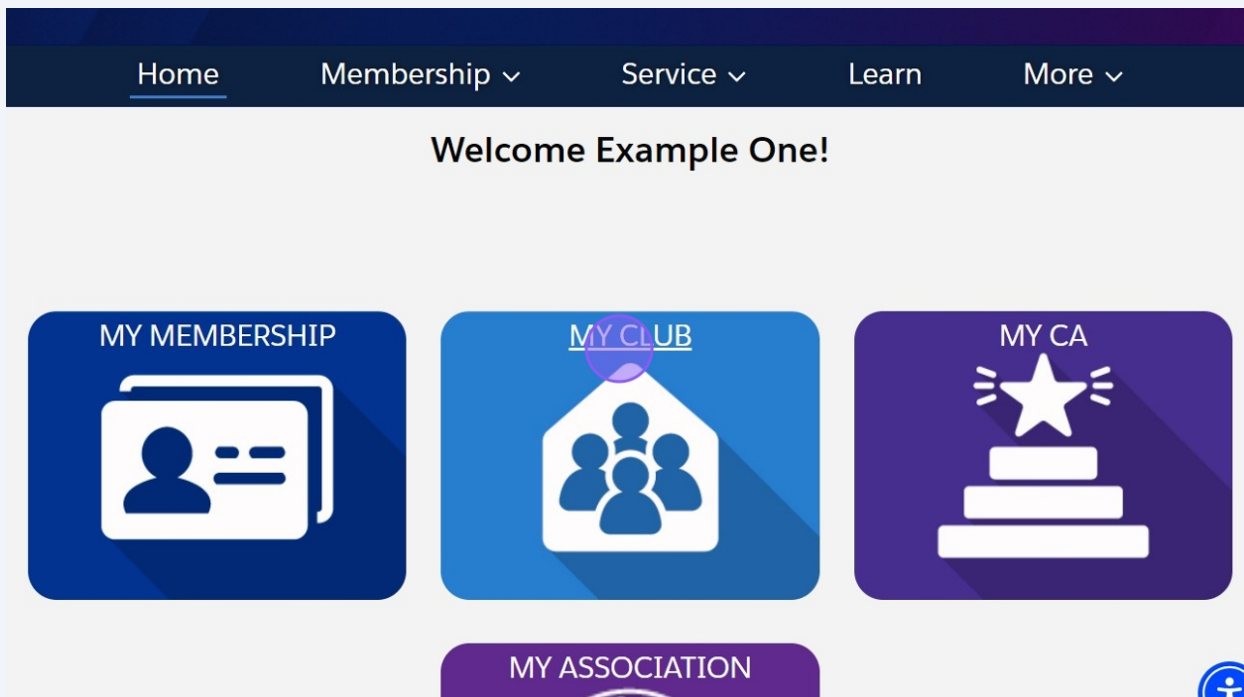


Club Page - Export Data

This guide provides a straightforward method for exporting essential member and service activity data from the Lion Portal, making it a valuable resource for club leaders and administrators. By following the steps outlined, users can easily access and manipulate important information regarding club members and their activities, which can aid in reporting and analysis. The guide also offers tips for optimizing data compatibility with various spreadsheet programs, ensuring users can effectively utilize the exported data. Viewing this guide will enhance the efficiency of data management within clubs.

1 Sign into the Lion Portal lionportal.org

2 Click here.



3 Click "Data Export" tab

Home Membership ▾ Service ▾ Learn More ▾

Account
Example Club For Training + Follow

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	56

Club Details **Data Export** Club Statements Club Service Activities More

Member ... Club Acti...

Account Name
Example Club For Training

Parent Account ⓘ
[District 1 J](#)

Region or Zone ⓘ
[SE Zone 1](#)

Lion ID ⓘ
200158

Type ⓘ
Lions Club


Active Member Count
56

Club Specialty ⓘ
Cultural

Club Sub-Specialty ⓘ

Manage Club Members

Manage Club Officers

 Tip! Data that can be exported is determined by the report link chosen.

At the Club Level the options are:

Member Contact Information - Basic contact information: Member ID, Name, email, phone, address, local language name, address, spouse/companion name, membership type, club, district, multiple district for ALL Club members

Officer Contact Information - Basic contact information as previously described for active officers with officer title and region and zone

Member Detail Information - Basic contact information, birthdate, occupation, gender, sponsor, Lion Join date (date became a member)

Club Level Service Activity Information - Activity type (project, fundraiser, donation, meeting), Start and End date, title, description, metrics (people served, volunteer hours, funds raised, funds donated), signature activity, club, district, multiple district.

4 Click report data to export. This example uses: "Member Contact Information"

Lion ID 200158	Type Lions Club	Status Active	Billing Address 124 Any Place Naperville, Illinois 60565 United States	Active Member Count 56
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Club Details **Data Export** Club Statements Club Service Activities More

Member ... Club Acti...

If the selected report does not generate any results, it is due to data privacy restrictions.

[Member Contact Information](#)

[Club Officer Contact Information](#)

[Member Detail Information](#)

[Club Level Service Activities Information](#)

Manage Club Members

Manage Club Officers

Manage Cub Club Leader

Manage Delegates

5 The report will open in a new tab. The number of rows to be exported is shown under "Total Records". This club has 56 members.

Home Membership ▾ Service ▾ Learn More ▾

Report: Accounts with Memberships and Contact
Member Contact Information Enable Field Editing Search Add Chart Filter Refresh Export

Member Listing of Name, Address, Email and Phone Numbers

Total Records
56

Parent Multiple District ↑ ▾	Parent District ↑ ▾	Account Name ↑ ▾	Contact Member ID ▾	Contact: Salutation ▾	Cont
<input type="checkbox"/> Multiple District 1 (56)	District 1 J (56)	Example Club For Training (56)	26691550	-	Exan
			26691551	Mx.	Exan
			26691553	-	Exan

6

View report data using the scroll bars to scroll vertically and horizontally. Click "Filters" to view report filters.

Home Membership Service Learn More

Report: Accounts with Memberships and Contact
Member Contact Information
Member Listing of Name, Address, Email and Phone Numbers

Enable Field Editing Add Chart Filters Export

11 Records

Multiple District ↑	Parent District ↑	Account Name ↑	Contact Member ID	Contact: Salutation	Contact
Multiple District 1 (56)	District 1 J (56)	Example Club For Training (56)	26691550	-	Exan
			26691551	Mx.	Exan
			26691553	-	Exan

7

The filters are shown.

Member Contact Information
Member Listing of Name, Address, Email and Phone Numbers

11 Records

Multiple District ↑	Parent District ↑	Account Name ↑	Contact Member ID	Contact
Multiple District 1 (56)	District 1 J (56)	Example Club For Training (56)	26691550	
			26691551	
			26691553	
			26691568	
			26691562	

Filters Close Filter Panel

Show Me
All accounts

Last Activity
All Time

Type
equals Alpha Leo Club, Leo Lions, Lions Club, Omega Leo Club

Membership Status
equals Active Member

Linked Filters

Account Id
equals 001Nq0000M9viOIAR

8 Click this button to close the filter pane.

Home Membership Service Learn More

Report: Accounts with Memberships and Contact
Member Contact Information
Member Listing of Name, Address, Email and Phone Numbers

Enable Field Editing Add Chart Export

Filters
Close Filter Panel

Show Me
All accounts

Last Activity
All Time

Type
equals Alpha Leo Club, Leo Lions,
Lions Club, Omega Leo Club

Membership Status
equals Active Member

Linked Filters
Account Id
equals 001Nc00000M9viQIAR

Multiple District	Parent District	Account Name	Contact Member ID
Multiple District 1 (56)	District 1 J (56)	Example Club For Training (56)	26691550
			26691551
			26691553

9 Click "Export" to begin the process.

Home Membership Service Learn More

Report: Accounts with Memberships and Contact
Member Contact Information
Member Listing of Name, Address, Email and Phone Numbers

Enable Field Editing Add Chart Export

Records

Multiple District	Parent District	Account Name	Contact Member ID	Contact: Salutation	Contact: Email
Multiple District 1 (56)	District 1 J (56)	Example Club For Training (56)	26691550	-	Example
			26691551	Mx.	Example
			26691553	-	Example



Tip! For best compatibility with most spreadsheet programs chose "Details Only" and the .xlsx format.

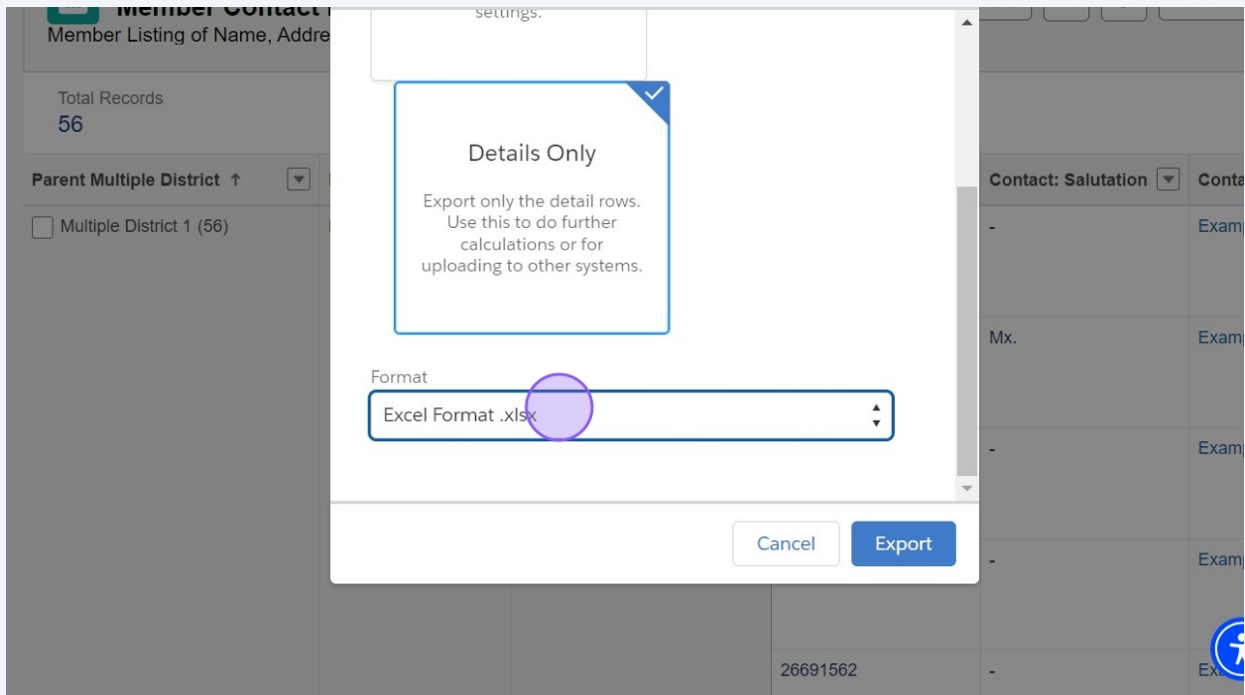
10

Click "Export only the detail rows. Use this to do further calculations or for uploading to other systems." Click "Formatted Report" to retain groupings, subtotals and totals.

The screenshot shows a software interface for 'Member Contact' with 56 records. An export dialog box is open, offering two options: 'Formatted Report' (which includes headers, groupings, and filter settings) and 'Details Only' (which exports only detail rows for further calculations or uploads). The 'Details Only' option is highlighted with a purple circle. The background table shows columns for 'Contact: Salutation' and 'Exam'.

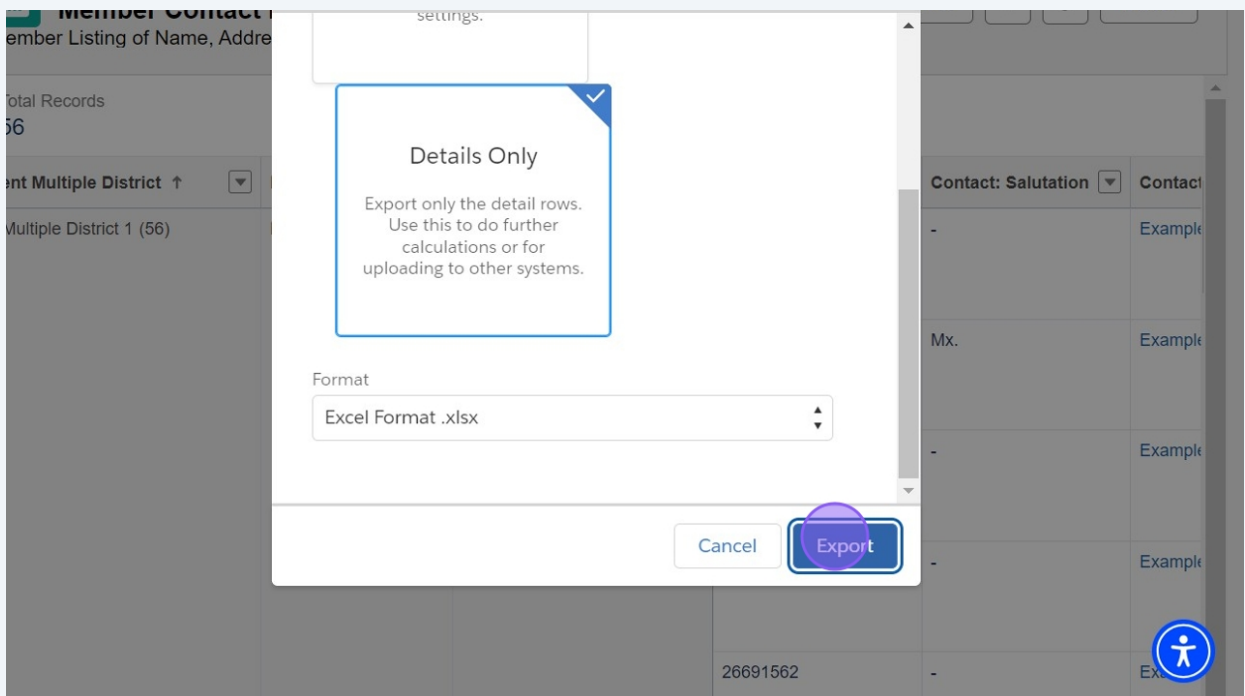
11

Click this dropdown and choose .xlsx format for the greatest compatibility. Other format options are: Comma Delineated .csv; older Excel .xls

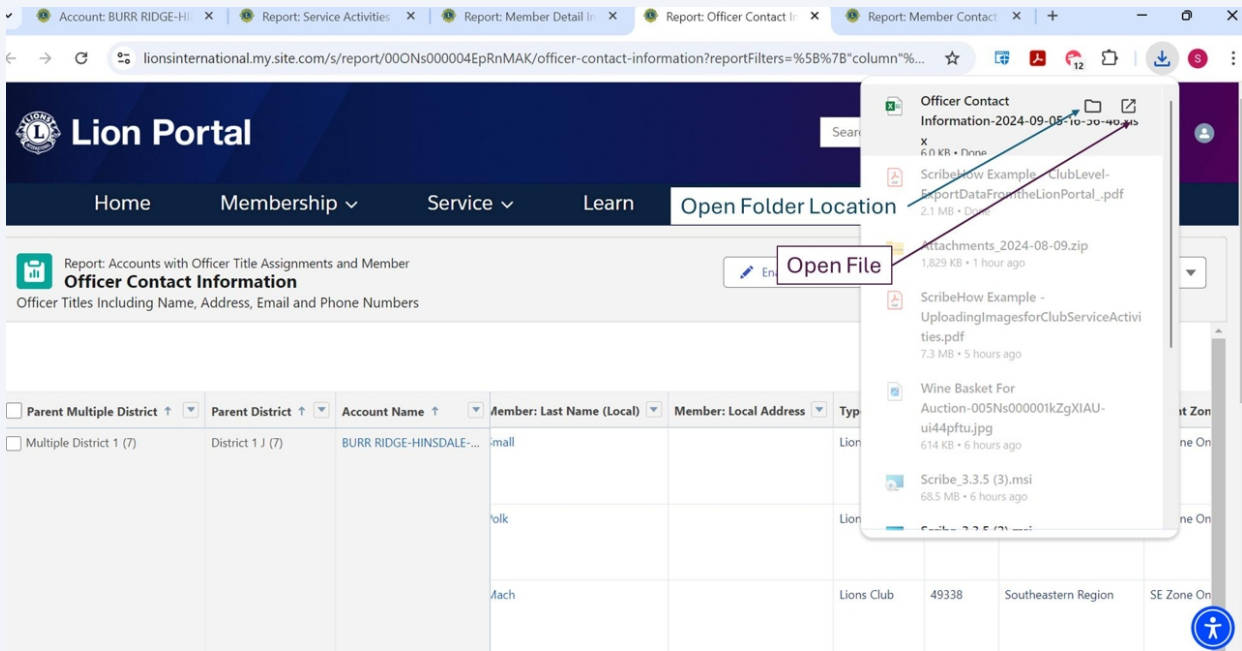


12

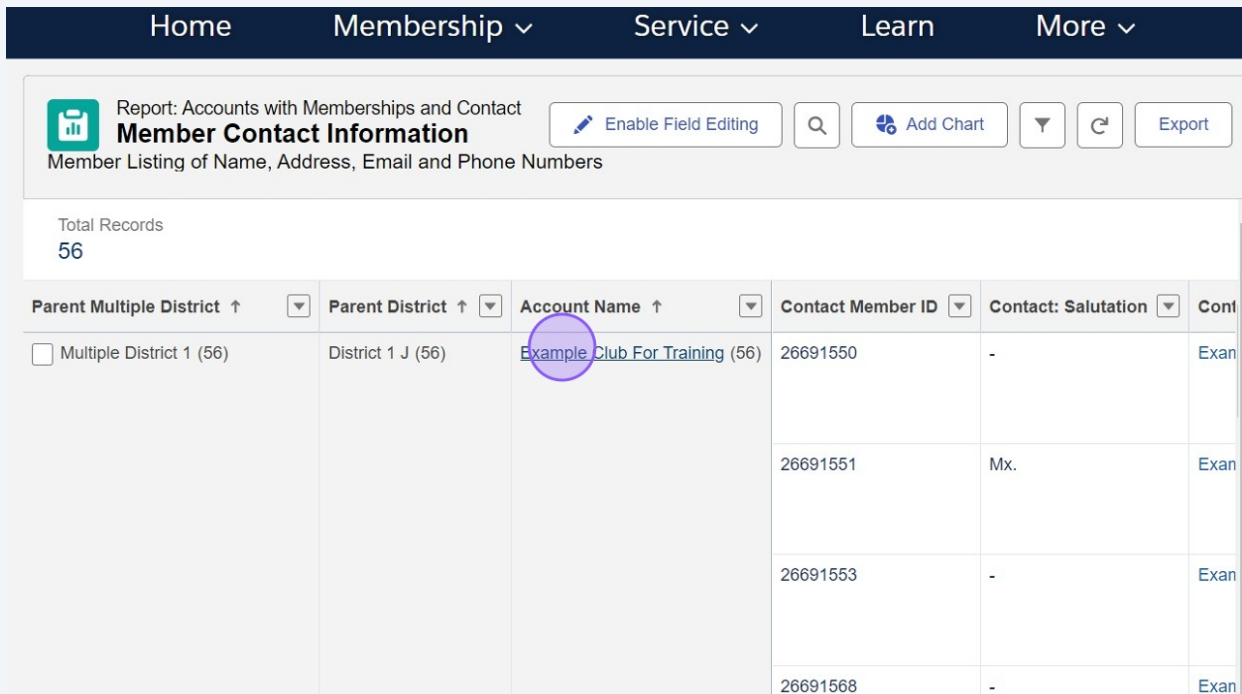
Click "Export"



13 The browser will show when the download is complete.



14 Click the Club ("Account") name link to return to your club page, or close the newly opened tab.



15 Click "Home" to return to the landing page

The screenshot shows the 'Lion Portal' interface. At the top, there is a search bar and a user profile icon. Below the search bar is a navigation menu with 'Home' (highlighted), 'Membership', 'Service', 'Learn', and 'More'. The main content area displays account information for 'Example Club For Training'. A table lists details such as Lion ID (200158), Type (Lions Club), Status (Active), Billing Address (124 Any Place, Naperville, Illinois 60565, United States), and Active Member Count (56). Below the table are tabs for 'Club Details', 'Data Export', 'Club Statements', 'Club Service Activities', and 'More'. The 'Club Details' tab is active, showing fields for Account Name, Parent Account, Type (Lions Club), and Active Member Count. A 'Manage Club Members' button is visible on the right side.

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	56

16 This concludes the "Club Page - Export Data" Quick Guide

The screenshot shows the 'Lion Portal' home page. At the top, there is a navigation menu with 'Home' (highlighted), 'Membership', 'Service', 'Learn', and 'More'. Below the navigation menu is a large heading that says 'Welcome Example One!'. Underneath the heading are four large, colorful buttons: 'MY MEMBERSHIP' (dark blue), 'MY CLUB' (medium blue), 'MY CA' (purple), and 'MY ASSOCIATION' (dark purple). Each button contains an icon representing its function. At the bottom right, there is a user profile icon and a search icon.