

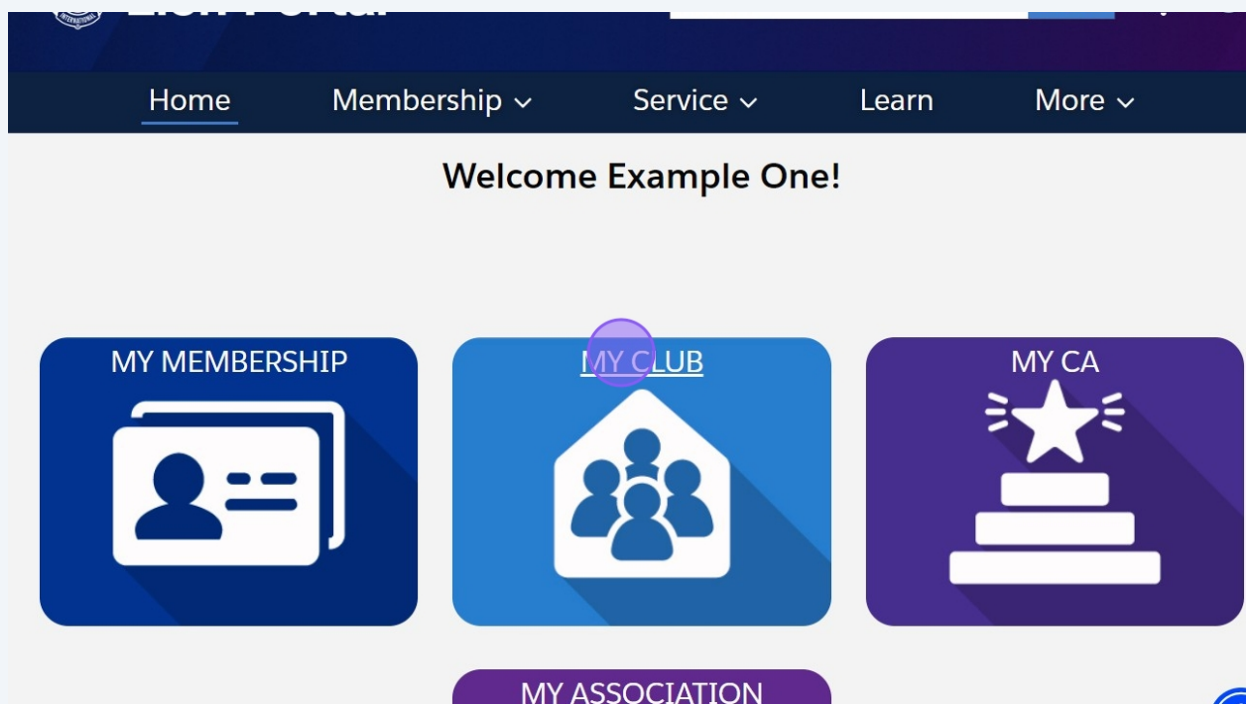
Manage Club Members - Edit Member Change Membership Type



This guide provides a comprehensive walkthrough for club administrators on how to update a member's membership type within the Lion Portal. It emphasizes the importance of accurately managing membership types, which can affect eligibility for delegate counts and re-instatement. By following this guide, users can ensure they maintain updated records and comply with Lions International regulations, ultimately enhancing the efficiency of club management.

1 Sign in to the Lion Portal. lionportal.org

2 Click "MY CLUB"



Membership Type Update

3 Click "Manage Club Members"

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	56

Details

Data Export

Club Statements

Club Service Activities

More

Account Name

Example Club For Training

Parent Account

District 1 J

Region or Zone

SE Zone 1

Lion ID

200158

Youth Programs

Type

Lions Club

Active Member Count

56

Club Specialty

Cultural

Club Sub-Specialty

Specialty Description

Arts and Entertainment

Charter Established Date

7/1/2010

Member ...

Club Acti...

Manage Club Members

Manage Club Officers

Manage Club Club Leader

4 Select "Edit Member"

Lion ID	Type	Status	Billing Address	Active	Member Count
200158	Lions Club	Active	124 Any Place	56	

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

Manage Club Members

Choose what you want to manage below.

☒

Add New Member

☐

Edit Member

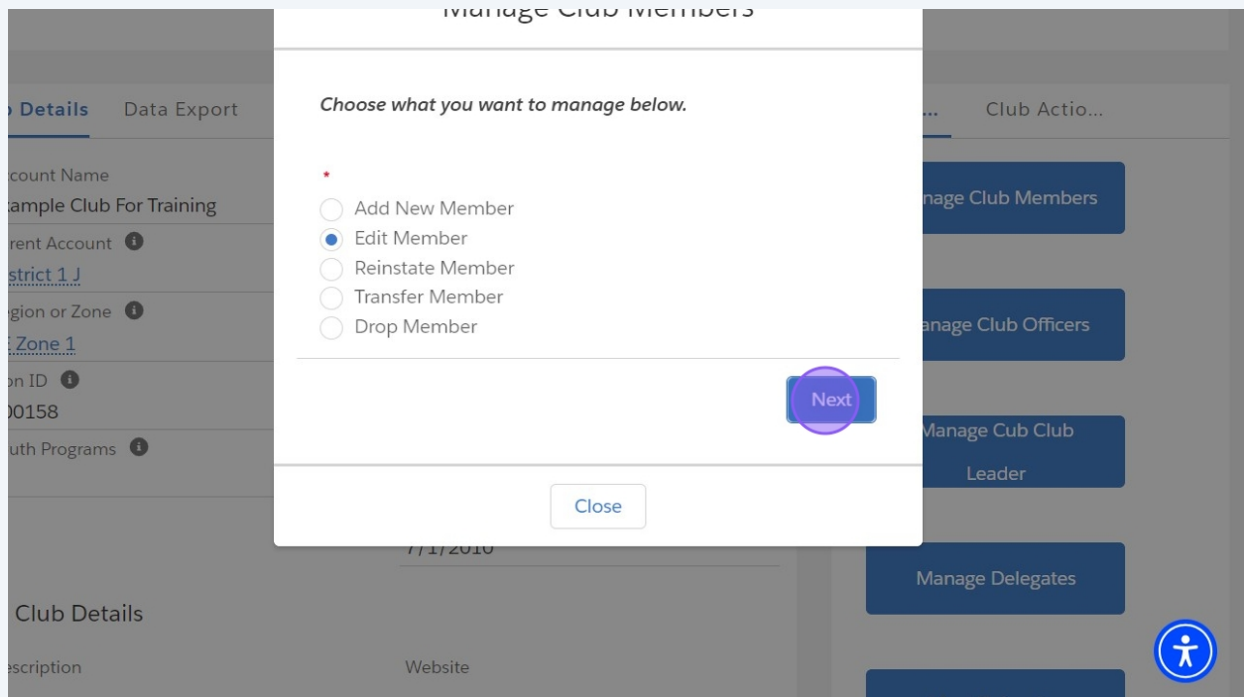
☐

Reinstate Member☐☐

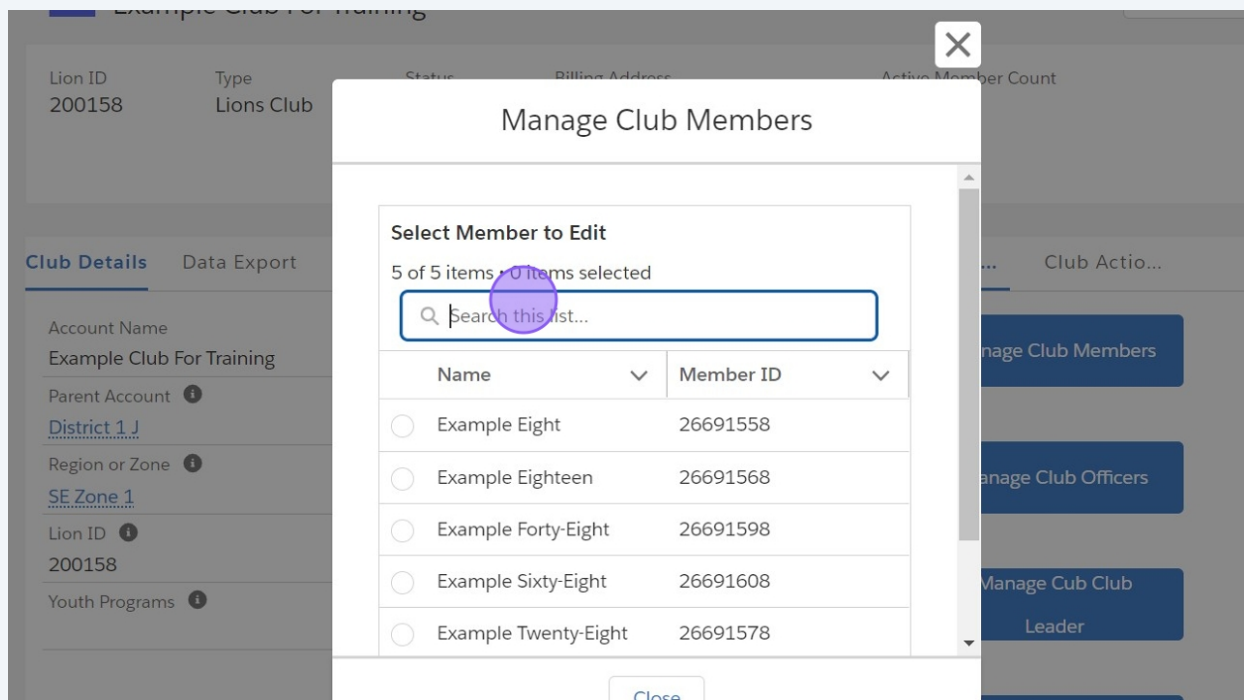
Next

Close

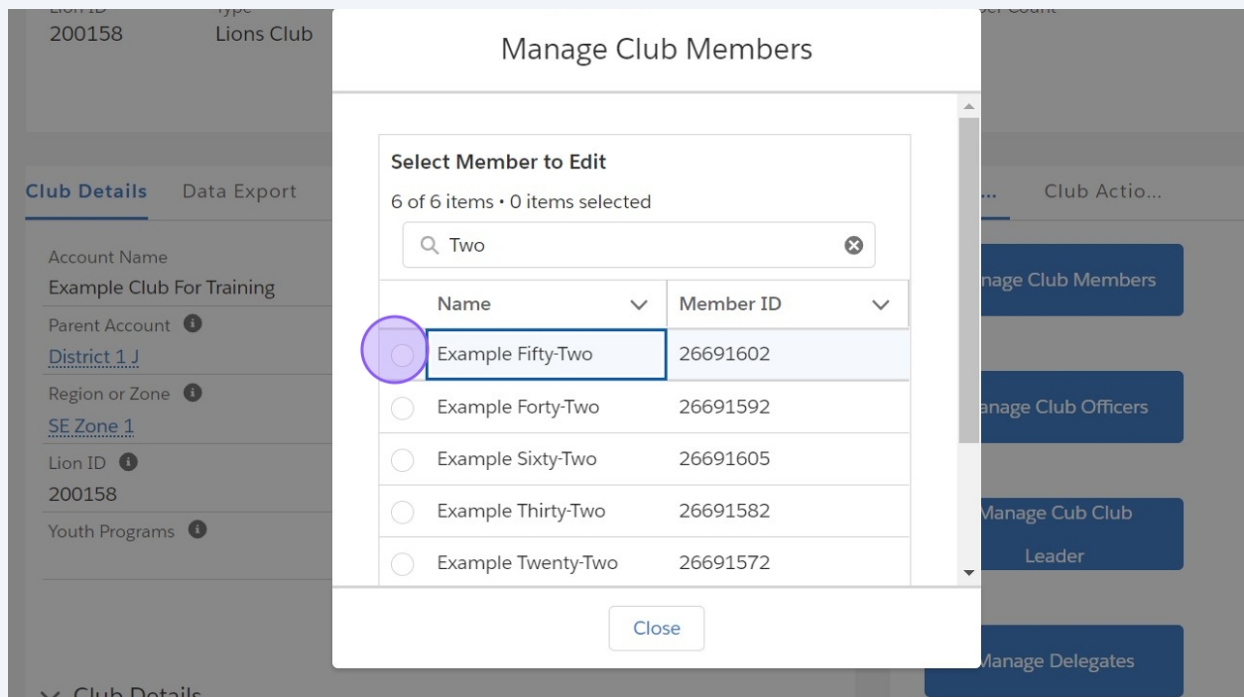
5 Click "Next"



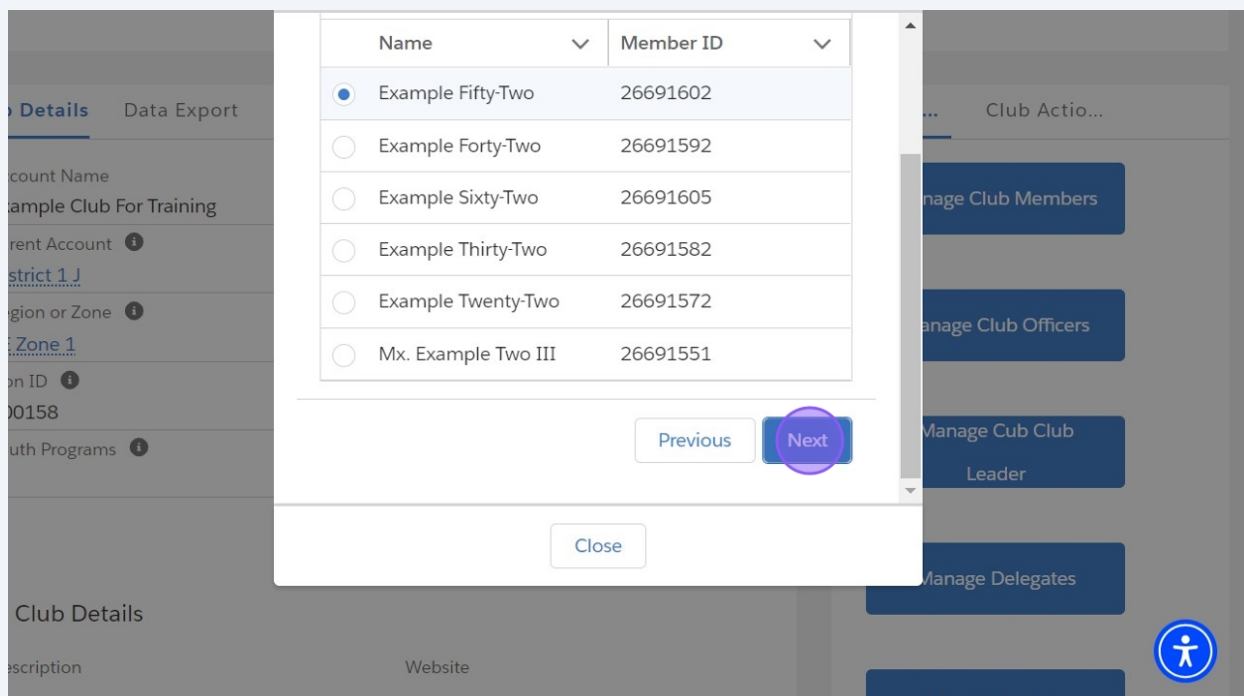
6 Scroll down the list of members or click the "Search this list..." and enter all or part of the Name or Member ID.



7 Click the "Radio Button" next to the member name.



8 Click "Next"



9 Click the "Radio Button" option "Membership Type".

Member Name:
Example Fifty-Two

Member's ID: 26691602

Select the type of member information you want to edit:

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

Next

Close

10 Click "Next"

Member Name:
Example Fifty-Two

Member's ID: 26691602

Select the type of member information you want to edit:

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

Next

Close



Reminder - Choose the "Membership Type" that will be the new "Membership Type".

11 Click the "Membership Type" dropdown.

Manage Club Members

* Membership Type: Regular Member

* Membership Category: Active

Next

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



Note: Membership Types are:

- Regular Member (full dues paying membership)
- Honorary Member
- Young Adult Member
- Family Member
- Leo Lion Member
- Student Member

12 Select the new membership type

The screenshot shows the 'Manage Club Members' dialog box overlaid on a club details page. The dialog has two dropdown menus: '* Membership Type' and '* Membership Category'. The '* Membership Type' dropdown is open, showing a list of options: '--None--', 'Regular Member' (highlighted in blue), 'Honorary Member', 'Young Adult Member', 'Family Member', and 'Leo Lion Member'. A purple circle highlights the 'Regular Member' option. The '* Membership Category' dropdown is set to 'Active'. A 'Next' button is visible at the bottom right of the dialog. The background shows club details for 'Example Club For Training' with a Lion ID of 200158, Type 'Lions Club', Status 'Active', and Billing Address '124 Any Place, Naperville, Illinois 60565, United States'.

13 "Active" is the default. Click the "Membership Category" for additional choices

The screenshot shows the 'Manage Club Members' dialog box overlaid on the same club details page. The '* Membership Type' dropdown is set to 'Regular Member'. The '* Membership Category' dropdown is open, showing a list of options: '--None--', 'Active' (highlighted in blue), 'Affiliate', 'Member at Large', and 'Privileged'. A purple circle highlights the 'Active' option. A 'Next' button is visible at the bottom right of the dialog. The background shows club details for 'Example Club For Training' with a Lion ID of 200158, Type 'Lions Club', Status 'Active', and Billing Address '124 Any Place, Naperville, Illinois 60565, United States'.

14 Click "Next"

The screenshot shows a modal window titled "Manage Club Members" overlaid on a blurred background of a club's details page. The modal contains two dropdown menus: "* Membership Type" with "Regular Member" selected, and "* Membership Category" with "Active" selected. A purple "Next" button is positioned to the right of the second dropdown, and a "Close" button is at the bottom center of the modal.

15 The green "Success!" message confirms the change. Click the "X" icon to close.

The screenshot shows the "Club Details" page for "Example Club For Training". A green success message banner at the top reads "Success! Membership Record Created!" with a checkmark icon and a close "X" icon. The club details include: Type: Lions Club, Active Member Count: 56, Club Specialty: Cultural, Club Sub-Specialty: Arts and Entertainment, and Charter Established Date: 7/1/2010. On the right side, there are buttons for "Manage Club Members", "Manage Club Officers", and "Manage Cub Club Leader".

View Member's Membership History

16 From the Club Detail page locate the member.

24 Any Place
aperville, Illinois 60565
nited States

Meeting Location 1

Meeting Place ⓘ Town Center	Meeting Local Place ⓘ टाउन सेंटर
Meeting Week of Month ⓘ 1st	Meeting Local Street ⓘ
Meeting Day ⓘ Monday	Meeting Local City ⓘ
Meeting Time ⓘ 7:00	Meeting Local Zip Code ⓘ
Meeting Street ⓘ 15 Town Road	Meeting Local State or Prov ⓘ IL
Meeting City ⓘ aperville	Meeting Local Country ⓘ US
Meeting State or Prov ⓘ	Online Meeting 1 ⓘ ☐
Meeting Zip Code ⓘ	Online Meeting 1 Place ⓘ

Active Members

Active Members

56 of 56 items

Search this list...

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 Eight	Lion- Chart er- Regul ar [Activ e]	zuser 008@ lionfa ke.co m	(63 0) 456 -78 90

17 Example Member Fifty-Two "Membership Type" was updated.



Contact

Example Member Fifty-Two

+ Follow

Primary Affiliation
[Example Club For Training](#)

Member ID
26691602

Email
zfiftytwo@fake.com

Phone
773 2341111

Name
Example Member Fifty-Two

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

Nickname ⓘ

Gender ⓘ
Female

Spouse Name ⓘ
Companion Fifty-Two

Birthday ⓘ
September 20

Birthdate
9/20/1994

Occupation ⓘ
Transportation/Utilities

Local Language Information

First Name (Local)

Contact Members Services

Email: lionssupport@lionsclubs.org

Phone: (+001) 630-468-6900



Club Me... (3)



3 items • Sorted by Start Date • Updated a few seconds ago

	Club Name ▾	Membershi
1	Example Club ...	Lion-Regula
2	Example Club ...	Lion-Discou

18 The Membership History for the member is shown to the right.

[Example Club For Training](#) 26691602 [zfiftytwo@fake.com](#) 773 2341111

Name

Example Member Fifty-Two

Primary Affiliation ⓘ

[Example Club For Training](#)

Nickname ⓘ

Gender ⓘ

Female

✓ Local Language Information

First Name (Local)

Middle Name (Local)

Last Name (Local)

Spouse Name ⓘ

Companion Fifty-Two

Birthday ⓘ

September 20

Birthdate

9/20/1994

Occupation ⓘ

Transportation/Utilities

Contact Members Services

Email: lionssupport@lionsclubs.org

Phone: (+001) 630-468-6900

Club Me... (3)

3 items • Sorted by Start Date • Updated a few seconds ago

	Club Name	Membershi...
1	Example Club ...	Lion-Regular [
2	Example Club ...	Lion-Discount
3	Example Club ...	Lion-Regular [

View All

19 Click "View All Club Memberships" to see the full history.

[Example Club For Training](#) 26691602 [zfiftytwo@fake.com](#) 773 2341111

Name

Example Member Fifty-Two

Primary Affiliation ⓘ

[Example Club For Training](#)

Nickname ⓘ

Gender ⓘ

Female

✓ Local Language Information

First Name (Local)

Middle Name (Local)

Last Name (Local)

✓ Contact Information

Spouse Name ⓘ

Companion Fifty-Two

Birthday ⓘ

September 20

Birthdate

9/20/1994

Occupation ⓘ

Transportation/Utilities

Contact Members Services

Email: lionssupport@lionsclubs.org

Phone: (+001) 630-468-6900

Club Me... (3)

3 items • Sorted by Start Date • Updated a few seconds ago

	Club Name	Membershi...
1	Example Club ...	Lion-Regular [
2	Example Club ...	Lion-Discount
3	Example Club ...	Lion-Regular [

View All

Members Sponsored (0)

- 20 Use the slide bars at the top of the column to make wider or thinner.

The screenshot shows the 'Lion Portal' interface. At the top is a dark blue navigation bar with the 'Lion Portal' logo, a search bar, and navigation links: Home, Membership, Service, Learn, and More. Below the navigation bar is a breadcrumb trail: 'Contacts > Example Member Fifty-Two'. The main section is titled 'Club Memberships' and shows a table of membership data. The table has columns: Club Name, Membership Full Type, Start Date, End Date, Membership Status, and Membership ID. The 'End Date' column has a purple circle highlighting a vertical slide bar at the top, used for adjusting the column width. The table contains three rows of data.

Club Name	Membership Full Type	Start Date	End Date	Membership Status	Membership ID
Example Club For...	Lion-Regular [Dropped]	6/15/2024	9/18/20...	Inactive Memb...	MEMBER#00:
Example Club For...	Lion-Discounted-Family Me...	9/18/2024	9/27/20...	Inactive Memb...	MEMBER#00:
Example Club For...	Lion-Regular [Active]	9/27/2024		Active Member	MEMBER#00:

i Note! Membership History tracks changes in "Membership Type" which can determine eligibility to be included in the Club delegate count or be eligible for re-instatement. Refer to the official Lions International Constitution and By-Laws and Policy documents for specific details.

21

The history of this member's membership changes are displayed. The default sort order is "Start Date" oldest date to newest date.

This Member:

- Became a "Regular Membership Type" (full dues) Lion on 6/15/2024 as a full dues paying member
- Changed to a "Family Membership Type" (discounted dues) on 9/18/2024
- Changed to "Regular Membership Type" (full dues) on 9/27/2024

The screenshot shows the 'Lion Portal' interface. The header includes the Lion logo, a search bar, and navigation links: Home, Membership (selected), Service, Learn, and More. The main content area displays the path 'contacts > Example Member Fifty-Two' and the title 'Club Memberships'. Below this, it indicates 'Items • Sorted by Start Date • Updated a few seconds ago'. A table lists the membership history with columns: Club Name, Membership Full Type, Start Date, End Date, Membership Status, and Membership ID. The table shows three entries: 1. Example Club For... Lion-Regular [Dropped] from 6/15/2024 to 9/18/2024, Inactive Member. 2. Example Club For... Lion-Discounted-Family Me... from 9/18/2024 to 9/27/2024, Inactive Member. 3. Example Club For... Lion-Regular [Active] starting 9/27/2024, Active Member. Each entry has a corresponding 'MEMBER#C' link.

	Club Name	Membership Full Type	Start Date	End Date	Membershi...	M...	Membershi
1	Example Club For...	Lion-Regular [Dropped]	6/15/2024	9/18/2024	Inactive Memb...		MEMBER#C
2	Example Club For...	Lion-Discounted-Family Me...	9/18/2024	9/27/2024	Inactive Memb...		MEMBER#C
3	Example Club For...	Lion-Regular [Active]	9/27/2024		Active Member		MEMBER#C

- 22 To navigate back to the Club page click blue link displaying the Club Name.

The screenshot shows the 'Lion Portal' interface. A member profile for 'Example Member Fifty-Two' is visible, with a purple circle highlighting the 'Example Club For Training' link under 'Primary Affiliation'. A modal window titled 'Example Club For Training' is open, displaying the following details:

Example Club For Training	
Lion ID	200158
Type	Lions Club
Status	Active
Billing Address	124 Any Place Naperville, Illinois 60565 United States
Active Member Count	56

Below the modal, the member's personal details are shown:

Example Member Fifty-Two	
Name	Example Member Fifty-Two
Primary Affiliation	Example Club For Training
Nickname	
Gender	Female
Birthdate	9/20/1994
Occupation	Transportation / Utilities

On the right, there is a 'Contact Members Services' section with email and phone information, and a 'Club Members' section showing 3 items.

- 23 Returned to the Club Page

The screenshot shows the 'Example Club For Training' club page. The navigation bar includes 'Home', 'Membership', 'Service', 'Learn', and 'More'. The club details are displayed as follows:

Account Name	Type	Status	Billing Address	Active Member Count
Example Club For Training	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	56

Below the details, there are tabs for 'Details', 'Data Export', 'Club Statements', 'Club Service Activities', and 'More'. The 'Details' tab is active, showing the following information:

Account Name	Type
Example Club For Training	Lions Club

Other details include 'Active Member Count' (56) and 'Club Specialty' (Cultural).

On the right, there are buttons for 'Manage Club Members' and 'Manage Club Officers'.

- 24 Click "Home" to return to the landing 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 a user profile icon. Below the header is a navigation bar with links: Home (highlighted with a purple circle), Membership, Service, Learn, and More. The main content area displays account information for 'Example Club For Training'. A table lists details: Lion ID (200158), Type (Lions Club), Status (Active), Billing Address (124 Any Place, Naperville, Illinois 60565, United States), and Active Member Count (56). Below this is a tabbed interface with 'Club Details' selected. The 'Club Details' tab shows fields for Account Name (Example Club For Training), Parent Account, Type (Lions Club), and Active Member Count. To the right of the tabs is a 'Member ...' tab and a 'Club Acti...' tab. A blue button labeled 'Manage Club Members' is visible under the 'Member ...' tab.

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	56

Account Name	Type
Example Club For Training	Lions Club
Parent Account	Active Member Count

- 25 This concludes the "Manage Club Members - Edit Member Change Membership Type" Quick Guide.

The screenshot shows the 'Lion Portal' landing page. At the top is a dark blue header with the 'Lion Portal' logo, a search bar, and a user profile icon. Below the header is a navigation bar with links: Home (highlighted with a purple circle), Membership, Service, Learn, and More. The main content area displays a welcome message: 'Welcome Example One!'. Below the welcome message are four large, colorful buttons: 'MY MEMBERSHIP' (dark blue), 'MY CLUB' (blue), 'MY CA' (purple), and 'MY ASSOCIATION' (purple). Each button contains a white icon representing its function. In the bottom right corner, there is a purple circle and a blue circle with a white person icon.