

Manage Club Members - Add a Club Member



This guide is essential for anyone involved in managing club memberships, specifically for adding new full dues-paying Lion members. It provides clear, step-by-step instructions for the process, including creating a unique Member ID that tracks an individual's membership history. By following this guide, users can efficiently navigate the Lion Portal and ensure accurate member records, which is crucial for maintaining club organization and communication. Overall, it streamlines the membership addition process, making it easier for club administrators to manage their members effectively.



Tip! This Quick Guide demonstrates how to add a new Lion member who is a full dues paying member.

To add Family Member refer to the "Manage Club Members - Add a Family Member"

To add Student Member refer to the "Manage Club Members - Other Member Types"



Tip! When adding a member to a club the person record is created this person is assigned a "Member ID" sometimes also called a "Lion ID". This identification is unique to the person and remains with them throughout their Lion journey.

Each time a Member changes their membership relationship a unique history record is created to track the Membership History. These include changes like:

- Regular Membership to Family Membership
- Dropping and then Reinstating or transferring clubs
- Having an association with another Club in addition to your primary club

This tracking number looks like: MEMBER#0011943930

Lion Portal

twenty-three Search

Home Membership Service Learn Reports/Insights Shop More

Contact Example Member Twenty-Three **Lion Member ID** + Follow

Primary Affiliation: Example Club For Training
Member ID: 26691573
Email: zuser023@lionfake.com
Phone: (630) 101-1213

History Of Memberships

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

Club Memberships (4)
4 Items • Sorted by Start Date • Updated a few seconds ago

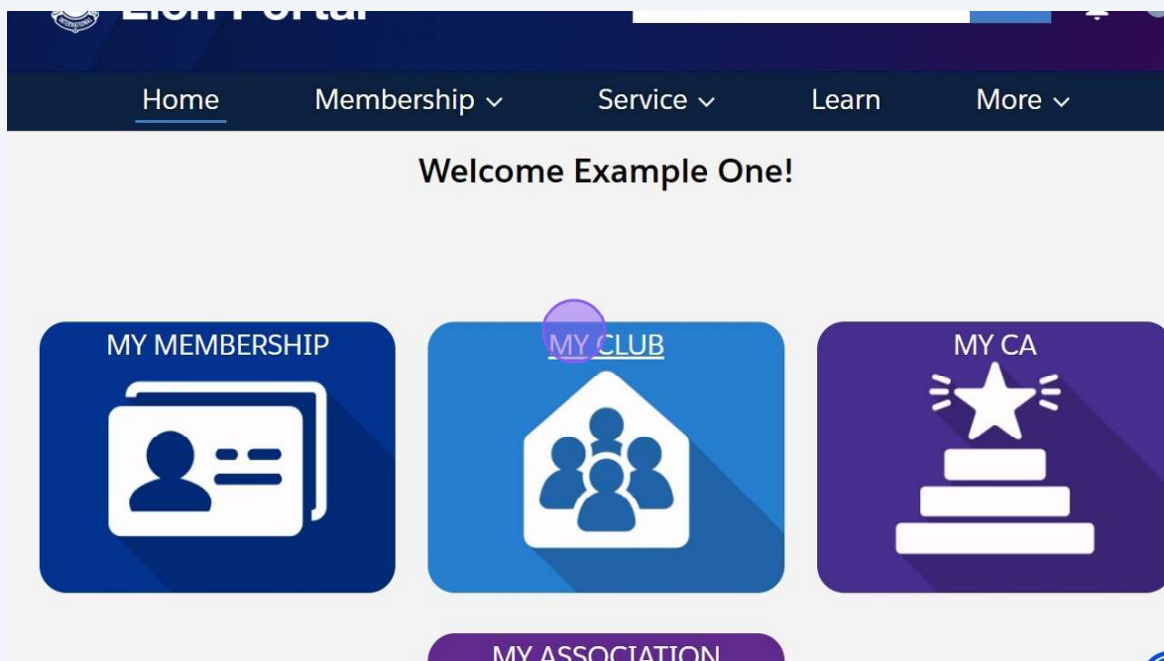
	Club Name	Membershi...	Start Date	End
1	Example Club ...	Lion-Charter-R...	8/1/2010	6/30
2	BURR RIDGE-H...	Lion-Associate-...	7/5/2015	6/30
3	Example Club ...	Lion-Charter-Fa...	7/1/2017	12/31
4	Example Club ...	Lion-Charter-R...	12/16/2021	

View All

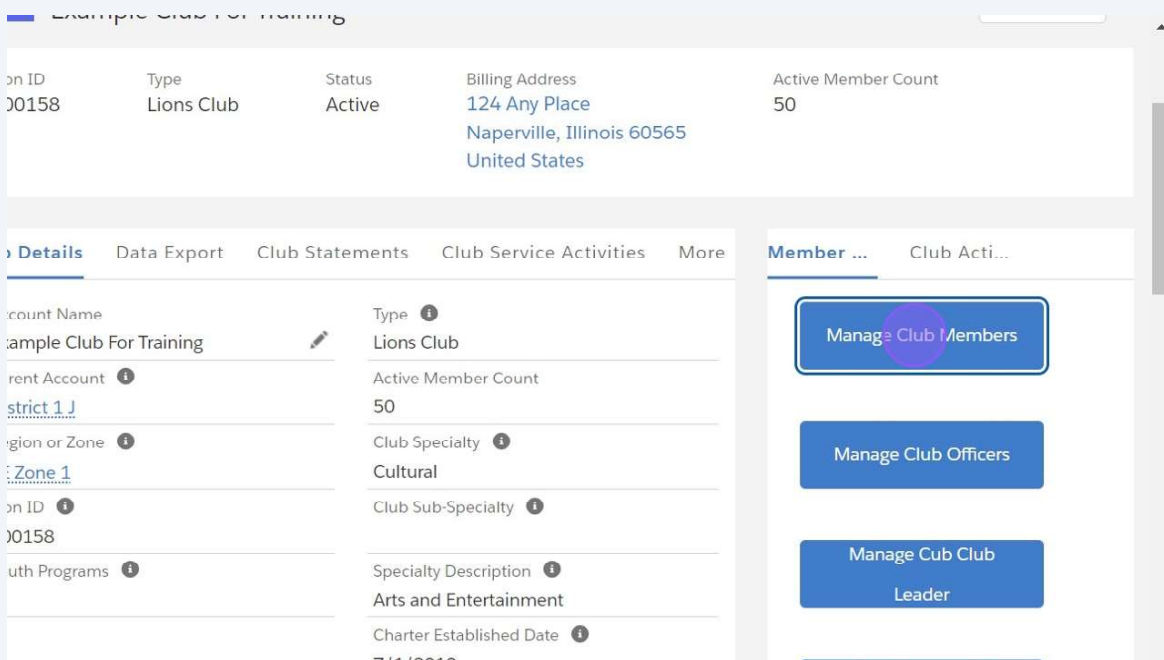
1

Sign in to the Lion Portal. lionportal.org

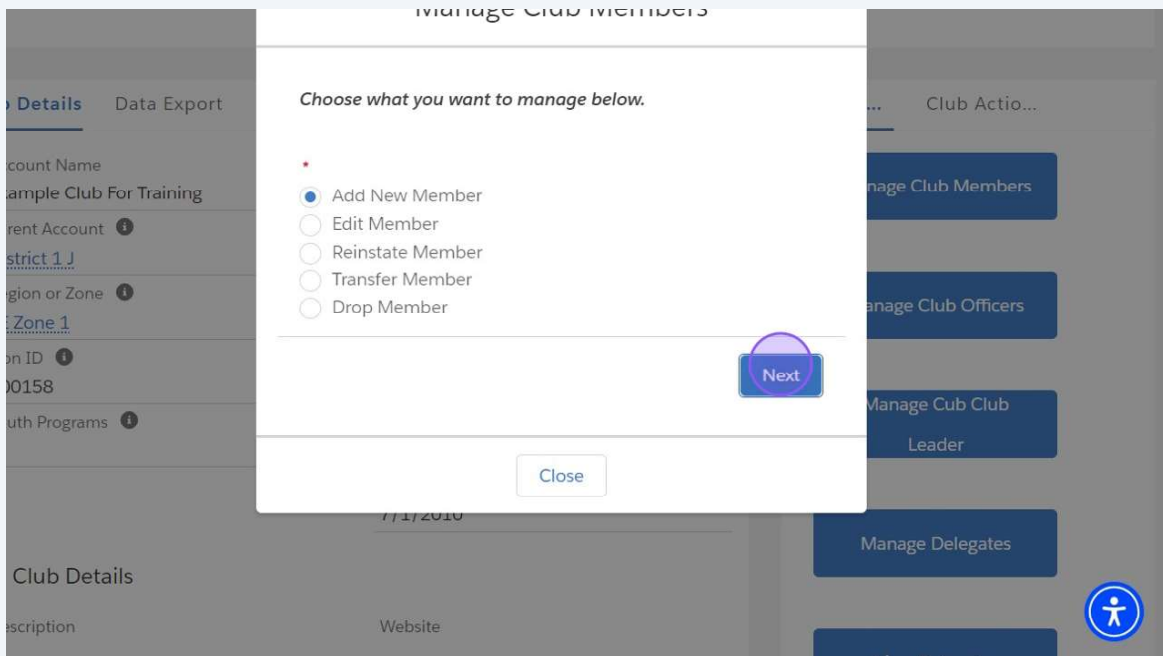
2 Click "MY CLUB"



3 Click "Manage Club Members"



4 Select "Add New Member" and click "Next"



5 To begin the process enter the required data

6

Click this dropdown.

The screenshot shows a web application interface for managing club members. A modal window titled "Manage Club Members" is centered on the screen. Inside the modal, there is a heading "Please complete fields to begin new membership process". Below this heading are four input fields: "First Name" (containing "Example"), "Last Name" (containing "Fifty-One"), "Date of Birth" (containing "Jan 8, 1988" with a calendar icon and the placeholder "MMM d, yyyy"), and "Gender" (a dropdown menu). The "Gender" dropdown menu is open, showing a list of options: "--None--", "Male", "Female", "Non-Binary", and "Prefer Not To Answer". A purple circle highlights the dropdown arrow of the "Gender" field. At the bottom of the modal, there are "Previous" and "Search" buttons. The background of the application is dimmed, showing a sidebar with "Details" and "Data Export" tabs, and a main area with various club management buttons like "Manage Club Members", "Manage Club Officers", "Manage Club Club", "Leader", and "Manage Delegates".



Tip! The system will search to ensure this is not a duplicate. If there are no potential duplicates you will be brought to the enter address step.

7 Click "Search"

Please complete fields to begin new membership process

* First Name

* Last Name

* Date of Birth

* Gender

MMM d, yyyy

8 Begin entering additional data

Manage Club Members

Create New Contact

* First Name

Middle Name

Prefix

* Gender

* Last Name

Nickname

Suffix

* Date of Birth

MMM d, yyyy

* Address Fields Required

Address

Country

Primary Email

Secondary Email

9 To add the address, first select the country

The screenshot shows the 'Manage Club Members' form. On the left, the 'Club Details' sidebar lists: Account Name (Example Club For Training), Parent Account (District 1 J), Region or Zone (SE Zone 1), Lion ID (200158), and Youth Programs. The main form has tabs for 'Fifty-One' and 'Fifty-Two'. The 'Address' section is titled '*Address Fields Required' and includes fields for Country, Street, City, State/Province, and Zip/Postal Code. The 'Country' dropdown is currently set to '--None--' and is highlighted with a purple circle. To the right of the address fields are input fields for Primary Email, Secondary Email, Mobile Phone, Work Phone, and Home Phone. A 'Close' button is at the bottom of the form.

10 Click the "Country" to bring down the list of countries and select the country

This screenshot shows the same 'Manage Club Members' form, but the 'Country' dropdown menu is open, displaying a list of countries: Tunisia, Turkey, Turks and Caicos Islands, Uganda, Ukraine, United Arab Emirates, United Kingdom, and United States. The 'United States' option is highlighted with a purple circle. The rest of the form, including the sidebar and other input fields, remains the same as in the previous screenshot.

11 enter the additional data for this member

*Address Fields Required

Address

Country: United States

Street: 462 Spring Way

City: Naperville

State/Province: Illir

Zip/Postal Code: |

Primary Email: zFiftyone@fa

Secondary Email: you@exempl

Mobile Phone: 630 942-223

Work Phone:

Home Phone:

Close

12 Click "Next"

Naperville

Illir

Zip/Postal Code: 60565

Home Phone:

Occupation: Business/Co

Spouse/Companion Full Name: Companion f

Previous

Next

Close

13 Enter the start date of the membership and the "Member Type"

The screenshot shows a 'Manage Club Members' dialog box overlaid on a 'Club Details' page. The dialog box has a title bar 'Manage Club Members'. Inside, there are two main sections. The first section is for 'Membership Start Date', which includes a date input field showing 'Sep 1, 2024' and a calendar icon, with the text 'MMM d, yyyy' below it. The second section is for 'Membership Type', which includes a dropdown menu currently showing '--None--'. A purple circle highlights the dropdown arrow. Below the dropdown is a list of options: '--None--', 'Regular Member', 'Family Member', 'Leo Lion Member', 'Young Adult Member', and 'Student Member'. To the right of the dropdown is a 'Next' button. At the bottom of the dialog box is a 'Close' button. The background page shows 'Club Details' for 'Example Club For Training' with fields for 'Account Name', 'Parent Account', 'Region or Zone', 'Lion ID', and 'Youth Programs'.

14 Click "Next"

This screenshot shows the same 'Manage Club Members' dialog box as in the previous step, but with the 'Next' button highlighted by a purple circle. The 'Membership Start Date' field now also includes a 'Membership Category' dropdown menu showing 'Active'. The 'Membership Type' dropdown now shows 'Regular Member'. The 'Next' button is highlighted, and the 'Close' button remains at the bottom. The background page is the same 'Club Details' page.

- 15 Add the member sponsor. To search for sponsor by name select "Name" and click next

Manage Club Members

Please search for a sponsor for the new member.

* Search by Name or Lion ID

☒ Name

☐ Lion ID

Previous Next

Close

- 16 Enter the name and click "Next"

Manage Club Members

Please search for a sponsor for the new member.

* Search by Name or Lion ID

☒ Name

☐ Lion ID

* First Name

Example

* Last Name

one

Previous Next

Close

17 Select the member from the list and click "Next"

Manage Club Members

1 of 1 item • 0 items selected

Search this list...

Name	Member ID	Club Name
Example One	26691550	Example Club For Training

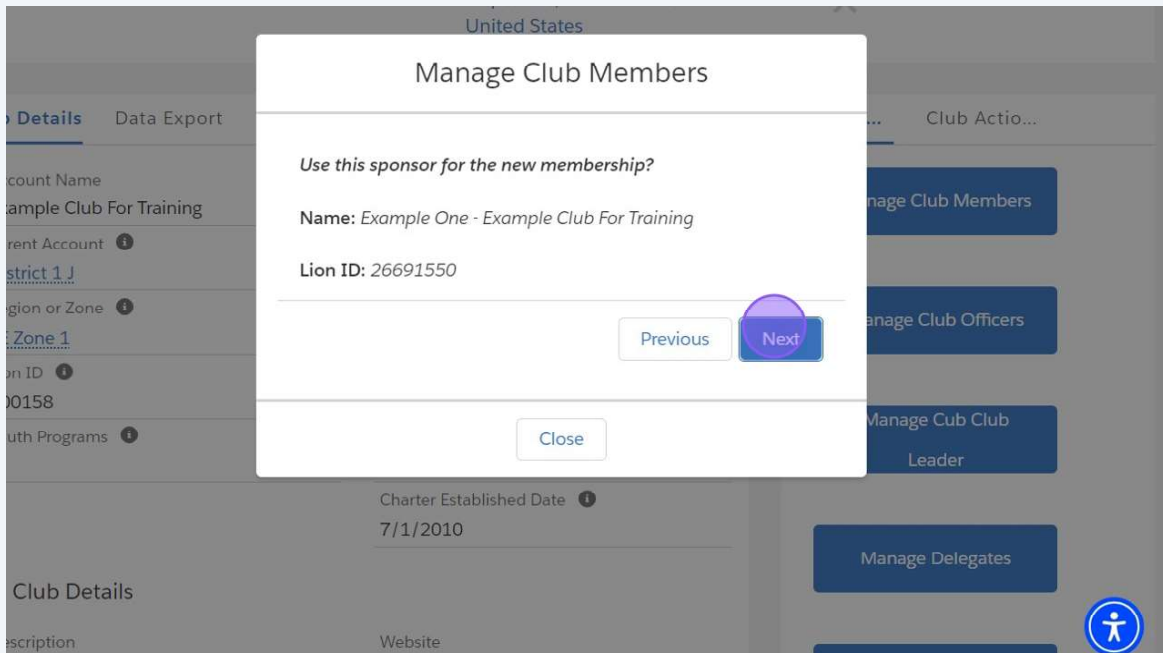
Previous Next

Close



Alert! If this is not the correct sponsor member, click "Previous" to return the the search for sponsor step.



















- 18 Confirm you have selected the correct sponsor member and click "Next"



- 19 A Green Success message will show at the top of the screen and you are returned to the "Club Details" page

View the Member and there Membership Details



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Meeting Location 1 Meeting Week of Month  Meeting Day  Meeting Time  Meeting Street  Meeting City  Meeting State or Prov  Meeting Zip Code  Meeting Country  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 Location 2 Meeting 2 Place  Meeting 2 Local Place 
--	--

	N. ▾	M ▾	M ▾	M ▾
Exam ple Twelv e	Lion- Chart er- Regul ar [Activ e]	zuser 012@ lionfa ke.co m	(63 0) 890 -12 34	
Exam ple Five	Lion- Chart er- Regul ar [Activ e]	zuser 005@ lionfa ke.co m	(63 0) 123 -45 67	
	Lion- Chart	zuser	(63 0)	

Tip! You can make the columns larger or smaller by clicking and dragging the column as shown below

21 The member list is shown

Lion Portal Search  

Home Membership Service Learn More

Accounts > Example Club For Training
Club Members

50+ items • Sorted by Contact Full Name • Updated a few seconds ago

	Con...	Mem...	Email	Phone	Lion J...	Start ...	E...	Mem...	Mem...
1	Example ...	Lion-Cha...	zuser008...	(630) 45...	7/1/2010	7/1/2010		Active M...	MEMBER...
2	Example ...	Lion-Cha...	zuser018...	(630) 55...	7/1/2010	7/1/2010		Active M...	MEMBER...
3	Example ...	Lion-Cha...	zuser011...	(630) 78...	7/1/2010	7/1/2010		Active M...	MEMBER...
4	Example ...	Lion-Reg...	zfiftyone...	630 942-...	9/1/2024	9/1/2024		Active M...	MEMBER...
5	Example ...	Lion-Cha...	zuser015...	(630) 22...	7/1/2010	7/1/2010		Active M...	MEMBER...
6	Example ...	Lion-Stu...	zuser050...	(630) 18...	6/14/20...	6/14/20...		Active M...	MEMBER...

22 To view the details of the Membership Type click the blue system identification for this membership

Home Membership Service Learn More

Accounts > Example Club For Training
Club Members

50+ items • Sorted by Contact Full Name • Updated a few seconds ago

	Contact Full Name ↑	Mem...	Email	Phone	Lion J...	Start ...	E...	Mem...	Mem...
1	Example Eight	Lion-Cha...	zuser008...	(630) 45...	7/1/2010	7/1/2010		Active M...	M
2	Example Eighteen	Lion-Cha...	zuser018...	(630) 55...	7/1/2010	7/1/2010		Active M...	M
3	Example Eleven	Lion-Cha...	zuser011...	(630) 78...	7/1/2010	7/1/2010		Active M...	M
4	Example Fifty-One	Lion-Reg...	zfiftyone...	630 942-...	9/1/2024	9/1/2024		Active M...	M
5	Example Fifteen	Lion-Cha...	zuser015...	(630) 22...	7/1/2010	7/1/2010		Active M...	M
6	Example Fifty	Lion-Stu...	zuser050...	(630) 18...	6/14/20...	6/14/20...		Active M...	M
7	Example Five	Lion-Cha...	zuser005...	(630) 12...	7/1/2010	7/1/2010		Active M...	M
8	Example Forty	Lion-Reg...	zuser040...	(630) 89...	6/14/20...	6/14/20...		Active M...	M

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The details of the Membership Type are displayed

Contact	Club	Club Branch	Membership Full Type
Example Fifty-One	Example Club For Training		Lion-Regular [Active]

Details

Club	Example Club For Training
Contact	Example Fifty-One
Club Branch	
Relationship Type	
Membership Sponsor	Example Member One

Membership Details

Join Date

Membership Status	Active Member
Membership Type	Lion
Membership Category	Active
Program	Regular
Add Type	New

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

No related lists to display

24

Scroll to see additional details

Start Date	1/2024
End Date	
Total Years	05

Hierarchies

Membership Club	Example Club For Training	Constitutional Area	U.S. and Affiliates, Bermuda and Bahamas
AT Constitutional Area		LCIF Constitutional Area	LCIF Constitutional Area 1
AT Group		LCIF Group	LCIF Group C - Area 1
Multiple District		District	District 1 J
Region		Zone	SE Zone 1

25 Click the link under "Contact" to view the Member Details

Contact
[Example Fifty-One](#)

Club
[Example Club For Training](#)

Club Branch

Membership Full Type
Lion-Regular [Active]

Details

Club ⓘ
[Example Club For Tra](#)

Contact ⓘ
[Example Fifty-One](#)

Club Branch ⓘ

Relationship Type ⓘ

Membership Sponsor ⓘ
[Example Member One](#)

▼ Membership Details

Lion Join Date ⓘ

regular

Add Type ⓘ
New

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

No related lists to display

26 Details about the Member are shown

Primary Affiliation
[Example Club For Training](#)

Member ID
26691601

Email
zfiftyone@fake.com

Phone
630 942-2233

Name
Example Fifty-One

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

Nickname ⓘ
M-Man

Gender ⓘ
Male

▼ Local Language Information

First Name (Local)

Middle Name (Local)

Last Name (Local)

Spouse Name ⓘ
Companion Fifty-One

Birthday ⓘ
January 8

Birthdate
1/8/1988

Occupation ⓘ
Business/Consultant/Service Provider

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

Club Me... (1) ⚙️ ↺

1 item • Sorted by Start Date • Updated a few seconds ago

Club Name ▾

Membershi...

1

Example Club ...

Lion-Regular [

View All

Members Sponsored (0)

27

27

✓ Contact Information

Local Address

Home Phone

Personal Email ⓘ
zfiftyone@fake.com

Work Email

Alternate Email

Fax



28

28



Search

Search



[Home](#)

Membership ▾

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Learn

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Contact

Example Fifty-One

+ Follow

Phone
630 942-2233

Birthdate
1/8/1988

Contact Members Services

Email: lionssupport@lionsclubs.org

Phone: (+001) 630-468-6900



Club Me... (1)



1 item • Sorted by Start Date • Updated a few seconds ago

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This concludes the Manage Club Members - Add a Club Member Quick Guide

