How to Offer a Trial from the Waiting List

Emails · https://a2bmanager.com/docs/offer-a-trial/

Embedded media: https://a2bmanager.com/wp-content/uploads/2026/10/offer-a-trial-walkthrough-v3.mp4

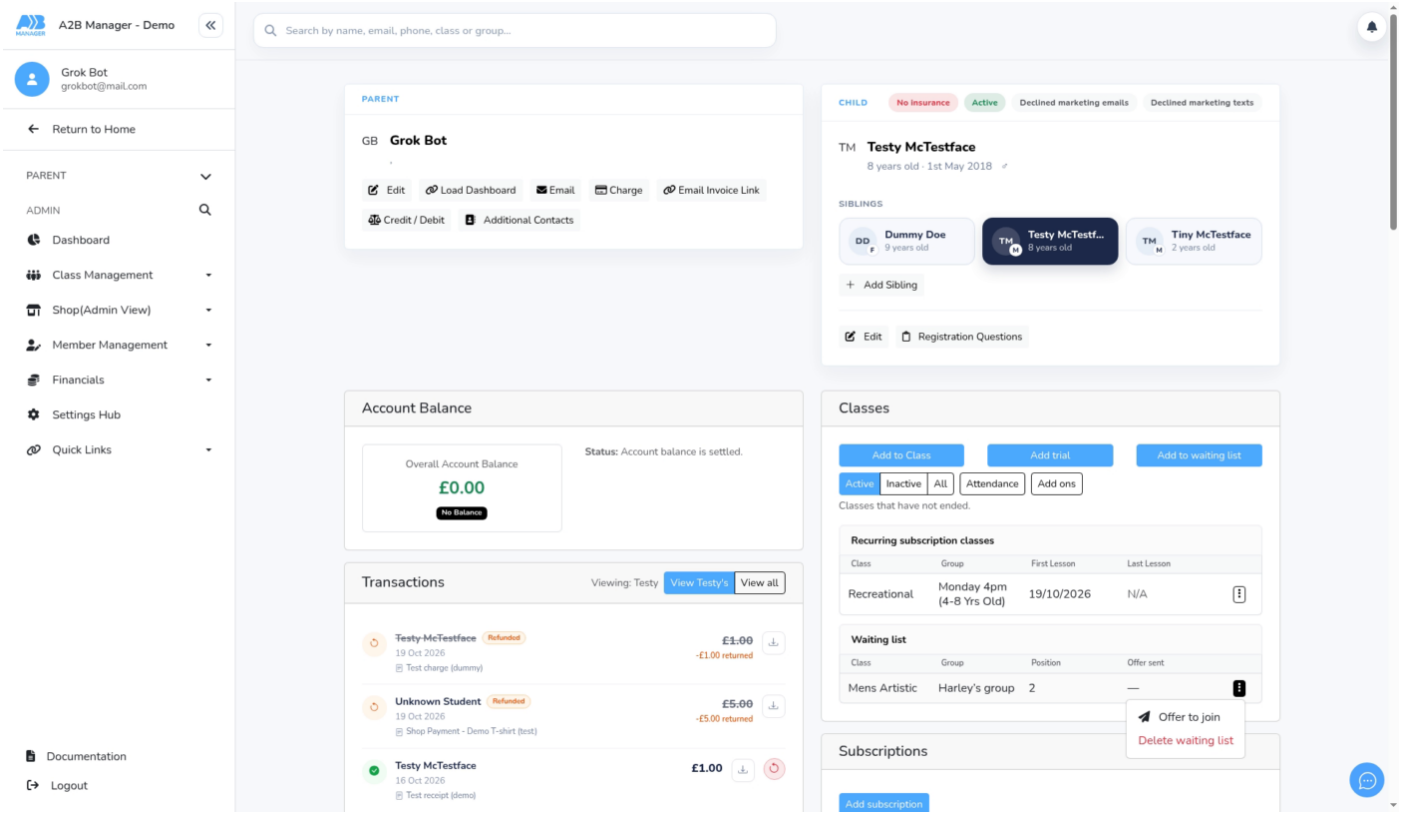
Video walkthrough

When a space comes up, you can offer a child on the waiting list a trial. They get an email and the offer appears on their parent dashboard.

Sending the offer

Step 1: Find the waiting list entry (0:00)

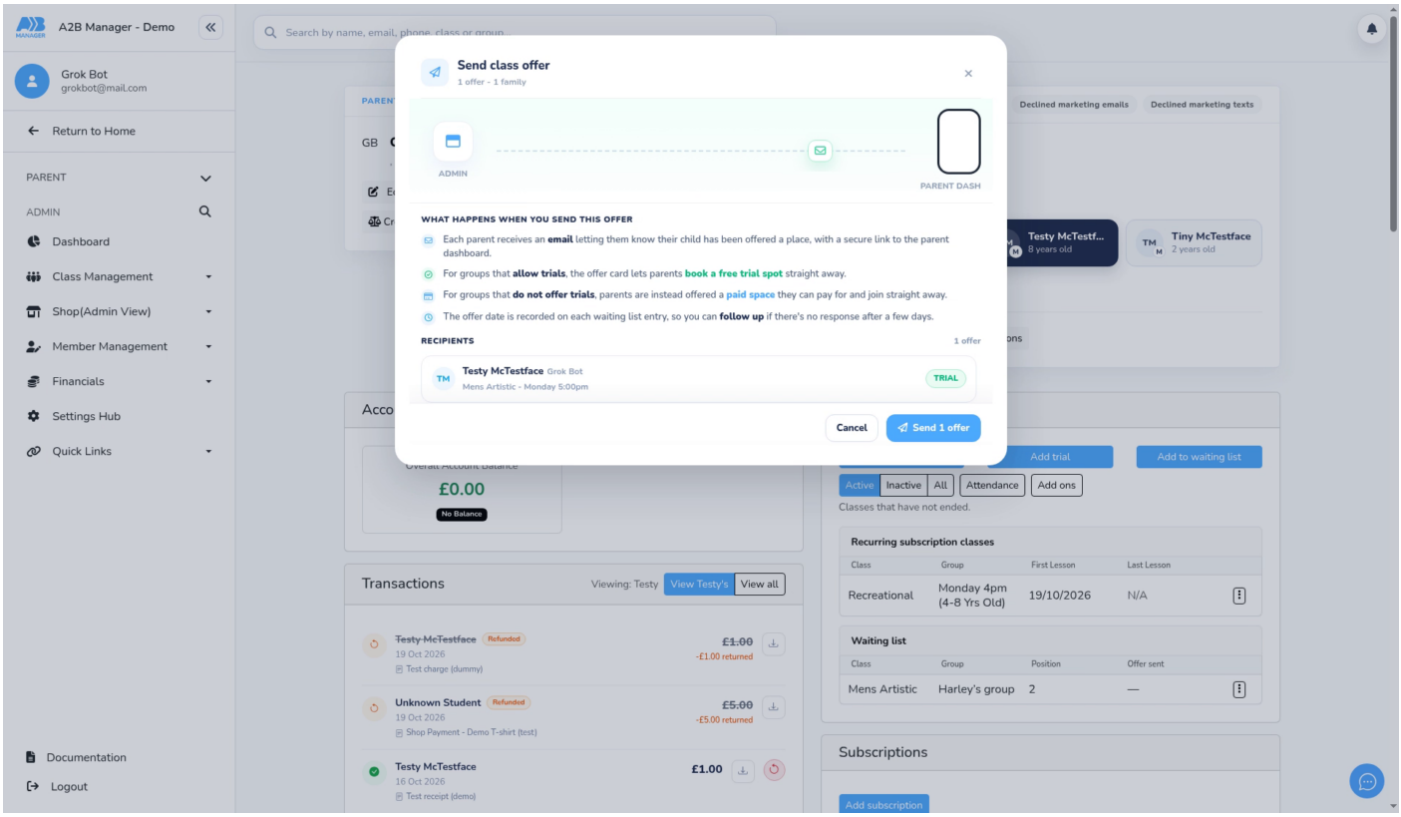
- Open the child's profile. Under **Classes**, the **Waiting list** table shows the class, group, position and **Offer sent**.



Step 1: The waiting list on the profile

Step 2: Choose Offer to join (0:08)

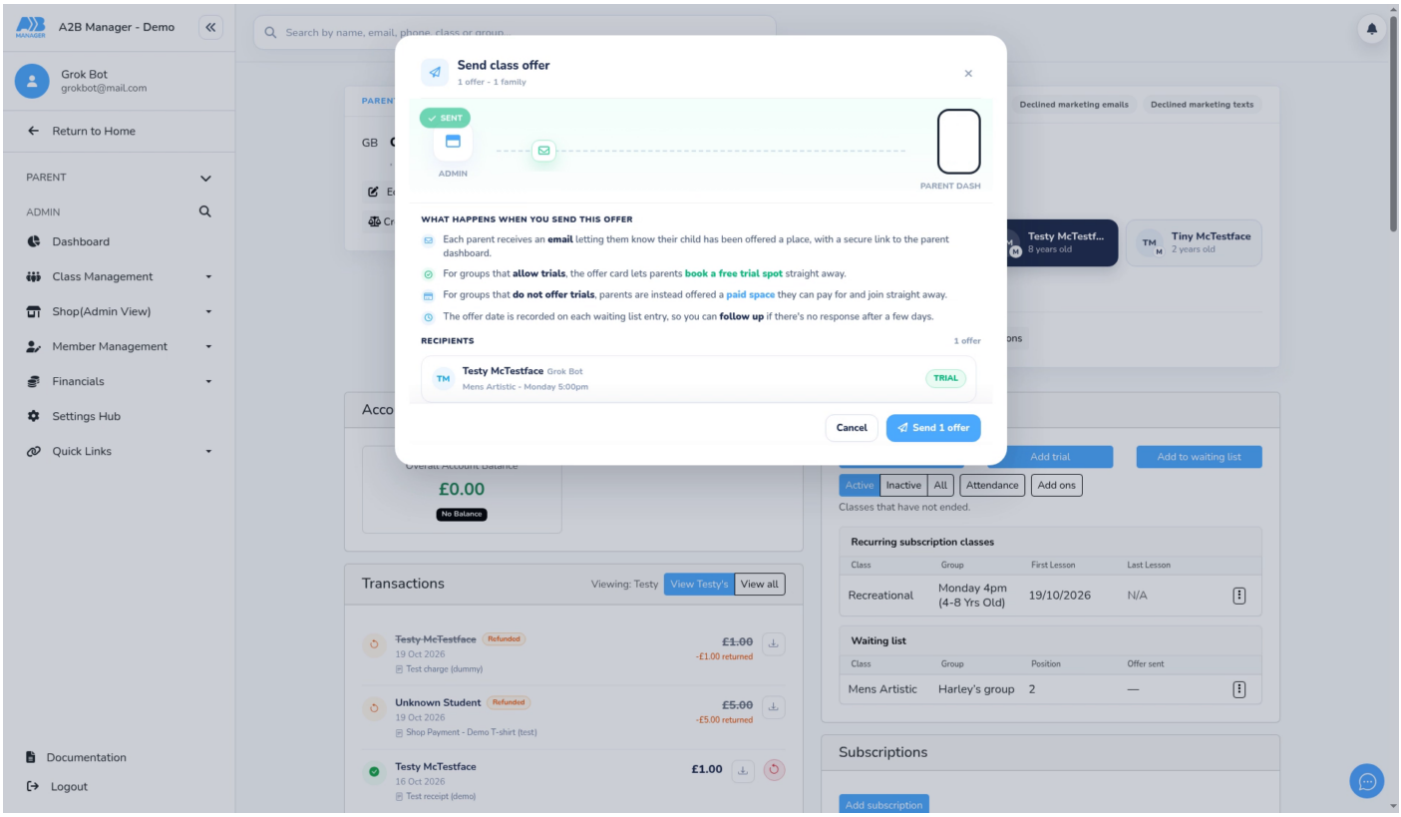
- Click the menu (⋮) on the row and choose **Offer to join**.
- The same option is used for trial offers and paid places.



Step 2: The row menu

Step 3: Check the offer (0:11)

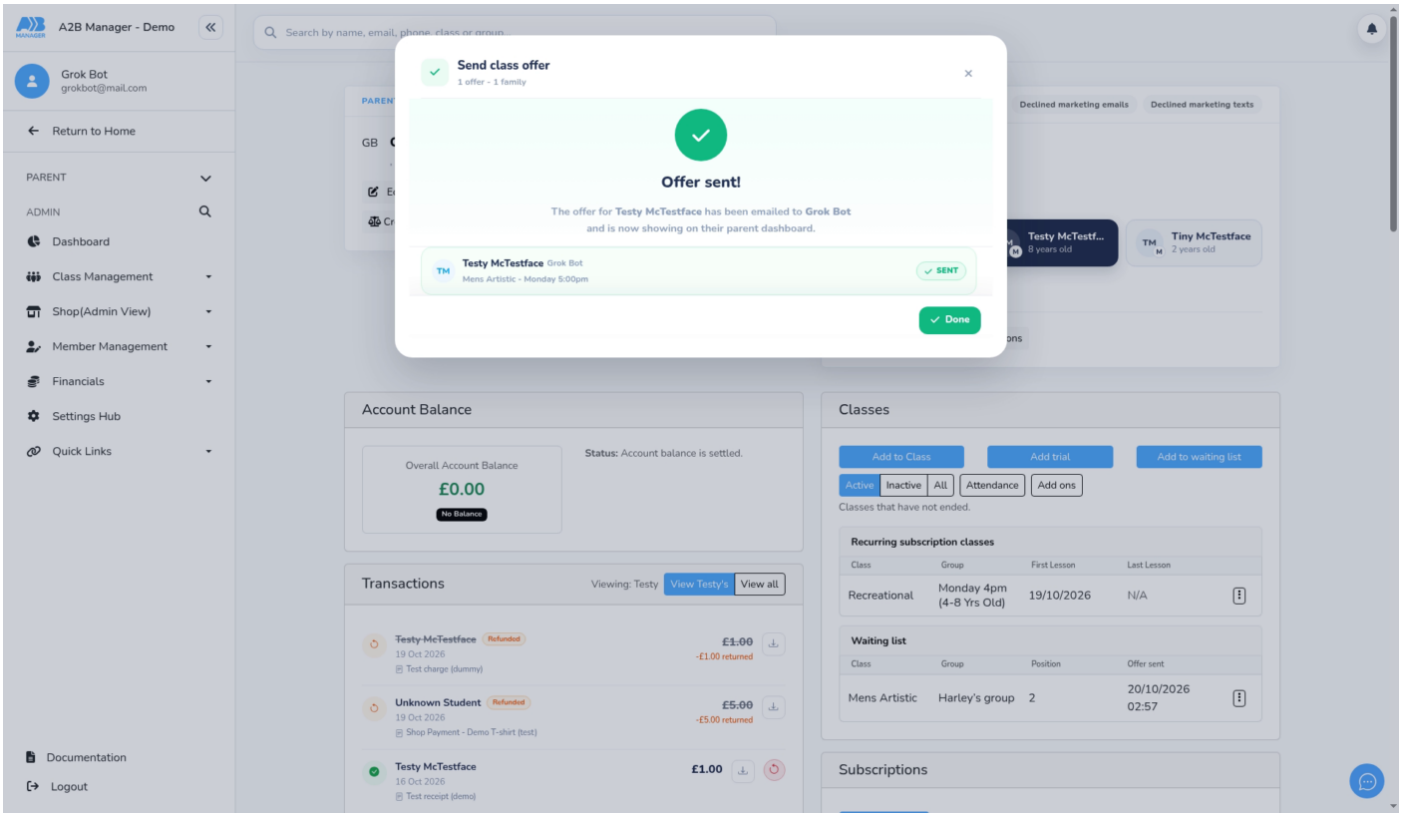
- The **Send class offer** window explains what happens and lists each recipient.
- The tag next to the child shows what they'll be offered: **TRIAL** or **OFFER**.
- Click **Send 1 offer**.



Step 3: Send class offer

Step 4: Offer sent (0:20)

- You'll see **Offer sent!**: the offer has been emailed to the parent and is showing on their parent dashboard. Click **Done**.
- The row's **Offer sent** column now shows the date and time.



Step 4: Offer sent

Which email is sent

- There's one **Send class offer** window for both cases. Each recipient is tagged **TRIAL** or **OFFER**.
- **TRIAL**: the group has a trial price set (shown as **Trial** on the class page) and the child isn't already on a trial in that group. The **Offer a trial** email is sent, and the parent's dashboard card lets them book a trial.
- **OFFER**: the group has no trial price, or the child has already had a trial there. The **Invited To Join** email is sent, and the parent can pay for a place and join straight away.
- Term groups use their own templates instead: **Term Invited To Trial** and **Term Invited To Join**.
- Edit the wording under **Settings Hub** > **Email Templates**. The default trial email still contains the placeholder text *(Session, days, times, address)*, and the default join email contains *(class day times etc)*, so replace these with your own details.

The email

- The default **Offer a trial** email says the child *has been offered to book a trial for the class below*, followed by the class, group and a **booking link**.

After the offer

- The waiting list row shows the date and time in **Offer sent**, so you can follow up if there's no reply.
- The offer stays on the parent's dashboard until they accept or decline it. Deleting the child from the waiting list does not remove the offer.

Download the PDF guide (optional)