

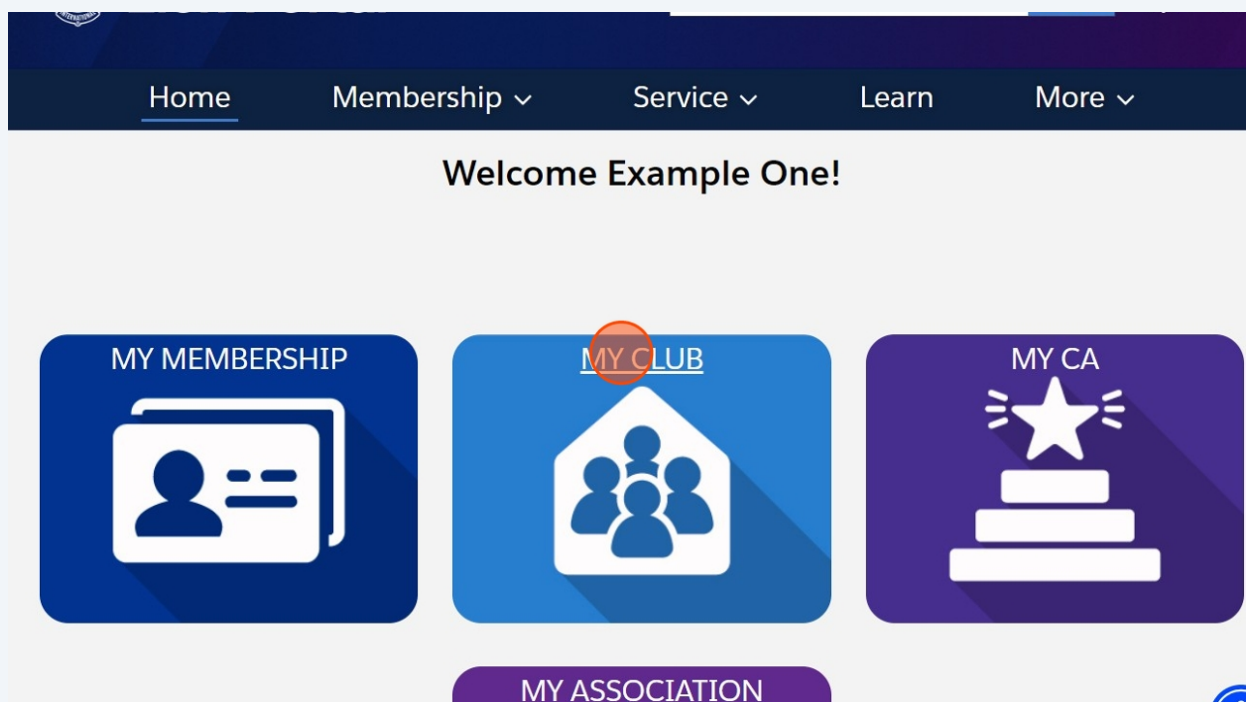
Manage Club Members - Add A Student Member



This guide provides a step-by-step process for efficiently adding a student member to a club through the Lion Portal. It simplifies the often complex membership management task, ensuring that users can complete the process smoothly and accurately. By following this guide, users can save time and avoid potential errors, making club administration more effective. It is an essential resource for anyone responsible for managing club memberships.

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

- 2 Click "MY CLUB"



3 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 ID (00158), type (Lions Club), status (Active), and billing address (124 Any Place, Naperville, Illinois 60565, United States). The active member count is 59. 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', 'Club ID', 'Type', 'Active Member Count', 'Club Specialty', and 'Club Sub-Specialty'. The 'Manage Club Members' button is highlighted with a red circle. Other buttons visible are 'Manage Club Officers' and a user icon.

Club ID	Type	Status	Billing Address	Active Member Count
00158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	59

Account Name: Example Club For Training
Parent Account: District 1 J
Region or Zone: Zone 1
Club ID: 00158
Type: Lions Club
Active Member Count: 59
Club Specialty: Cultural
Club Sub-Specialty: [info icon]

Buttons: Manage Club Members, Manage Club Officers, User Icon

4 Click the "Radio Button" "Add New Member", click "Next"

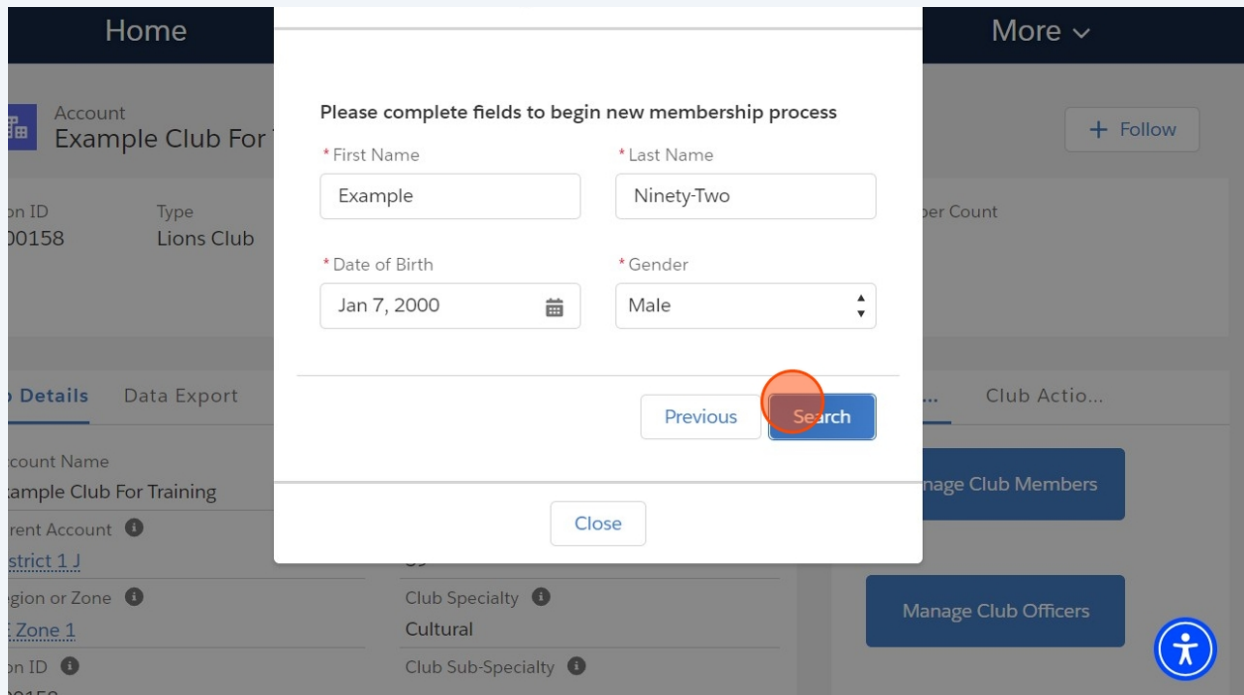
The screenshot shows the 'Manage Club Members' modal. The modal title is 'Manage Club Members'. The text inside says 'Choose what you want to manage below.' There are five radio buttons: 'Add New Member' (selected), 'Edit Member', 'Reinstate Member', 'Transfer Member', and 'Drop Member'. A 'Next' button is highlighted with a red circle. A 'Close' button is also visible at the bottom of the modal. The background shows the same club page as in the previous screenshot.

Choose what you want to manage below.

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

Buttons: Next, Close

5 Enter the members data and click "Search"

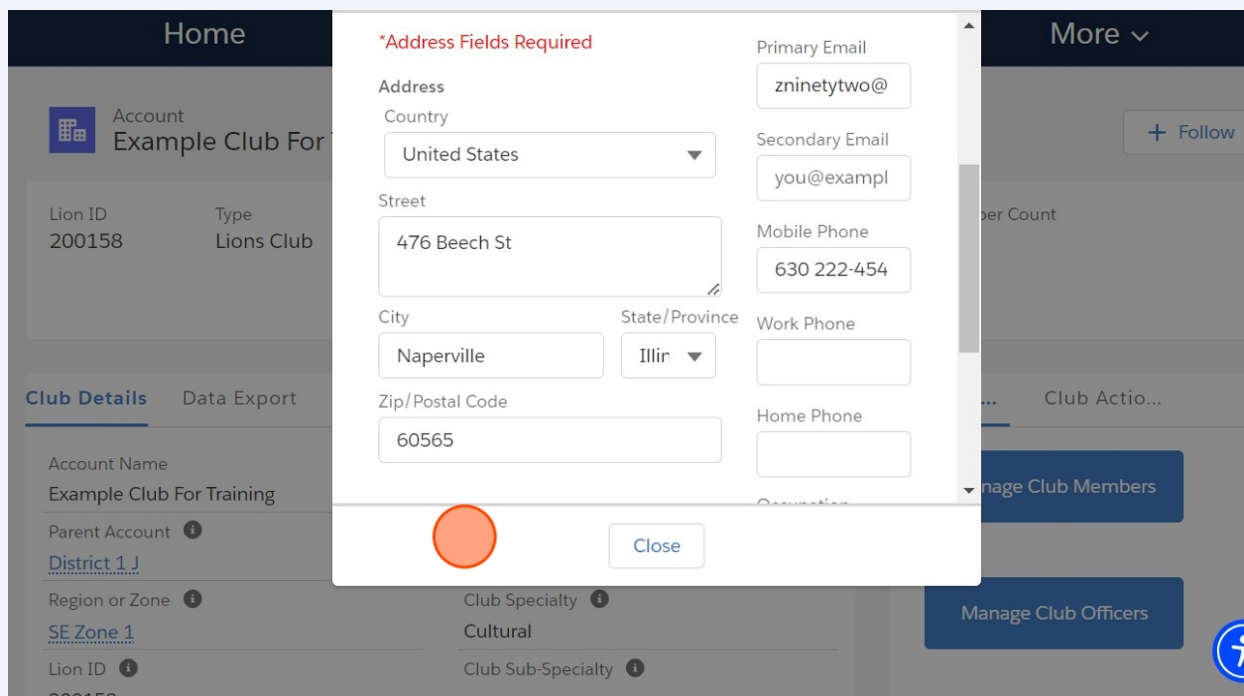


The screenshot shows a web application interface for managing a Lions Club. A modal form titled "Please complete fields to begin new membership process" is displayed in the center. The form contains the following fields:

- *First Name: Example
- *Last Name: Ninety-Two
- *Date of Birth: Jan 7, 2000
- *Gender: Male

At the bottom of the form, there are three buttons: "Previous", "Search" (highlighted with a red circle), and "Close". The background shows a sidebar with "Home" and "More" options, and a main content area with "Club Details" and "Data Export" tabs.

6 Enter address and other member data.



The screenshot shows the same web application interface, but the modal form now includes additional fields for address and contact information. The form is titled "*Address Fields Required". The fields are:

- Address: United States (dropdown)
- Country: United States (dropdown)
- Street: 476 Beech St
- City: Naperville
- State/Province: Illir (dropdown)
- Zip/Postal Code: 60565
- Primary Email: zninetytwo@
- Secondary Email: you@exampl
- Mobile Phone: 630 222-454
- Work Phone: (empty)
- Home Phone: (empty)

At the bottom of the form, there are two buttons: "Close" (highlighted with a red circle) and "Search". The background shows the same sidebar and main content area as in the previous screenshot.

7 Click "Next"

The screenshot shows a web application interface with a modal form titled 'Manage Club Members'. The form contains the following fields: 'City' (Naperville), 'State' (Illir), 'Zip/Postal Code' (60565), 'Home Phone', 'Occupation' (Student), and 'Spouse/Partner Full Name'. At the bottom of the form are 'Previous', 'Next', and 'Close' buttons. The 'Next' button is highlighted with a red circle. The background shows a sidebar with 'Home' and 'More' options, and a main content area with club details for 'Example Club For Training'.

8 Enter the membership start date. Select the "Student Member" from the "Membership Type" drop down list.

The screenshot shows the same 'Manage Club Members' modal form. The 'Membership Start Date' is set to 'Sep 1, 2024' and the 'Membership Category' is set to 'Active'. The 'Membership Type' dropdown menu is open, showing 'Student Member' as the selected option, which is highlighted with a red circle. The 'Next' button is visible at the bottom right of the form. The background interface remains the same as in the previous step.

9 Click "Next"

The screenshot shows a web application interface with a modal window titled "Manage Club Members". The modal contains the following fields:

- * Membership Start Date: A date picker showing "Sep 1, 2024".
- * Membership Category: A dropdown menu showing "Active".
- * Membership Type: A dropdown menu showing "Student Member".

At the bottom right of the modal, a blue button labeled "Next" is highlighted with a red circle. A "Close" button is located at the bottom center of the modal. The background shows a sidebar with "Home" and "More" options, and a main content area with club details for "Example Club For Training".

10 Provide the Proof of Enrollment Type required fields.

The screenshot shows the same "Manage Club Members" modal window, but now it includes additional fields for proof of enrollment and age verification:

- Please Provide the Proof of Enrollment Type:
- * Proof of Enrollment: A dropdown menu showing "Student Identification Card", which is highlighted with a red circle.
- Please Select Verification of Age Type:
- * Verification Type: A dropdown menu showing "Drivers License".

At the bottom of the modal, there are three buttons: "Previous", "Next", and "Close". The "Next" button is highlighted with a blue background. The background interface remains the same as in the previous screenshot.

11



12



13 Click "Next"

The screenshot shows a 'Manage Club Members' dialog box overlaid on a web application. The dialog box has a title bar 'Manage Club Members'. Inside, it says 'Please search for a sponsor for the new member.' Below this, there are two radio buttons: 'Name' (selected) and 'Lion ID'. There are two text input fields: '* First Name' with the value 'Example' and '* Last Name' with the value 'two'. At the bottom of the dialog box, there are three buttons: 'Previous', 'Next' (highlighted with a red circle), and 'Close'.

Home

Account
Example Club For

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

59

Club Specialty ⓘ

Cultural

Club Sub-Specialty ⓘ

More ▾

+ Follow

Member Count

Club Actio...

Manage Club Members

Manage Club Officers ⓘ

Close

Previous Next

14 Click the "Radio Button" to select the sponsor

The screenshot shows the same 'Manage Club Members' dialog box, but now it displays a list of search results. At the top, it says '1 of 1 item • 0 items selected'. Below this is a search bar with the placeholder text 'Search this list...'. The list has three columns: 'Name', 'Member ID', and 'Club Name'. There is one row in the list with the following values: 'Mx. Example Two', '26691551', and 'Example Club For Training'. A red circle highlights the radio button to the left of the first row. At the bottom of the dialog box, there are three buttons: 'Previous', 'Next', and 'Close'.

Home

Account
Example Club For

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

59

Club Specialty ⓘ

Cultural

More ▾

+ Follow

Member Count

Club Actio...

Manage Club Members

Manage Club Officers ⓘ

Close

Previous Next

1 of 1 item • 0 items selected

Search this list...

Name ▾	Member ID ▾	Club Name ▾
Mx. Example Two	26691551	Example Club For Training

15 Click "Next"

The screenshot shows a 'Manage Club Members' dialog box overlaid on a background page. The dialog box has a title bar 'Manage Club Members'. Inside, it displays '1 of 1 item • 1 item selected' and a search bar 'Search this list...'. Below the search bar is a table with three columns: 'Name', 'Member ID', and 'Club Name'. The table contains one row: 'Mx. Example Two', '26691551', and 'Example Club For Training'. At the bottom of the dialog box, there are three buttons: 'Previous', 'Next' (highlighted with a red circle), and 'Close'.

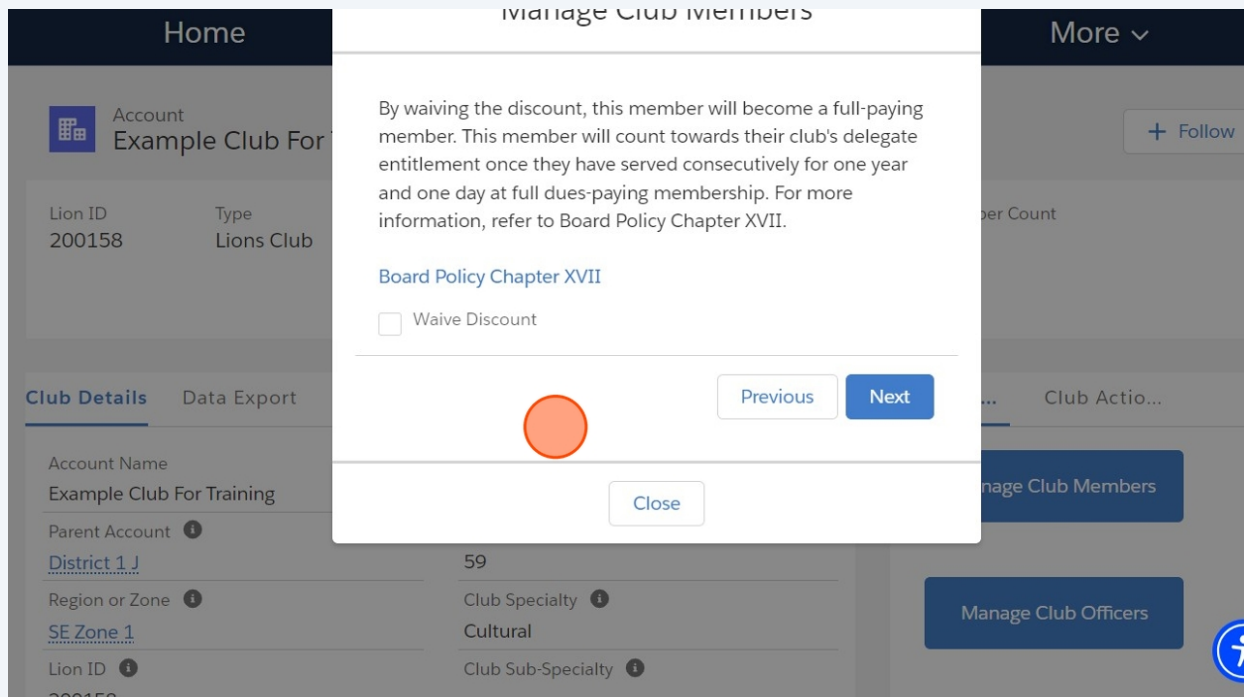
Name	Member ID	Club Name
Mx. Example Two	26691551	Example Club For Training

16 To confirm the sponsor "Click "Next"

The screenshot shows the same 'Manage Club Members' dialog box, but now it displays a confirmation prompt: 'Use this sponsor for the new membership?'. Below the prompt, it shows the selected member's details: 'Name: Example Two - Example Club For Training' and 'Lion ID: 26691551'. At the bottom of the dialog box, there are three buttons: 'Previous', 'Next' (highlighted with a red circle), and 'Close'.

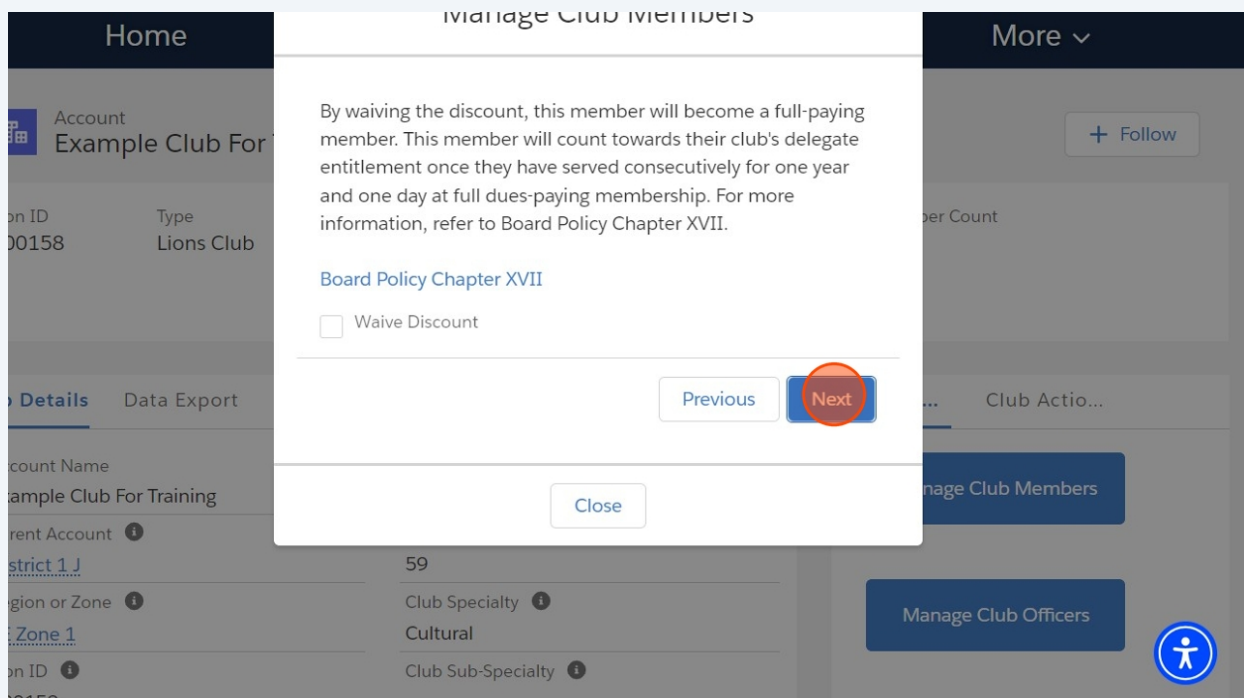
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Review the option to "Waive Discount". To waive discount, click the "Waive Discount" checkbox.



18

Click "Next"



- 19 The green success message is displayed. Click the "X" icon to close the message.

The screenshot shows the top of the Lion Po website. A green success message banner at the top reads "Success! Membership Record Created!". A red circle highlights an "X" icon in the top right corner of the banner, indicating where to click to close the message. Below the banner 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 the navigation bar is a light gray section for the "Example Club For Training" account. It includes a "Follow" button and a table with club details. The table has columns for Club ID, Type, Status, Billing Address, and Active Member Count. The data row shows Club ID 00158, Type Lions Club, Status Active, Billing Address 124 Any Place, Naperville, Illinois 60565, United States, and Active Member Count 59. Below the table are tabs for Details, Data Export, Club Statements, Club Service Activities, and More. The Details tab is active, showing fields for Account Name (Example Club For Training), Type (Lions Club), and Active Member Count. To the right of the Details tab is a "Member ..." tab and a "Club Acti..." tab. Below these tabs are two blue buttons: "Manage Club Members" and "Manage Club Officers".

Club ID	Type	Status	Billing Address	Active Member Count
00158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	59

- 20 The Club Details page is displayed.

The screenshot shows the Club Details page on the Lion Po website. The navigation bar is the same as in the previous screenshot. Below the navigation bar is the "Example Club For Training" account section, which includes a "Follow" button and a table with club details. The table has columns for Club ID, Type, Status, Billing Address, and Active Member Count. The data row shows Club ID 00158, Type Lions Club, Status Active, Billing Address 124 Any Place, Naperville, Illinois 60565, United States, and Active Member Count 60. Below the table are tabs for Details, Data Export, Club Statements, Club Service Activities, and More. The Details tab is active, showing fields for Account Name (Example Club For Training), Type (Lions Club), Active Member Count (60), Region or Zone (Zone 1), Club Specialty (Cultural), and Club Sub-Specialty. To the right of the Details tab is a "Member ..." tab and a "Club Acti..." tab. Below these tabs are two blue buttons: "Manage Club Members" and "Manage Club Officers". A red circle highlights the "Manage Club Members" button, and a blue circle highlights the "Manage Club Officers" button.

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

- 21 Click "Home" to return to the portal landing page.

The screenshot shows the Lion Portal interface. At the top, there is a dark blue header with the Lion Portal logo on the left, a search bar in the center, and a bell icon and user profile icon on the right. Below the header is a navigation bar with the following items: Home (highlighted with an orange circle), Membership (with a dropdown arrow), Service (with a dropdown arrow), Learn, and More (with a dropdown arrow). Below the navigation bar, there is a section for the current user's account, labeled "Account Example Club For Training" with a "+ Follow" button. Below this is a table with the following data:

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	60

Below the table, there are two tabs: "Club Details" and "Member ...". The "Club Details" tab is active, showing the following information:

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

On the right side of the "Club Details" tab, there is a blue button labeled "Manage Club Members".

- 22 This concludes the "Manage Club Members - Add A Student Member" Quick Guide

The screenshot shows the Lion Portal landing page. At the top, there is a dark blue header with the following items: Home (highlighted with an orange circle), Membership (with a dropdown arrow), Service (with a dropdown arrow), Learn, and More (with a dropdown arrow). Below the header, there is a large white area with the text "Welcome Example One!". Below this, there are four large, colorful buttons arranged in a grid:

- MY MEMBERSHIP (dark blue button with a white icon of a person and a list)
- MY CLUB (blue button with a white icon of a house and three people)
- MY CA (purple button with a white icon of a star and a podium)
- MY ASSOCIATION (purple button with a white icon of the Lions Club logo)

At the bottom right of the page, there is an orange circle and a blue icon of a person.