Manage Club Members - Transfer A Member

This guide provides a step-by-step process for transferring a member from one club to another using the Lion Portal, ensuring a seamless transition while maintaining accurate membership records. It clarifies the responsibilities of the current and new club officers, helping users understand the necessary actions required from both parties. By following this guide, club administrators can efficiently manage membership changes, enhancing organizational effectiveness and member satisfaction.

1

Sign in to the Lion Portal. lionportal.org

Drop - Transfer From Old Club



Alert! To transfer a member into your Club the member needs to be dropped from their current club. The steps shown in this section are performed by the other club.



This step is done by the Officer or Administrator of the **current** Club. Once the membership of the Member has been dropped the Officer or Administrator of the new club can transfer the member into the new club. This creates a new "Membership" record for the history of the member.

2 Click "MY CLUB"



Click "Manage Club Members"

Н	ome	Membe	rship ~	Service ~	l	Learn	More ~
Accour BURF	RIDGE-HIN	ISDALE-O4	AK BROOK				+ Follow
on ID 9338	Type Lions Club	Statu: Activ	s Billing re Oak Unite	g Address Brook, Illinois 6052 ed States	23	Active Member Co 42	punt
Details	Data Export	Club State	ments Club S Type 🚯	Service Activities	More	Member Manage (Club Acti
rent Account	0		Active Member 42	Count			
gion or Zone Zone One	0		Club Specialty	0		Manage	Club Officers
on ID () 9338	•		Club Sub-Specia	lty 1		Manag	ge Cub Club

4 Select the "Drop Member" "Radio Button" and click "Next"

ŀ	lome	manage clab members	More ~
Accour BURF	RIDGE-HINS	Choose what you want to manage below.	+ Follow
on ID 9338	Type Lions Club	 Add New Member Edit Member Reinstate Member Transfer Member Drop Member 	er Count
Details	Data Export	Next	nage Club Members
rent Account strict 1 J	0	Close	
gion or Zone Zone One	0	Club Specialty	Manage Club Officers
on ID 🚯		Club Sub-Specialty	Manage Cub Club

Select the member to drop by clicking the "Radio Button" next to the member name and click "Next"

5

Home	Inidiate Cian Inferimers	More ~
Account BURR RIDGE-HINS	Select Member to Drop 1 of 1 item • 1 item selected	+ Follow
on ID Type 9338 Lions Club	Q nine ♥ Contact Full Name ♥	er Count
Details Data Export	Previous	Club Actio nage Club Members
rent Account ① strict 1 J	Close	
gion or Zone 0	Club Specialty 0	Manage Club Officers
on ID 0 3338	Club Sub-Specialty	Manage Cub Club

3

Enter the "Membership End Date". Select the "Drop Reason" option "Transferred" option.

Home	Member Name: Example Ninety	- More ∽
Account BURR RIDGE-HINS	Member's ID: 26691612	+ Follow
Lion ID Type 49338 Lions Club	* Drop Reason ()	er Count
Club Details Data Export	Transferred	Club Actio
BURR RIDGE-HINSDALE-OAK BR Parent Account District 1 J Region or Zone	Close	nage Club Members
SE Zone One Lion ID 49338	Club Sub-Specialty	

7 "Drop Reason Details" can be entered. Click "Save"

6

Home	Member Name: Example Ninety Member's ID: 26691612	^ More ∽
Account BURR RIDGE-HINS	* Membership End Date	+ Follow
	Sep 1, 2024	
on ID Type 2338 Lions Club	* Drop Reason 🚯	er Count
	Transferred	
	Drop Reason Details	
Details Data Export	Moving to Example Club For Training	Club Actio
count Name JRR RIDGE-HINSDALE-OAK BR	Save	nage Club Members
rent Account ① strict 1 J	Close	
gion or Zone 🕚	ciose	manage Club Officers
Zone One		
on ID 🙂	Club Sub-Specialty 🕕	(*)
		Manage Cub Club

(i) The member has been dropped from their current club.

Add - Transfer to the New Club

(i) These steps are done by the Officer or Administrator of the **new** Club. This creates a new "Membership" record with the new Club to track the history of the member.

8 The Officer or Administrator of Club to receive the transferred member is signed in to the portal.

9	Click "MY C	CLUB"				
	Homo	Momborshin	Sorvice	Loarn	Mora	
	Home	Welcom	e Example Or	ne!		
			•			
	MY MEMBER	SHIP	MY CLUB		MYCA	
			2			
			282			
		MY A	SSOCIATION			

Click "Manage Club Members"

H	ome	Membe	rship ~	Service ~		Learn	More ~
Accoun Exam	^t ple Club For	Training					+ Follow
on ID 00158	Type Lions Club	Stat Act	us ive	Billing Address 124 Any Place Naperville, Illinois 605 United States	65	Active Member 60	Count
Details	Data Export For Training	Club State	ments CI Type 1 Lions Club	lub Service Activities	More	Member Manage	Club Acti
rent Account strict 1 J	0		Active Mem	nber Count			
gion or Zone Zone 1	0		Club Specia Cultural	alty 1		Manag	e Club Officers
on ID 🚯			Club Sub-Sp	pecialty 🚺			

11 Select the "Radio Button" next to "Transfer Member" and click "Next"

Home	ואמוומצב כומה ואבווחבוז	More ~
Account Example Club For	Choose what you want to manage below.	+ Follow
on ID Type D0158 Lions Club	 Add New Member Edit Member Reinstate Member Transfer Member Drop Member 	per Count
Details Data Export		ext Club Actio
count Name ample Club For Training rent Account	Close	nage Club Members
strict 1 J	60	
gion or Zone 1	Club Specialty ① Cultural	Manage Club Officers
on ID 😈	Club Sub-Speciality	

12 To locate the member you can search by "Name" or "Lion ID". Enter the data and click "Search"

Home		More ~
Account Example Club For	Please complete fields to begin new membership process * Search by Name or Lion ID	+ Follow
on ID Type D0158 Lions Club	Name Lion ID *First Name Example Ninety	per Count
Details Data Export	Previous	Club Actio
count Name ample Club For Training rent Account ① strict 1 J	Close	nage Club Members
gion or Zone Zone 1 Dn ID	Club Specialty Club Sub-Specialty	Manage Club Officers

13 Select the member by clicking the "Radio Button" next to the member name and click "Next"

Home		[↑] More ∨
	Duplicate Contacts	
Account	1 of 1 item • 1 item selected	
Example Club For	✓ F. ∨ D ∨ C ∨ C ∨ L. ∨ M ∨ M ∨	+ Follow
on ID Type D0158 Lions Club	Exam ple Sep Uni Mem 14, 2669 Illino ted ber 1969 1612 is Sta Ninet y	per Count
Details Data Export —		Club Actio
count Name ample Club For Training	Previous	🗸 nage Club Members
rent Account 0	Close	
gion or Zone	Club Specialty 0	Manage Club Officers
Zone 1	Cultural	
on ID 🚯	Club Sub-Specialty 0	

Confirm the Membership of the member.

Home	be transferred.	1					ˆ More ∽
Account Example Club For	Existing Member 1 of 1 item • 1 ite	erships em selected					+ Follow
Lion ID Type 200158 Lions Club Club Details Data Export Account Name Example Club For Training	BUR R RIDG E- HINS DALE -OAK BRO OK	Inact Inact Inact Mem ber	Jun 30, 2020	Dr	N V Regul ar [Dro pped]	D V Dro p Tra ns- ferr ed in Go od Sta	per Count Club Actio → nage Club Members
Parent Account ① District 1.J			Close				
Region or Zone SE Zone 1 Lion ID	Club Spe Cultural Club Sub	cialty 🚯 -Specialty 🕻	•				Manage Club Officers
200158							

15 Click "Next"

Home Account Example Club For on ID Type D0158 Lions Club	BUR R RIDG E- HINS DALE OAK BRO OK BUR Inact Jun 30, Sep Dur Jun 30, Sep Dur P Tra Regul Sep Dur P Tra ar ed [Dro in pped Go Sta nd- ing	▲ More ↓ + Follow
o Details Data Export	<	nage Club Members
rent Account ① strict 1 J	Close	
gion or Zone Cone 1	Club Specialty Club Sub-Specialty	Manage Club Officers

16 Enter the "Membership Start Date", Select the "Membership Type" option, "Membership Category" and click "Next".

Home	Manage Club Members	More ~
Account Example Club For	* Membership Start Date * Membership Category Sep 10, 2024 Active	+ Follow
on ID Type D0158 Lions Club	* Membership Type Regular Member	ber Count
Details Data Export	Next	Club Actio
count Name ample Club For Training	Close	nage Club Members
rent Account ①	Active Member Count 60	
gion or Zone ① Zone 1	Club Specialty Cultural	Manage Club Officers
on ID 🕕	Club Sub-Specialty 0	

17 A green Success message is displayed. Click the "X" icon to close the message.

D Li	on Pc	Success! Membership	Record Created!	Search 📮 😩			
н	lome	Membership	✓ Service ✓	Learn	More ~		
Accour Exan	^{nt} nple Club For	[.] Training			+ Follow		
on ID 00158	Type Statu Lions Club Activ		Billing Address 124 Any Place Naperville, Illinois 60565 United States	Active Membe 60	Active Member Count 60		
Details	Data Export	Club Statements	Club Service Activities Mor	e Member	Club Acti		
count Name ample Club rent Account	For Training	Type Lions Active	Club Member Count	Manag	e Club Members		

The Club Detail tab is displayed.

	Home	Membe	rship ~	Service ~		Learn	More ∽
Acc Ex	count cample Club Fe	or Training	Ş				+ Follow
on ID 00158	Type Status Billing Address 8 Lions Club Active 124 Any Place Naperville, Illinois 60565 United States		65	Active Member Count 61			
) Details	Data Export	Club Stater	ments C	lub Service Activities	More	Member	Club Acti
count Nam	e b For Training	/	Type 🚯	0		Manage	e Club Members
rent Account strict 1 J			Active Member Count 61				
gion or Zone 🕚			Club Specialty Cultural		Manag	e Club Officers	
			CIUL CUL C	·····			

Click "Home" to return to the portal landing page

Lior	Portal		Search		Search 🏚 🗈
Hom	e Meml	bership ~	Service \sim	Learn	More ~
Account Exampl	e Club For Train	ing			+ Follow
Lion ID 1 200158 I	^{Type} S Lions Club	Status Billi Active 124 Naj Uni	ng Address 4 Any Place perville, Illinois 605 ted States	Active M 61 65	lember Count
Club Details Data	a Export Club Sta	itements Club S	Service Activities	More Membe	r Club Acti
Account Name Example Club For Tr Parent Account	aining 💉	Type 1 Lions Club Active Member 0	Count	N	Aanage Club Members

20 This concludes the "Manage Club Members - Transfer A Member" Quick Guide

