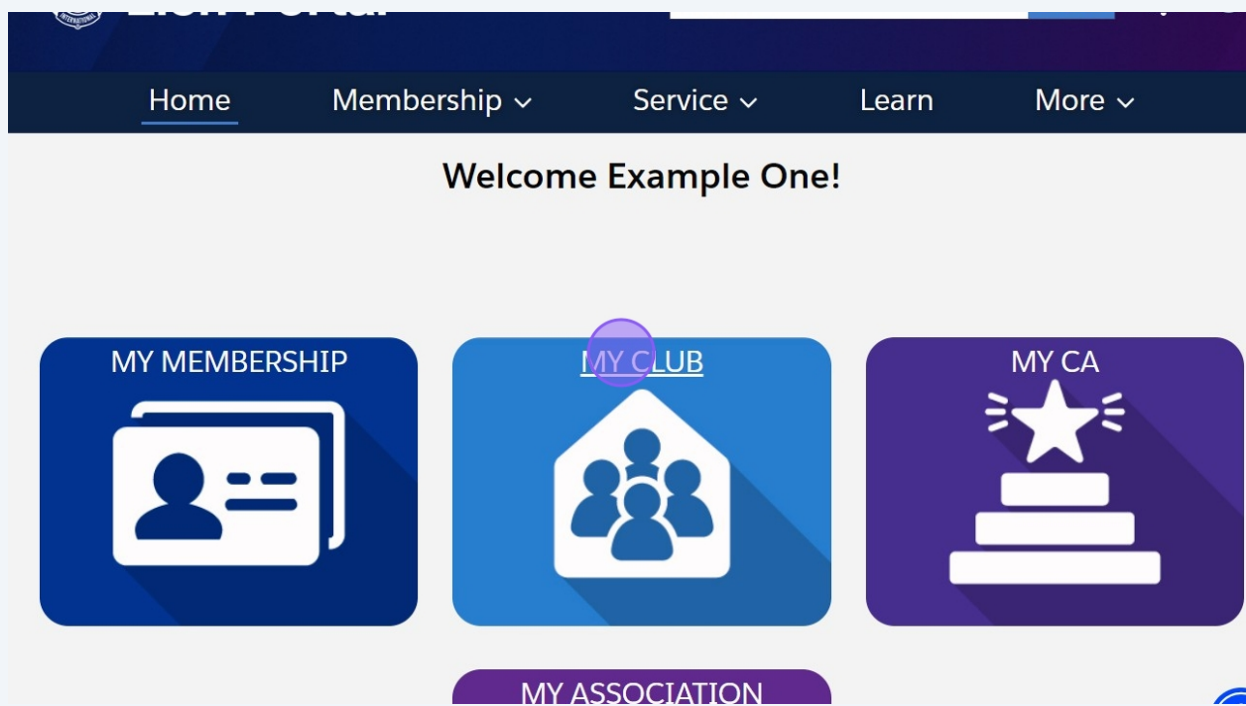


Manage Club Members - Edit Member Change Membership Type

This guide provides a comprehensive walkthrough for club administrators on how to update a member's membership type within the Lion Portal. It emphasizes the importance of accurately managing membership types, which can affect eligibility for delegate counts and re-instatement. By following this guide, users can ensure they maintain updated records and comply with Lions International regulations, ultimately enhancing the efficiency of club management.

1 Sign in to the Lion Portal. lionportal.org

2 Click "MY CLUB"



Membership Type Update

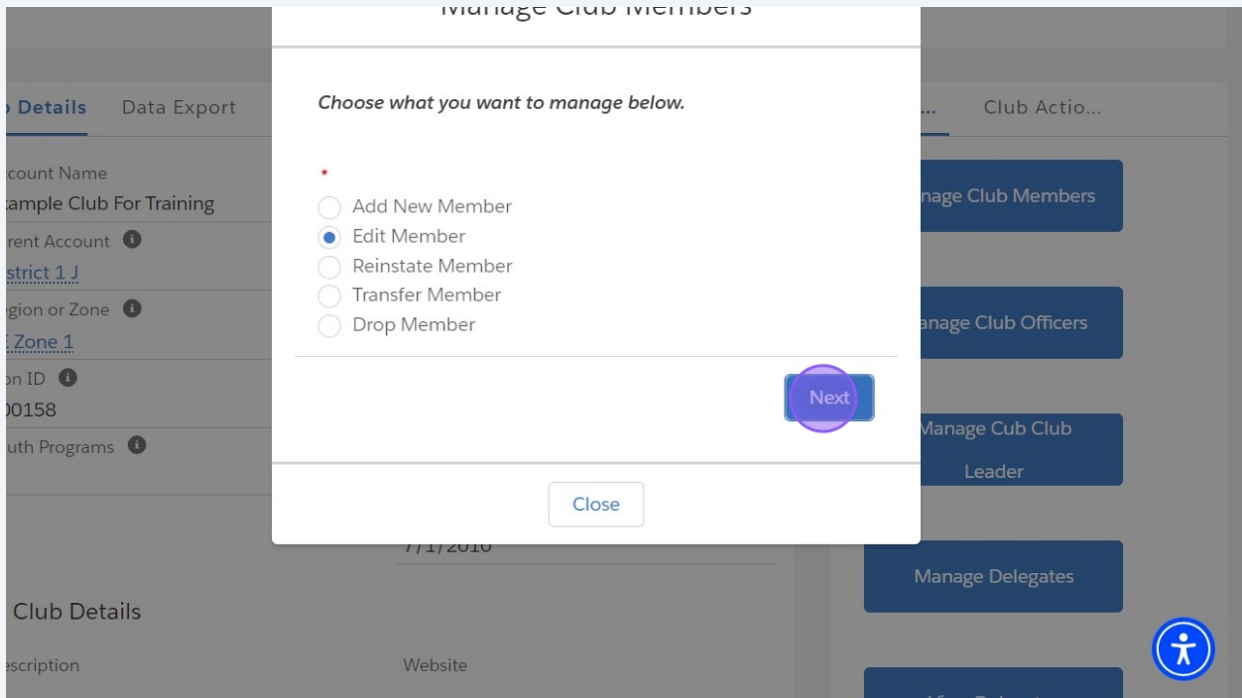
3 Click "Manage Club Members"

The screenshot shows a web interface for managing a club. At the top, there is a table with columns: Lion ID, Type, Status, Billing Address, and Active Member Count. The data row shows: 200158, Lions Club, Active, 124 Any Place, Naperville, Illinois 60565, United States, and 56. Below the table is a navigation bar with tabs: Details, Data Export, Club Statements, Club Service Activities, and More. The 'Details' tab is active. The main content area is divided into two columns. The left column contains fields for Account Name (Example Club For Training), Parent Account (District 1 J), Region or Zone (SE Zone 1), Lion ID (200158), and Youth Programs. The right column contains fields for Type (Lions Club), Active Member Count (56), Club Specialty (Cultural), Club Sub-Specialty, Specialty Description (Arts and Entertainment), and Charter Established Date (7/1/2010). On the right side of the interface, there is a vertical list of buttons: Manage Club Members, Manage Club Officers, Manage Club Club Leader, and Manage Delegates. The 'Manage Club Members' button is highlighted with a purple circle.

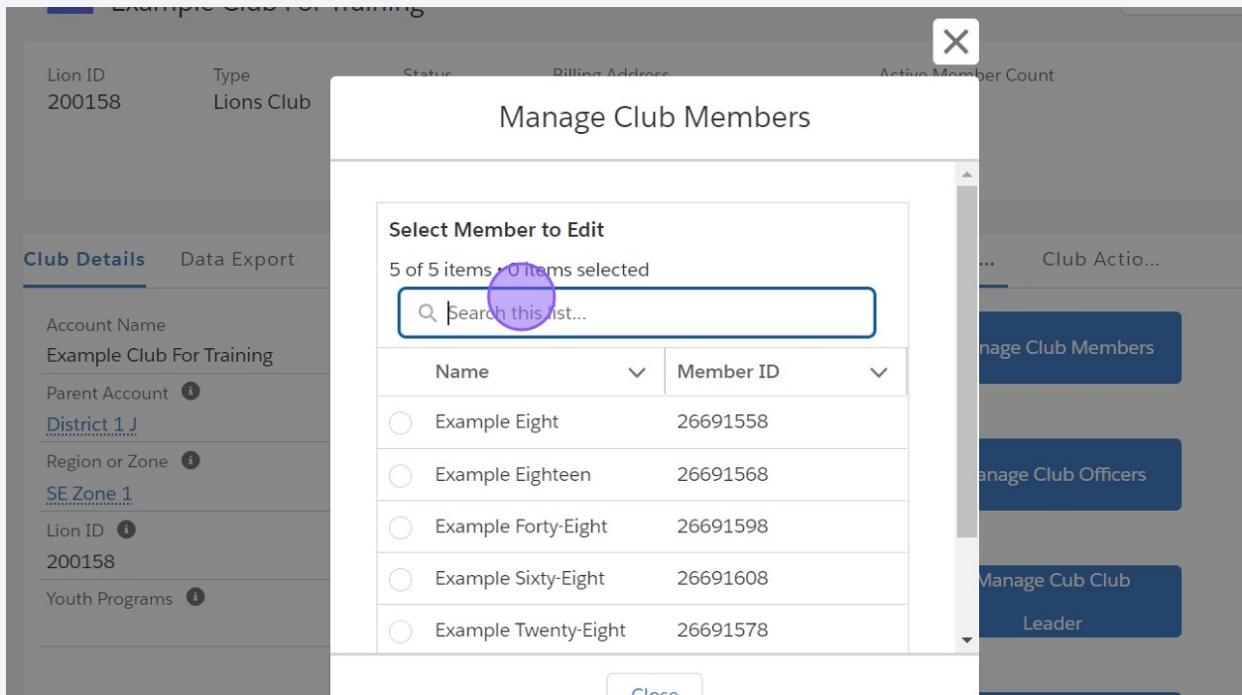
4 Select "Edit Member"

The screenshot shows the 'Manage Club Members' dialog box overlaid on the web interface. The dialog box has a title bar with a close button (X). Below the title bar, it says 'Choose what you want to manage below.' There is a red asterisk (*) above a list of radio buttons: Add New Member, Edit Member, Reinstatement Member, Transfer Member, and Drop Member. The 'Edit Member' radio button is selected and highlighted with a purple circle. At the bottom right of the dialog box is a 'Next' button, and at the bottom center is a 'Close' button.

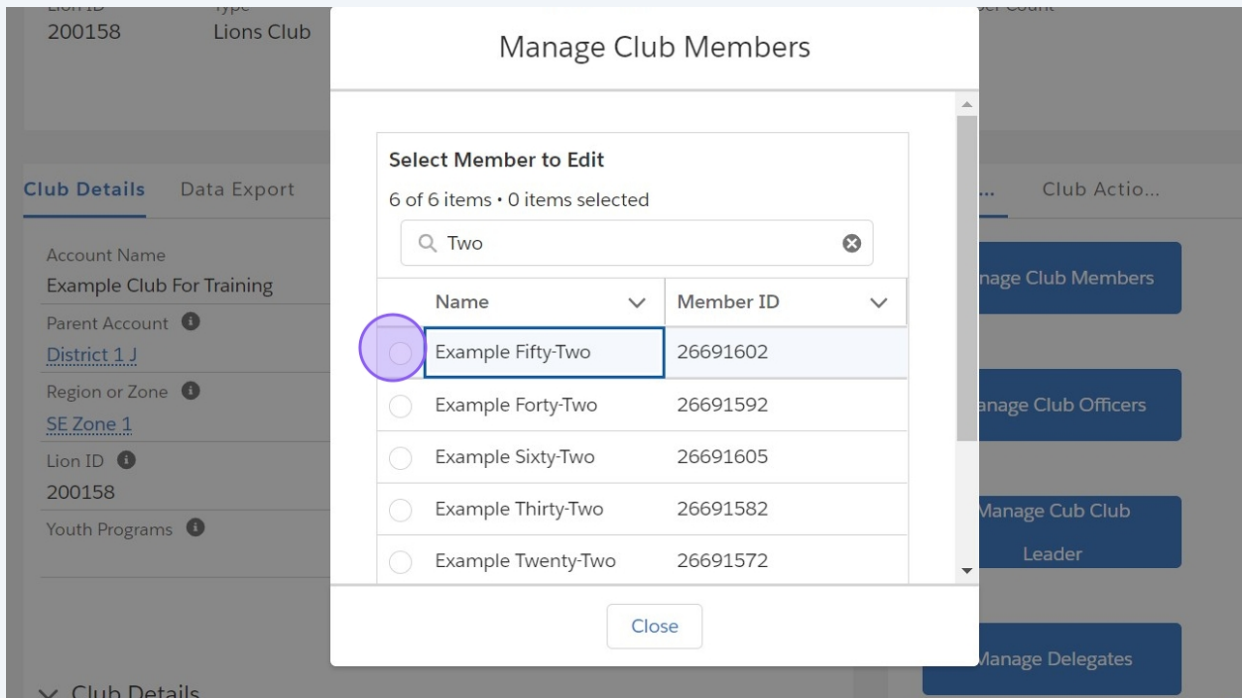
5 Click "Next"



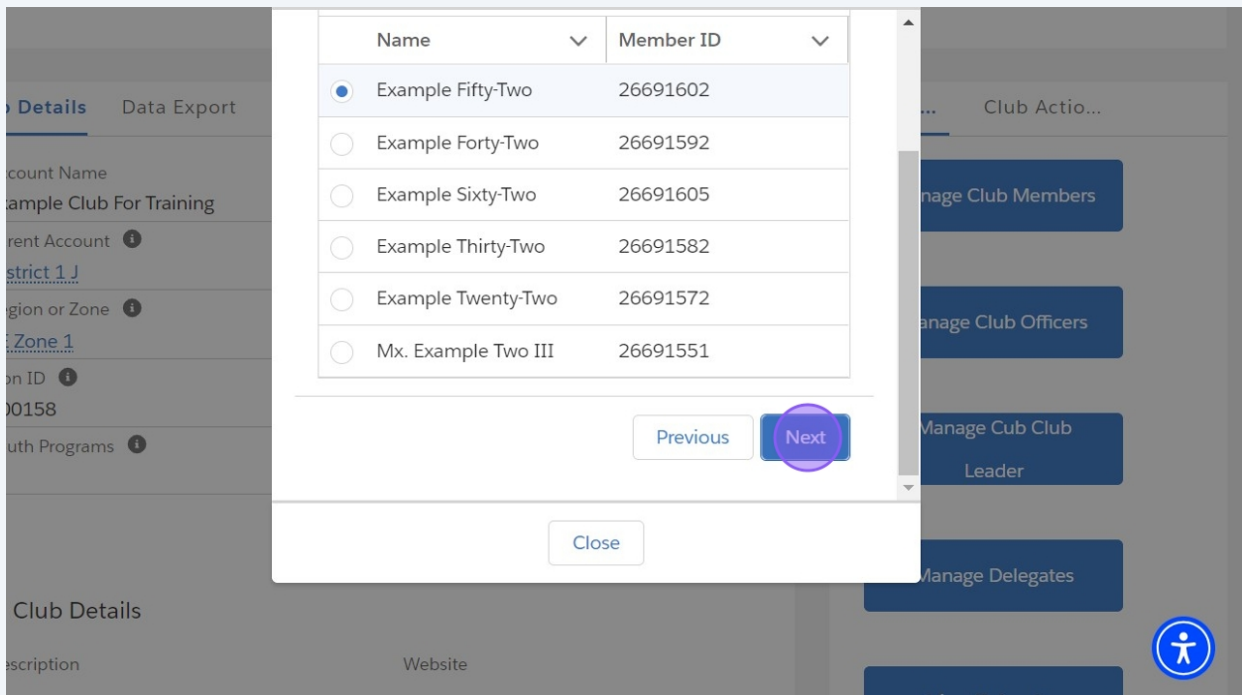
6 Scroll down the list of members or click the "Search this list..." and enter all or part of the Name or Member ID.



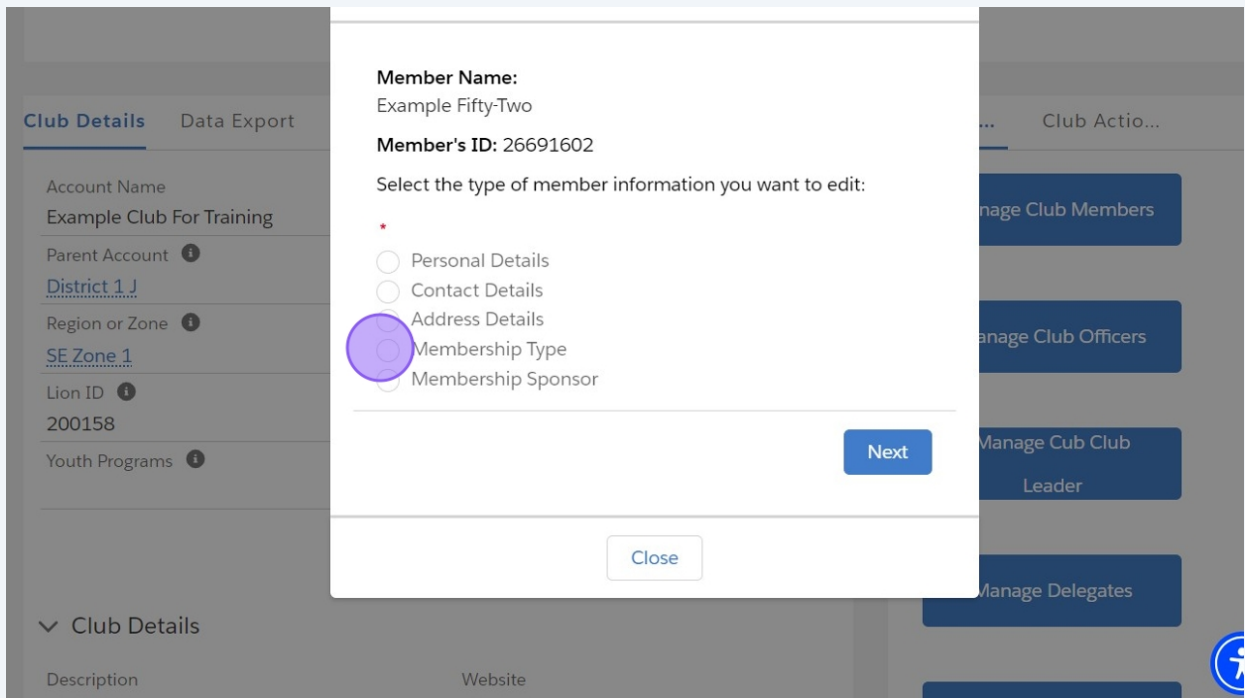
7 Click the "Radio Button" next to the member name.



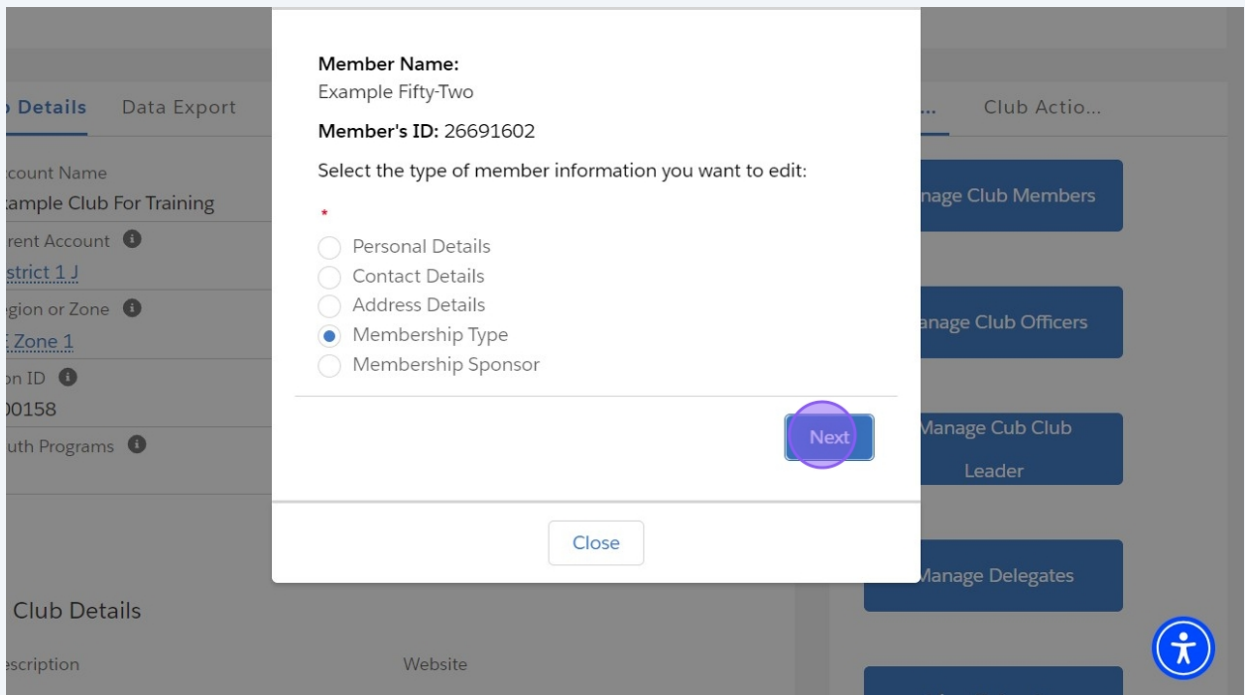
8 Click "Next"



9 Click the "Radio Button" option "Membership Type".



10 Click "Next"





Reminder - Choose the "Membership Type" that will be the new "Membership Type".

11 Click the "Membership Type" dropdown.

The screenshot shows a 'Manage Club Members' dialog box overlaid on a club details page. The dialog contains two dropdown menus: '* Membership Type' and '* Membership Category'. The '* Membership Type' dropdown is open, showing a list of options: '--None--', 'Regular Member', 'Honorary Member', 'Young Adult Member', 'Family Member', and 'Leo Lion Member'. The '* Membership Category' dropdown is set to 'Active'. A 'Next' button is located at the bottom right of the dialog. The background page shows club details for 'Example Club For Training' with a Lion ID of 200158, Type of 'Lions Club', Status of 'Active', and an Active Member Count of 56.



Note: Membership Types are:

- Regular Member (full dues paying membership)
- Honorary Member
- Young Adult Member
- Family Member
- Leo Lion Member
- Student Member

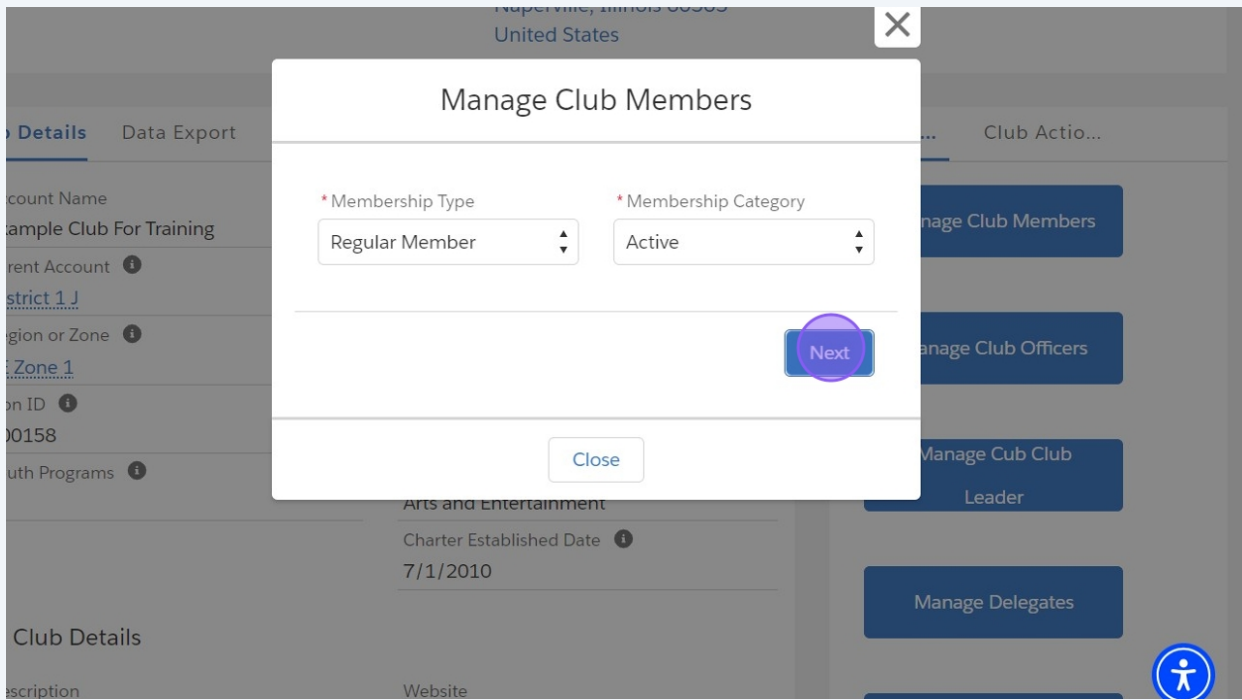
12 Select the new membership type

The screenshot shows a web application interface for managing club members. A modal dialog titled "Manage Club Members" is open. It contains two dropdown menus: "* Membership Type" and "* Membership Category". The "Membership Type" dropdown is currently open, showing a list of options: "--None--", "Regular Member", "Honorary Member", "Young Adult Member", "Family Member", and "Leo Lion Member". The "Regular Member" option is highlighted in blue. A purple circle highlights the dropdown arrow of the "Membership Type" field. A "Next" button is visible to the right of the dropdowns. The background shows a table with columns: Lion ID, Type, Status, Billing Address, and Active Member Count. The table data includes: Lion ID 200158, Type Lions Club, Status Active, Billing Address 124 Any Place, Naperville, Illinois 60565, United States, and Active Member Count 56.

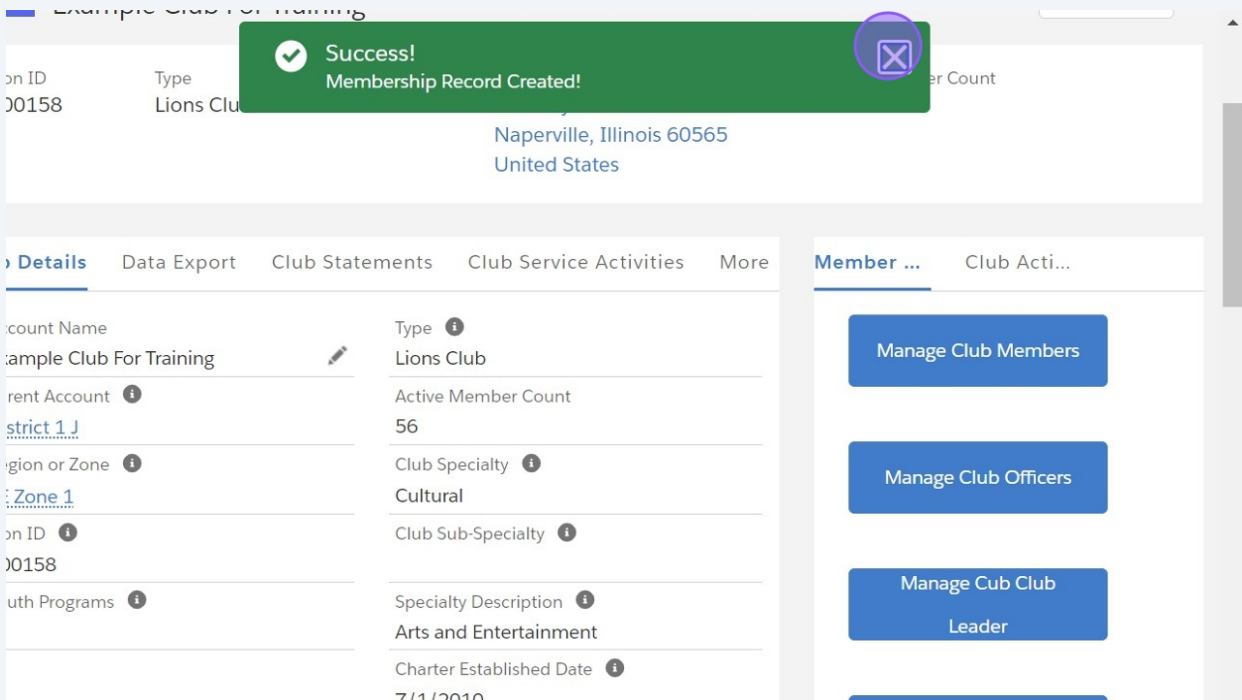
13 "Active" is the default. Click the "Membership Category" for additional choices

The screenshot shows the same "Manage Club Members" dialog box. In this view, the "Membership Category" dropdown menu is open, showing a list of options: "--None--", "Active", "Affiliate", "Member at Large", and "Privileged". The "Active" option is highlighted in blue. A purple circle highlights the dropdown arrow of the "Membership Category" field. A "Next" button is visible to the right of the dropdowns. The background shows the same table as in the previous screenshot, with columns: Lion ID, Type, Status, Billing Address, and Active Member Count. The table data includes: Lion ID 200158, Type Lions Club, Status Active, Billing Address 124 Any Place, Naperville, Illinois 60565, United States, and Active Member Count 56.

14 Click "Next"



15 The green "Success!" message confirms the change. Click the "X" icon to close.



View Member's Membership History

16 From the Club Detail page locate the member.

24 Any Place
 aperville, Illinois 60565
 nited States

Meeting Location 1

Meeting Place ⓘ
 own Center

Meeting Week of Month ⓘ
 irst

Meeting Day ⓘ
 onday

Meeting Time ⓘ
 7:00

Meeting Street ⓘ
 35 Town Road

Meeting City ⓘ
 aperville

Meeting State or Prov ⓘ

Meeting Zip Code ⓘ

Meeting Local Place ⓘ
 टाउन सेंटर

Meeting Local Street ⓘ

Meeting Local City ⓘ

Meeting Local Zip Code ⓘ

Meeting Local State or Prov ⓘ
 IL

Meeting Local Country ⓘ
 US

Online Meeting 1 ⓘ

Online Meeting 1 Place ⓘ

Active Members

Active Members
 56 of 56 items

Search this list...

N. ▾	M ▾	M ▾	M ▾
Exam	Lion-Chart	zuser	(630)
ple	er-	012@	0
Twelv	Regul	lionfa	890
e	ar	ke.co	-12
	[Activ	m	34
	e]		
Exam	Lion-Chart	zuser	(630)
ple	er-	008@	0
Eight	Regul	lionfa	456
	ar	ke.co	-78
	[Activ	m	90
	e]		

17 Example Member Fifty-Two "Membership Type" was updated.

Home Membership Service Learn More

Contact
 Example Member Fifty-Two + Follow

Primary Affiliation Example Club For Training	Member ID 26691602	Email zfiftytwo@fake.com	Phone 773 2341111
--	-----------------------	---	----------------------

Name
Example Member Fifty-Two

Primary Affiliation ⓘ
[Example Club For Training](#)

Nickname ⓘ

Gender ⓘ
Female

Local Language Information
First Name (Local)

Spouse Name ⓘ
Companion Fifty-Two

Birthday ⓘ
September 20

Birthdate
9/20/1994

Occupation ⓘ
Transportation/Utilities


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

Club Me... (3) ⚙️ 🔄
 3 items · Sorted by Start Date · Updated a few seconds ago

	Club Name ▾	Membershi
1	Example Club ...	Lion-Regula
2	Example Club ...	Lion-Discou




18 The Membership History for the member is shown to the right.

Example Club For Training 26691602 zfiftytwo@fake.com 773 2341111

<p>Name Example Member Fifty-Two</p> <p>Primary Affiliation ⓘ Example Club For Training</p> <p>Nickname ⓘ</p> <p>Gender ⓘ Female</p> <p>✓ Local Language Information</p> <p>First Name (Local)</p> <p>Middle Name (Local)</p> <p>Last Name (Local)</p>	<p>Spouse Name ⓘ Companion Fifty-Two</p> <p>Birthday ⓘ September 20</p> <p>Birthdate 9/20/1994</p> <p>Occupation ⓘ Transportation/Utilities</p>	<p>Contact Members Services Email: lionssupport@lionsclubs.org Phone: (+001) 630-468-6900</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p> Club Me... (3) ⚙️ ↻</p> <p>3 items • Sorted by Start Date • Updated a few seconds ago</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 70%;">Club Name</th> <th style="width: 25%;">Membershi...</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Example Club ...</td> <td>Lion-Regular [</td> </tr> <tr> <td>2</td> <td>Example Club ...</td> <td>Lion-Discount</td> </tr> <tr> <td>3</td> <td>Example Club ...</td> <td>Lion-Regular [</td> </tr> </tbody> </table> <p style="text-align: right;">View All</p> </div>		Club Name	Membershi...	1	Example Club ...	Lion-Regular [2	Example Club ...	Lion-Discount	3	Example Club ...	Lion-Regular [
	Club Name	Membershi...												
1	Example Club ...	Lion-Regular [
2	Example Club ...	Lion-Discount												
3	Example Club ...	Lion-Regular [

19 Click "View All Club Memberships" to see the full history.

Example Club For Training 26691602 zfiftytwo@fake.com 773 2341111

<p>Name Example Member Fifty-Two</p> <p>Primary Affiliation ⓘ Example Club For Training</p> <p>Nickname ⓘ</p> <p>Gender ⓘ Female</p> <p>✓ Local Language Information</p> <p>First Name (Local)</p> <p>Middle Name (Local)</p> <p>Last Name (Local)</p> <p>✓ Contact Information</p>	<p>Spouse Name ⓘ Companion Fifty-Two</p> <p>Birthday ⓘ September 20</p> <p>Birthdate 9/20/1994</p> <p>Occupation ⓘ Transportation/Utilities</p>	<p>Contact Members Services Email: lionssupport@lionsclubs.org Phone: (+001) 630-468-6900</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p> Club Me... (3) ⚙️ ↻</p> <p>3 items • Sorted by Start Date • Updated a few seconds ago</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 70%;">Club Name</th> <th style="width: 25%;">Membershi...</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Example Club ...</td> <td>Lion-Regular [</td> </tr> <tr> <td>2</td> <td>Example Club ...</td> <td>Lion-Discount</td> </tr> <tr> <td>3</td> <td>Example Club ...</td> <td>Lion-Regular [</td> </tr> </tbody> </table> <p style="text-align: right;">View All</p> </div> <p> Members Sponsored (0) </p>		Club Name	Membershi...	1	Example Club ...	Lion-Regular [2	Example Club ...	Lion-Discount	3	Example Club ...	Lion-Regular [
	Club Name	Membershi...												
1	Example Club ...	Lion-Regular [
2	Example Club ...	Lion-Discount												
3	Example Club ...	Lion-Regular [

20 Use the slide bars at the top of the column to make wider or thinner.

The screenshot shows the 'Lion Portal' interface. At the top, there is a search bar and navigation links for Home, Membership, Service, Learn, and More. Below the navigation is a breadcrumb trail: 'contacts > Example Member Fifty-Two' and a section title 'Club Memberships'. There are three icons (settings, refresh, filter) to the right of the title. Below the title, it says 'Items - Sorted by Start Date - Updated a few seconds ago'. A table with the following columns is displayed: Club Name, Membership Full Type, Start Date, End Date, Membership, M..., and Membership. The 'End Date' column header has a vertical slide bar on its right side, which is highlighted with a purple circle. The table contains three rows of data:

Club Name	Membership Full Type	Start Date	End Date	Membership	M...	Membership:
Example Club For...	Lion-Regular [Dropped]	6/15/2024	9/18/20...	Inactive Memb...		MEMBER#00:
Example Club For...	Lion-Discounted-Family Me...	9/18/2024	9/27/20...	Inactive Memb...		MEMBER#00:
Example Club For...	Lion-Regular [Active]	9/27/2024		Active Member		MEMBER#00:



Note! Membership History tracks changes in "Membership Type" which can determine eligibility to be included in the Club delegate count or be eligible for re-instatement. Refer to the official Lions International Constitution and By-Laws and Policy documents for specific details.

21

The history of this member's membership changes are displayed. The default sort order is "Start Date" oldest date to newest date.

This Member:

- Became a "Regular Membership Type" (full dues) Lion on 6/15/2024 as a full dues paying member
- Changed to a "Family Membership Type" (discounted dues) on 9/18/2024
- Changed to "Regular Membership Type" (full dues) on 9/27/2024

The screenshot shows the 'Lion Portal' interface. At the top, there is a search bar and navigation links for Home, Membership, Service, Learn, and More. Below the navigation, the page title is 'Example Member Fifty-Two Club Memberships'. The table below shows the membership history:

Club Name	Membership Full Type	Start Date	End Date	Membershi...	M...	Membershi
Example Club For...	Lion-Regular [Dropped]	6/15/2024	9/18/2024	Inactive Memb...		MEMBER#C
Example Club For...	Lion-Discounted-Family Me...	9/18/2024	9/27/2024	Inactive Memb...		MEMBER#C
Example Club For...	Lion-Regular [Active]	9/27/2024		Active Member		MEMBER#C

22 To navigate back to the Club page click blue link displaying the Club Name.

The screenshot shows the 'Lion Portal' interface. At the top, there is a search bar and navigation links for 'Home', 'Learn', and 'More'. A member profile for 'Example Member Fifty-Two' is visible, with a purple circle highlighting the 'Primary Affiliation' link 'Example Club For Training'. A modal window titled 'Example Club For Training' is open, displaying the following information:

Lion ID	200158	Type	Lions Club
Status	Active	Billing Address	124 Any Place Naperville, Illinois 60565 United States
Active Member Count	56	No related lists to display	

Additional details visible in the background include contact information for 'Example Club For Training' (Email: lionssupport@lionsclubs.org, Phone: (+001) 630-468-6900) and a 'Club Members Services' section with 3 items.

23 Returned to the Club Page

The screenshot shows the 'Example Club For Training' club page. The navigation bar includes 'Home', 'Membership', 'Service', 'Learn', and 'More'. The club's account information is displayed at the top, including a 'Follow' button. The main content area shows the club's details:

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

Below the details, there are tabs for 'Details', 'Data Export', 'Club Statements', 'Club Service Activities', and 'More'. The 'Details' tab is active, showing the club's name, account name, and region. On the right side, there are buttons for 'Manage Club Members' and 'Manage Club Officers'.

24 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' with a '+ Follow' button. Below this is a table with the following data:

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	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' (Example Club For Training), 'Parent Account', 'Type' (Lions Club), and 'Active Member Count'. A 'Manage Club Members' button is visible on the right side of the page.

25 This concludes the "Manage Club Members - Edit Member Change Membership Type" 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 welcome message: 'Welcome Example One!'. The main content area features four large, colorful buttons: 'MY MEMBERSHIP' (dark blue), 'MY CLUB' (medium blue), 'MY CA' (purple), and 'MY ASSOCIATION' (dark purple). The 'MY ASSOCIATION' button includes the Lions Club logo. In the bottom right corner, there is a user profile icon and a notification bell icon.