Club Actions - Create Club Branch

Lion Portal

This guide is essential for anyone looking to establish a Branch Club through the Lion Portal, providing a step-by-step process that ensures all necessary requirements are met. It highlights key roles needed, such as the Branch Liaison and Club Officers, while also guiding users through the submission and approval process. Additionally, the guide outlines how to manage and view the Branch Club once it is created, making it a comprehensive resource for effective club organization. By following this guide, users can efficiently navigate the creation and management of their Branch Club, enhancing their club's outreach and impact.

**1**   Sign into the Lion Portal **lionportal.org**

(i)   Tip! This guide walks through establishing a Branch Club. To establish a Brach Club:

   • A minimum of five (5) members are required

   • A Branch Liaison, who is not a member of the Branch Club must be assigned

   • Branch Club Officers of President, Secretary and Treasurer must be assigned and be members of the Branch Club

When approved by LCI the Branch Club status moves from "Pending" to "Active"

2   Click "MY CLUB"
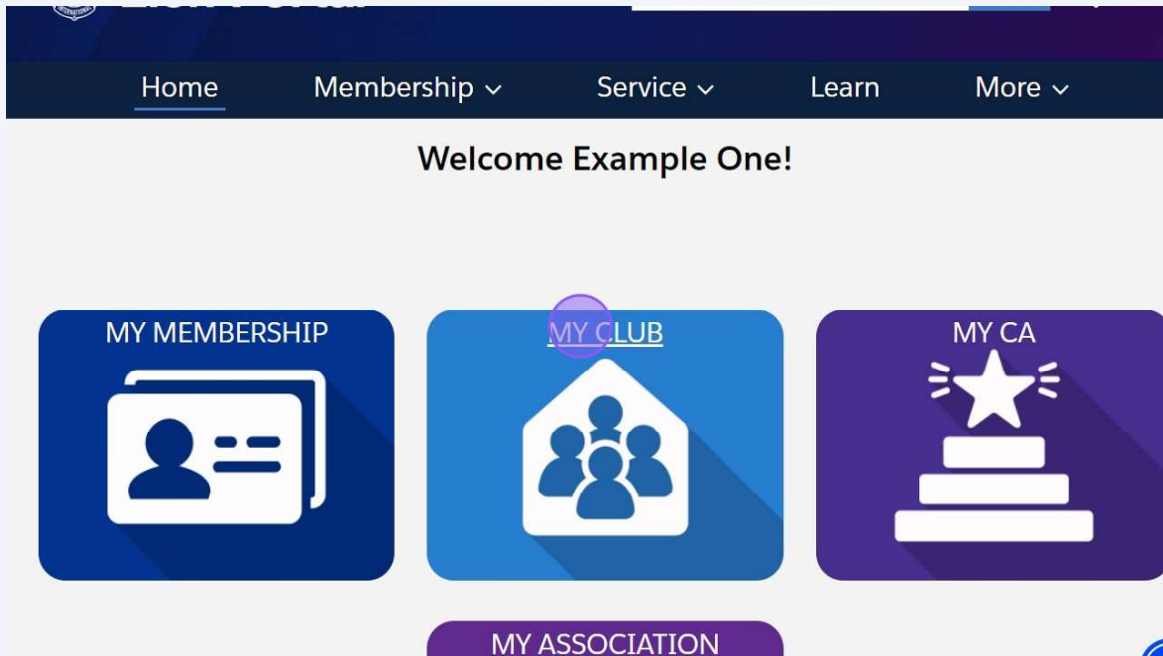
3   Click "Club Actions"
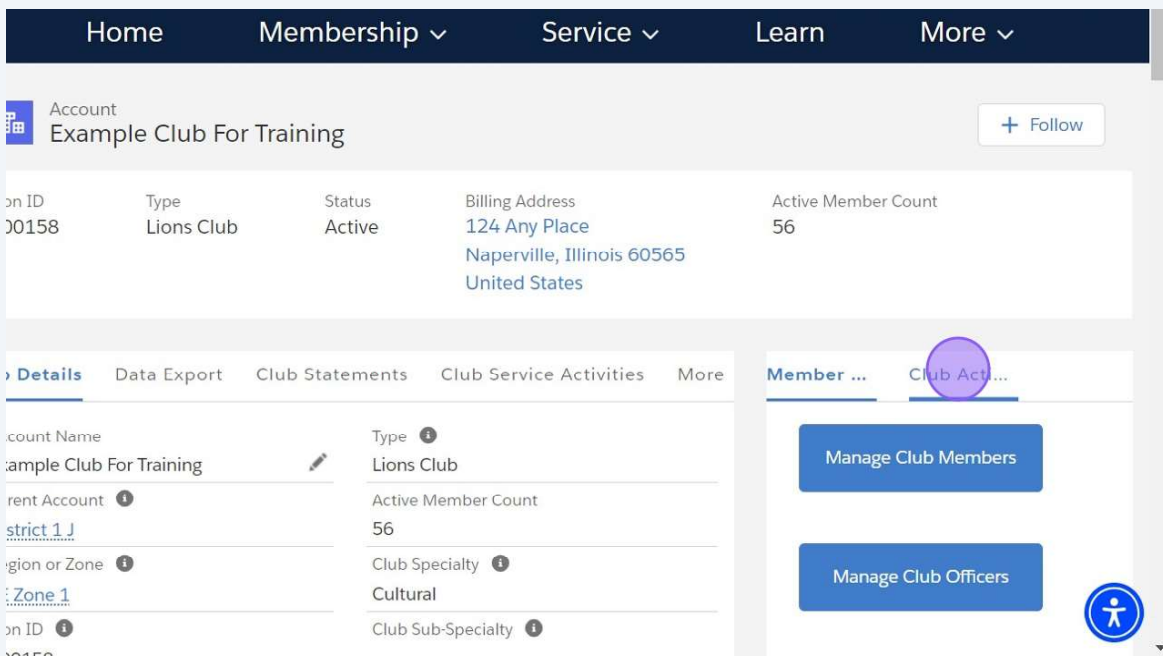
Create The Branch Club

4   Click "Create Club Branch"

5   Enter the information about the Branch Club. Fields with a red "*" are required.

6   Continue to scroll through the form, adding data.

7   When entry of data is complete click "Next" to continue.

8 Select the Liaison

United States ✕

Details   Data Export

Create Club Branch

Club Acti...

count Name
ample Club For Training

Assign a Branch Liaison Officer to the Primary Club

Membership Cards

rent Account ℹ️
strict 1 J

* Branch Liaison

Example Eight   ▲▼

Get Delegate

gion or Zone ℹ️
Zone 1

Assign Club Branch Officers

onfirmation Letter

on ID ℹ️
0158

* Branch President

--None--   ▲▼

View Reports

uth Programs ℹ️

* Branch Secretary

--None--   ▲▼

Club Details

* Branch Treasurer

reate Club Branch

--None--   ▲▼

escription

9 Select the President

10 Select the Secretary

11   Select the Treasurer

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
SE Zone 1

Lion ID ⓘ
200158

Youth Programs ⓘ

* Branch Liaison

Example Eight ▲▼

Assign Club Branch Officers

* Branch President

Example Forty-Four ▲▼

* Branch Secretary

Example Forty-Five ▲▼

* Branch Treasurer

Example Forty-Six ▲▼

Membership Cards

Get Delegate
onfirmation Letter

View Reports

reate Club Branch

ate New Application

✓ Club Details

Description

✓ Address

Billing Address

Previous   Continue

Edit Club Details

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12   Click "Continue"

count Name
ample Club For Training

rent Account ⓘ
strict 1 J

gion or Zone ⓘ
Zone 1

on ID ⓘ
00158

uth Programs ⓘ

* Branch Liaison

Example Eight ▲▼

Assign Club Branch Officers

* Branch President

Example Forty-Four ▲▼

* Branch Secretary

Example Forty-Five ▲▼

* Branch Treasurer

Example Forty-Six ▲▼

Membership Cards

Get Delegate
onfirmation Letter

View Reports

reate Club Branch

ate New Application

Club Details

escription

Address

ling Address

Previous   Continue

Edit Club Details

13   Select the fourth Branch Club member

14   Select the fifth Branch Club member

15   Additional members can be added by selecting the "Yes" radio button

16   Click "Next" when all Branch Club members have been added.

Viewing The Branch Club

17 Click "More"

Club Details

escription   Website

Address

ling Address
24 Any Place
aperville, Illinois 60565
nited States

ipping Address
24 Any Place
aperville, Illinois 60565
nited States

Meeting Location 1

eeting Place ⓘ   Meeting Local Place ⓘ
wn Center   टाउन सेंटर

eeting Week of Month ⓘ   Meeting Local Street ⓘ
rst

Create Club Branch

Create New Application

Edit Club Details

Club Me...   Club Offic...   More

∨ Active Members

Active Members
56 of 56 items

🔍 Search this list...

N. ∨   M ∨   M ∨   M ∨

Lion-

18   Click "Sponsored Clubs"

Tip! Under "Sponsored Clubs" all types of sponsorships by your club are listed. This includes:

- Branch Clubs

- Leo Clubs

- New Club Application

19 A list of Sponsored Clubs is displayed. Click the radio button next to the club

aperville, Illinois 60565
nited States

ipping Address
24 Any Place
aperville, Illinois 60565
nited States

Meeting Location 1

Meeting Place ⓘ	Meeting Local Place ⓘ
wn Center	टाउन सेंटर
eeting Week of Month ⓘ rst	Meeting Local Street ⓘ
eeting Day ⓘ onday	Meeting Local City ⓘ
eeting Time ⓘ 7:00	Meeting Local Zip Code ⓘ
eeting Street ⓘ 55 Town Road	Meeting Local State or Prov ⓘ IL
eeting City ⓘ aperville	Meeting Local Country ⓘ US

Club Mem...   **Sponsore...**   More

⌄ Sponsored Clubs

1 of 1 item · 0 items selected

🔍 Search this list...

☐	N ⌄	T. ⌄	S. ⌄	Ch.
☐	Exam ple Club Bran ch	Club Bran ch	Pend ing Appr oval	

View

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20 Click "View" to see the details.

aperville, Illinois 60565
nited States

ipping Address
24 Any Place
aperville, Illinois 60565
nited States

Meeting Location 1

Meeting Place ⓘ	Meeting Local Place ⓘ
wn Center	टाउन सेंटर
eeting Week of Month ⓘ rst	Meeting Local Street ⓘ
eeting Day ⓘ onday	Meeting Local City ⓘ
eeting Time ⓘ 7:00	Meeting Local Zip Code ⓘ
eeting Street ⓘ 55 Town Road	Meeting Local State or Prov ⓘ IL
eeting City ⓘ aperville	Meeting Local Country ⓘ US

Club Mem...   **Sponsore...**   More

⌄ Sponsored Clubs

1 of 1 item · 1 item selected

🔍 Search this list...

✔	N ⌄	T. ⌄	S. ⌄	Ch.
✔	Exam ple Club Bran ch	Club Bran ch	Pend ing Appr oval	

View

21 The page for the selected sponsored club is displayed.

Note: the "Status" is "Pending Approval". When approved the "Status" will be "Active"

22 Click "View All" to see a larger list of the members

> ⓘ Tip! When a member of your Club is assigned to the Branch Club their "Membership Type" will now show "Branch" in their "Membership Type".

23 The list of Club Members assigned to the Branch Club is displayed. Click the link to return to the Branch Club page.

24 Click "Club Officers"

| Home | Membership ⌄ | Service ⌄ | Learn | More ⌄ |

Account
Example Club Branch   + Follow

on ID   Type   Status   Billing Address
00164   Club Branch   Pending Approval

Details   Club Acti...

count Name   Type ⓘ
ample Club Branch   ✎   Club Branch   Edit Club Branch

rent Account ⓘ   Active Member Count
ample Club For Training   0   Club Me...   Club Offic...

gion or Zone ⓘ   Club Specialty ⓘ
                                                        ⌄ Active Members
on ID ⓘ   Club Sub-Specialty ⓘ
00164   Active Members
                                                        5 of 5 items
uth Programs ⓘ   Specialty Description ⓘ

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25 Now the Officer "Active" and "Past" are shown. Scroll down to "View All".

ample Club Branch   ✎   Club Branch
rent Account ⓘ   Active Member Count
ample Club For Training   0   Club Mem...   Club Offi...
gion or Zone ⓘ   Club Specialty ⓘ
                                                        ⌄ Active Officers
on ID ⓘ   Club Sub-Specialty ⓘ
00164   Active Officers
uth Programs ⓘ   Specialty Description ⓘ   4 of 4 items

                              Charter Established Date ⓘ   🔍 Search this list...

                                                        Light   on   .com
Club Details
escription   Website   Exam   Bran   zuser
                                                        ple   ch   044   (630)
                                                        Forty- Presi   @lio   134-
Address   Four   dent   nfake   4555
ling Address   .com

                                                        Exam   Bran   zuser
                                                        ple   ch   045   (630)
ipping Address   Forty- Secre   @lio   145-
                                                        Five   tary   nfake   5666

26 Click "View All" to view a larger list of officers.

27 The list of officers is displayed.

Click the link "OTA-########" to view the details of the "Office Title Assignment" (OTA).

Click the Club Name link to return to the Club page

⚠️ Alert! Edits cannot be made to the Branch Club while in "Pending Approval" status. If changes are needed contact the Member Service Center.

28 This new Branch Club has been approved by LCI and now shows "Status" as Active

29   Click "Edit Club Branch" to see the available actions.

⚠ Alert! To be added to a Branch Club roster the person must be a Member of the Club. Add the person to the Sponsoring Club (Parent Club) using the "Add Member" process. The new member will then be available for the "Edit Branch Club - Add New Member" list.

30 These are the actions available:

- Edit Club Details

- Add New Member

- Remove Member

- Assign Club Branch Officers

31   Click the "X" icon to close this window
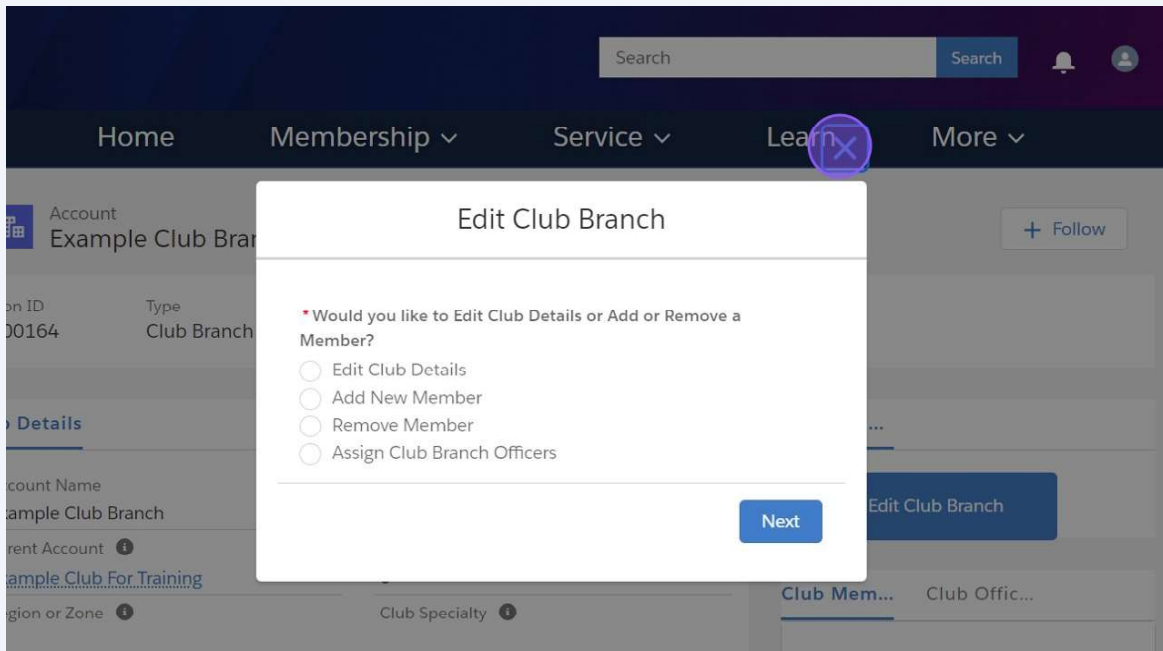
32   Return to the Sponsoring Club page by clicking the link under "Parent Account"
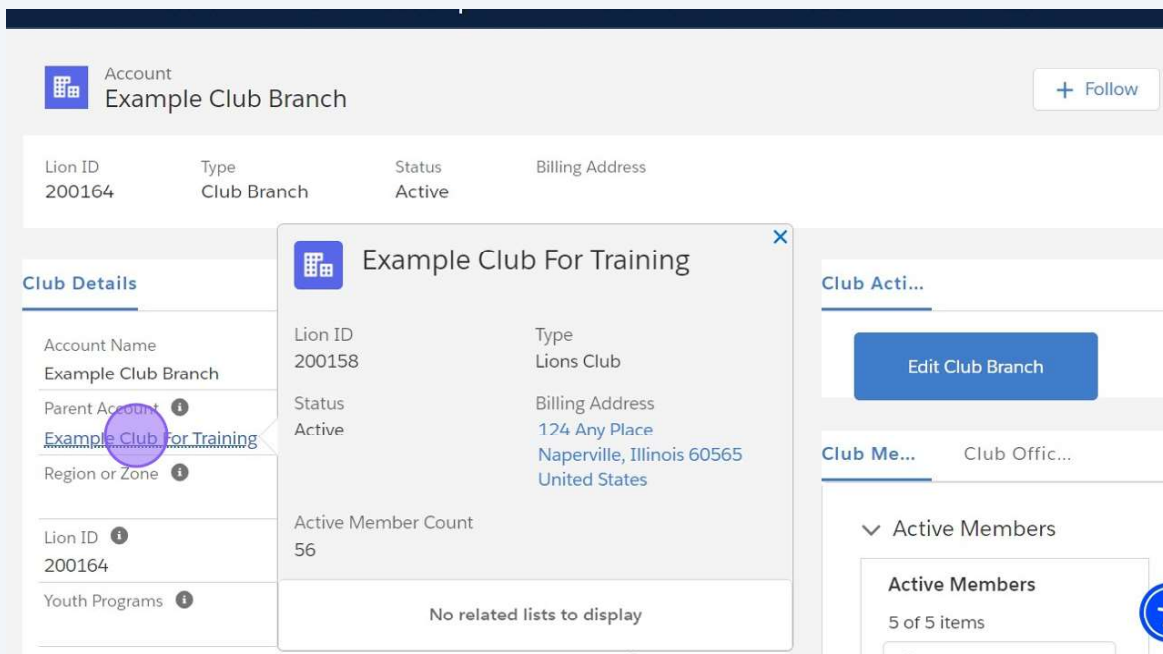
33   Click "Home" to return to the landing page.

34   This concludes the "Club Actions - Create Club Branch" Quick Guide