

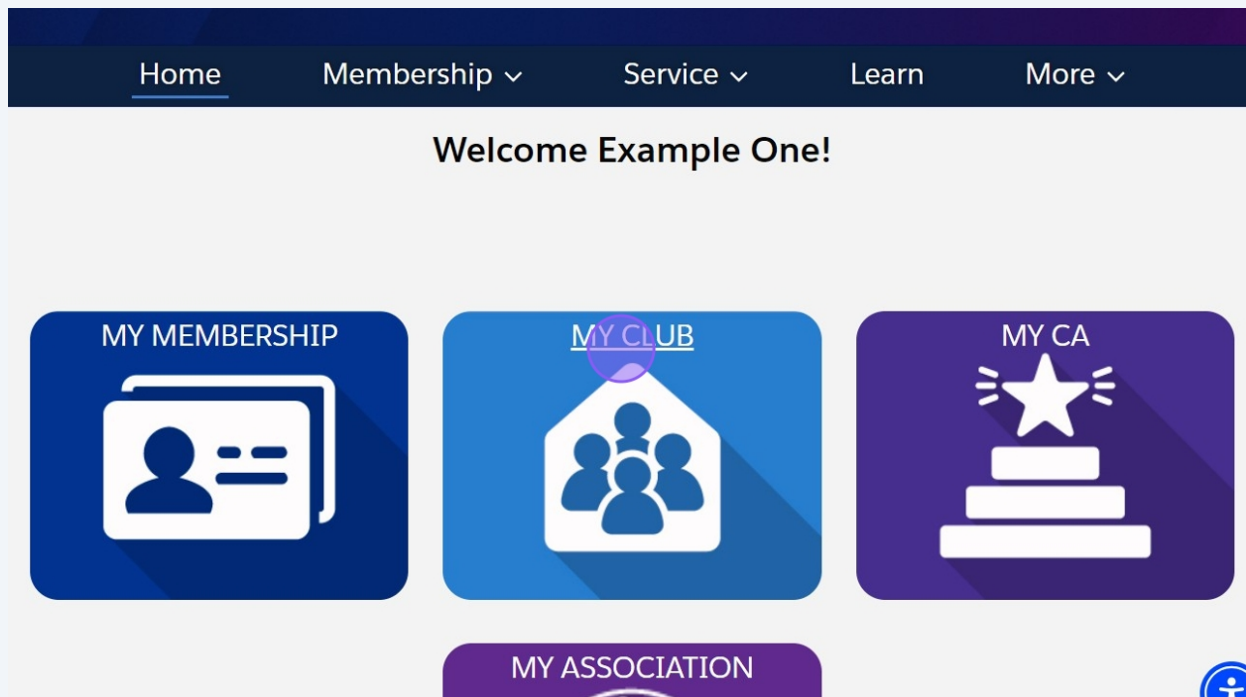
Club Page - Export Data



This guide provides a straightforward method for exporting essential member and service activity data from the Lion Portal, making it a valuable resource for club leaders and administrators. By following the steps outlined, users can easily access and manipulate important information regarding club members and their activities, which can aid in reporting and analysis. The guide also offers tips for optimizing data compatibility with various spreadsheet programs, ensuring users can effectively utilize the exported data. Viewing this guide will enhance the efficiency of data management within clubs.

1 Sign into the Lion Portal lionportal.org

2 Click here.



3 Click "Data Export" tab

The screenshot shows the Lions Club website interface. At the top is a dark blue navigation bar with links: Home, Membership (with a dropdown arrow), Service (with a dropdown arrow), Learn, and More (with a dropdown arrow). Below this is a header section for the 'Example Club For Training' account, featuring a building icon, the account name, and a '+ Follow' button. A summary row displays key information: Lion ID 200158, Type Lions Club, Status Active, Billing Address 124 Any Place, Naperville, Illinois 60565, United States, and Active Member Count 56. The main content area has a tabbed interface with 'Club Details', 'Data Export' (highlighted with a purple circle), 'Club Statements', 'Club Service Activities', and 'More'. The 'Data Export' tab is active, showing a form with fields for Account Name (Example Club For Training), Parent Account (District 1 J), Region or Zone (SE Zone 1), Lion ID (200158), Type (Lions Club), Active Member Count (56), Club Specialty (Cultural), and Club Sub-Specialty. To the right of the form are two blue buttons: 'Manage Club Members' and 'Manage Club Officers'.

 Tip! Data that can be exported is determined by the report link chosen.

At the Club Level the options are:

Member Contact Information - Basic contact information: Member ID, Name, email, phone, address, local language name, address, spouse/companion name, membership type, club, district, multiple district for ALL Club members

Officer Contact Information - Basic contact information as previously described for active officers with officer title and region and zone

Member Detail Information - Basic contact information, birthdate, occupation, gender, sponsor, Lion Join date (date became a member)

Club Level Service Activity Information - Activity type (project, fundraiser, donation, meeting), Start and End date, title, description, metrics (people served, volunteer hours, funds raised, funds donated), signature activity, club, district, multiple district.

4 Click report data to export. This example uses: "Member Contact Information"

Lion ID 200158	Type Lions Club	Status Active	Billing Address 124 Any Place Naperville, Illinois 60565 United States	Active Member Count 56
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Club Details
Data Export
Club Statements
Club Service Activities
More

If the selected report does not generate any results, it is due to data privacy restrictions.

Member Contact Information

Club Officer Contact Information

Member Detail Information

Club Level Service Activities Information

Member ...
Club Acti...

Manage Club Members

Manage Club Officers

Manage Cub Club Leader

Manage Delegates

5 The report will open in a new tab. The number of rows to be exported is shown under "Total Records". This club has 56 members.

Home
Membership ▾
Service ▾
Learn
More ▾

Report: Accounts with Memberships and Contact
Member Contact Information
Member Listing of Name, Address, Email and Phone Numbers

Enable Field Editing

Add Chart

Export

Total Records
56

Parent Multiple District ↑ ▾	Parent District ↑ ▾	Account Name ↑ ▾	Contact Member ID ▾	Contact: Salutation ▾	Contact: Phone Number ▾
☐ Multiple District 1 (56)	District 1 J (56)	Example Club For Training (56)	26691550	-	Example Phone Number
			26691551	Mx.	Example Phone Number
			26691553	-	Example Phone Number

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View report data using the scroll bars to scroll vertically and horizontally. Click "Filters" to view report filters.

Home
Membership
Service
Learn
More

Report: Accounts with Memberships and Contact

Enable Field Editing

Add Chart

Export

Member Contact Information
 Member Listing of Name, Address, Email and Phone Numbers

11 Records

Multiple District ↑	Parent District ↑	Account Name ↑	Contact Member ID	Contact: Salutation	Contact
Multiple District 1 (56)	District 1 J (56)	Example Club For Training (56)	26691550	-	Example
			26691551	Mx.	Example
			26691553	-	Example

7

The filters are shown.

Member Contact Information
 Member Listing of Name, Address, Email and Phone Numbers

11 Records

Multiple District ↑	Parent District ↑	Account Name ↑	Contact Member ID
Multiple District 1 (56)	District 1 J (56)	Example Club For Training (56)	26691550
			26691551
			26691553
			26691568
			26691562

Filters

Close Filter Panel

Show Me
All accounts

Last Activity
All Time

Type
equals Alpha Leo Club, Leo Lions, Lions Club, Omega Leo Club

Membership Status
equals Active Member

Linked Filters

Account Id
equals 001Nq0000M9viOIAR

8 Click this button to close the filter pane.

Home Membership Service Learn More

Report: Accounts with Memberships and Contact
Member Contact Information
Member Listing of Name, Address, Email and Phone Numbers

Enable Field Editing

Add Chart

Export

Filters

Close Filter Panel

Show Me
All accounts

Last Activity
All Time

Type
equals Alpha Leo Club, Leo Lions,
Lions Club, Omega Leo Club

Membership Status
equals Active Member

Linked Filters

Account Id
equals 001N00000M9viQIAR

Multiple District	Parent District	Account Name	Contact Member ID
Multiple District 1 (56)	District 1 J (56)	Example Club For Training (56)	26691550
			26691551
			26691553

9 Click "Export" to begin the process.

Home Membership Service Learn More

Report: Accounts with Memberships and Contact
Member Contact Information
Member Listing of Name, Address, Email and Phone Numbers

Enable Field Editing

Add Chart

Export

Filters

Close Filter Panel

Show Me
All accounts

Last Activity
All Time

Type
equals Alpha Leo Club, Leo Lions,
Lions Club, Omega Leo Club

Membership Status
equals Active Member

Linked Filters

Account Id
equals 001N00000M9viQIAR

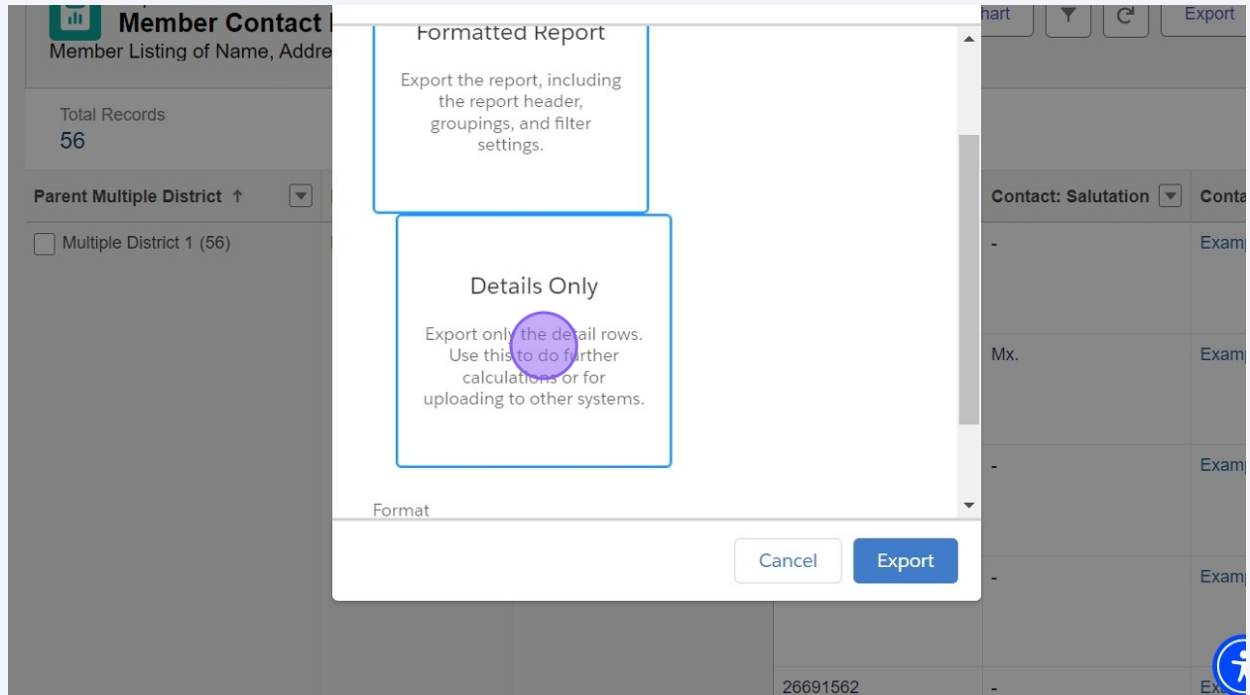
Multiple District	Parent District	Account Name	Contact Member ID	Contact: Salutation	Contact: Email
Multiple District 1 (56)	District 1 J (56)	Example Club For Training (56)	26691550	-	Example Club For Training (56)
			26691551	Mx.	Example Club For Training (56)
			26691553	-	Example Club For Training (56)



Tip! For best compatibility with most spreadsheet programs chose "Details Only" and the .xlsx format.

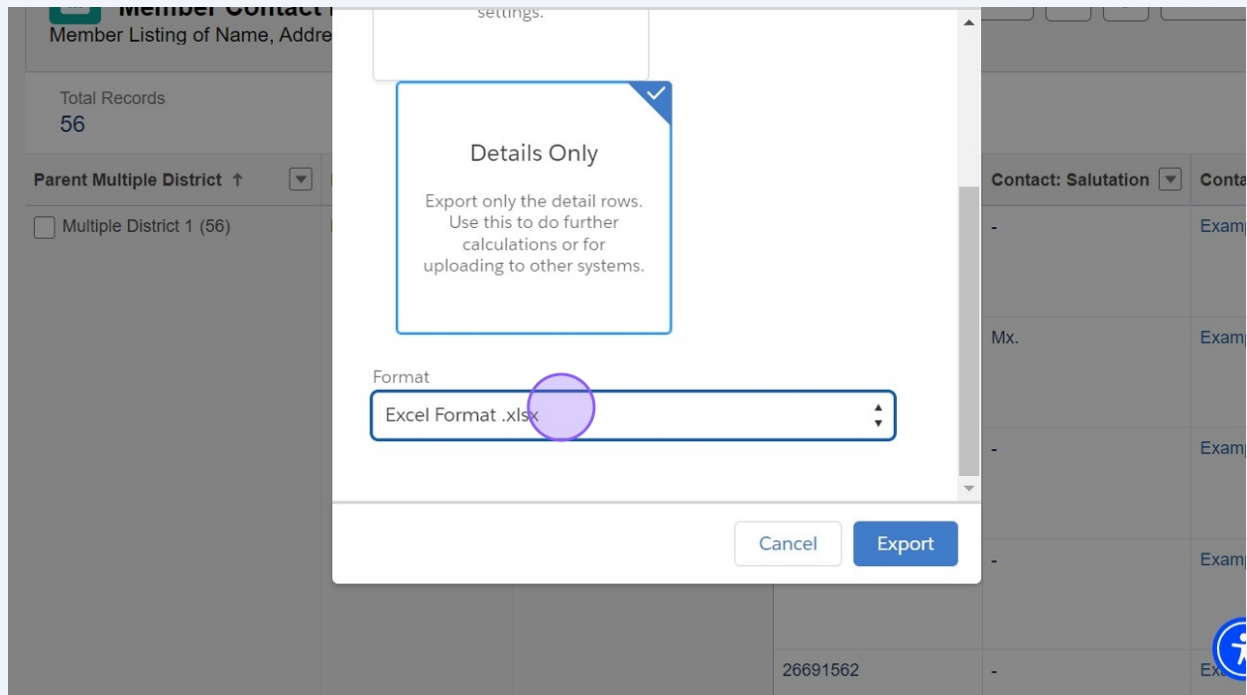
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Click "Export only the detail rows. Use this to do further calculations or for uploading to other systems." Click "Formatted Report" to retain groupings, subtotals and totals.



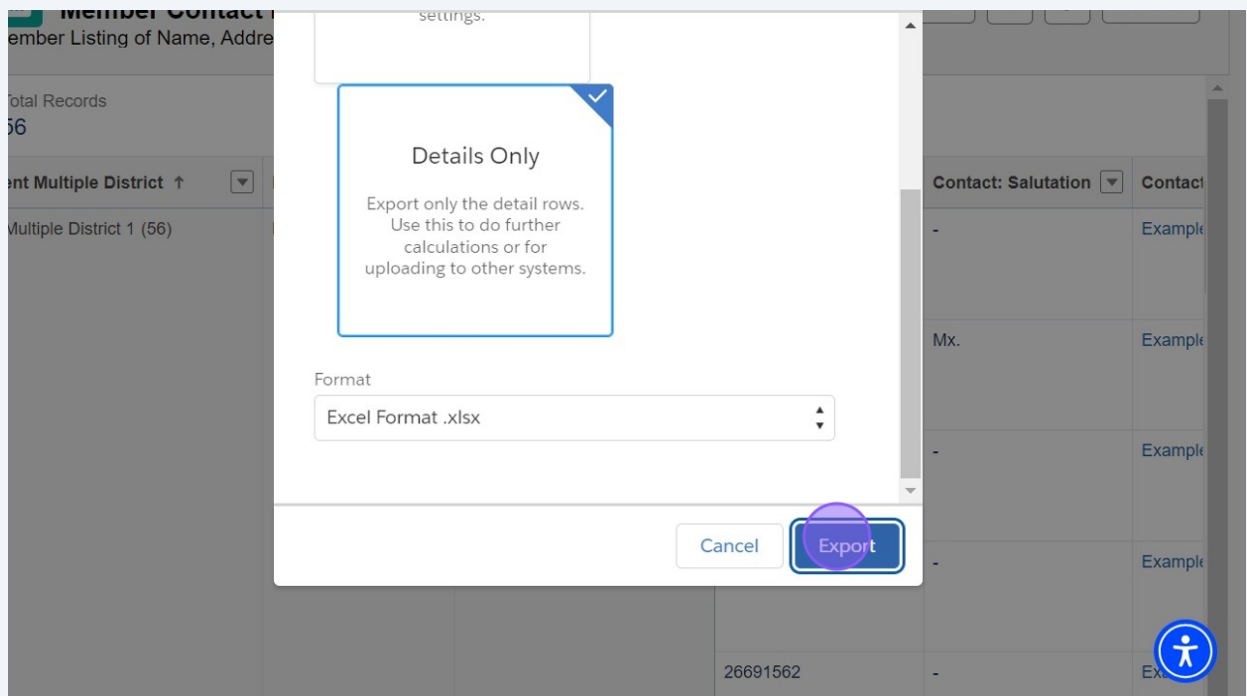
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Click this dropdown and choose .xlsx format for the greatest compatibility. Other format options are: Comma Delineated .csv; older Excel .xls

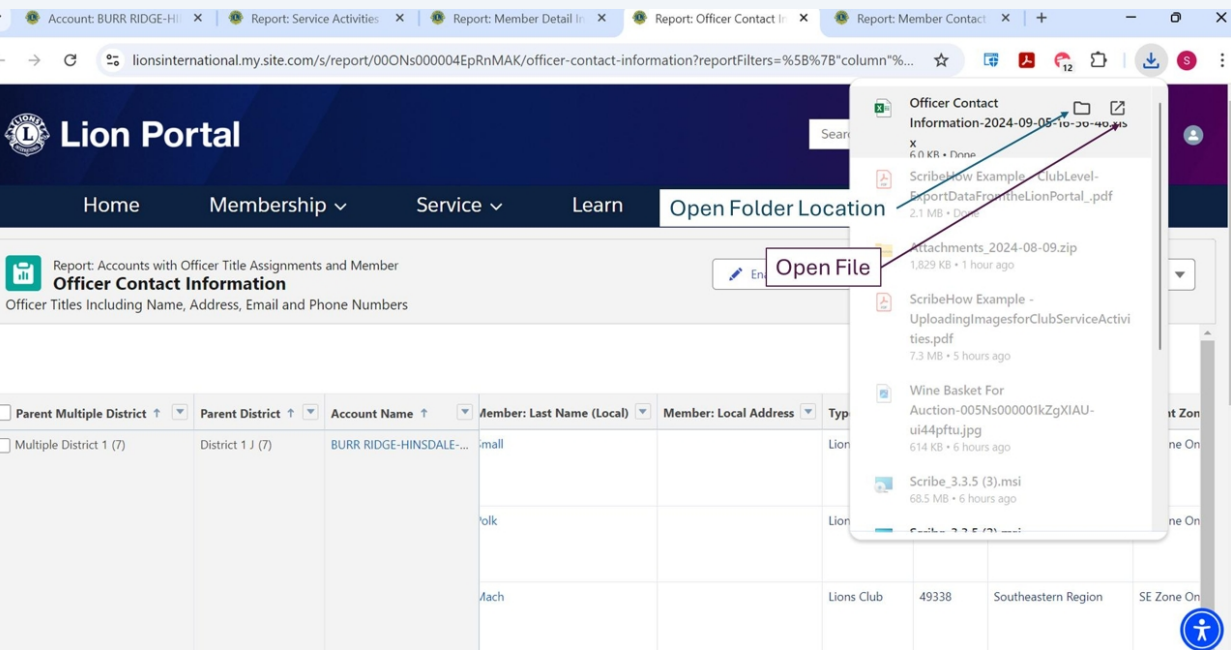


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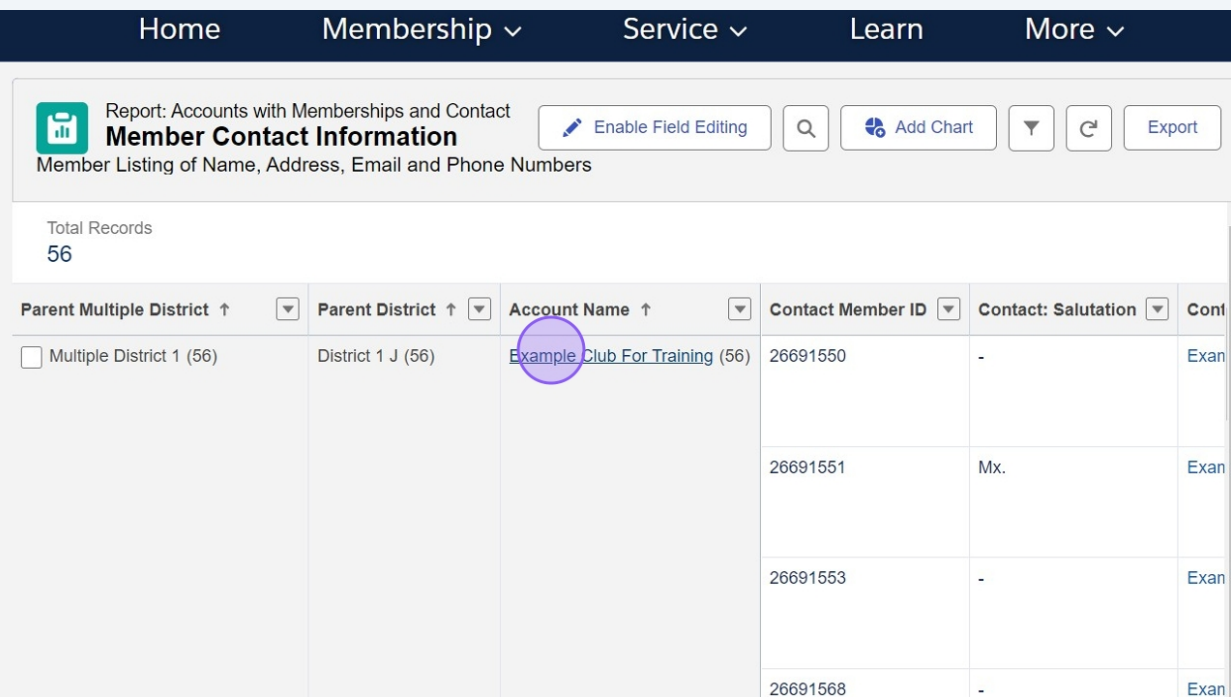
Click "Export"



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14



- 15 Click "Home" to return to the landing page

The screenshot shows the 'Lion Portal' interface. At the top, there's a dark blue header with the 'Lion Portal' logo, a search bar, and navigation links: Home (highlighted with a purple circle), Membership, Service, Learn, and More. Below the header, the account name 'Example Club For Training' is displayed with a '+ Follow' button. A table provides club details:

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

Below the table, there are tabs for 'Club Details' (selected), 'Data Export', 'Club Statements', 'Club Service Activities', and 'More'. 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, there's a 'Member ...' tab and a 'Club Acti...' tab, with a 'Manage Club Members' button.

- 16 This concludes the "Club Page - Export Data" Quick Guide

The screenshot shows the 'Lion Portal' landing page. The header is dark blue with navigation links: Home (underlined), Membership, Service, Learn, and More. Below the header, a large white box contains the text 'Welcome Example One!'. Underneath, there are four main sections: 'MY MEMBERSHIP' (blue box with a person icon), 'MY CLUB' (blue box with a house and people icon), 'MY CA' (purple box with a star and podium icon), and 'MY ASSOCIATION' (purple box with the Lions Club logo). In the bottom right corner, there are two circular icons: a purple one and a blue one with a person icon.