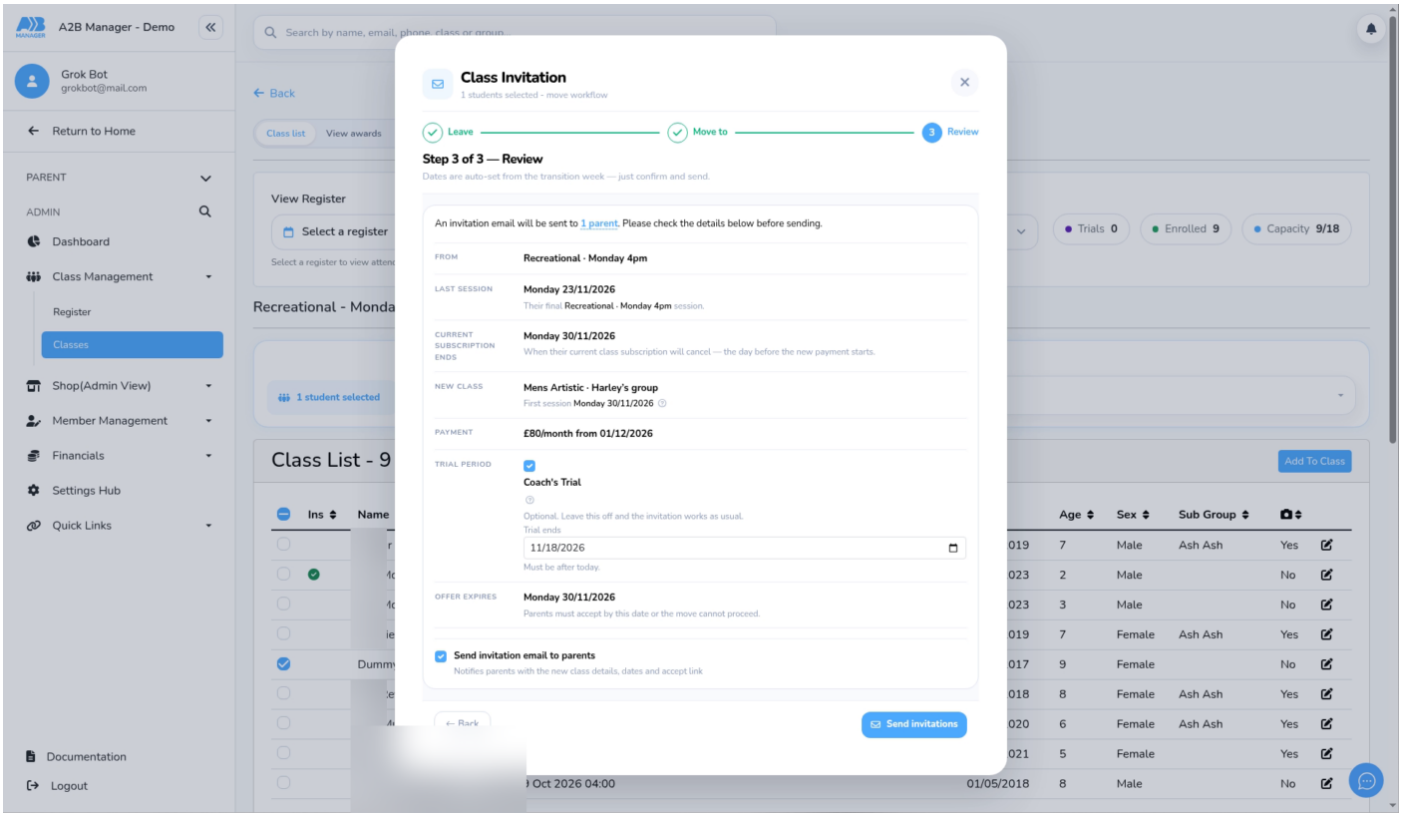
- Check **From**, **Last session**, **Current subscription ends**, **New class** and **Payment**.
- Under **Trial period**, tick **Coach's Trial**.
- Under **Trial ends**, pick the date the trial finishes. It must be after today.



Step 4: Ticking Coach's Trial on the Review step

Step 5: Send the invitations (0:43)

- Check the **Offer expires** date. Parents must accept by then.
- Leave **Send invitation email to parents** ticked to email them the new class details, dates and an accept link.
- Click **Send invitations**. A child who already has an active invitation is skipped; expire or complete that invitation first.



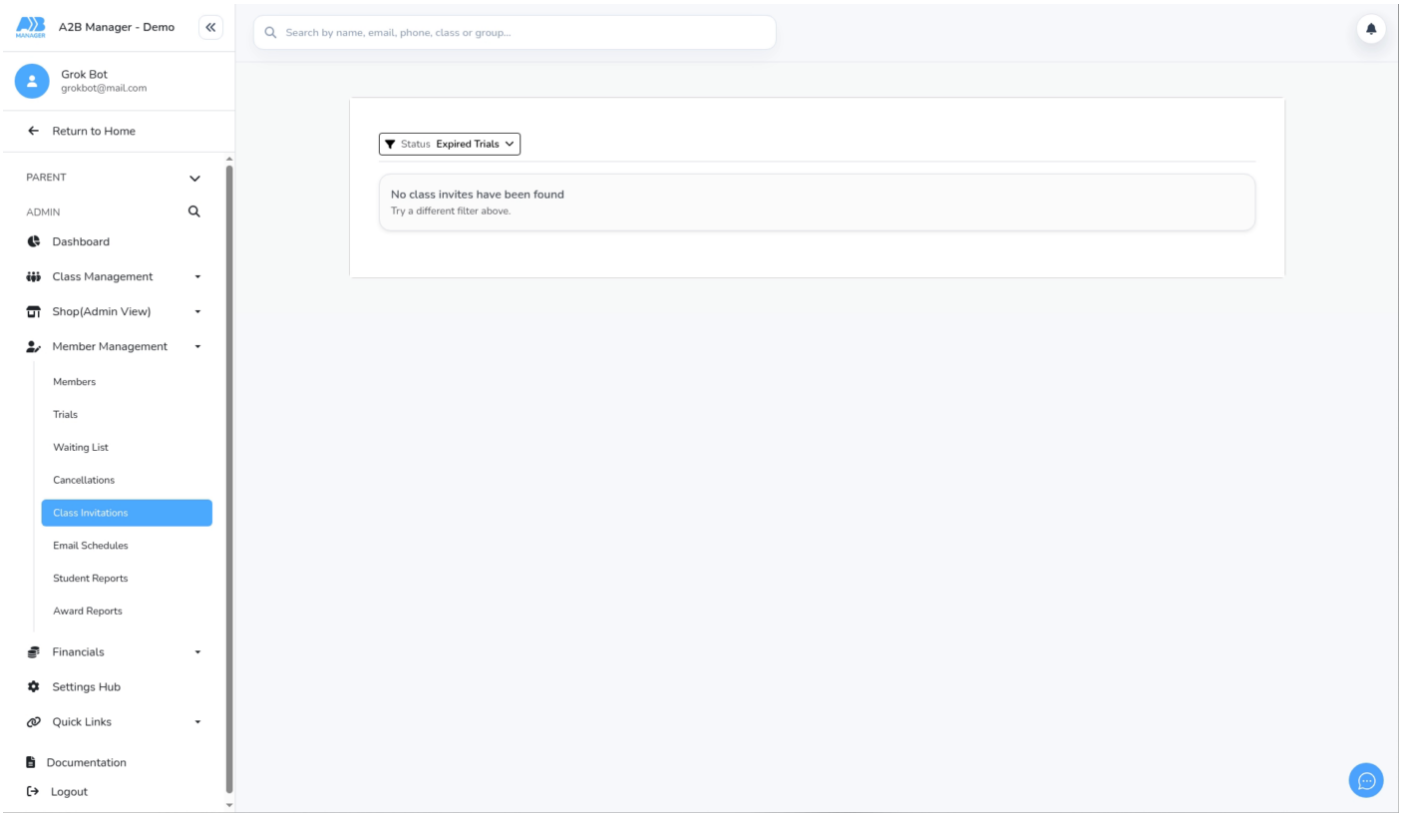
Step 5: Trial end date picked, ready to send

After the parent accepts

- The child moves into the new group with a blue **Coach's Trial** label next to their name on the class list, register, Members page and their profile. Hover over or tap the label to see when the trial ends.
- To find everyone on a trial, use the **Coach Trial** filter in the Members search.
- You can follow each invitation on **Member Management** > **Class Invitations**.

When the trial ends

- Nothing changes automatically on the end date. The child stays in the group and keeps the label, which now shows **Trial Ended**.
- Open **Member Management** > **Class Invitations** and choose the **Expired Trials** status filter. It lists accepted trials whose end date has passed.
- If the child is staying, click **Remove Coach's Trial label**. If they aren't, move or remove them as usual.



The Expired Trials filter on Class Invitations

Download the PDF guide (optional)