

Manage Club Members - Transfer A Member



This guide provides a step-by-step process for transferring a member from one club to another using the Lion Portal, ensuring a seamless transition while maintaining accurate membership records. It clarifies the responsibilities of the current and new club officers, helping users understand the necessary actions required from both parties. By following this guide, club administrators can efficiently manage membership changes, enhancing organizational effectiveness and member satisfaction.

- 1 Sign in to the Lion Portal. lionportal.org

Drop - Transfer From Old Club

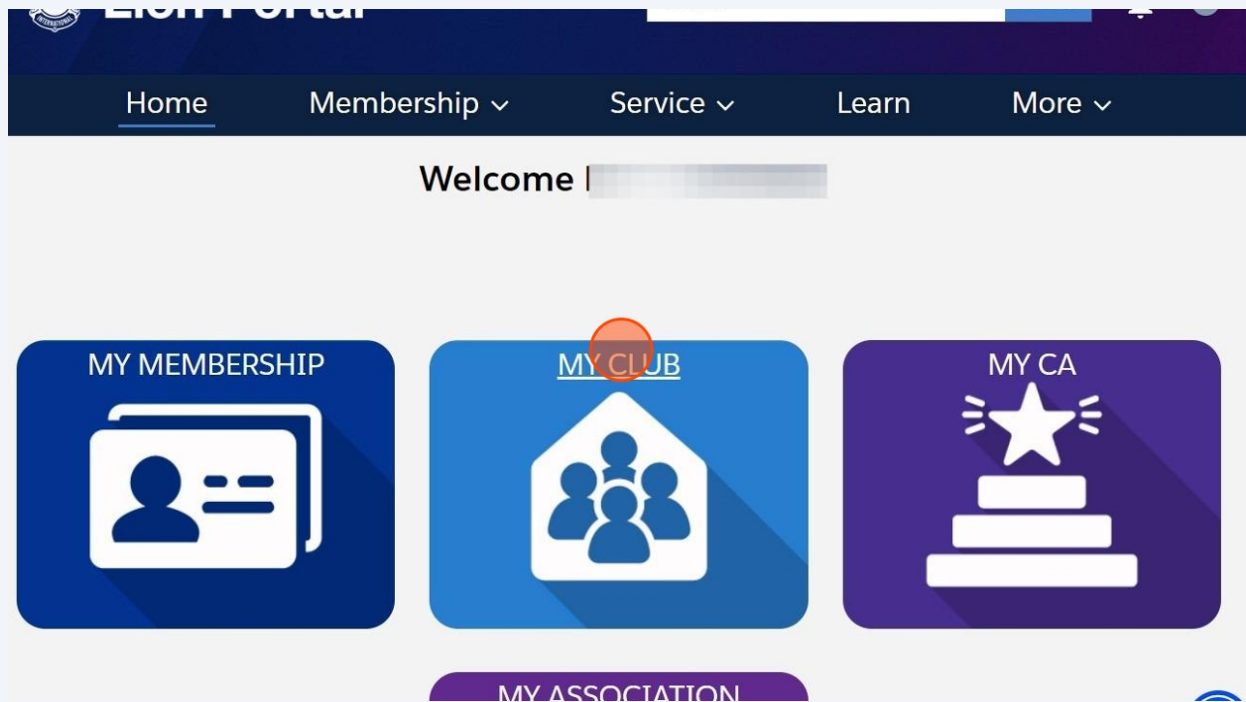


Alert! To transfer a member into your Club the member needs to be dropped from their current club. The steps shown in this section are performed by the other club.

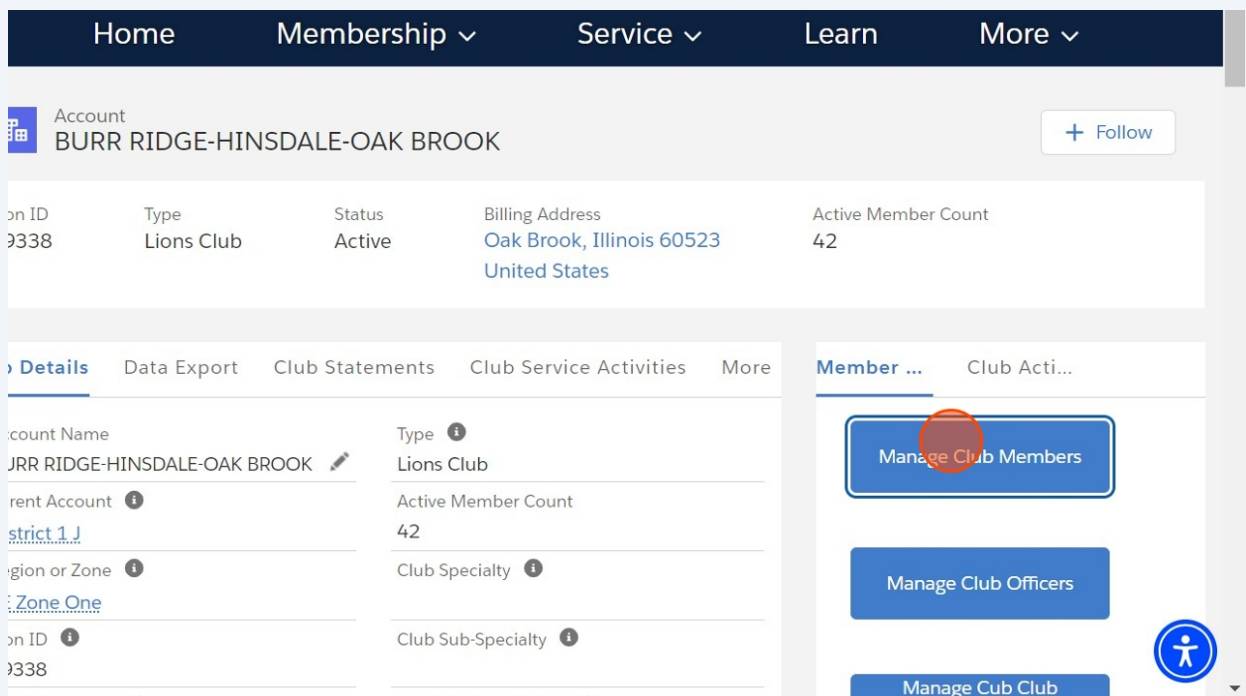


This step is done by the Officer or Administrator of the **current** Club. Once the membership of the Member has been dropped the Officer or Administrator of the new club can transfer the member into the new club. This creates a new "Membership" record for the history of the member.

2 Click "MY CLUB"



3 Click "Manage Club Members"



4 Select the "Drop Member" "Radio Button" and click "Next"

The screenshot shows a web application interface with a 'Manage Club Members' modal open. The modal has a title bar and a close button. Inside, it says 'Choose what you want to manage below.' and lists five options with radio buttons: 'Add New Member', 'Edit Member', 'Reinstate Member', 'Transfer Member', and 'Drop Member'. The 'Drop Member' option is selected. A red circle highlights the 'Next' button at the bottom right of the modal. The background shows a sidebar with 'Home' and 'More' links, and a main content area with a table of club members and various management buttons like 'Manage Club Members', 'Manage Club Officers', and 'Manage Club Club'.

5 Select the member to drop by clicking the "Radio Button" next to the member name and click "Next"

The screenshot shows the same 'Manage Club Members' modal, but now it's in the 'Select Member to Drop' step. It displays '1 of 1 item • 1 item selected' and a search bar with the text 'nine'. Below the search bar, there's a list of members with radio buttons. The first member, 'Example Ninety', is selected. A red circle highlights the 'Next' button at the bottom right of the modal. The background interface is the same as in the previous screenshot.

6

Enter the "Membership End Date". Select the "Drop Reason" option "Transferred" option.

The screenshot shows a web application interface with a modal form for editing a member. The background is a 'Home' page for a Lions Club account named 'BURR RIDGE-HINSDALE-OAK BR'. The modal form contains the following fields:

- Member Name:** Example Ninety
- Member's ID:** 26691612
- * Membership End Date:** A date picker showing 'Sep 1, 2024'.
- * Drop Reason:** A dropdown menu with 'Transferred' selected. An orange circle highlights the dropdown arrow.
- Drop Reason Details:** An empty text input field.
- Buttons:** 'Save' (blue) and 'Close' (white) buttons at the bottom right of the modal.

7

"Drop Reason Details" can be entered. Click "Save"

This screenshot shows the same modal form as in the previous step, but with the 'Drop Reason Details' field now containing the text 'Moving to Example Club For Training'. The 'Save' button is highlighted with an orange circle, indicating it should be clicked to save the changes.

- Member Name:** Example Ninety
- Member's ID:** 26691612
- * Membership End Date:** Sep 1, 2024
- * Drop Reason:** Transferred
- Drop Reason Details:** Moving to Example Club For Training
- Buttons:** 'Save' (blue, highlighted with an orange circle) and 'Close' (white) buttons.



The member has been dropped from their current club.

Add - Transfer to the New Club



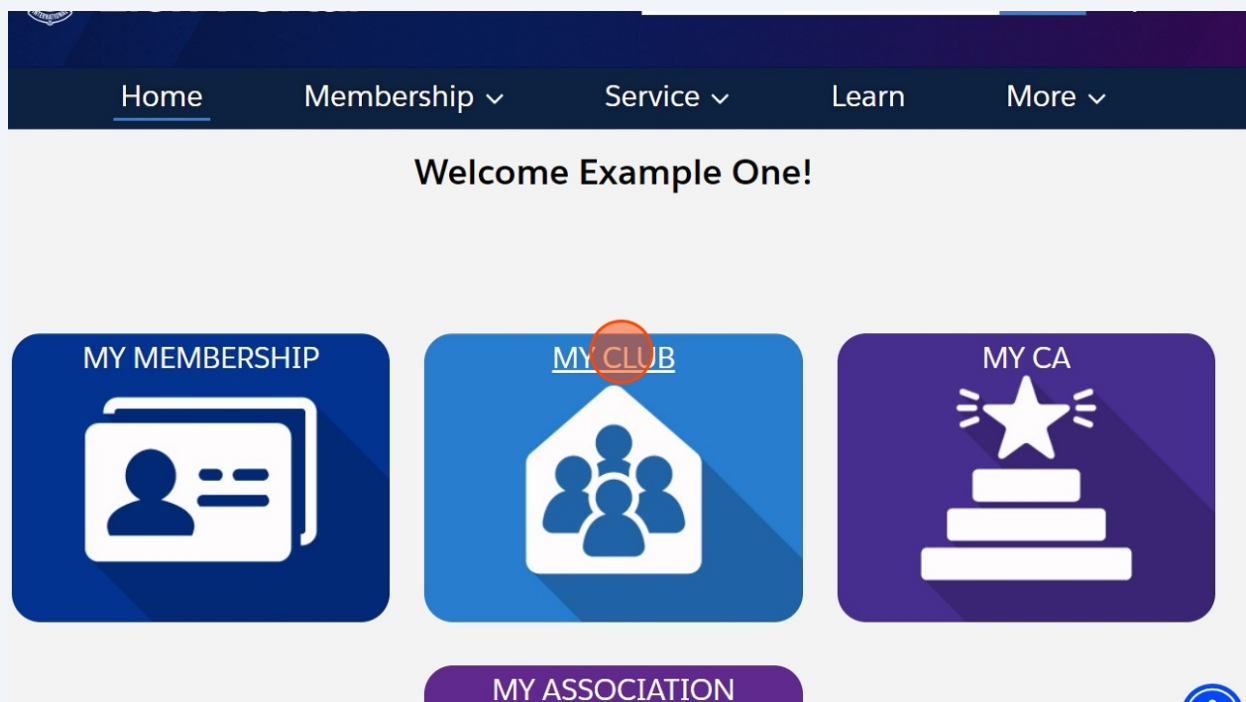
These steps are done by the Officer or Administrator of the **new** Club. This creates a new "Membership" record with the new Club to track the history of the member.

8

The Officer or Administrator of Club to receive the transferred member is signed in to the portal.

9

Click "MY CLUB"



10 Click "Manage Club Members"

The screenshot shows the 'Example Club For Training' page. The top navigation bar includes 'Home', 'Membership', 'Service', 'Learn', and 'More'. The club's account information is displayed, including the club name, type (Lions Club), status (Active), billing address (124 Any Place, Naperville, Illinois 60565, United States), and active member count (60). Below this, there are tabs for 'Details', 'Data Export', 'Club Statements', 'Club Service Activities', and 'More'. The 'Details' tab is active, showing fields for account name, parent account, region or zone, and club ID. To the right, there are buttons for 'Manage Club Members' and 'Manage Club Officers'. The 'Manage Club Members' button is highlighted with a red circle.

Home Membership Service Learn More

Account Example Club For Training + Follow

Club ID 00158 Type Lions Club Status Active Billing Address 124 Any Place Naperville, Illinois 60565 United States Active Member Count 60

Details Data Export Club Statements Club Service Activities More

Account Name Example Club For Training Type Lions Club

Parent Account strict 1 J Active Member Count 60

Region or Zone Zone 1 Club Specialty Cultural

Club ID 00158 Club Sub-Specialty

Manage Club Members Manage Club Officers

11 Select the "Radio Button" next to "Transfer Member" and click "Next"

The screenshot shows the 'Manage Club Members' dialog box. The dialog box has a title bar 'Manage Club Members' and a close button. The main content area says 'Choose what you want to manage below.' and lists five options with radio buttons: 'Add New Member', 'Edit Member', 'Reinstate Member', 'Transfer Member' (which is selected), and 'Drop Member'. At the bottom right of the dialog box is a 'Next' button, which is highlighted with a red circle. At the bottom center is a 'Close' button. The background shows the same club page as the previous screenshot, but it is dimmed.

Home Manage Club Members More

Account Example Club For Training + Follow

Club ID 00158 Type Lions Club Status Active Billing Address 124 Any Place Naperville, Illinois 60565 United States Active Member Count 60

Details Data Export Club Statements Club Service Activities More

Account Name Example Club For Training Type Lions Club

Parent Account strict 1 J Active Member Count 60

Region or Zone Zone 1 Club Specialty Cultural

Club ID 00158 Club Sub-Specialty

Manage Club Members Manage Club Officers

Choose what you want to manage below.

☐ Add New Member

☐ Edit Member

☐ Reinstate Member

☒ Transfer Member

☐ Drop Member

Next

Close

12

To locate the member you can search by "Name" or "Lion ID". Enter the data and click "Search"

Please complete fields to begin new membership process

* Search by Name or Lion ID

☒ Name
☐ Lion ID

* First Name: Example
 * Last Name: Ninety

Previous Search Close

13

Select the member by clicking the "Radio Button" next to the member name and click "Next"

Duplicate Contacts

1 of 1 item • 1 item selected

☒	F. ▾	D. ▾	C. ▾	C. ▾	L. ▾	M. ▾	M. ▾
☒	Example Member Ninety	Sep 14, 1969			2669 1612	Illinois	United States

Previous Next Close

14 Confirm the Membership of the member.

The screenshot shows a web application interface with a 'Home' header and a 'More' dropdown. A modal dialog titled 'Existing Memberships' is open, displaying a table of membership data. A red circle highlights the first row of the table. The background shows club details for 'Example Club For Training'.

be transferred.

Existing Memberships

1 of 1 item • 1 item selected

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Close

15 Click "Next"

The screenshot shows the same web application interface as the previous step. The 'Existing Memberships' dialog box is still open, and a red circle now highlights the 'Next' button at the bottom right of the dialog. The background shows the same club details.

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16

Enter the "Membership Start Date", Select the "Membership Type" option, "Membership Category" and click "Next".

Home Manage Club Members More ▾

Account
Example Club For Training

* Membership Start Date
Sep 10, 2024

* Membership Category
Active

* Membership Type
Regular Member

Next

Close

on ID
00158

Type
Lions Club

Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ

District 1 J

Region or Zone ⓘ

Zone 1

on ID ⓘ

00158

Active Member Count
60

Club Specialty ⓘ
Cultural

Club Sub-Specialty ⓘ

+ Follow

Member Count

Club Actio...

Manage Club Members

Manage Club Officers

ⓘ

17

A green Success message is displayed. Click the "X" icon to close the message.

Lion Po

Success!
Membership Record Created!

Search ⓘ

Home Membership ▾ Service ▾ Learn More ▾

Account
Example Club For Training

+ Follow

on ID	Type	Status	Billing Address	Active Member Count
00158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	60

Details Data Export Club Statements Club Service Activities More

Account Name
Example Club For Training ⓘ

Type ⓘ
Lions Club

Parent Account ⓘ

Active Member Count

Member ... Club Acti...

Manage Club Members

18 The Club Detail tab is displayed.

The screenshot shows the 'Club Detail' page for 'Example Club For Training'. The top navigation bar includes 'Home', 'Membership', 'Service', 'Learn', and 'More'. Below the navigation bar, the account name 'Example Club For Training' is displayed with a '+ Follow' button. A table lists club details: Lion ID (200158), Type (Lions Club), Status (Active), Billing Address (124 Any Place, Naperville, Illinois 60565, United States), and Active Member Count (61). Below the table, there are tabs for 'Details', 'Data Export', 'Club Statements', 'Club Service Activities', and 'More'. The 'Details' tab is active, showing fields for Account Name, Parent Account, Region or Zone, Type, Active Member Count, Club Specialty, and Club Sub-Specialty. To the right, there are buttons for 'Manage Club Members' and 'Manage Club Officers'.

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	61

Account Name: Example Club For Training
Parent Account: strict 1 J
Region or Zone: Zone 1
Type: Lions Club
Active Member Count: 61
Club Specialty: Cultural
Club Sub-Specialty:

Manage Club Members
Manage Club Officers

19 Click "Home" to return to the portal landing page

The screenshot shows the 'Lion Portal' landing page. The top navigation bar includes 'Home', 'Membership', 'Service', 'Learn', and 'More'. Below the navigation bar, the account name 'Example Club For Training' is displayed with a '+ Follow' button. A table lists club details: Lion ID (200158), Type (Lions Club), Status (Active), Billing Address (124 Any Place, Naperville, Illinois 60565, United States), and Active Member Count (61). 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 fields for Account Name, Parent Account, Type, Active Member Count, and Club Specialty. To the right, there is a button for 'Manage Club Members'.

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	61

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

Manage Club Members

