Manage Club Members - Add a Club Member

Lion Portal

This guide is essential for anyone involved in managing club memberships, specifically for adding new full dues-paying Lion members. It provides clear, step-by-step instructions for the process, including creating a unique Member ID that tracks an individual's membership history. By following this guide, users can efficiently navigate the Lion Portal and ensure accurate member records, which is crucial for maintaining club organization and communication. Overall, it streamlines the membership addition process, making it easier for club administrators to manage their members effectively.

> ⓘ Tip! This Quick Guide demonstrates how to add a new Lion member who is a full dues paying member.
>
> To add Family Member refer to the "Manage Club Members - Add a Family Member"
>
> To add Student Member refer to the "Manage Club Members - Other Member Types"

(i) Tip! When adding a member to a club the person record is created this person is assigned a "Member ID" sometimes also called a "Lion ID". This identification is unique to the person and remains with them throughout their Lion journey.

Each time a Member changes there membership relationship a unique history record is created to track the Membership History. These include changes like:

• Regular Membership to Family Membership

• Dropping and then Reinstating or transferring clubs

• Having an association with another Club in addition to your primary club

This tracking number looks like: MEMBER#0011943930

1   Sign in to the Lion Portal. **lionportal.org**

2 Click "MY CLUB"
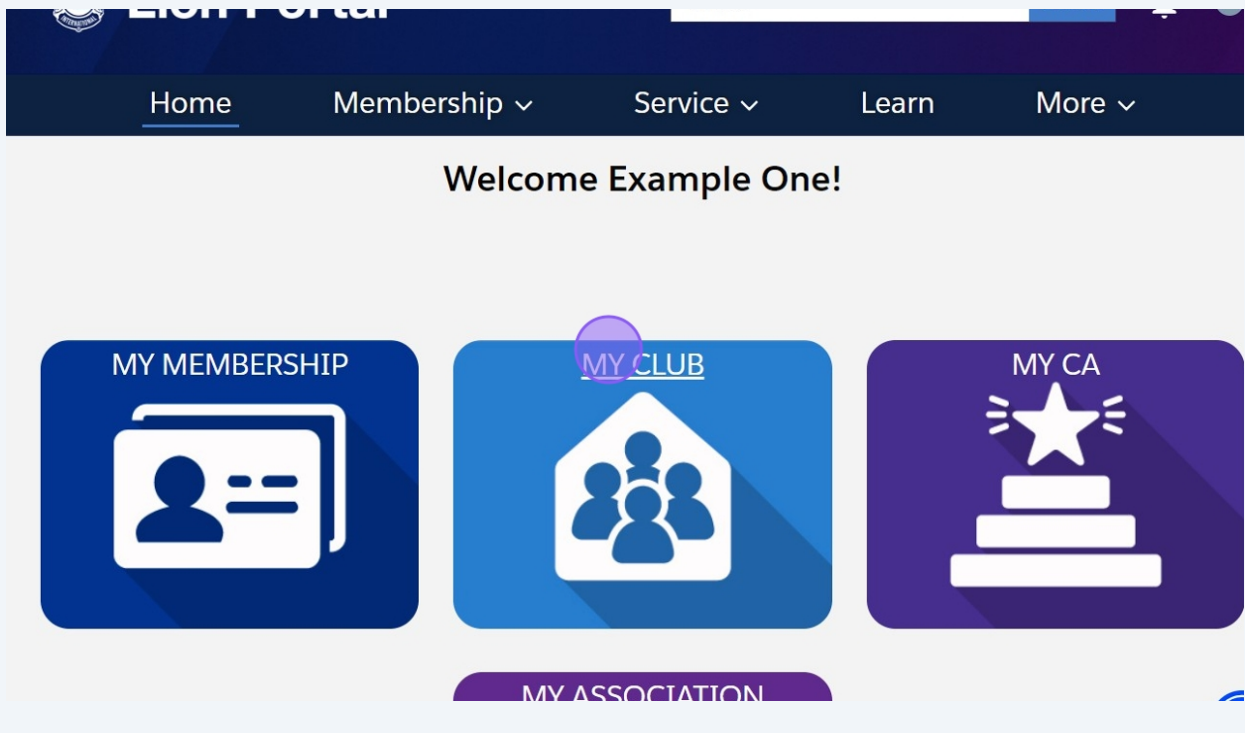
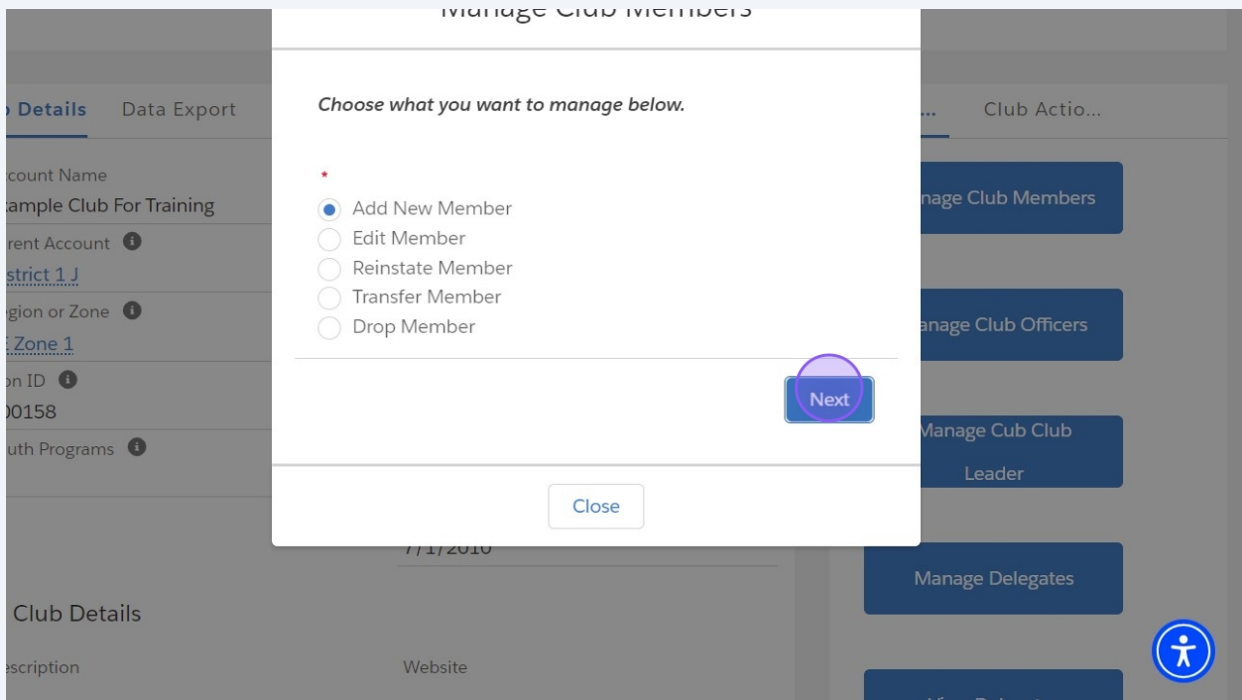**3** Click "Manage Club Members"
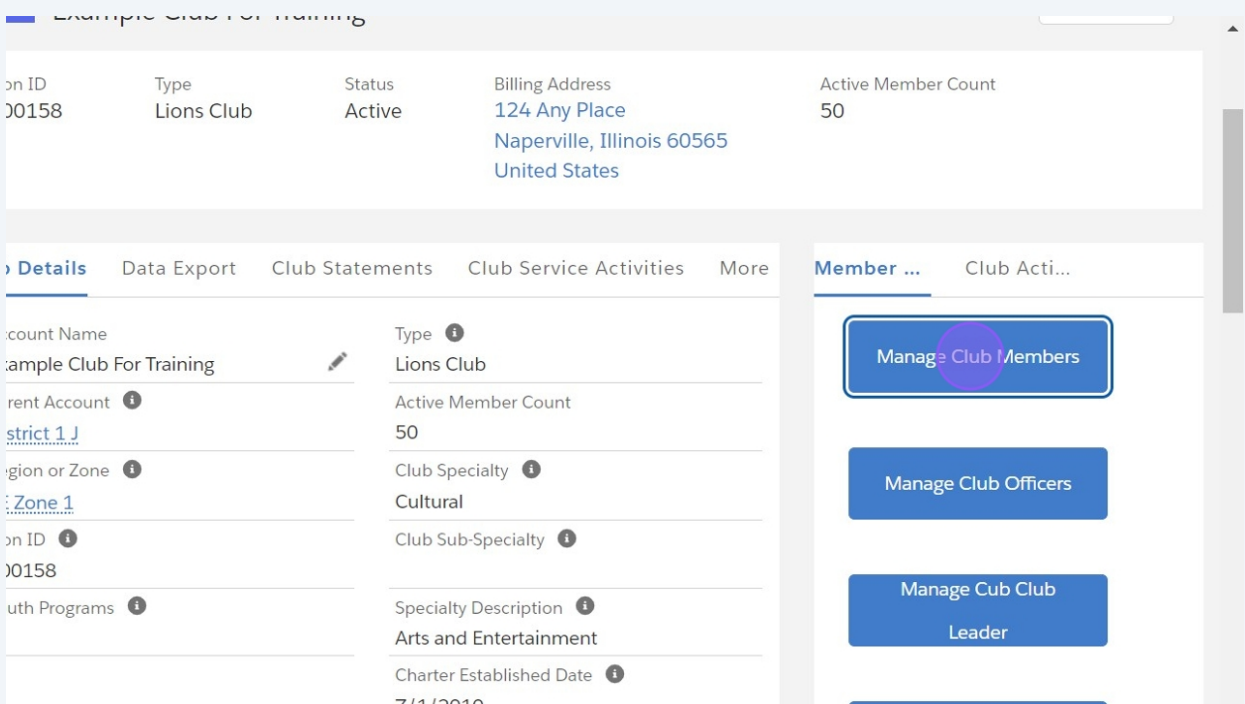
4 Select "Add New Member" and click "Next"

5 To begin the process enter the required data

6 Click this dropdown.

Manage Club Members

Please complete fields to begin new membership process

* First Name

Example

* Last Name

Fifity-One

* Date of Birth

Jan 8, 1988

MMM d, yyyy

* Gender

--None--

Previous   **Search**

--None--
Male
Female
Non-Binary
Prefer Not To Answer

Close

Club Details

Details   Data Export

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
Zone 1

on ID ⓘ
00158

uth Programs ⓘ

Club Actio...

nage Club Members

anage Club Officers

Manage Cub Club
Leader

Manage Delegates

ⓘ Tip! The system will search to ensure this is not a duplicate. If there are no potential duplicates you will be brought to the enter address step.

5

7 Click "Search"

Please complete fields to begin new membership process

* First Name

Example

* Last Name

Fifity-One

* Date of Birth

Jan 8, 1988

MMM d, yyyy

* Gender

Male

Previous   Search

Close

Details   Data Export

ccount Name
ample Club For Training

rent Account
strict 1 J

gion or Zone
Zone 1

on ID
0158

uth Programs

Club Details

escription   Website

Club Actio...

nage Club Members

anage Club Officers

Manage Cub Club
Leader

Manage Delegates

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8 Begin entering additional data

200158   Lions Club

Manage Club Members

Create New Contact

* First Name	Middle Name	Prefix	* Gender
Exampl			Male

* Last Name	Nickname	Suffix	* Date of Birth
Fifity-Oı			Jan 8

MMM d, yyyy

*Address Fields Required

Primary Email

you@exampl

Address

Country

--None--

Secondary Email

Close

Club Details   Data Export

Account Name
Example Club For Training

Parent Account
District 1 J

Region or Zone
SE Zone 1

Lion ID
200158

Youth Programs

∨ Club Details

Club Actio...

nage Club Members

anage Club Officers

Manage Cub Club
Leader

Manage Delegates

9   To add the address, first select the country
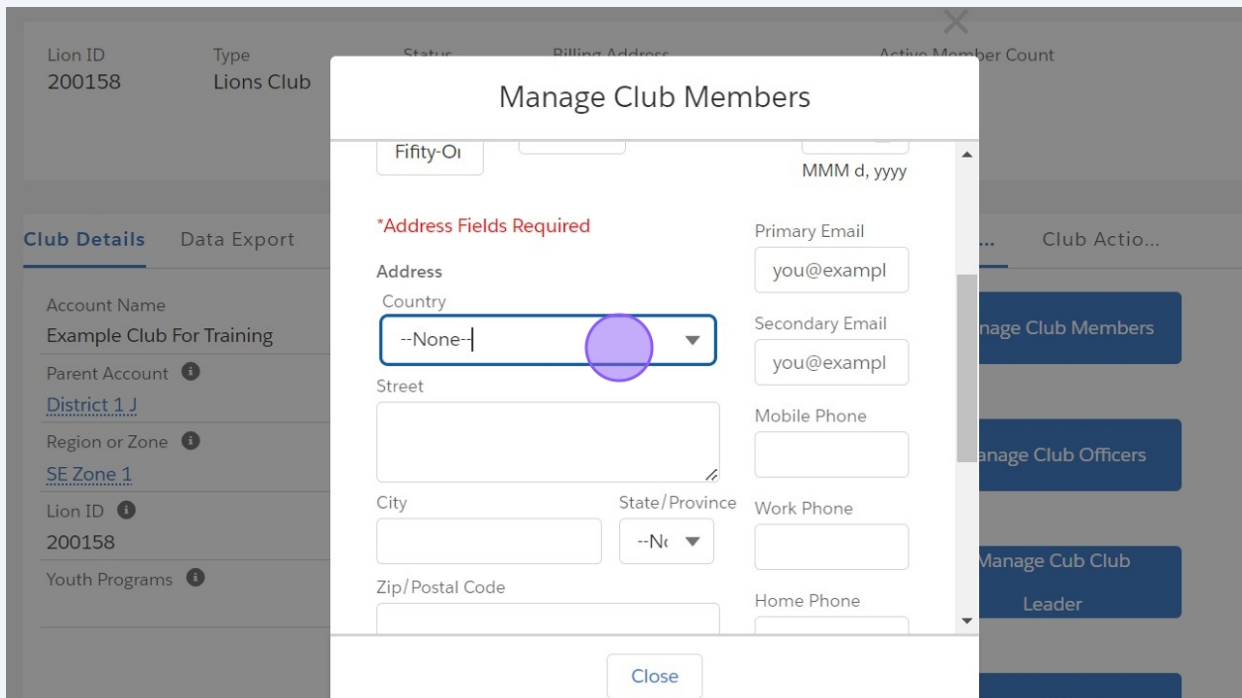
10   Click the "Country" to bring down the list of countries and select the country
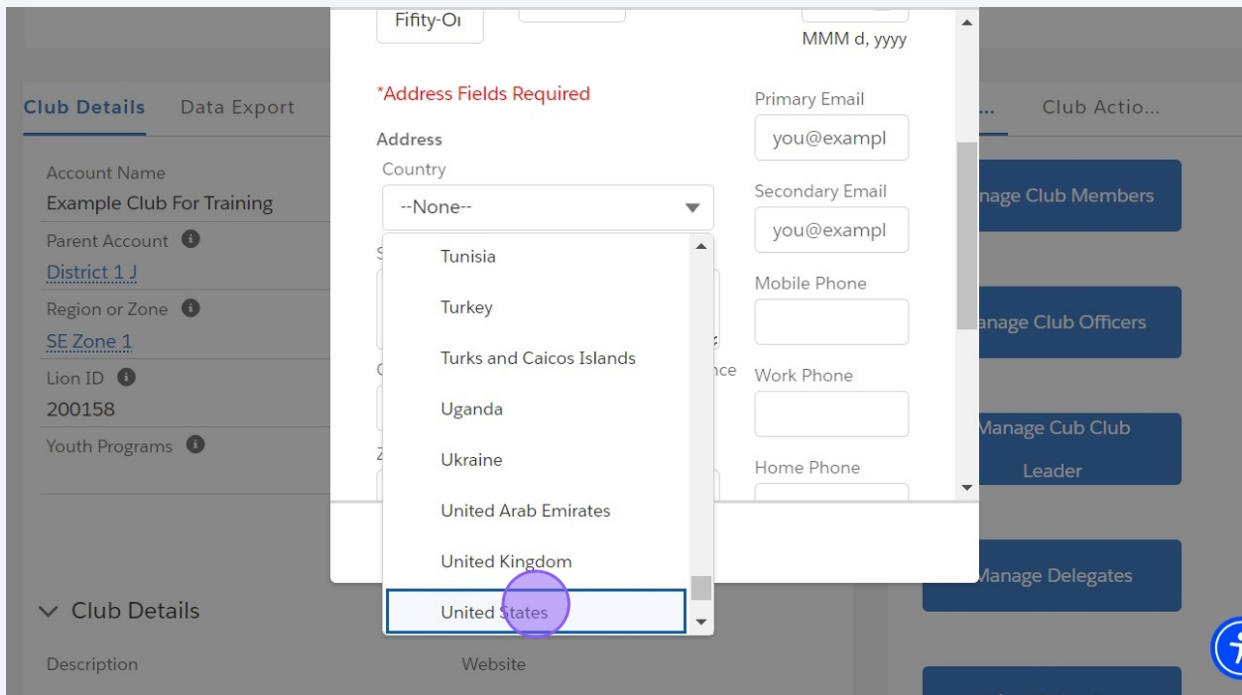
11 enter the additional data for this member

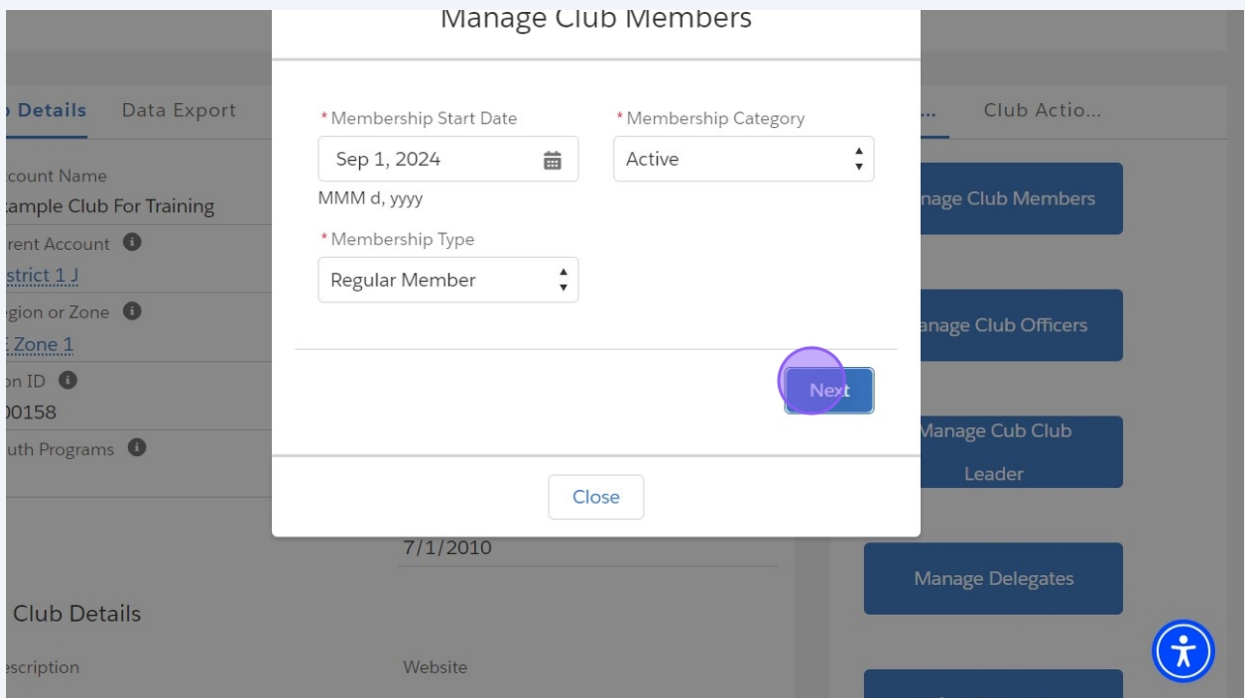**12** Click "Next"

13 Enter the start date of the membership and the "Member Type"
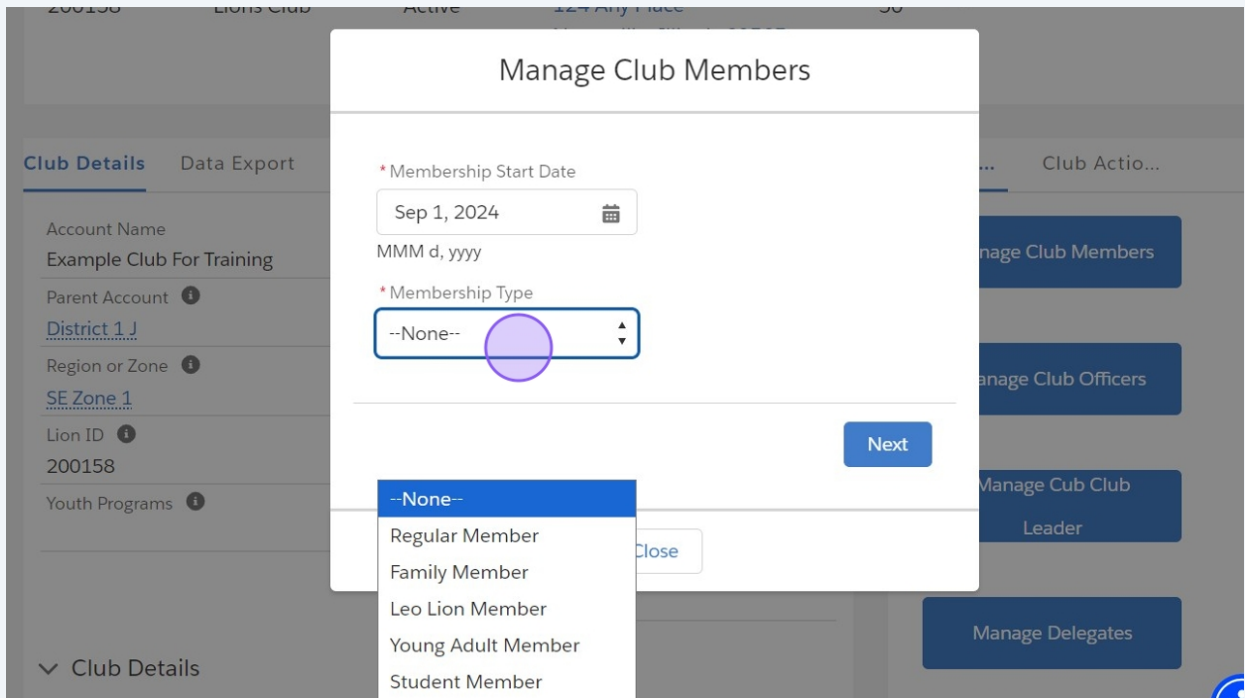
14 Click "Next"

15 Add the member sponsor. To search for sponsor by name select "Name" and click next

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	50

Club Details Data Export

Manage Club Members

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
SE Zone 1

Lion ID ⓘ
200158

Youth Programs ⓘ

Please search for a sponsor for the new member.

*Search by Name or Lion ID
○ Name
○ Lion ID

Previous   **Next**

nage Club Members

anage Club Officers

Manage Cub Club
Leader

Close

Charter Established Date ⓘ
7/1/2010

Manage Delegates

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16 Enter the name and click "Next"

Manage Club Members

 Details   Data Export

Please search for a sponsor for the new member.

*Search by Name or Lion ID
● Name
○ Lion ID

*First Name   *Last Name
Example   one

count Name
ample Club For Training

rent Account ⓘ
strict 1 J

gion or Zone ⓘ
Zone 1

on ID ⓘ
00158

uth Programs ⓘ

Previous   **Next**

Close

Club Details

escription   Website

Club Actio...

nage Club Members

anage Club Officers

Manage Cub Club
Leader

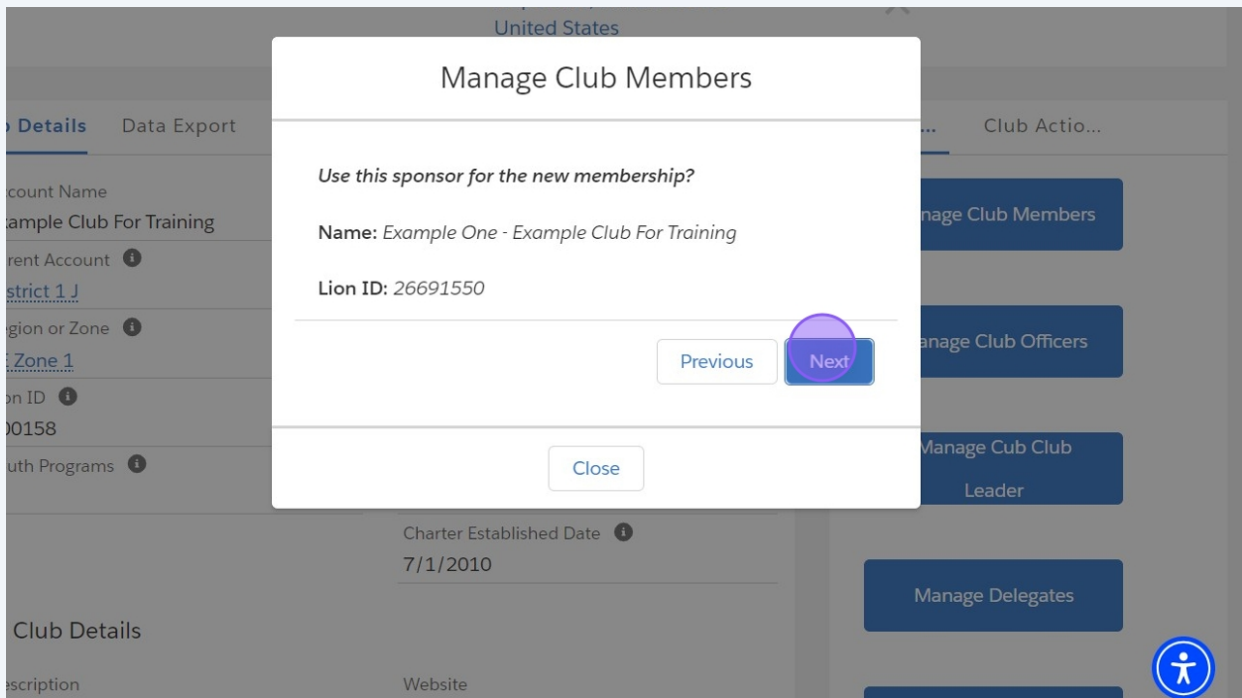Manage Delegates

17   Select the member from the list and click "Next"

⚠ Alert! If this is not the correct sponsor member, click "Previous" to return the the search for sponsor step.

18 Confirm you have selected the correct sponsor member and click "Next"

19 A Green Success message will show at the top of the screen and you are returned to the "Club Details" page

View the Member and there Membership Details

20   Under "View Members" click "View All"

wn Center		टाउन सेंटर		

N. ⌄	M ⌄	M ⌄	M ⌄
Exam ple Twelv e	Lion-Chart er-Regul ar [Activ e]	zuser 012@ lionfa ke.co m	(63 0) 890 -12 34
Exam ple Five	Lion-Chart er-Regul ar [Activ e]	zuser 005@ lionfa ke.co m	(63 0) 123 -45 67
	Lion-Chart	zuser	(63 0)

Meeting Week of Month ⓘ
rst

Meeting Day ⓘ
onday

Meeting Time ⓘ
7:00

Meeting Street ⓘ
55 Town Road

Meeting City ⓘ
aperville

Meeting State or Prov ⓘ

Meeting Zip Code ⓘ
0565

Meeting Country ⓘ
nited States

Meeting Local Street ⓘ
४५५ टाउन रोड

Meeting Local City ⓘ
नेपरविल

Meeting Local Zip Code ⓘ

Meeting Local State or Prov ⓘ
IL

Meeting Local Country ⓘ
संयुक्त राज्य अमेरिका

Online Meeting 1 ⓘ
☐

Online Meeting 1 Place ⓘ

Online Meeting 1 Address ⓘ

Meeting Location 2

eeting 2 Place ⓘ

Meeting 2 Local Place ⓘ

View

ⓘ   Tip! You can make the columns larger or smaller by clicking and dragging the column as shown below

21 The member list is shown

22 To view the details of the Membership Type click the blue system identification for this membership

23   The details of the Membership Type are displayed

ontact	Club	Club Branch	Membership Full Type
:ample Fifity-One	Example Club For Training		Lion-Regular [Active]

ails

ub ⓘ	Membership Status ⓘ	**Contact Customer Service**
:ample Club For Training	Active Member	Email: lionssupport@lionsclubs.org
ontact ⓘ	Membership Type ⓘ	Phone: (+001) 630-468-6900
:ample Fifity-One ✏	Lion	
ub Branch ⓘ	Membership Category ⓘ	No related lists to display
	Active	
lationship Type ⓘ	Program ⓘ	
	Regular	
embership Sponsor ⓘ	Add Type ⓘ	
:ample Member One	New	

Membership Details

on Join Date ⓘ

---

24   Scroll to see additional details

art Date ⓘ
'1/2024 ✏

d Date ⓘ

tal Years ⓘ
05

Hierarchies

embership Club	Constitutional Area
:ample Club For Training	U.S. and Affiliates, Bermuda and Bahamas
AT Constitutional Area	LCIF Constitutional Area
AT Constitutional Area 1	LCIF Constitutional Area 1
AT Group	LCIF Group
AT Group E - Area 1	LCIF Group C - Area 1
ultiple District	District
ultiple District 1	District 1 J
gion	Zone
: Region	SE Zone 1

25 Click the link under "Contact" to view the Member Details

Contact	Club	Club Branch	Membership Full Type
Example Fifity-One	Example Club For Training		Lion-Regular [Active]

Details

Club ⓘ
Example Club For Tra...

Contact ⓘ
Example Fifity-One

Club Branch ⓘ

Relationship Type ⓘ

Regular

Membership Sponsor ⓘ
Example Member One

Add Type ⓘ
New

⌄ Membership Details

Lion Join Date ⓘ

Contact Customer Service
Email: lionssupport@lionsclubs.org
Phone: (+001) 630-468-6900

No related lists to display

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26 Details about the Member are shown

Primary Affiliation	Member ID	Email	Phone
Example Club For Training	26691601	zfiftyone@fake.com	630 942-2233

Name
Example Fifty-One

Primary Affiliation ⓘ
Example Club For Training

Nickname ⓘ
M-Man

Gender ⓘ
Male

Spouse Name ⓘ
Companion Fifty-One

Birthday ⓘ
January 8

Birthdate
1/8/1988

Occupation ⓘ
Business/Consultant/Service Provider

⌄ Local Language Information

First Name (Local)

Middle Name (Local)

Last Name (Local)

Contact Members Services
Email: lionssupport@lionsclubs.org
Phone: (+001) 630-468-6900

Club Me... (1)   ⚙ ▾   ↻
1 item • Sorted by Start Date • Updated a few seconds ago

	Club Name ⌄	Membershi...
1	Example Club ...	Lion-Regular [

View All

Members Sponsored (0)

27 Scroll to see more details

Contact Information

Mailing Address
462 Spring Way
Naperville, Illinois 60565
United States

Local Address

Preferred Phone ⓘ
Mobile

Home Phone

Preferred Email ⓘ
Personal

Mobile
630 942-2233

Personal Email ⓘ
zfiftyone@fake.com

Work Phone ⓘ

Work Email ⓘ

Other Phone

Alternate Email ⓘ

Fax

Officer Titles (0)

28 Click "Home" to return to the landing page

Lion Portal

Search   Search

Home   Membership ⌄   Service ⌄   Learn   More ⌄

Contact
Example Fifity-One

+ Follow

Primary Affiliation
Example Club For Training

Member ID
26691601

Email
zfiftyone@fake.com

Phone
630 942-2233

Name
Example Fifty-One

Spouse Name ⓘ
Companion Fifty-One

Primary Affiliation ⓘ
Example Club For Training

Birthday ⓘ
January 8

Nickname ⓘ
M-Man

Birthdate
1/8/1988

Contact Members Services
Email: lionssupport@lionsclubs.org
Phone: (+001) 630-468-6900

Club Me... (1)   ⚙ ▾   ↻

1 item · Sorted by Start Date · Updated a few seconds ago

29   This concludes the Manage Club Members - Add a Club Member Quick Guide

Home	Membership ⌄	Service ⌄	Learn	More ⌄

Welcome Example One!

MY MEMBERSHIP

MY CLUB

MY CA

MY ASSOCIATION