

Club Actions - Create Club Branch



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

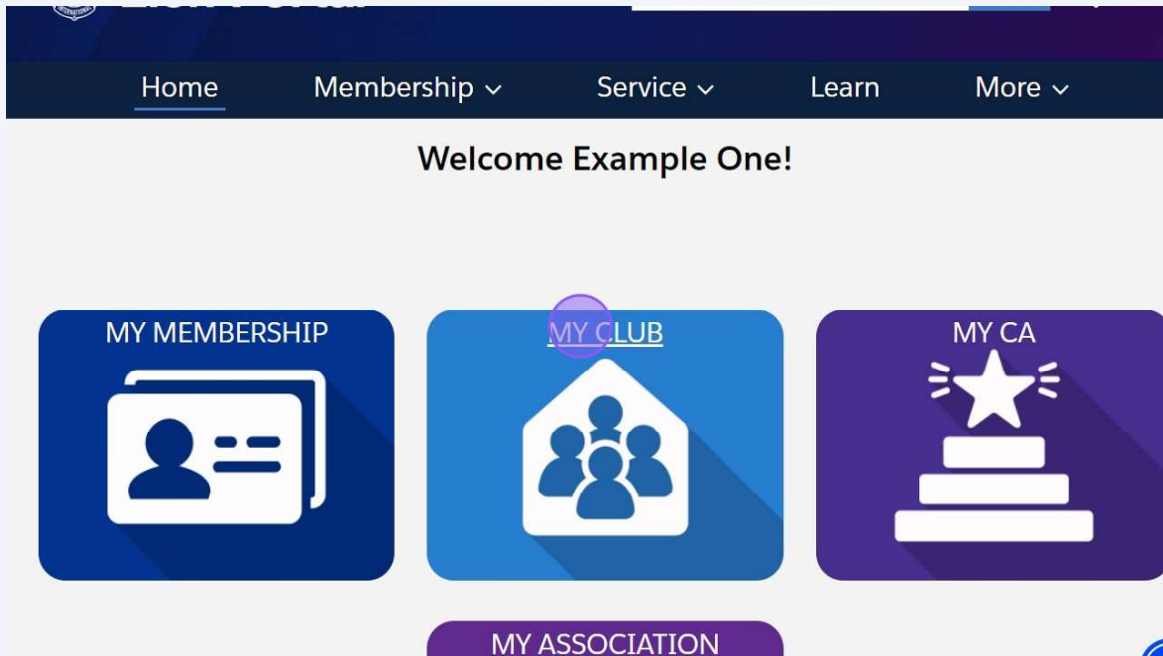


Tip! This guide walks through establishing a Branch Club. To establish a Branch Club:

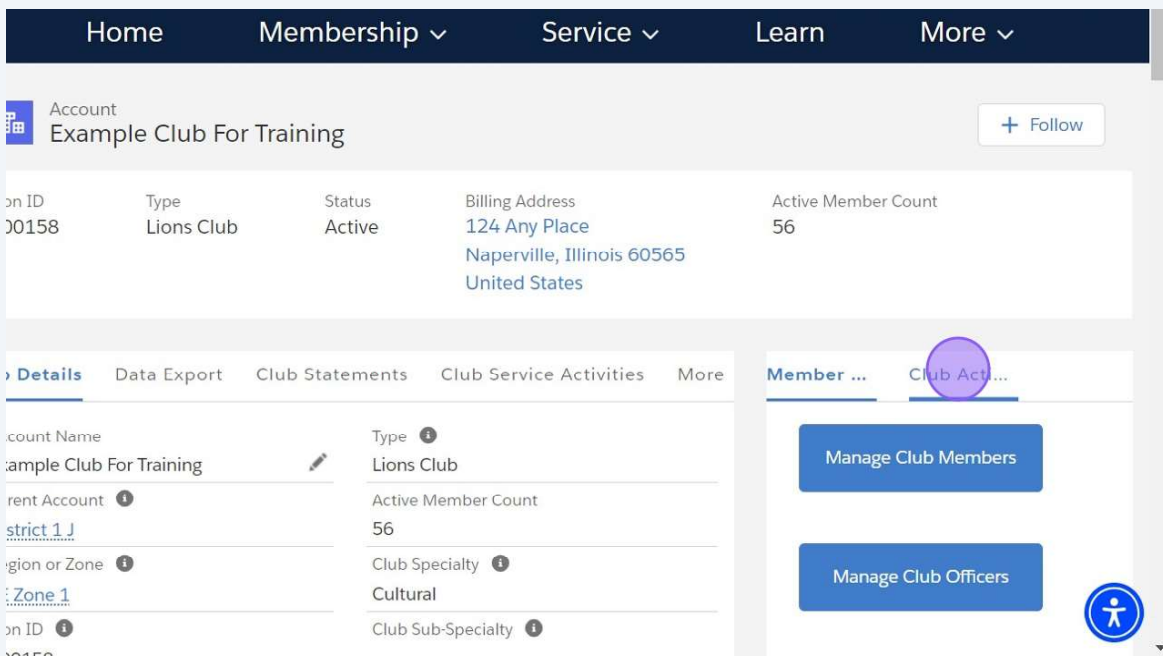
- A minimum of five (5) members are required
- A Branch Liaison, who is not a member of the Branch Club must be assigned
- Branch Club Officers of President, Secretary and Treasurer must be assigned and be members of the Branch Club

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"

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
SE Zone 1

Lion ID ⓘ
200158

Youth Programs ⓘ

Club Details

Description

Website

Type ⓘ
Lions Club

Active Member Count
56

Club Specialty ⓘ
Cultural

Club Sub-Specialty ⓘ

Specialty Description ⓘ
Arts and Entertainment

Charter Established Date ⓘ
7/1/2010

Get Membership Cards

Get Delegate Confirmation Letter

View Reports

Create Club Branch

Create New Application

Edit Club Details

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

United States

Club Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
SE Zone 1

Lion ID ⓘ
200158

Youth Programs ⓘ

Club Details

Description

Create Club Branch

Please enter New Club Branch Details.

* Branch Name

Branch Specialty
-- none selected --

Club Branch Meeting Information (Optional)

Meeting Street

Meeting City

Meeting Zip Code

Meeting State/Prov

Meeting Country

Meeting Place

Meeting Week of the Month

Meeting Local Place

6 Continue to scroll through the form, adding data.

Create Club Branch

Please enter New Club Branch Details.

* Branch Name: Example Club Branch

Branch Specialty: Life-Stage/Experience

Branch Sub-Specialty: -- none selected --

Club Branch Meeting Information (Optional)

Meeting Street: [text input]

Meeting City: [text input]

Meeting Zip Code: [text input]

Meeting State/Prov: [text input]

Meeting Country: [text input]

Meeting Place: [text input]

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

Meeting Country: [text input]

Meeting Place: Community House

Meeting Week of the Month: Second

Meeting Local Place: [text input]

Meeting Day: Tuesday

Meeting Time: 11:30

☐ Online Meeting

Next



Tip! In this step the Officers and Liaison are added. A list of the members will be displayed at each title. Select the member by clicking the name.

8

Select the Liaison

United States

Create Club Branch

Assign a Branch Liaison Officer to the Primary Club

* Branch Liaison

Example Eight

Assign Club Branch Officers

* Branch President

--None--

* Branch Secretary

--None--

* Branch Treasurer

--None--

9 Select the President

The screenshot shows a 'Create Club Branch' dialog box overlaid on a web application. The dialog has two main sections: 'Assign a Branch Liaison Officer to the Primary Club' and 'Assign Club Branch Officers'. In the first section, 'Example Eight' is selected for the Branch Liaison. In the second section, 'Example Forty-Four' is selected for the Branch President, highlighted with a purple circle. The other officer roles (Secretary and Treasurer) are currently set to '--None--'. The background shows a sidebar with 'Details' and 'Data Export' tabs, and a main area with various club-related buttons like 'Membership Cards', 'Get Delegate', 'Confirmation Letter', 'View Reports', 'Create Club Branch', and 'Create New Application'.

Create Club Branch

Assign a Branch Liaison Officer to the Primary Club

- * Branch Liaison: Example Eight

Assign Club Branch Officers

- * Branch President: Example Forty-Four
- * Branch Secretary: --None--
- * Branch Treasurer: --None--

10 Select the Secretary

This screenshot is similar to the previous one, showing the 'Create Club Branch' dialog box. In this step, 'Example Forty-Five' is selected for the Branch Secretary, highlighted with a purple circle. The Branch President remains 'Example Forty-Four', and the Branch Treasurer remains '--None--'. The background interface is consistent with the previous screenshot, showing the same sidebar and main area buttons.

Create Club Branch

Assign a Branch Liaison Officer to the Primary Club

- * Branch Liaison: Example Eight

Assign Club Branch Officers

- * Branch President: Example Forty-Four
- * Branch Secretary: Example Forty-Five
- * Branch Treasurer: --None--

11 Select the Treasurer

The screenshot shows a web application interface for assigning club branch officers. A modal dialog box titled "Assign Club Branch Officers" is centered on the screen. It contains four dropdown menus, each preceded by an asterisk (*). The first dropdown is "Branch Liaison" with the value "Example Eight". The second is "Branch President" with "Example Forty-Four". The third is "Branch Secretary" with "Example Forty-Five". The fourth is "Branch Treasurer" with "Example Forty-Six", which is highlighted by a purple circle. At the bottom of the dialog are "Previous" and "Continue" buttons. The background is a blurred view of the club's main page, showing fields for account name, parent account, district, region, lion ID, and youth programs, along with a sidebar of navigation buttons like "Membership Cards", "Get Delegate", "Confirmation Letter", "View Reports", "Create Club Branch", "Create New Application", and "Edit Club Details".

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
SE Zone 1

Lion ID ⓘ
200158

Youth Programs ⓘ

✓ Club Details

Description

✓ Address

Billing Address

Membership Cards

Get Delegate

Confirmation Letter

View Reports

Create Club Branch

Create New Application

Edit Club Details

Previous Continue

12 Click "Continue"

This screenshot is identical to the one above, showing the "Assign Club Branch Officers" dialog box. However, the purple circle is now positioned over the "Continue" button at the bottom right of the dialog, indicating the next step in the process. The background interface remains the same, showing the club details and navigation options.

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
SE Zone 1

Lion ID ⓘ
200158

Youth Programs ⓘ

✓ Club Details

Description

✓ Address

Billing Address

Membership Cards

Get Delegate

Confirmation Letter

View Reports

Create Club Branch

Create New Application

Edit Club Details

Previous Continue

13 Select the fourth Branch Club member

United States

Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
Zone 1

Lion ID ⓘ
00158

Youth Programs ⓘ

Club Details

Description

Create Club Branch

Please assign Members to your New Club Branch. A minimum of 5 Members are required for a New Club Branch.

* Club Branch President
Exmpl

* Club Branch Secretary
Exmpl

* Club Branch Treasurer
Exmpl

* Member 4
Exmpl

* Member 5
--None--

* Would you like to add additional Members?
☐ Yes
☐ No

Previous Next

14 Select the fifth Branch Club member

Club Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
SE Zone 1

Lion ID ⓘ
200158

Youth Programs ⓘ

Club Details

Description

Address

Create Club Branch

Please assign Members to your New Club Branch. A minimum of 5 Members are required for a New Club Branch.

* Club Branch President
Exmpl

* Club Branch Secretary
Exmpl

* Club Branch Treasurer
Exmpl

* Member 4
Exmpl

* Member 5
Exmpl

* Would you like to add additional Members?
☐ Yes
☐ No

Previous Next

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

Account Name
Example Club For Training

Parent Account
District 1 J

Region or Zone
SE Zone 1

Lion ID
200158

Youth Programs

Club Details

Description

Address

Billing Address

Membership Cards

Get Delegate

Confirmation Letter

View Reports

Create Club Branch

Generate New Application

Edit Club Details

Please assign Members to your New Club Branch. A minimum of 5 Members are required for a New Club Branch.

* Club Branch President
Exempl

* Club Branch Secretary
Exempl

* Club Branch Treasurer
Exempl

* Member 4
Exempl

* Member 5
Exempl

* Would you like to add additional Members?

☐ Yes

☒ No

Previous Next

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

Account Name
Example Club For Training

Parent Account
District 1 J

Region or Zone
SE Zone 1

Lion ID
200158

Youth Programs

Club Details

Description

Address

Billing Address

Membership Cards

Get Delegate

Confirmation Letter

View Reports

Create Club Branch

Generate New Application

Edit Club Details

Please assign Members to your New Club Branch. A minimum of 5 Members are required for a New Club Branch.

* Club Branch President
Exempl

* Club Branch Secretary
Exempl

* Club Branch Treasurer
Exempl

* Member 4
Exempl

* Member 5
Exempl

* Would you like to add additional Members?

☐ Yes

☒ No

Previous Next



Tip! A green message indicating the Branch Club has been created and submitted to LCI for approval will be shown. Click the "X" icon to close the message.

Viewing The Branch Club

17

Click "More"

The screenshot displays the 'Club Details' page. On the left, there are input fields for 'Description', 'Website', 'Address' (with a placeholder '24 Any Place'), 'Shipping Address' (with a placeholder '24 Any Place'), and 'Meeting Location 1' (with a placeholder 'Town Center'). On the right, there are three blue buttons: 'Create Club Branch', 'Create New Application', and 'Edit Club Details'. Below these buttons is a tabbed interface with 'Club Me...', 'Club Offic...', and 'More' (highlighted with a purple circle). The 'Active Members' section is expanded, showing a search bar and a list of members. The first member is 'Lion-'. There is a blue circular icon with a person silhouette in the bottom right corner of the members list.

18 Click "Sponsored Clubs"

Club Details

Description

Website

Address

Billing Address

24 Any Place
Springville, Illinois 60565
United States

Shipping Address

24 Any Place
Springville, Illinois 60565
United States

Meeting Location 1

Meeting Place ⓘ

Down Center

Meeting Week of Month ⓘ

First

Meeting Local Place ⓘ

टाउन सेंटर

Meeting Local Street ⓘ

Create New Application

Edit Club Details

Club Me... Club Offic... More

Sponsored Clubs

Active Members

56 of 56 items

Search this list...

N. ▾

M ▾

M ▾

M ▾

Lion-



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
United States

Shipping Address

24 Any Place
aperville, Illinois 60565
United States

Meeting Location 1

Meeting Place ⓘ
Town Center

Meeting Week of Month ⓘ
1st

Meeting Day ⓘ
Monday

Meeting Time ⓘ
7:00

Meeting Street ⓘ
15 Town Road

Meeting City ⓘ
aperville

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


Club Mem... **Sponsor...** More

▼ Sponsored Clubs

1 of 1 item • 0 items selected

Search this list...

<input type="checkbox"/>	N ▼	T. ▼	S. ▼	Ch.
<input type="checkbox"/>	Example Club Branch	Club Branch	Pending Approval	

View 

20 Click "View" to see the details.

aperville, Illinois 60565
United States

Shipping Address

24 Any Place
aperville, Illinois 60565
United States

Meeting Location 1

Meeting Place ⓘ
Town Center

Meeting Week of Month ⓘ
1st

Meeting Day ⓘ
Monday

Meeting Time ⓘ
7:00

Meeting Street ⓘ
15 Town Road

Meeting City ⓘ
aperville

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


Club Mem... **Sponsor...** More

▼ Sponsored Clubs

1 of 1 item • 1 item selected

Search this list...

<input checked="" type="checkbox"/>	N ▼	T. ▼	S. ▼	Ch.
<input checked="" type="checkbox"/>	Example Club Branch	Club Branch	Pending Approval	

View 

12

21 The page for the selected sponsored club is displayed.

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

HomeMembership ▾Service ▾LearnMore ▾

Account

Example Club Branch

+ Follow

Lion ID

200164

Type

Club Branch

Status

Pending Approval

Billing Address

Club Details

Account Name

Example Club Branch

Parent Account

Example Club For Training

Region or Zone

Lion ID

200164

Youth Programs

Type

Club Branch

Active Member Count

0

Club Specialty

Club Sub-Specialty

Specialty Description

Club Acti...

Edit Club Branch

Club Me...Club Offic...

Active Members

Active Members

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

Billing Address

Billing Address

Shipping Address

Shipping Address

Meeting Location 1

Meeting Place

Community House

Meeting Week of Month

Meeting Day

Meeting Time

Meeting Street

Meeting City

Meeting State or Prov

Meeting Local Place

Meeting Local Street

Meeting Local City

Meeting Local Zip Code

Meeting Local State or Prov

Meeting Local Country

Online Meeting 1

Example Club Branch

Regular

lionfa

167

Example Club Branch

Regular

ke.co

-78

Example Club Branch

Active

m

88

View All

Contact Members Services

Email: lionssupport@lionsclubs.org

Phone: (+001) 630-468-6900

13



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.

The screenshot shows the Lion Portal interface. At the top is a dark blue header with the Lion Portal logo, a search bar, and navigation links: Home, Membership, Service, Learn, and More. Below the header, the breadcrumb path is "Accounts > Example Club Branch", and the page title is "Club Branch Members". A status bar indicates "5 items · Updated a few seconds ago". To the right of the status bar are icons for settings, refresh, and filter. Below this is a table with columns: Contact Full Name, Membership Type, Start Date, Email, Memberships, and a dropdown menu. The table contains five rows of member data. A purple circle highlights the "Example Club Branch" link in the breadcrumb path.

	Contact Full ...	Membershi...	Start ...	E...	Members...	Membershi...	Membershi...	
1	Example Forty-F...	Lion-Branch-Re...	4/15/20...		Active Memb...	Example Twent...	MEMBER#0011...	▼
2	Example Forty-Six	Lion-Branch-Fa...	4/15/20...		Active Memb...	Example Twent...	MEMBER#0011...	▼
3	Example Forty-E...	Lion-Branch-For...	6/14/20...		Active Memb...	Example One	MEMBER#0011...	▼
4	Example Forty-S...	Lion-Branch-Re...	6/14/20...		Active Memb...	Example Eleven	MEMBER#0011...	▼
5	Example Forty-F...	Lion-Branch-Re...	6/14/20...		Active Memb...	Example Forty-F...	MEMBER#0011...	▼

24 Click "Club Officers"

The screenshot shows the 'Example Club Branch' page. The top navigation bar includes 'Home', 'Membership', 'Service', 'Learn', and 'More'. The page header shows 'Account Example Club Branch' with a '+ Follow' button. Below the header, there's a table with columns: 'on ID', 'Type', 'Status', and 'Billing Address'. The table contains one row: '00164', 'Club Branch', 'Pending Approval', and an empty 'Billing Address' cell. The 'Details' section on the left lists fields: 'Account Name' (Example Club Branch), 'Parent Account' (Example Club For Training), 'Region or Zone', 'on ID' (00164), and 'Youth Programs'. The 'Club Branch' section on the right lists: 'Type' (Club Branch), 'Active Member Count' (0), 'Club Specialty', 'Club Sub-Specialty', and 'Specialty Description'. The 'Club Officers' tab is highlighted with a purple circle, and the 'Active Members' section shows '5 of 5 items'.

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

The screenshot shows the 'Example Club Branch' page with the 'Club Officers' tab selected. The 'Active Officers' section displays a list of 4 items. The list includes columns for 'Name', 'Branch', 'Position', and 'Contact Information'. The officers listed are: 'Example Branch President' (zuser044@liofake.com, 630-134-4555) and 'Example Branch Secretary' (zuser045@liofake.com, 630-145-5666).

Name	Branch	Position	Contact Information
Example Branch President	Example Branch	President	zuser044@liofake.com (630) 134-4555
Example Branch Secretary	Example Branch	Secretary	zuser045@liofake.com (630) 145-5666

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

Meeting Week of Month ⓘ

Meeting Day ⓘ

Meeting Time ⓘ

Meeting Street ⓘ

Meeting City ⓘ

Meeting State or Prov ⓘ

Meeting Zip Code ⓘ

Meeting Country ⓘ

Meeting Location 2

Meeting 2 Place ⓘ

Meeting Local Street ⓘ

Meeting Local City ⓘ

Meeting Local Zip Code ⓘ

Meeting Local State or Prov ⓘ

Meeting Local Country ⓘ

Online Meeting 1 ⓘ

Online Meeting 1 Place ⓘ

Online Meeting 1 Address ⓘ

Meeting 2 Local Place ⓘ

Non-Active Officers

0 of 0 items

Na... ▾

Title ▾

End D... ▾


No items to display.

View All

Contact Members Services

Email: lionssupport@lionsclubs.org

Phone: (+001) 630-468-6900



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

Search

Home

Membership ▾

Service ▾

Learn

More ▾

Accounts > Example Club Branch

Officers

4 items • Sorted by End Date • Updated a few seconds ago

⚙️

🔄

🔍

	Member Full ... ▾	Title ▾	Member Email ▾	Member P... ▾	O... ▾	E.. ▾	Officer T... ▾	
1	Example Eight	Branch Liaison	zuser008@lionfake.co...	(630) 456-78...	Active		OTA-7290348	▾
2	Example Forty-Four	Branch Preside...	zuser044@lionfake.co...	(630) 134-45...	Active		OTA-7290349	▾
3	Example Forty-Five	Branch Secretary	zuser045@lionfake.co...	(630) 145-56...	Active		OTA-7290350	▾
4	Example Forty-Six	Branch Treasurer	zuser046@lionfake.co...	(630) 156-67...	Active		OTA-7290351	▾



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

The screenshot displays the LCI system interface for a Branch Club profile. At the top, there is a dark blue navigation bar with a search bar and a 'Search' button. Below the navigation bar, the main header shows 'Account Example Club Branch' with a '+ Follow' button. The main content area is divided into two columns. The left column contains a table with the following data:

Lion ID	Type	Status	Billing Address
200164	Club Branch	Active	

The 'Status' cell in the table is circled in purple. Below the table, there is a 'Club Details' section with the following information:

- Account Name: Example Club Branch
- Parent Account: Example Club For Training
- Region or Zone:
- Type: Club Branch
- Active Member Count: 0
- Club Specialty:

The right column contains a 'Club Acti...' section with an 'Edit Club Branch' button. Below this, there is a 'Club Me...' section with a 'Club Offic...' button. At the bottom, there is a 'Active Members' section with a dropdown arrow.

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

The screenshot displays the 'Example Club Branch' account page. At the top, there's a header with the account name and a '+ Follow' button. Below this is a table with columns: 'on ID', 'Type', 'Status', and 'Billing Address'. The table contains one row with values: '00164', 'Club Branch', 'Active', and an empty cell. The main content area is divided into two sections: 'Details' on the left and 'Club Actions' on the right. The 'Details' section has fields for 'Account Name' (Example Club Branch), 'Parent Account' (Example Club For Training), 'Region or Zone', 'on ID' (00164), and 'Youth Programs'. The 'Club Actions' section has a tab for 'Club Actions' and a button labeled 'Edit Club Branch' which is highlighted with a purple circle. Below this, there are tabs for 'Club Members' and 'Club Officers'. The 'Club Members' tab is active, showing a list of 'Active Members' with a sub-header 'Active Members' and '5 of 5 items'. A blue circular icon with a person symbol is visible in the bottom right corner of the 'Active Members' list.



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

The screenshot shows a web application interface with a modal dialog box titled "Edit Club Branch". The dialog box contains a question: "* Would you like to Edit Club Details or Add or Remove a Member?". Below the question are four radio button options: "Edit Club Details", "Add New Member", "Remove Member", and "Assign Club Branch Officers". A blue "Next" button is located at the bottom right of the dialog box. The background of the application is dimmed, showing a sidebar with "Account" and "Example Club Branch" information, and a main content area with "Club Details" and "Active Members" sections.

Account
Example Club Branch

Lion ID
200164

Type
Club Branch

Club Details

Account Name
Example Club Branch

Parent Account ⓘ
Example Club For Training

Region or Zone ⓘ

Lion ID ⓘ
200164

Youth Programs ⓘ

Club Specialty ⓘ

Club Sub-Specialty ⓘ

Specialty Description ⓘ

Club Mem... Club Offic...

Active Members

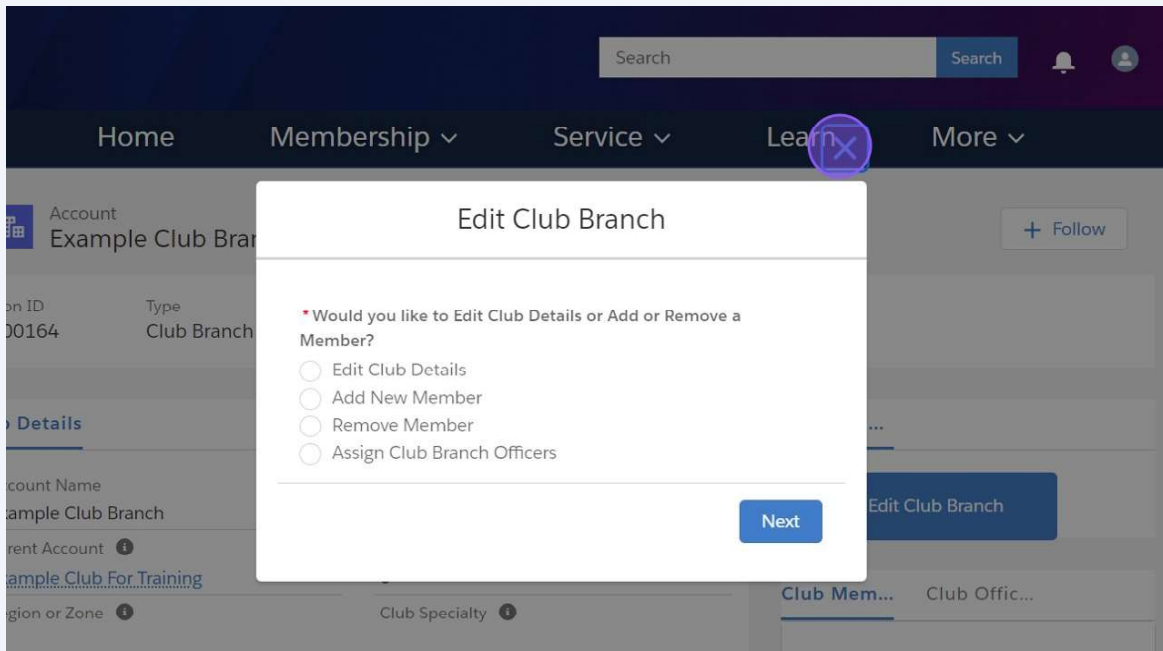
Active Members

5 of 5 items

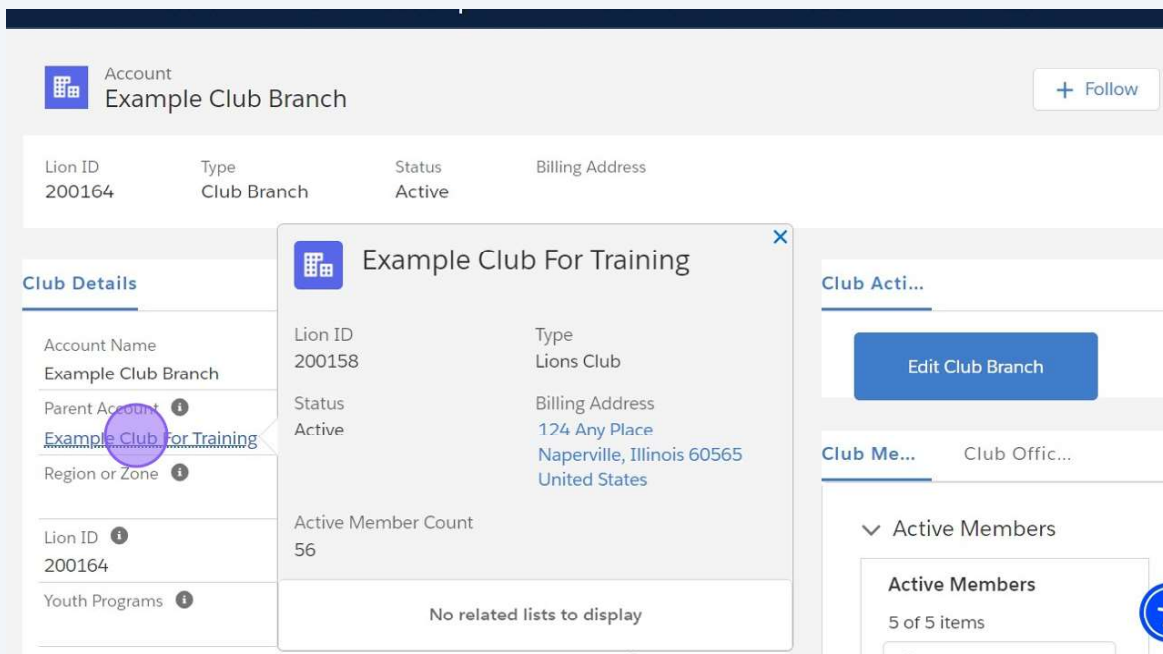
Edit Club Branch

Next

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.

The screenshot shows the top navigation bar of the Lions Club website. The 'Home' button is highlighted with a purple circle. Below the navigation bar, the 'Account' section for 'Example Club For Training' is visible. It includes 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, there are tabs for 'Club Details', 'Data Export', 'Club Statements', 'Club Service Activities', and 'More'. The 'Club Details' tab is active, showing the 'Account Name' as 'Example Club For Training' and the 'Type' as 'Lions Club'. The 'Parent Account' is 'District 1 J' and the 'Active Member Count' is 56. To the right, there is a 'Member ...' tab and a 'Club Acti...' tab. A 'Manage Club Members' button is visible under the 'Member ...' tab.

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

The screenshot shows the main content area of the Lions Club website. At the top, it says 'Welcome Example One!'. Below this, there are four main action buttons arranged in a grid:

- MY MEMBERSHIP**: A blue button with a white icon of a person and a list.
- MY CLUB**: A blue button with a white icon of a house with three people inside.
- MY CA**: A purple button with a white icon of a star on top of a stack of books.
- MY ASSOCIATION**: A purple button with a white icon of the Lions Club logo.

At the bottom right, there are two circular icons: a purple one and a blue one with a white person icon.