

# 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](https://lionportal.org)

## Drop - Transfer From Old Club

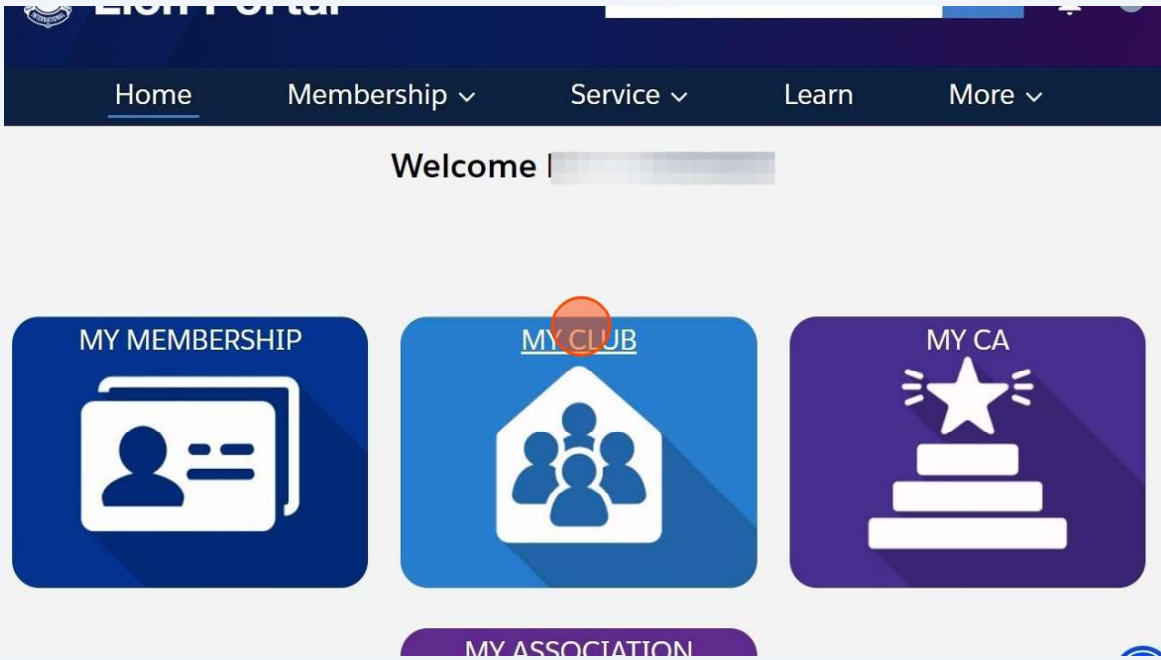


**Alert!** To transfer a member into your Club the member needs to be dropped from their current club. The steps shown in this section are performed by the other club.

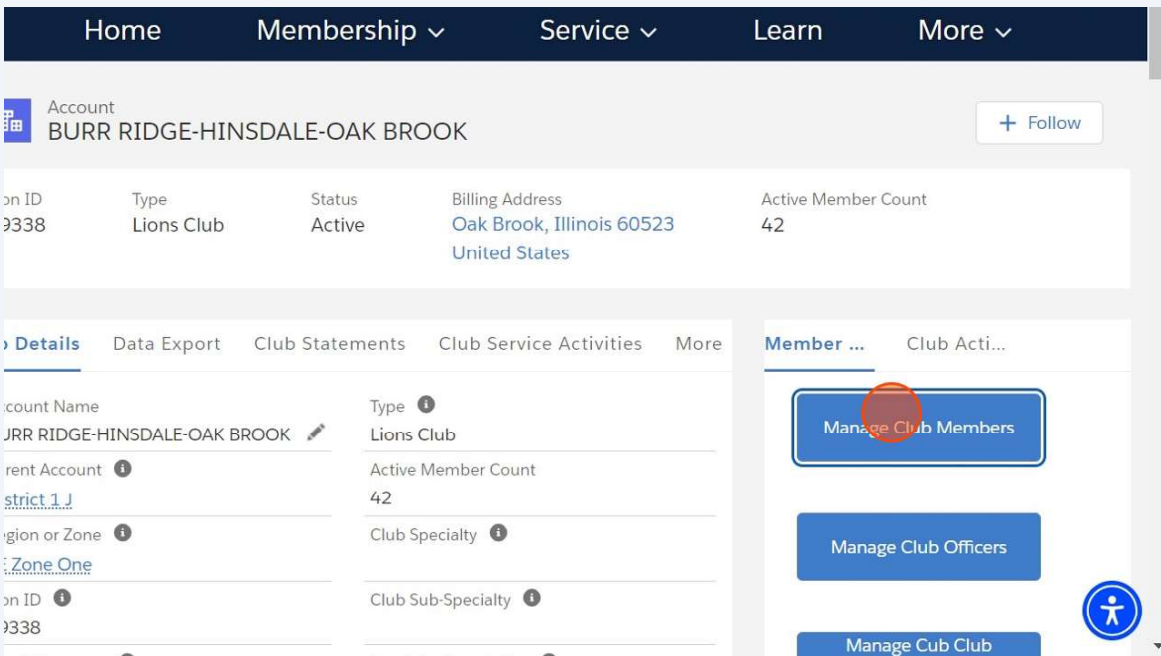


This step is done by the Officer or Administrator of the **current** Club. Once the membership of the Member has been dropped the Officer or Administrator of the new club can transfer the member into the new club. This creates a new "Membership" record for the history of the member.

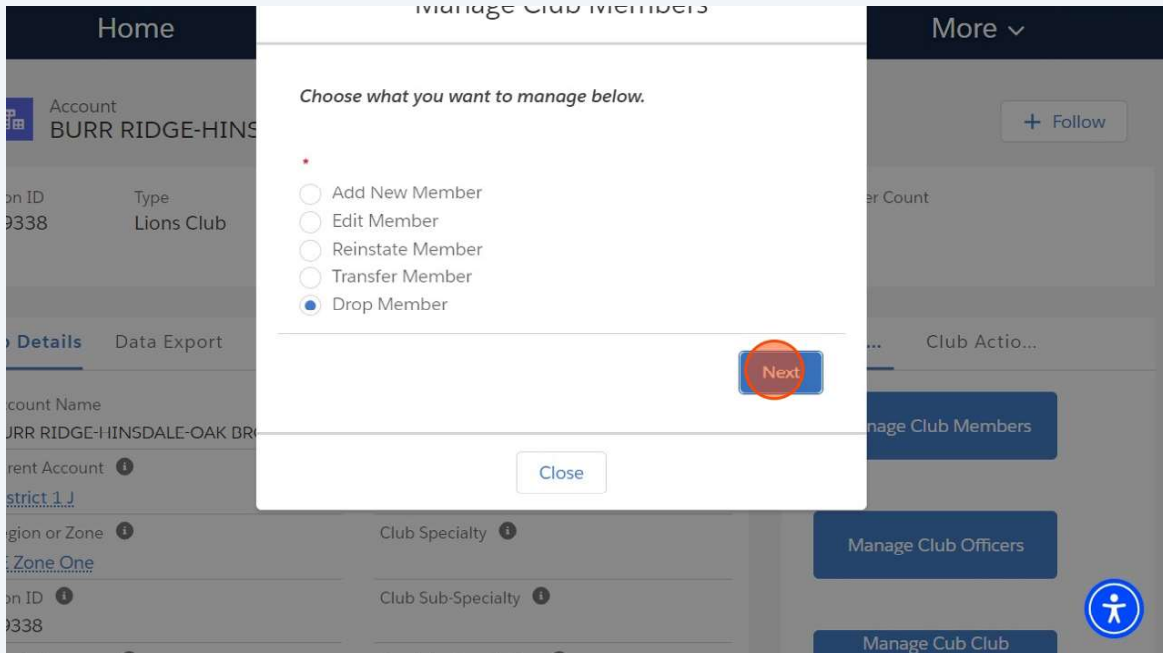
2 Click "MY CLUB"



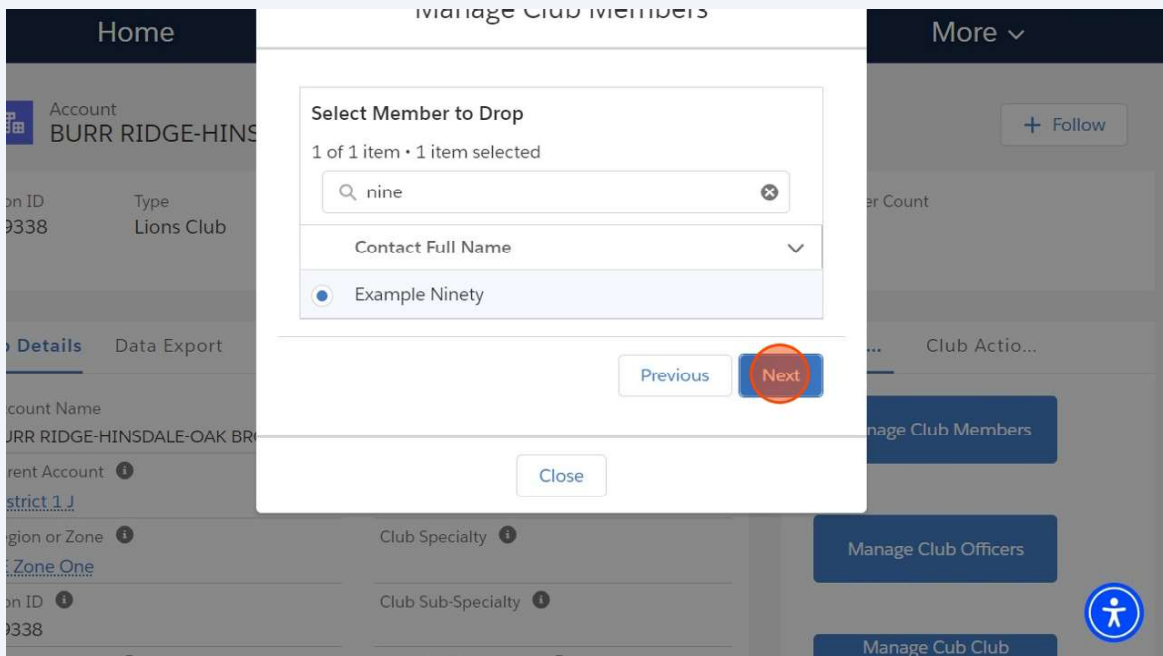
3 Click "Manage Club Members"



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



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



6

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

The screenshot shows a web application interface with a modal window open. The modal contains the following information:

- Member Name:** Example Ninety
- Member's ID:** 26691612
- \* Membership End Date:** Sep 1, 2024
- \* Drop Reason:** Transferred
- Drop Reason Details:** (empty text box)

Buttons for "Save" and "Close" are visible at the bottom of the modal. The background shows a member profile for "Burr Ridge-Hinsdale-Oak Brook Lions Club" with a Lion ID of 49338.

7

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

The screenshot shows the same web application interface as in step 6, but with the "Drop Reason Details" field now containing the text "Moving to Example Club For Training". The "Save" button is highlighted with a red circle, indicating it should be clicked.



The member has been dropped from their current club.

## Add - Transfer to the New Club



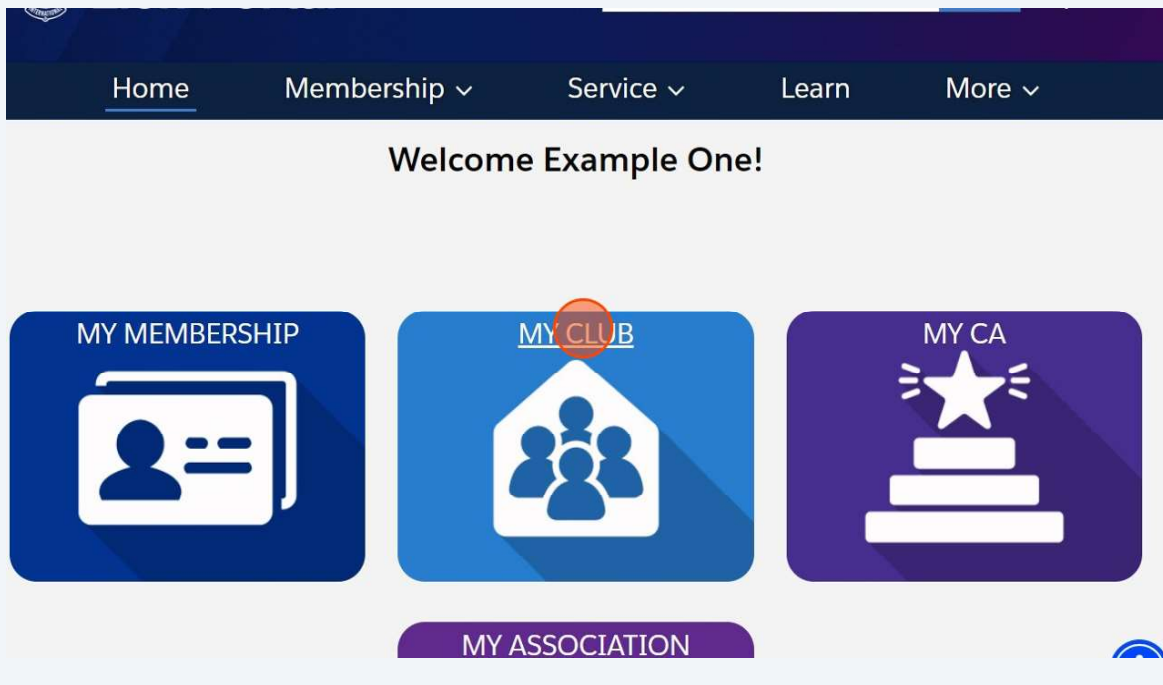
These steps are done by the Officer or Administrator of the **new** Club. This creates a new "Membership" record with the new Club to track the history of the member.

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

9

Click "MY CLUB"



10 Click "Manage Club Members"

The screenshot shows the top navigation bar with 'Home', 'Membership', 'Service', 'Learn', and 'More'. Below the navigation is the account header for 'Example Club For Training' with a '+ Follow' button. A table lists club details:

Club ID	Type	Status	Billing Address	Active Member Count
00158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	60

Below the table are tabs for 'Details', 'Data Export', 'Club Statements', 'Club Service Activities', and 'More'. The 'Details' tab is active, showing fields for Account Name, Parent Account, Region or Zone, Club ID, Type, Active Member Count, Club Specialty, and Club Sub-Specialty. On the right side, there are two buttons: 'Manage Club Members' (highlighted with a red circle) and 'Manage Club Officers'.

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

The screenshot shows the 'Manage Club Members' dialog box overlaid on the club details page. The dialog box contains the following text and options:

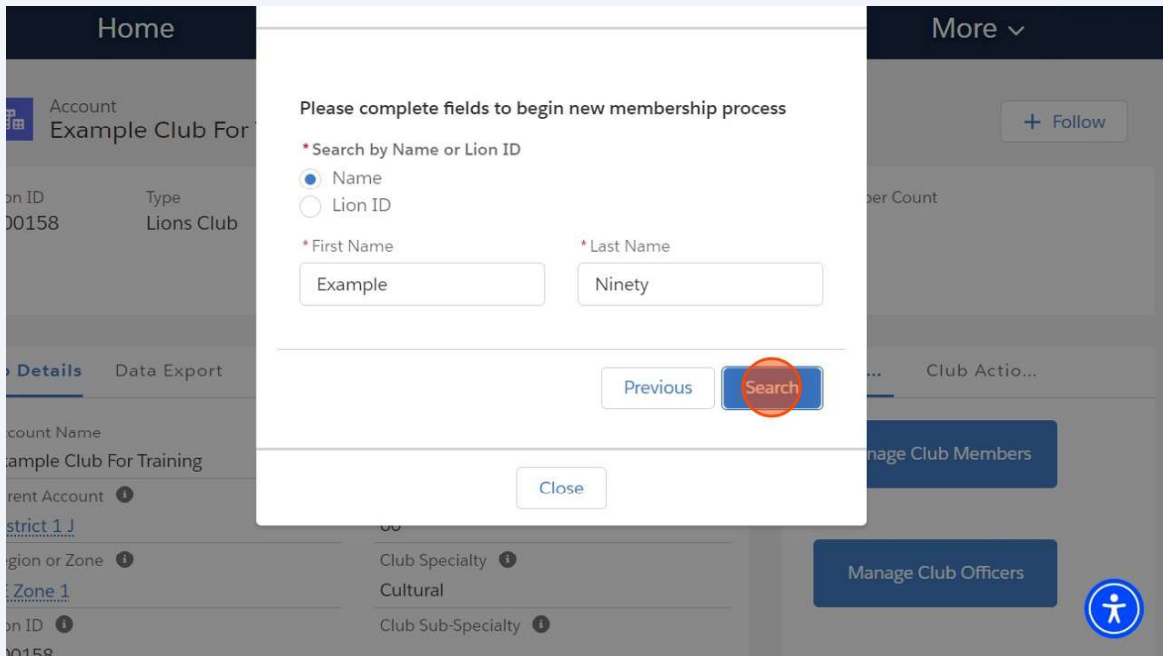
Choose what you want to manage below.

- Add New Member
- Edit Member
- Reinstate Member
- Transfer Member
- Drop Member

At the bottom of the dialog box, there is a 'Next' button (highlighted with a red circle) and a 'Close' button.

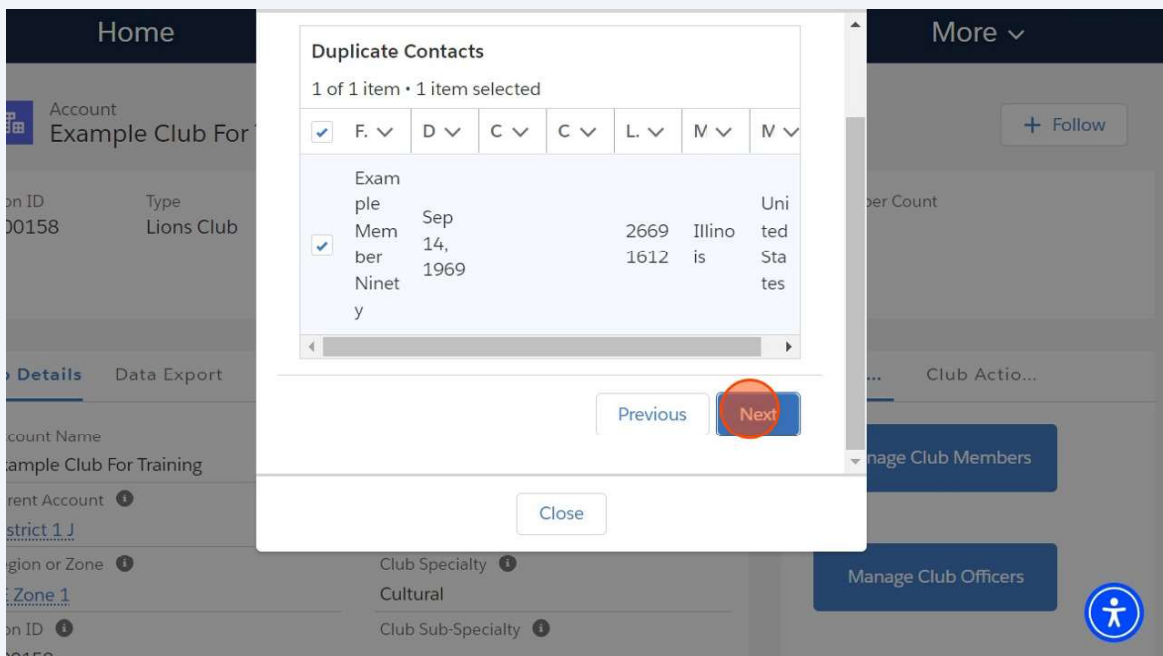
12

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

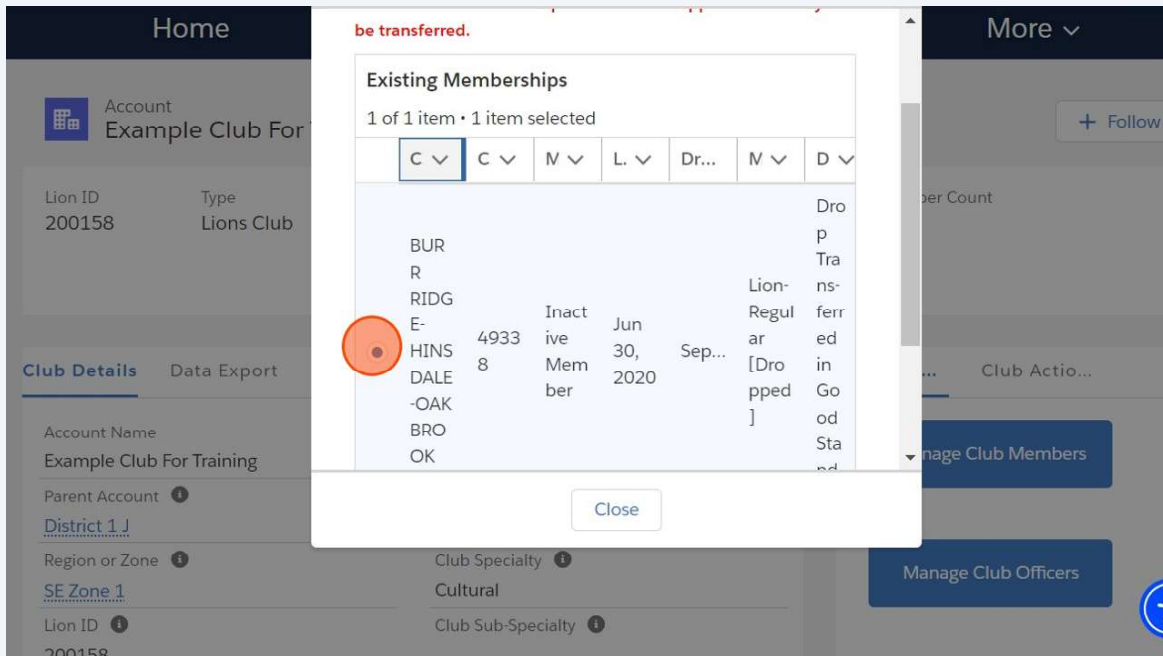


13

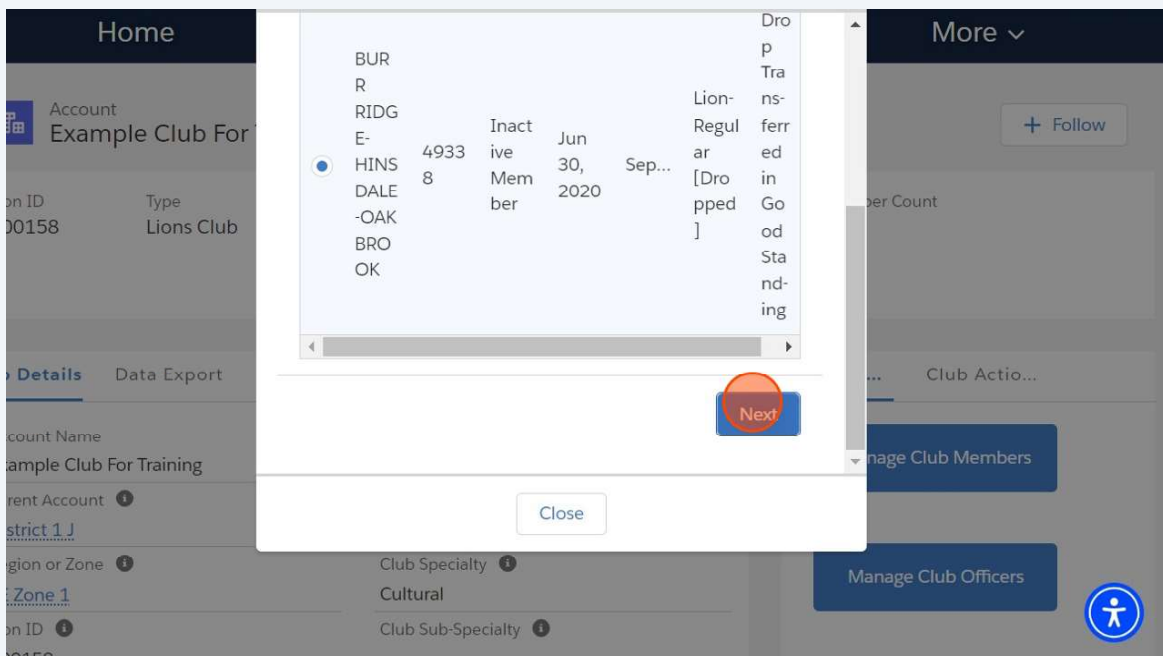
Select the member by clicking the "Radio Button" next to the member name and click "Next"



14 Confirm the Membership of the member.



15 Click "Next"





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

Home Manage Club Members More ▾

Account Example Club For Training + Follow

\* Membership Start Date Sep 10, 2024

\* Membership Category Active

\* Membership Type Regular Member

Next

Close

Account Name Example Club For Training

Account ID 00158 Type Lions Club

Active Member Count 60

Club Specialty Cultural

Club Sub-Specialty

Details Data Export

Manage Club Members

Manage Club Officers

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

Lion Power Search

Home Membership ▾ Service ▾ Learn More ▾

Account Example Club For Training + Follow

Account ID 00158 Type Lions Club Status Active Billing Address 124 Any Place Naperville, Illinois 60565 United States Active Member Count 60

Details Data Export Club Statements Club Service Activities More

Account Name Example Club For Training Type Lions Club

Account ID 00158 Active Member Count

Member ... Club Acti...

Manage Club Members

18 The Club Detail tab is displayed.

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	61

Details Data Export Club Statements Club Service Activities More

Account Name Example Club For Training [Edit](#) Type **Lions Club**

Parent Account **strict 1 J** Active Member Count **61**

Region or Zone **Zone 1** Club Specialty **Cultural**

Manage Club Members

Manage Club Officers

19 Click "Home" to return to the portal landing page

**Lion Portal** Search  Search

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	61

Club Details Data Export Club Statements Club Service Activities More

Account Name Example Club For Training [Edit](#) Type **Lions Club**

Parent Account **strict 1 J** Active Member Count **61**

Manage Club Members

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

