

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: lionssupport@lionsclubs.org
Phone: (+001) 630-468-6900

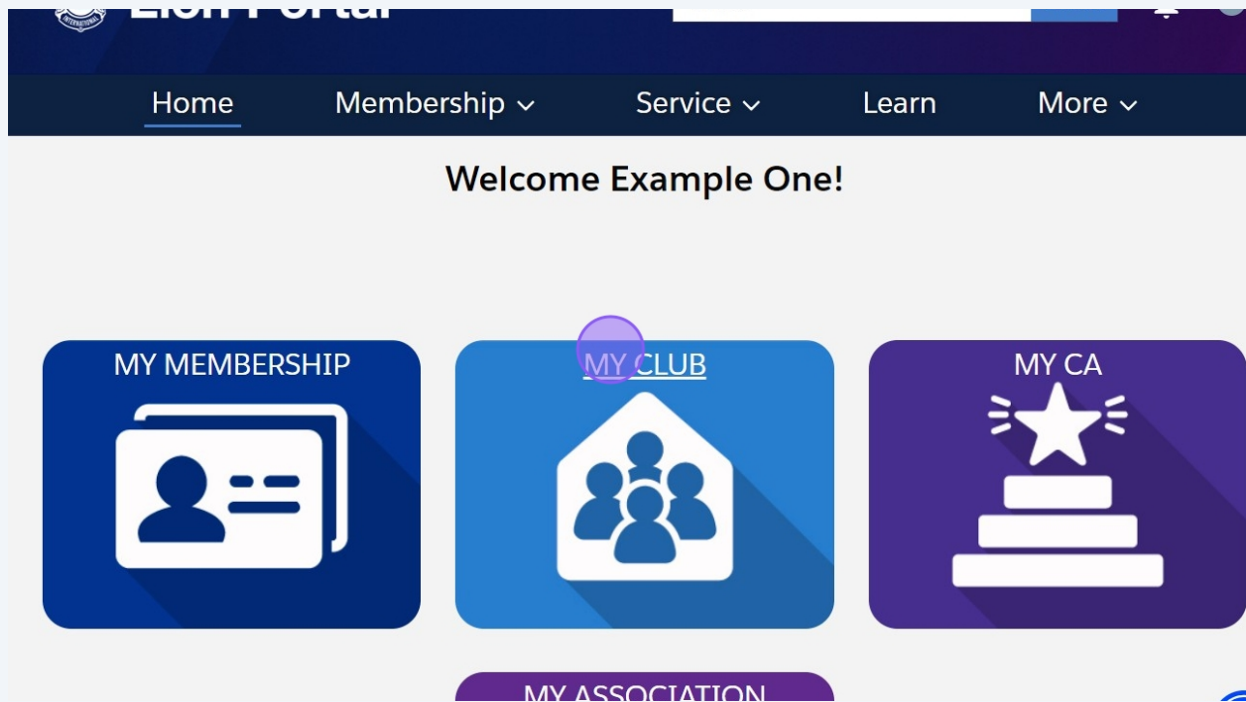
Club Memberships (4)
4 Items • Sorted by Start Date • Updated a few seconds ago

	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/...
4	Example Club ...	Lion-Charter-R...	12/16/2021	

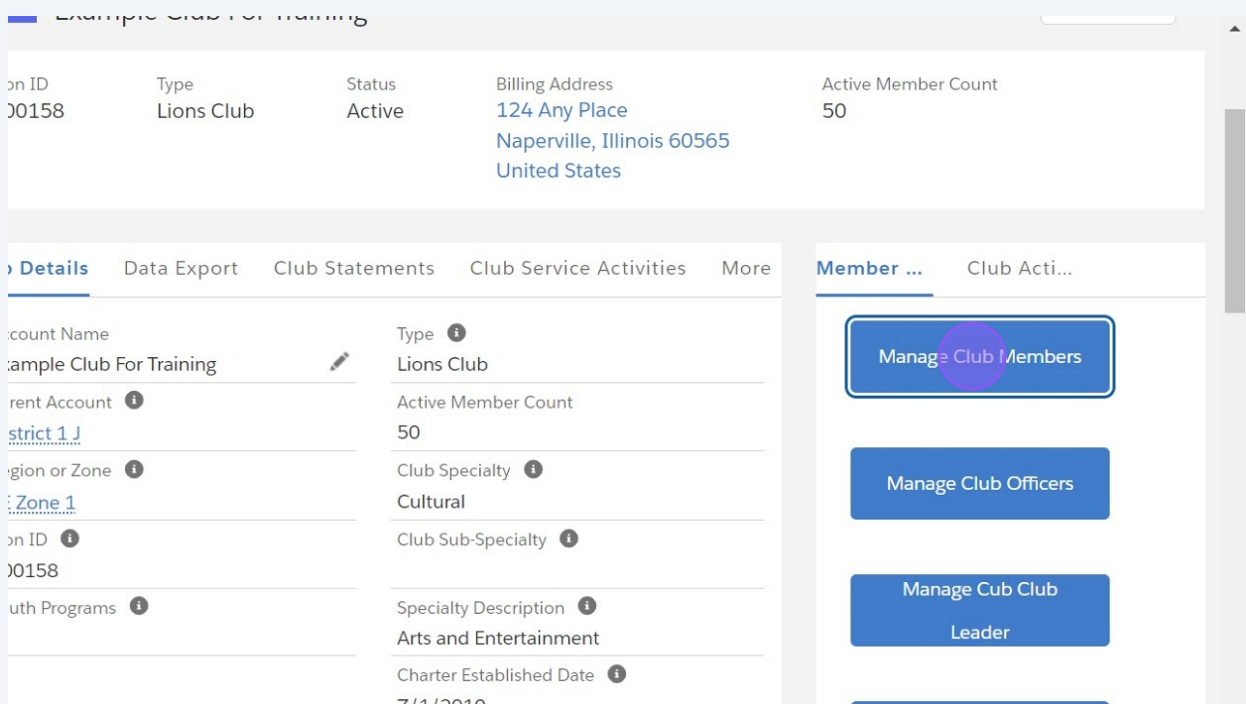
View All

1 Sign in to the Lion Portal. lionportal.org

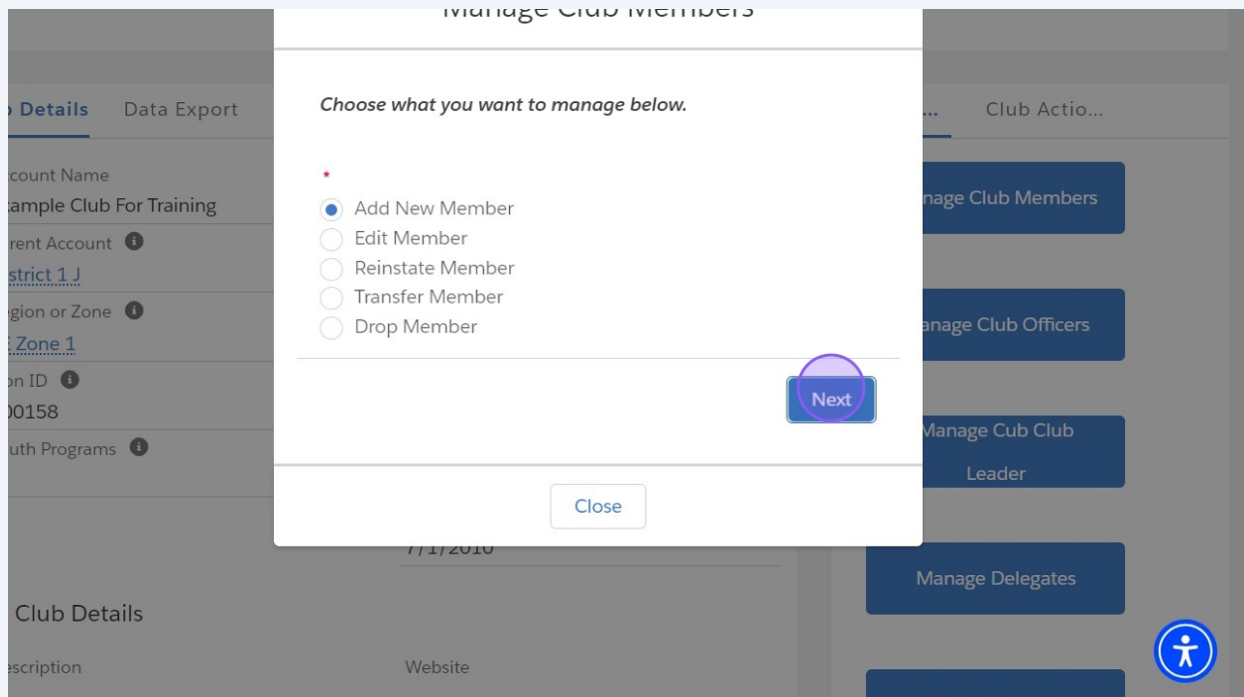
2 Click "MY CLUB"



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, there 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 format "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. To the left of the modal, a sidebar contains various club details and links. To the right, there are buttons for "Manage Club Members", "Manage Club Officers", "Manage Club Club Leader", and "Manage Delegates". At the bottom of the modal, there are "Previous" and "Search" buttons, and a "Close" button is partially visible on the left.



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
Example	Fifty-One
* Date of Birth	* Gender
Jan 8, 1988 MMM d, yyyy	Male

8 Begin entering additional data

Manage Club Members

Create New Contact

* First Name	Middle Name	Prefix	* Gender
Exempl			Male
* Last Name	Nickname	Suffix	* Date of Birth
Fifty-Or			Jan 8 MMM d, yyyy
*Address Fields Required		Primary Email	
Address		you@exempl	
Country		Secondary Email	
--None--			

9 To add the address, first select the country

The screenshot shows a web application interface for managing club members. A modal window titled "Manage Club Members" is open, displaying a form with various fields. The "Address" section is highlighted, and the "Country" dropdown menu is open, showing "--None--" as the selected option. A purple circle highlights the dropdown arrow. The form includes fields for "Primary Email", "Secondary Email", "Mobile Phone", "Work Phone", and "Home Phone". The background shows a sidebar with "Club Details" and a list of club members.

Manage Club Members

Fifty-Or MMM d, yyyy

***Address Fields Required**

Address

Country --None--

Street

City State/Province --Nc

Zip/Postal Code

Primary Email you@exampl

Secondary Email you@exampl

Mobile Phone

Work Phone

Home Phone

Close

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 now open, displaying a list of countries. The "United States" option is highlighted with a purple circle. The form fields for "Primary Email", "Secondary Email", "Mobile Phone", "Work Phone", and "Home Phone" are visible. The background shows the "Club Details" sidebar and a list of club members.

Manage Club Members

Fifty-Or MMM d, yyyy

***Address Fields Required**

Address

Country --None--

Tunisia

Turkey

Turks and Caicos Islands

Uganda

Ukraine

United Arab Emirates

United Kingdom

United States

Primary Email you@exampl

Secondary Email you@exampl

Mobile Phone

Work Phone

Home Phone

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@exampl

Mobile Phone: 630 942-223

Work Phone:

Home Phone:

Close

12 Click "Next"

City: Naperville

State/Province: 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 the 'Manage Club Members' dialog box. The 'Membership Start Date' is set to 'Sep 1, 2024'. The 'Membership Type' dropdown menu is open, showing options: '--None--', 'Regular Member', 'Family Member', 'Leo Lion Member', 'Young Adult Member', and 'Student Member'. A purple circle highlights the '--None--' option. The 'Next' button is visible at the bottom right of the dialog box.

Manage Club Members

* Membership Start Date
Sep 1, 2024
MMM d, yyyy

* Membership Type
--None--

Next

--None--
Regular Member
Family Member
Leo Lion Member
Young Adult Member
Student Member

14 Click "Next"

The screenshot shows the 'Manage Club Members' dialog box. The 'Membership Start Date' is set to 'Sep 1, 2024'. The 'Membership Category' is set to 'Active'. The 'Membership Type' is set to 'Regular Member'. A purple circle highlights the 'Next' button at the bottom right of the dialog box. The 'Close' button is visible at the bottom center of the dialog box.

Manage Club Members

* Membership Start Date
Sep 1, 2024
MMM d, yyyy

* Membership Category
Active

* Membership Type
Regular Member

Next

Close

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"

The screenshot shows a web application interface with a modal dialog box titled "Manage Club Members". The dialog box contains the following text:

- Use this sponsor for the new membership?*
- Name:** Example One - Example Club For Training
- Lion ID:** 26691550

Below the text, there are three buttons: "Previous", "Next" (highlighted with a purple circle), and "Close". The background of the application shows a "Club Details" page with various fields like "Account Name", "District 1 J", "Region or Zone", "Charter Established Date", and "Website".

- 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

20 Under "View Members" click "View All"

own Center

Meeting Week of Month ⓘ

st

Meeting Day ⓘ

Monday

Meeting Time ⓘ

7:00

Meeting Street ⓘ

5 Town Road

Meeting City ⓘ

aperville

Meeting State or Prov ⓘ

Meeting Zip Code ⓘ

0565

Meeting Country ⓘ

United States

Meeting Location 2

Meeting 2 Place ⓘ

टाउन सेंटर

Meeting Local Street ⓘ

४५५ टाउन रोड

Meeting Local City ⓘ

नेपरविल

Meeting Local Zip Code ⓘ

Meeting Local State or Prov ⓘ

IL

Meeting Local Country ⓘ

संयुक्त राज्य अमेरिका

Online Meeting 1 ⓘ

☐

Online Meeting 1 Place ⓘ

Online Meeting 1 Address ⓘ

Meeting 2 Local Place ⓘ

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

View



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

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	

23 The details of the Membership Type are displayed

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

LCIF Constitutional Area
LCIF Constitutional Area 1

LCIF Group
LCIF Group C - Area 1

District
District 1 J

Zone
SE Zone 1

Region
Region

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]
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Details

Club ⓘ
[Example Club For Tra](#)

Contact ⓘ
[Example Fifty-One](#)

Club Branch ⓘ

Relationship Type ⓘ
Regular

Membership Sponsor ⓘ
[Example Member One](#)

Add Type ⓘ
New

Membership Details

Lion Join Date ⓘ

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

Scroll to see more details

✓ Contact Information

Mailing Address

462 Spring Way
Naperville, Illinois 60565
United States

Preferred Phone ⓘ

Mobile

Home Phone

Mobile

630 942-2233

Work Phone ⓘ

Other Phone

Local Address

Preferred Email ⓘ

Personal

Personal Email ⓘ

zfiftyone@fake.com

Work Email ⓘ

Alternate Email ⓘ

Fax

Officer Titles (0)

28

Click "Home" to return to the landing page



Lion Portal

Search





Home

Membership ▾

Service ▾

Learn

More ▾



Contact
Example Fifty-One

+ Follow

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

Spouse Name ⓘ
Companion Fifty-One

Birthday ⓘ
January 8

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

29

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

