

Manage Club Members - Edit Member Data



This guide is essential for Club Officers, as it provides a straightforward process for updating member information in the Lion Portal. It outlines the necessary permissions, step-by-step instructions for editing personal and contact details, and highlights important tips, such as the limited time frame for changing a membership sponsor. By following this guide, Club Officers can efficiently manage member data, ensuring accurate records and effective club administration.

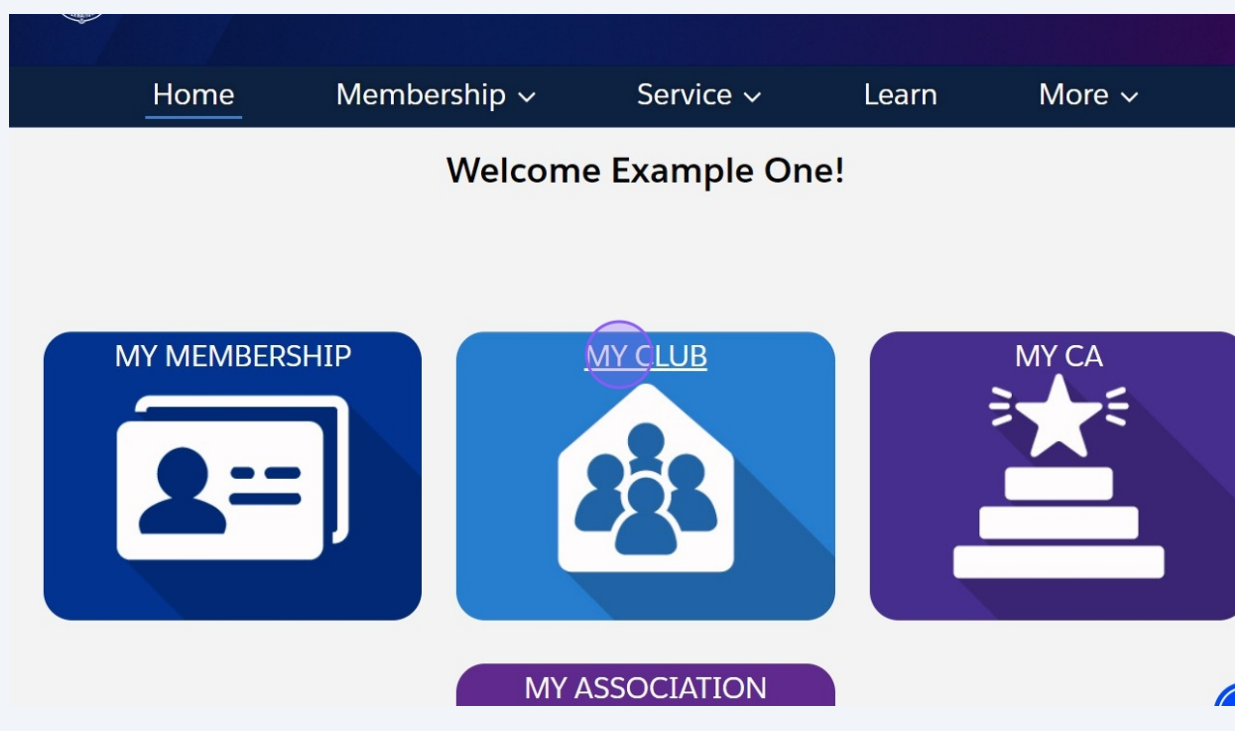


Tip! Member details can be updated at any time by Club Officers with the permissions to manage members. The Club Officer titles are: Club President, Club Secretary, Club Administrator.

District and Multiple District Administrators can edit the Member details for Clubs within their structure. At this level, first select the Club to manage.

1 Sign in to the Lion Portal. lionportal.org

2 Click "MY CLUB"



3 Click "Manage Club Members"

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	50

Details Data Export Club Statements Club Service Activities More

Account Name
Example Club For Training

Parent Account
District 1 J

Region or Zone
Zone 1

Lion ID
200158

Type
Lions Club

Active Member Count
50

Club Specialty
Cultural

Club Sub-Specialty

Manage Club Members

Manage Club Officers

4 This Quick Guide shows "Edit Member" functions

Lion Portal

Home 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	50

Club Details Data Export

Account Name
Example Club For Training

Parent Account
District 1 J

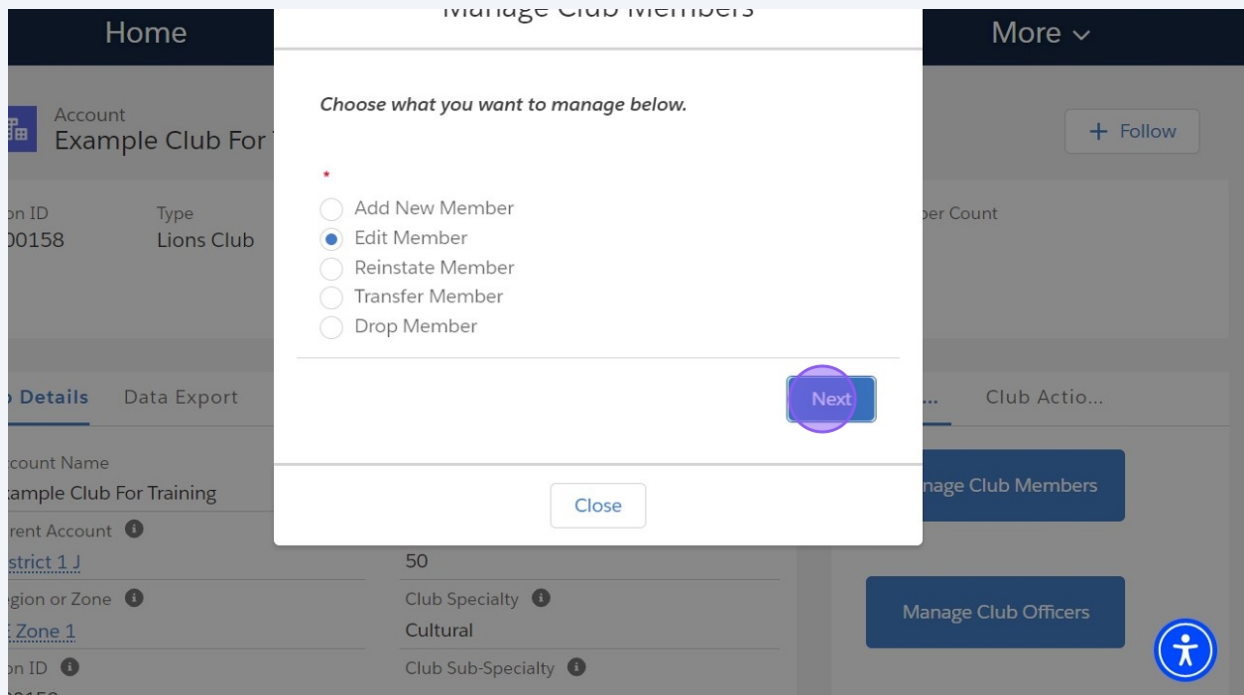
Manage Club Members

Choose what you want to manage below.

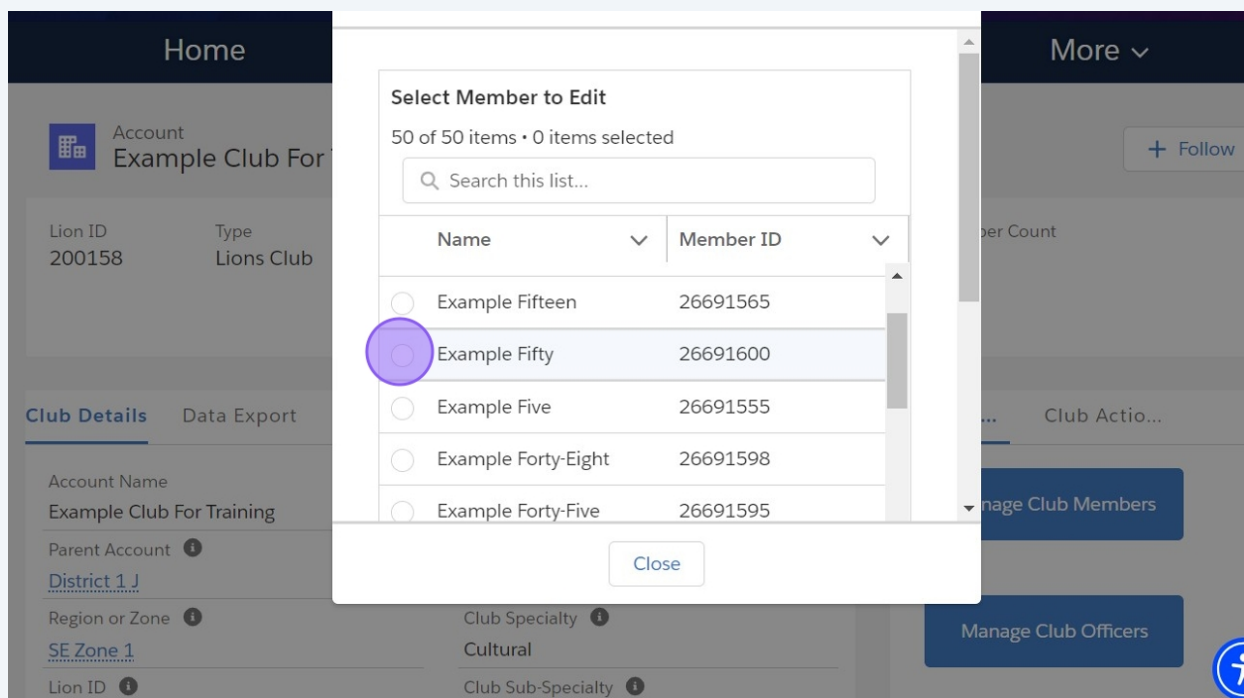
- ☒ Add New Member
- ☐ Edit Member
- ☐ Reinstate Member
- ☐ Transfer Member
- ☐ Drop Member

Next Close

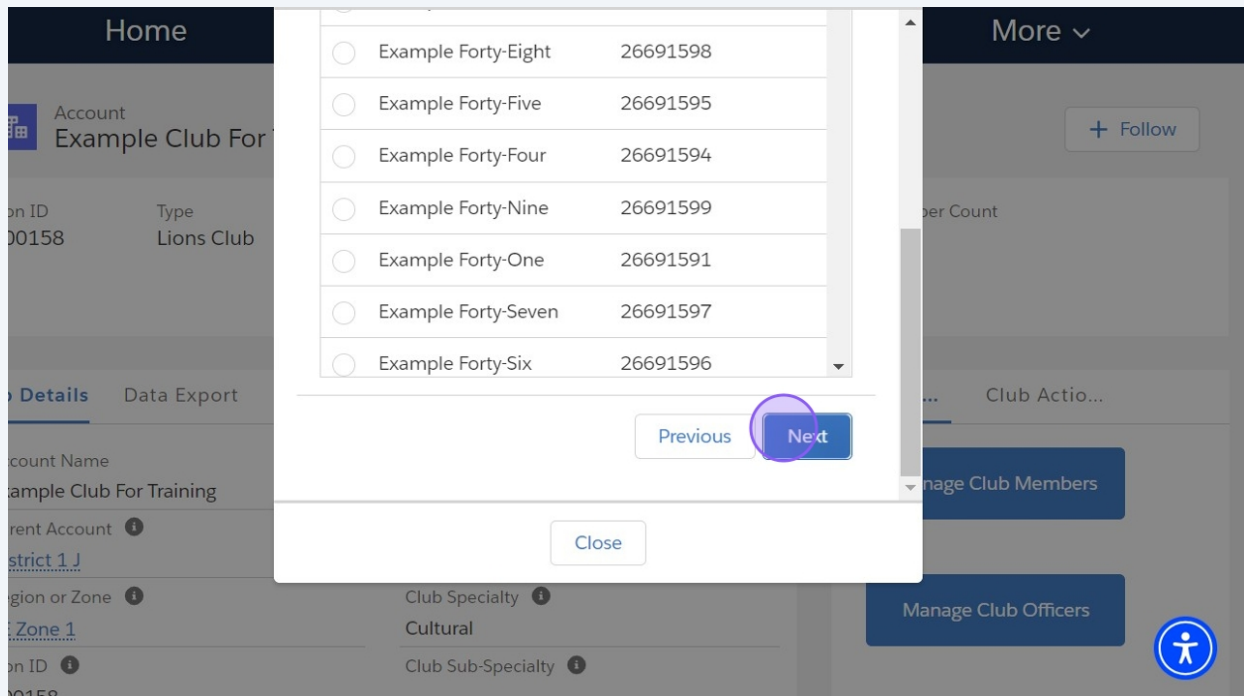
5 Select "Edit Member" and click "Next"



6 Scroll to or search for the member. Search by member name (part of name or Member ID). Select the radio button next to the member to edit.



7 Click "Next"



Tip! Edit Member Options:

- Personal Details - Name, gender, occupation, birthday (1 time update), Nickname, Companion
- Contact Details - phone numbers, email address
- Address - mailing address of the member
- Membership Type - change the details about the membership type/program
- Membership Sponsor - Sponsor can be change within the first 90 days

8 Select the radio button and click "Next"

Home

Account
Example Club For Training

Lion ID 200158 Type Lions Club

Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ

District 1 J

Region or Zone ⓘ
Zone 1

Lion ID ⓘ
200158

Club Specialty ⓘ
Cultural

Club Sub-Specialty ⓘ

More ▾

+ Follow

Member Count

Club Actio...

Manage Club Members

Manage Club Officers

Member Name:
Example Fifty

Member's ID: 26691600

Select the type of member information you want to edit:

- ☐ Personal Details
- ☐ Contact Details
- ☒ Address Details
- ☐ Membership Type
- ☐ Membership Sponsor

Next

Close

9 Click into each field to change the data.

Lion Portal

Home

Account
Example Club For Training

Lion ID 200158 Type Lions Club

Club Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ

District 1 J

Manage Club Members

26691600

Address

Country
United States ▾

Street
|

City
Naperville

State/Province
Illinois ▾

Zip/Postal Code
60564

Close

10 when you have completed the updates click "Next"

The screenshot shows a web application interface with a modal form for updating club details. The form is titled "Country" and contains the following fields:

- Country: United States (dropdown menu)
- Street: 462 Elm St (text input)
- City: Naperville (text input)
- State/Province: Illinois (dropdown menu)
- Zip/Postal Code: 60564 (text input)

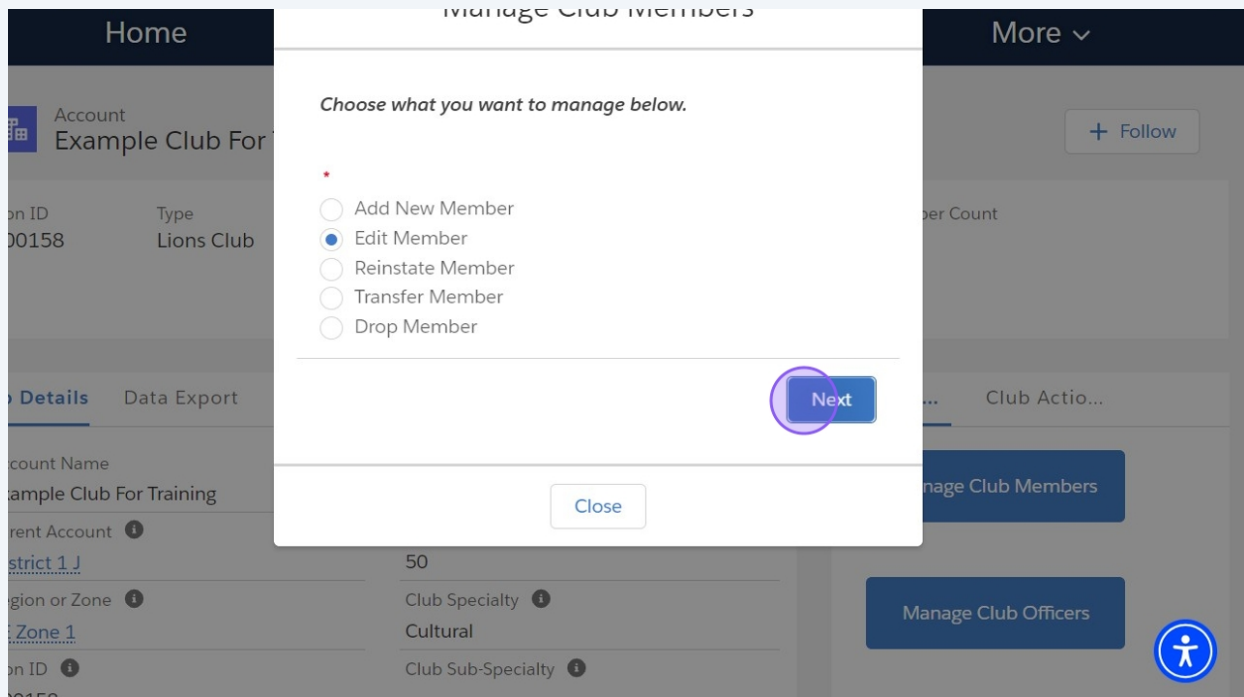
At the bottom of the form, there are three buttons: "Previous", "Next" (highlighted with a red circle), and "Close". The background shows a sidebar with "Home" and "More" options, and a main content area with "Account" and "Example Club For Training" information.



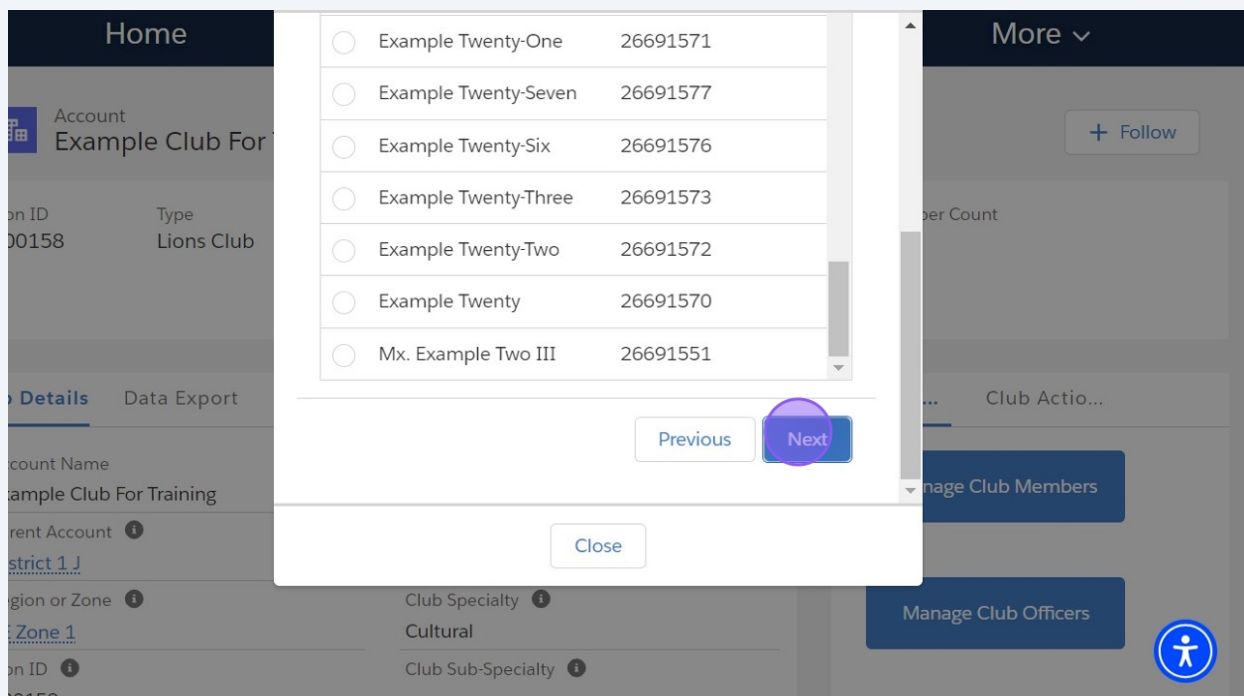
Tip! The next section shows the data that can be edited for:

- Edit Member
- Personal Details

11 Select "Edit Member" and click "Next"



12 Select the Member and click "Next"



13 Select "Personal Details" and click "Next"

The screenshot shows a web application interface with a dark blue header. A modal window titled 'Manage Club Members' is open in the center. The modal contains the following text: 'Member Name: Example Fifty', 'Member's ID: 26691600', and 'Select the type of member information you want to edit:'. Below this, there are five radio button options: 'Personal Details' (which is selected), 'Contact Details', 'Address Details', 'Membership Type', and 'Membership Sponsor'. At the bottom of the modal, there is a 'Next' button with a purple circular highlight and a 'Close' button. The background shows a sidebar with 'Home' and 'More' options, and a main content area with a table of member information.

Home

More ▾

Account
Example Club For

on ID
00158

Type
Lions Club

Details Data Export

Account Name
Example Club For Training

rent Account ⓘ

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gion or Zone ⓘ

Zone 1

on ID ⓘ

00158

Club Specialty ⓘ
Cultural

Club Sub-Specialty ⓘ

+ Follow

Member Count

Club Actio...

Manage Club Members

Manage Club Officers

Next

Close

14 Click into the data fields you wish to modify and enter the new data

The screenshot shows the same 'Manage Club Members' modal form, but now it is in the data entry stage. The 'Member Name' and 'Member's ID' fields are still populated with 'Example Fifty' and '26691600' respectively. Below these, there are four text input fields: 'Salutation' (empty), 'First Name' (containing 'Example'), 'Middle Name' (containing 'Member'), and 'Last Name' (empty). A purple circular highlight is placed over the top right corner of the modal. The background interface remains the same as in the previous step.

Manage Club Members

Member Name:
Example Fifty

Member's ID:
26691600

Salutation

First Name
Example

Middle Name
Member

Last Name

Close

15 Click into the data fields you wish to modify and enter the new data

The screenshot shows the 'Home' page of a system. A modal form is open in the center, allowing for the editing of member data. The form contains the following fields:

- Gender:** A dropdown menu with 'Male' selected.
- Date of Birth:** A text field containing 'Oct 10, 2003' with a calendar icon to its right.
- Occupation:** A dropdown menu with 'Education/Training' selected.
- Spouse Name:** A text field containing 'Companion Fifty'.

At the bottom of the modal, there are three buttons: 'Previous' (disabled), 'Next' (active), and 'Close'.

The background shows the 'Home' page with a sidebar on the left containing 'Club Details' and 'Data Export' tabs. The main content area displays account information for 'Example Club For Training' and a list of club details.

16 Select "Contact Details" and click "Next"

The screenshot shows the 'Home' page of a system. A modal form is open in the center, allowing for the selection of member information to edit. The form contains the following fields:

- Member Name:** A text field containing 'Example Fifty'.
- Member's ID:** A text field containing '26691600'.
- Select the type of member information you want to edit:** A list of radio buttons with the following options:
 - ☐ Personal Details
 - ☒ Contact Details
 - ☐ Address Details
 - ☐ Membership Type
 - ☐ Membership Sponsor

At the bottom of the modal, there are two buttons: 'Next' (active) and 'Close'.

The background shows the 'Home' page with a sidebar on the left containing 'Club Details' and 'Data Export' tabs. The main content area displays account information for 'Example Club For Training' and a list of club details.

- 17 Click into the data fields you wish to modify and enter the new data

The screenshot shows the 'Manage Club Members' modal form overlaid on the Lion Portal interface. The form contains the following fields:

- Member Name:** Example Fifty
- Member's ID:** 26691600
- Work Phone:** (empty text box)
- Home Phone:** (empty text box)
- Mobile Phone:** (630) 189-9001
- Email:** (empty text box)

A purple circle highlights the 'Member Name' field. The background shows the 'Home' page of the Lion Portal with a search bar, a 'Follow' button, and a 'Manage Club Members' button.

- 18 Click into the data fields you wish to modify and enter the new data

The screenshot shows the 'Manage Club Members' modal form overlaid on the Lion Portal interface. The form contains the following fields:

- Mobile Phone:** (630) 189-9001
- Email:** zuser050@lionfake.com
- Alternate Email:** you@example.com
- Fax:** (empty text box)

A purple circle highlights the 'Mobile Phone' field. The form has a 'Previous' button, a 'Next' button, and a 'Close' button. The background shows the 'Home' page of the Lion Portal with a search bar, a 'Follow' button, and a 'Manage Club Members' button.



Alert! The Member Sponsor can only be changed during the first 90 days of membership.

For historical corrections contact the Member Service Center for assistance



Tip! For detailed steps to search and select sponsor see the "Manage Club Members - Add A Member" Quick Guide

19 Select "Membership Sponsor" and click "Next"

Home

Account
Example Club For

on ID
00158

Type
Lions Club

Details Data Export

Account Name
Example Club For Training

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gion or Zone ⓘ

Zone 1

on ID ⓘ

00158

Club Specialty ⓘ
Cultural

Club Sub-Specialty ⓘ

More ▾

+ Follow

ber Count

Club Actio...

Manage Club Members

Manage Club Officers

Member Name:
Example Fifty

Member's ID: 26691600

Select the type of member information you want to edit:

- ☐ Personal Details
- ☐ Contact Details
- ☐ Address Details
- ☐ Membership Type
- ☒ Membership Sponsor

Next

Close

20 Click "Close" to exit the "Edit Member" flow

Home

Account
Example Club For Training

Lion ID 200158 Type Lions Club

Club Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ

District 1 J

Region or Zone ⓘ

SE Zone 1

Lion ID ⓘ

200158

Club Specialty ⓘ

Cultural

Club Sub-Specialty ⓘ

More ▾

+ Follow

Member Name:
Example Fifty

Member's ID: 26691600

Select the type of member information you want to edit:

☐ Personal Details

☐ Contact Details

☐ Address Details

☐ Membership Type

☒ Membership Sponsor

Next

Close

21 To return to the landing page click "Home"

Lion Portal

Search Search

Home Membership ▾ Service ▾ Learn More ▾

Account
Example Club For Training

+ Follow

Lion ID 200158	Type Lions Club	Status Active	Billing Address 124 Any Place Naperville, Illinois 60565 United States	Active Member Count 50
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Club Details Data Export Club Statements Club Service Activities More

Account Name
Example Club For Training

Parent Account ⓘ

Type ⓘ
Lions Club

Active Member Count

Member ... Club Acti...

Manage Club Members

22 This concludes the Manage Club Members - Edit Member Data Quick Guide

