

Club Actions - Create Club Branch



This guide is essential for anyone looking to establish a Branch Club through the Lion Portal, providing a step-by-step process that ensures all necessary requirements are met. It highlights key roles needed, such as the Branch Liaison and Club Officers, while also guiding users through the submission and approval process. Additionally, the guide outlines how to manage and view the Branch Club once it is created, making it a comprehensive resource for effective club organization. By following this guide, users can efficiently navigate the creation and management of their Branch Club, enhancing their club's outreach and impact.

1 Sign into the Lion Portal lionportal.org

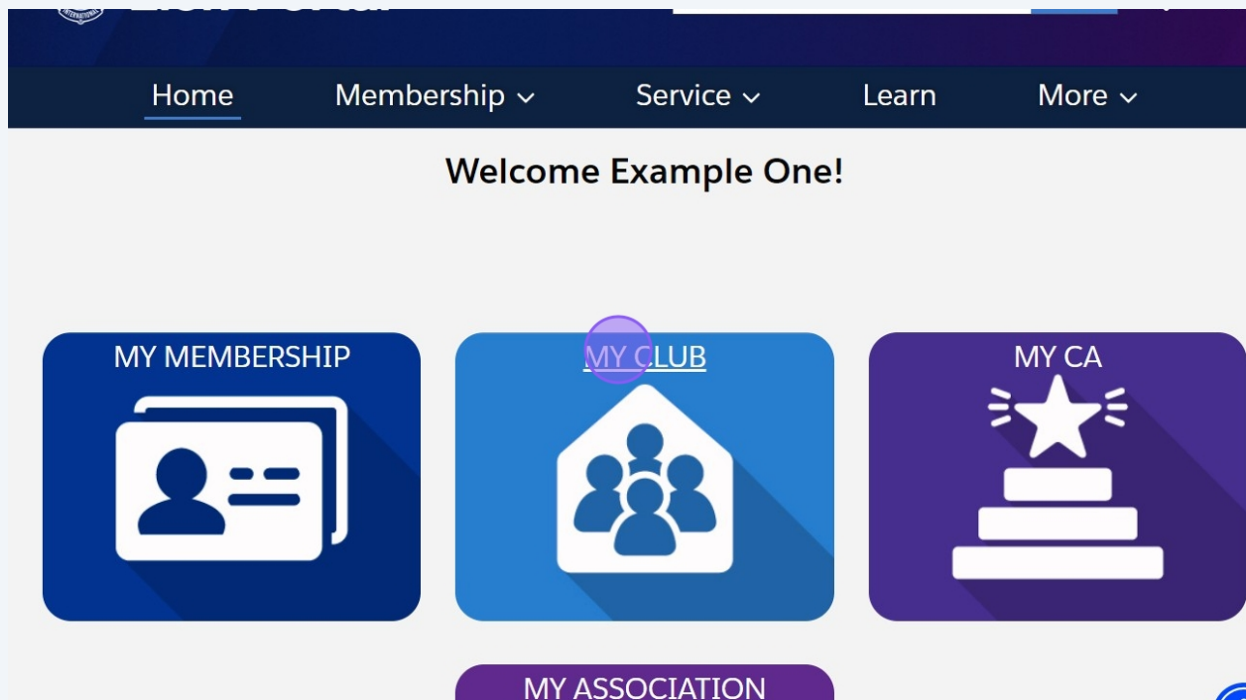


Tip! This guide walks through establishing a Branch Club. To establish a Branch Club:

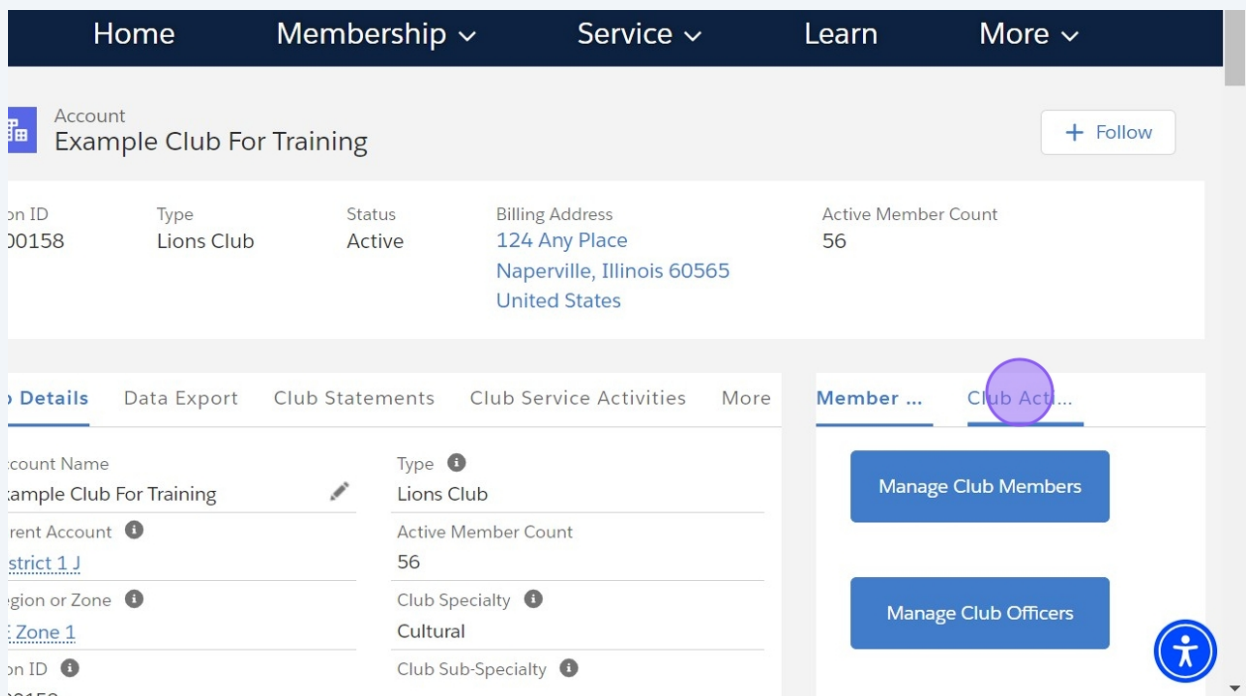
- A minimum of five (5) members are required
- A Branch Liaison, who is not a member of the Branch Club must be assigned
- Branch Club Officers of President, Secretary and Treasurer must be assigned and be members of the Branch Club

When approved by LCI the Branch Club status moves from "Pending" to "Active"

2 Click "MY CLUB"



3 Click "Club Actions"



Create The Branch Club

4 Click "Create Club Branch"

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

Club Details

Description

Website

Address

Billing Address

Get Membership Cards

Get Delegate Confirmation Letter

View Reports

Create Club Branch

Create New Application

Edit Club Details

5 Enter the information about the Branch Club. Fields with a red "*" are required.

United States

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 ⓘ

Club Details

Description

Create Club Branch

Please enter New Club Branch Details.

* Branch Name

Branch Specialty
-- none selected --

Club Branch Meeting Information (Optional)

Meeting Street

Meeting City

Meeting Zip Code

Meeting State/Prov

Meeting Country

Meeting Place

Meeting Week of the Month

Meeting Local Place

6 Continue to scroll through the form, adding data.

Create Club Branch

Please enter New Club Branch Details.

* Branch Name: Example Club Branch

Branch Specialty: Life-Stage/Experience

Branch Sub-Specialty: -- none selected --

Club Branch Meeting Information (Optional)

Meeting Street: [Text Field]

Meeting City: [Text Field]

Meeting Zip Code: [Text Field]

Meeting State/Prov: [Text Field]

Meeting Country: [Text Field]

Meeting Place: [Text Field]

7 When entry of data is complete click "Next" to continue.

Club Branch Meeting Information (Optional)

Meeting Country: [Text Field]

Meeting Place: Community House

Meeting Week of the Month: Second

Meeting Local Place: [Text Field]

Meeting Day: Tuesday

Meeting Time: 11:30

☐ Online Meeting

Next



Tip! In this step the Officers and Liaison are added. A list of the members will be displayed at each title. Select the member by clicking the name.

8

Select the Liaison

United States

Details Data Export

Account Name

Sample Club For Training

Parent Account ⓘ

District 1 J

Region or Zone ⓘ

Zone 1

on ID ⓘ

00158

Youth Programs ⓘ

Club Details

Description

Create Club Branch

Assign a Branch Liaison Officer to the Primary Club

* Branch Liaison

Example Eight

Assign Club Branch Officers

* Branch President

--None--

* Branch Secretary

--None--

* Branch Treasurer

--None--

Membership Cards

Get Delegate

Confirmation Letter

View Reports

Create Club Branch

9 Select the President

The screenshot shows a 'Create Club Branch' modal window. On the left, a sidebar lists club details: Account Name (Sample Club For Training), Parent Account (strict 1 J), Region or Zone (Zone 1), and Club ID (00158). The main area of the modal has two sections. The first, 'Assign a Branch Liaison Officer to the Primary Club', has a dropdown for 'Branch Liaison' set to 'Example Eight'. The second section, 'Assign Club Branch Officers', contains three dropdowns: 'Branch President' (set to 'Example Forty-Four' and highlighted with a purple circle), 'Branch Secretary' (set to '--None--'), and 'Branch Treasurer' (set to '--None--'). On the right side of the background interface, a 'Club Actions' menu includes buttons for 'Membership Cards', 'Get Delegate', 'Confirmation Letter', 'View Reports', 'Create Club Branch', and 'Create New Application'.

10 Select the Secretary

This screenshot is similar to the previous one, showing the 'Create Club Branch' modal. In this step, the 'Branch Secretary' dropdown in the 'Assign Club Branch Officers' section is highlighted with a purple circle and set to 'Example Forty-Five'. The 'Branch President' dropdown remains at 'Example Forty-Four', and the 'Branch Treasurer' remains at '--None--'. The sidebar and background interface are consistent with the previous screenshot.

11 Select the Treasurer

The screenshot shows a web application interface for assigning club branch officers. On the left, a sidebar contains fields for 'Account Name' (Example Club For Training), 'Parent Account' (District 1 J), 'Region or Zone' (SE Zone 1), 'Lion ID' (200158), and 'Youth Programs'. The main content area is titled 'Assign Club Branch Officers' and contains four dropdown menus: 'Branch Liaison' (Example Eight), 'Branch President' (Example Forty-Four), 'Branch Secretary' (Example Forty-Five), and 'Branch Treasurer' (Example Forty-Six). A purple circle highlights the 'Branch Treasurer' dropdown. At the bottom of the form are 'Previous' and 'Continue' buttons. On the right side of the screen, a vertical list of buttons includes 'Membership Cards', 'Get Delegate', 'Confirmation Letter', 'View Reports', 'Create Club Branch', 'Create New Application', and 'Edit Club Details'. A user icon is visible in the bottom right corner.

12 Click "Continue"

This screenshot is identical to the one above, showing the 'Assign Club Branch Officers' form. However, a purple circle now highlights the 'Continue' button at the bottom of the form, indicating the next step in the process. All other elements, including the sidebar, dropdown menus, and right-hand navigation buttons, remain the same.

13 Select the fourth Branch Club member

United States

Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
Zone 1

Lion ID ⓘ
00158

Youth Programs ⓘ

Club Details

Description

Create Club Branch

Please assign Members to your New Club Branch. A minimum of 5 Members are required for a New Club Branch.

* Club Branch President
Exemplar

* Club Branch Secretary
Exemplar

* Club Branch Treasurer
Exemplar

* Member 4
Exemplar

* Member 5
--None--

* Would you like to add additional Members?

☐ Yes
☐ No

Previous Next

14 Select the fifth Branch Club member

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 ⓘ

Club Details

Description

Address

Create Club Branch

Please assign Members to your New Club Branch. A minimum of 5 Members are required for a New Club Branch.

* Club Branch President
Exemplar

* Club Branch Secretary
Exemplar

* Club Branch Treasurer
Exemplar

* Member 4
Exemplar

* Member 5
Exemplar

* Would you like to add additional Members?

☐ Yes
☐ No

Previous Next

15 Additional members can be added by selecting the "Yes" radio button

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
SE Zone 1

Lion ID ⓘ
200158

Youth Programs ⓘ

Club Details

Description

Address

Billing Address

Membership Cards

Get Delegate

Confirmation Letter

View Reports

Create Club Branch

Generate New Application

Edit Club Details

Please assign Members to your New Club Branch. A minimum of 5 Members are required for a New Club Branch.

* Club Branch President
Exempl

* Club Branch Secretary
Exempl

* Club Branch Treasurer
Exempl

* Member 4
Exempl

* Member 5
Exempl

* Would you like to add additional Members?

☒ Yes
☐ No

Previous Next

16 Click "Next" when all Branch Club members have been added.

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
SE Zone 1

Lion ID ⓘ
200158

Youth Programs ⓘ

Club Details

Description

Address

Billing Address

Membership Cards

Get Delegate

Confirmation Letter

View Reports

Create Club Branch

Generate New Application

Edit Club Details

Please assign Members to your New Club Branch. A minimum of 5 Members are required for a New Club Branch.

* Club Branch President
Exempl

* Club Branch Secretary
Exempl

* Club Branch Treasurer
Exempl

* Member 4
Exempl

* Member 5
Exempl

* Would you like to add additional Members?

☐ Yes
☒ No

Previous Next



Tip! A green message indicating the Branch Club has been created and submitted to LCI for approval will be shown. Click the "X" icon to close the message.

Viewing The Branch Club

17 Click "More"

Club Details

Description

Website

Address

Shipping Address

24 Any Place
Anytown, Illinois 60565
United States

Billing Address

24 Any Place
Anytown, Illinois 60565
United States

Meeting Location 1

Meeting Place ⓘ

Anytown Center

Meeting Week of Month ⓘ

1st

Meeting Local Place ⓘ

टाउन सेंटर

Meeting Local Street ⓘ

Create Club Branch

Create New Application

Edit Club Details

Club Me...

Club Offic...

More

Active Members

Active Members

56 of 56 items

Search this list...

N. ▾

M ▾

M ▾

M ▾

Lion-

18 Click "Sponsored Clubs"

Club Details

Description

Website

Address

Shipping Address

24 Any Place

aperville, Illinois 60565

nited States

Billing Address

24 Any Place

aperville, Illinois 60565

nited States

Meeting Location 1

Meeting Place ⓘ

town Center

Meeting Week of Month ⓘ

st

Meeting Local Place ⓘ

टाउन सेंटर

Meeting Local Street ⓘ

Create New Application

Edit Club Details

Club Me...

Club Offic...

More

▼

Sponsored Clubs

Active Members

56 of 56 items

Q

Search this list...

N. ▼

M ▼

M ▼

M ▼

Lion-

Tip! Under "Sponsored Clubs" all types of sponsorships by your club are listed. This includes:

- Branch Clubs
- Leo Clubs
- New Club Application

11

19 A list of Sponsored Clubs is displayed. Click the radio button next to the club

aperville, Illinois 60565
nited States

ipping Address

24 Any Place

aperville, Illinois 60565
nited States

Meeting Location 1

eeeting Place ⓘ

own Center

eeeting Week of Month ⓘ

rst

eeeting Day ⓘ

onday

eeeting Time ⓘ

7:00

eeeting Street ⓘ

55 Town Road

eeeting City ⓘ

aperville

Meeting Local Place ⓘ

टाउन सेंटर

Meeting Local Street ⓘ

Meeting Local City ⓘ

Meeting Local Zip Code ⓘ

Meeting Local State or Prov ⓘ

IL

Meeting Local Country ⓘ

US

Club Mem... **Sponsor...** More

▼ Sponsored Clubs

1 of 1 item • 0 items selected

Q Search this list...

<input type="checkbox"/>	N ▼	T. ▼	S. ▼	Ch.
<input type="checkbox"/>	Exam ple Club Bran ch	Club Bran ch	Pend ing Appr oval	

View



20 Click "View" to see the details.

aperville, Illinois 60565
nited States

ipping Address

24 Any Place

aperville, Illinois 60565
nited States

Meeting Location 1

eeeting Place ⓘ

own Center

eeeting Week of Month ⓘ

rst

eeeting Day ⓘ

onday

eeeting Time ⓘ

7:00

eeeting Street ⓘ

55 Town Road

eeeting City ⓘ

aperville

Meeting Local Place ⓘ

टाउन सेंटर

Meeting Local Street ⓘ

Meeting Local City ⓘ

Meeting Local Zip Code ⓘ

Meeting Local State or Prov ⓘ

IL

Meeting Local Country ⓘ

US

Club Mem... **Sponsor...** More

▼ Sponsored Clubs

1 of 1 item • 1 item selected

Q Search this list...

<input checked="" type="checkbox"/>	N ▼	T. ▼	S. ▼	Ch.
<input checked="" type="checkbox"/>	Exam ple Club Bran ch	Club Bran ch	Pend ing Appr oval	

View



21 The page for the selected sponsored club is displayed.

Note: the "Status" is "Pending Approval". When approved the "Status" will be "Active"

HomeMembership ▾Service ▾LearnMore ▾

Account

Example Club Branch

+ Follow

Lion ID

200164

Type

Club Branch

Status

Pending Approval

Billing Address

Club Details

Account Name

Example Club Branch

Type ⓘ

Club Branch

Parent Account ⓘ

[Example Club For Training](#)

Active Member Count

0

Region or Zone ⓘ

Club Specialty ⓘ

Lion ID ⓘ

200164

Club Sub-Specialty ⓘ

Youth Programs ⓘ

Specialty Description ⓘ

Club Acti...

Edit Club Branch

Club Me...Club Offic...

▼ Active Members

Active Members

22 Click "View All" to see a larger list of the members

Address

Billing Address

Shipping Address

Meeting Location 1

Meeting Place ⓘ

Community House

Meeting Week of Month ⓘ

Meeting Day ⓘ

Meeting Time ⓘ

Meeting Street ⓘ

Meeting City ⓘ

Meeting State or Prov ⓘ

Meeting Local Place ⓘ

Meeting Local Street ⓘ

Meeting Local City ⓘ

Meeting Local Zip Code ⓘ

Meeting Local State or Prov ⓘ

Meeting Local Country ⓘ

Online Meeting 1 ⓘ

ple

Forty-

Seven

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167

-78

88

Exam

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Forty-

Four

[Activ

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Lion-

Branc

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Regul

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lionfa

ke.co

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(63

0)

134

-45

55

View All

Contact Members Services

Email: lionssupport@lionsclubs.org

Phone: (+001) 630-468-6900



Tip! When a member of your Club is assigned to the Branch Club their "Membership Type" will now show "Branch" in their "Membership Type".

23

The list of Club Members assigned to the Branch Club is displayed. Click the link to return to the Branch Club page.

Lion Portal

Search [] Search []

Home Membership ▾ Service ▾ Learn More ▾


Accounts > Example Club Branch
Club Branch Members

5 items • Updated a few seconds ago

	Contact Full ... ▾	Membershi... ▾	Start ... ▾	E... ▾	Members... ▾	Membershi... ▾	Membershi... ▾	
1	Example Forty-F...	Lion-Branch-Re...	4/15/20...		Active Memb...	Example Twent...	MEMBER#0011...	▾
2	Example Forty-Six	Lion-Branch-Fa...	4/15/20...		Active Memb...	Example Twent...	MEMBER#0011...	▾
3	Example Forty-E...	Lion-Branch-For...	6/14/20...		Active Memb...	Example One	MEMBER#0011...	▾
4	Example Forty-S...	Lion-Branch-Re...	6/14/20...		Active Memb...	Example Eleven	MEMBER#0011...	▾
5	Example Forty-F...	Lion-Branch-Re...	6/14/20...		Active Memb...	Example Forty-F...	MEMBER#0011...	▾

24 Click "Club Officers"

[Home](#) [Membership ▾](#) [Service ▾](#) [Learn](#) [More ▾](#)

 Account
Example Club Branch

[+ Follow](#)

on ID
00164

Type
Club Branch

Status
Pending Approval

Billing Address

[Details](#)

Account Name
Example Club Branch

Parent Account ⓘ
[Example Club For Training](#)

Region or Zone ⓘ

on ID ⓘ
00164

Auth Programs ⓘ

Type ⓘ
Club Branch

Active Member Count
0

Club Specialty ⓘ

Club Sub-Specialty ⓘ

Specialty Description ⓘ

Club Acti...

[Edit Club Branch](#)

Club Me... Club Offi...

▼ Active Members

Active Members
5 of 5 items

25 Now the Officer "Active" and "Past" are shown. Scroll down to "View All".

Example Club Branch

Parent Account ⓘ
[Example Club For Training](#)

Region or Zone ⓘ

on ID ⓘ
00164

Auth Programs ⓘ

Club Details

Description

Address

Billing Address

Shipping Address

Club branch

Active Member Count
0

Club Specialty ⓘ

Club Sub-Specialty ⓘ

Specialty Description ⓘ

Charter Established Date ⓘ

Website

Club Mem... Club Offi...

▼ Active Officers

Active Officers
4 of 4 items

Example Branch President

Example Branch Secretary

zuser044 (630) 134-nfake 4555.com

zuser045 (630) 145-nfake 5666.com

26 Click "View All" to view a larger list of officers.

Meeting Week of Month ⓘ
Meeting Day ⓘ
Meeting Time ⓘ
Meeting Street ⓘ
Meeting City ⓘ
Meeting State or Prov ⓘ
Meeting Zip Code ⓘ
Meeting Country ⓘ

Meeting Location 2
Meeting 2 Place ⓘ

Meeting Local Street ⓘ
Meeting Local City ⓘ
Meeting Local Zip Code ⓘ
Meeting Local State or Prov ⓘ
Meeting Local Country ⓘ
Online Meeting 1 ⓘ
Online Meeting 1 Place ⓘ
Online Meeting 1 Address ⓘ

Meeting 2 Local Place ⓘ


Non-Active Officers
0 of 0 items

Na...	Title	End D...
-------	-------	----------

No items to display.

View All

Contact Members Services
Email: lionssupport@lionsclubs.org
Phone: (+001) 630-468-6900





27 The list of officers is displayed.

Click the link "OTA-#####" to view the details of the "Office Title Assignment" (OTA).

Click the Club Name link to return to the Club page

Search




Search

Home
Membership ▾
Service ▾
Learn
More ▾

Accounts > Example Club Branch
Officers

4 items • Sorted by End Date • Updated a few seconds ago

	Member Full ... ▾	Title ▾	Member Email ▾	Member P... ▾	O... ▾	E.. ▾	Officer T... ▾
1	Example Eight	Branch Liaison	zuser008@lionfake.co...	(630) 456-78...	Active		OTA-7290348 ▾
2	Example Forty-Four	Branch Preside...	zuser044@lionfake.co...	(630) 134-45...	Active		OTA-7290349 ▾
3	Example Forty-Five	Branch Secretary	zuser045@lionfake.co...	(630) 145-56...	Active		OTA-7290350 ▾
4	Example Forty-Six	Branch Treasurer	zuser046@lionfake.co...	(630) 156-67...	Active		OTA-7290351 ▾



Alert! Edits cannot be made to the Branch Club while in "Pending Approval" status. If changes are needed contact the Member Service Center.

28

This new Branch Club has been approved by LCI and now shows "Status" as Active

The screenshot displays a web application interface for managing a Branch Club. At the top, there is a dark blue navigation bar with a search bar and a 'Search' button. Below the navigation bar, the main content area shows the club's details. The club's name is 'Example Club Branch' and its status is 'Active', which is circled in purple. The club's type is 'Club Branch' and its Lion ID is '200164'. The 'Club Details' section on the left lists the account name, parent account, and region. The 'Club Activity' section on the right shows the active member count and a button to 'Edit Club Branch'.

Lion ID	Type	Status	Billing Address
200164	Club Branch	Active	

Club Details

Account Name	Type ⓘ
Example Club Branch	Club Branch
Parent Account ⓘ	Active Member Count
Example Club For Training	0
Region or Zone ⓘ	Club Specialty ⓘ

Club Activity

[Edit Club Branch](#)

Club Membership

Club Officers

Active Members

29 Click "Edit Club Branch" to see the available actions.

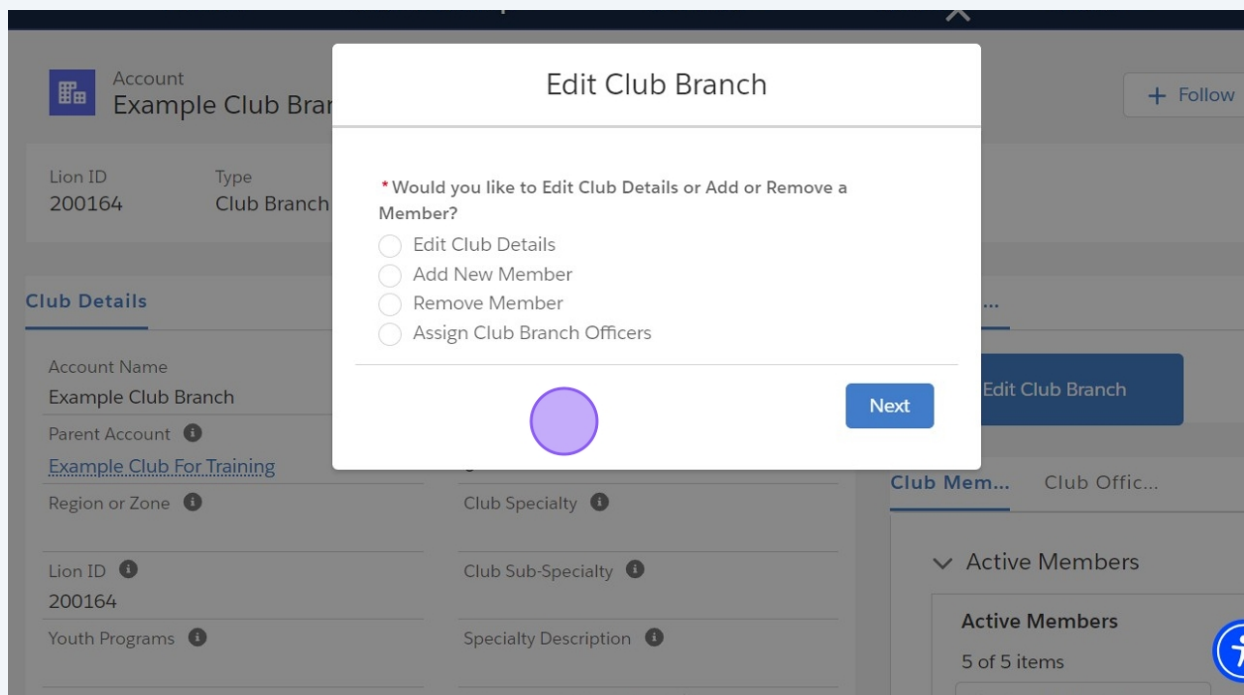
The screenshot displays the 'Example Club Branch' account page. At the top, there's a header with the account name and a '+ Follow' button. Below this is a table with columns: 'Account ID', 'Type', 'Status', and 'Billing Address'. The table contains one row with values: '00164', 'Club Branch', 'Active', and an empty cell. The main content area is divided into two sections. The left section, titled 'Details', contains fields for 'Account Name' (Example Club Branch), 'Parent Account' (Example Club For Training), 'Region or Zone', 'Account ID' (00164), and 'Auth Programs'. The right section, titled 'Club Actions', contains a button labeled 'Edit Club Branch' which is highlighted with a red circle. Below this, there are tabs for 'Club Members' and 'Club Officers'. The 'Club Members' tab is active, showing a list of 'Active Members' with a count of '5 of 5 items' and a person icon.



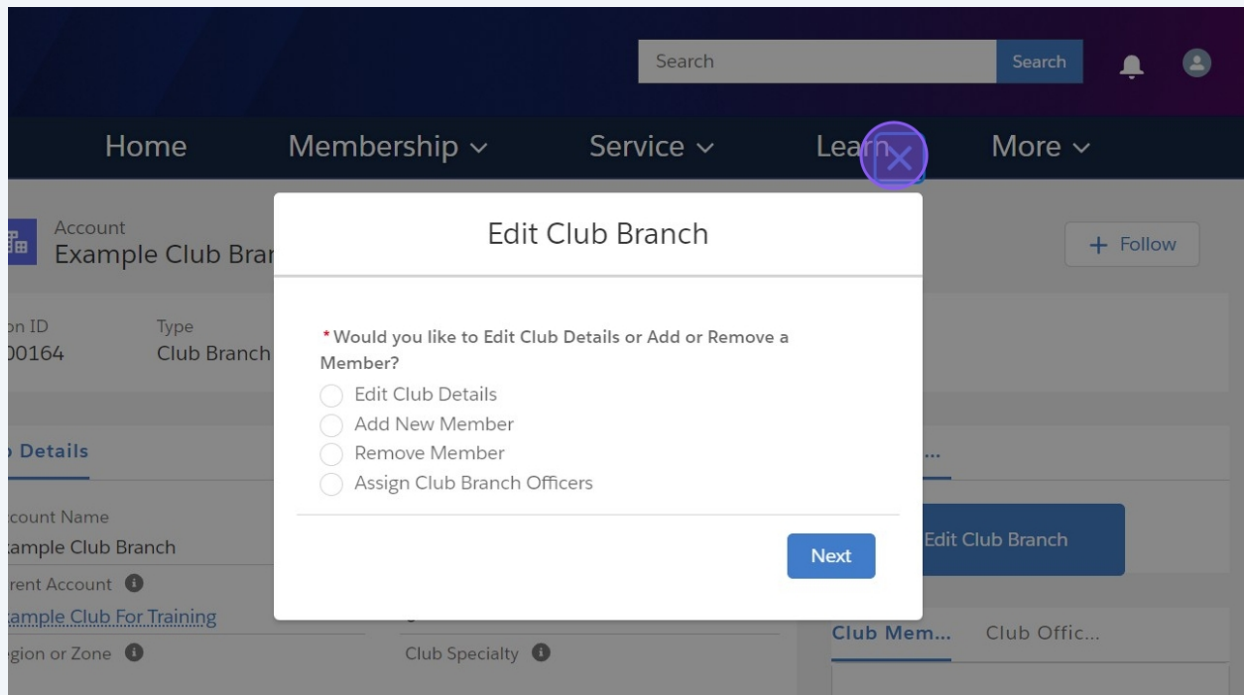
Alert! To be added to a Branch Club roster the person must be a Member of the Club. Add the person to the Sponsoring Club (Parent Club) using the "Add Member" process. The new member will then be available for the "Edit Branch Club - Add New Member" list.

30 These are the actions available:

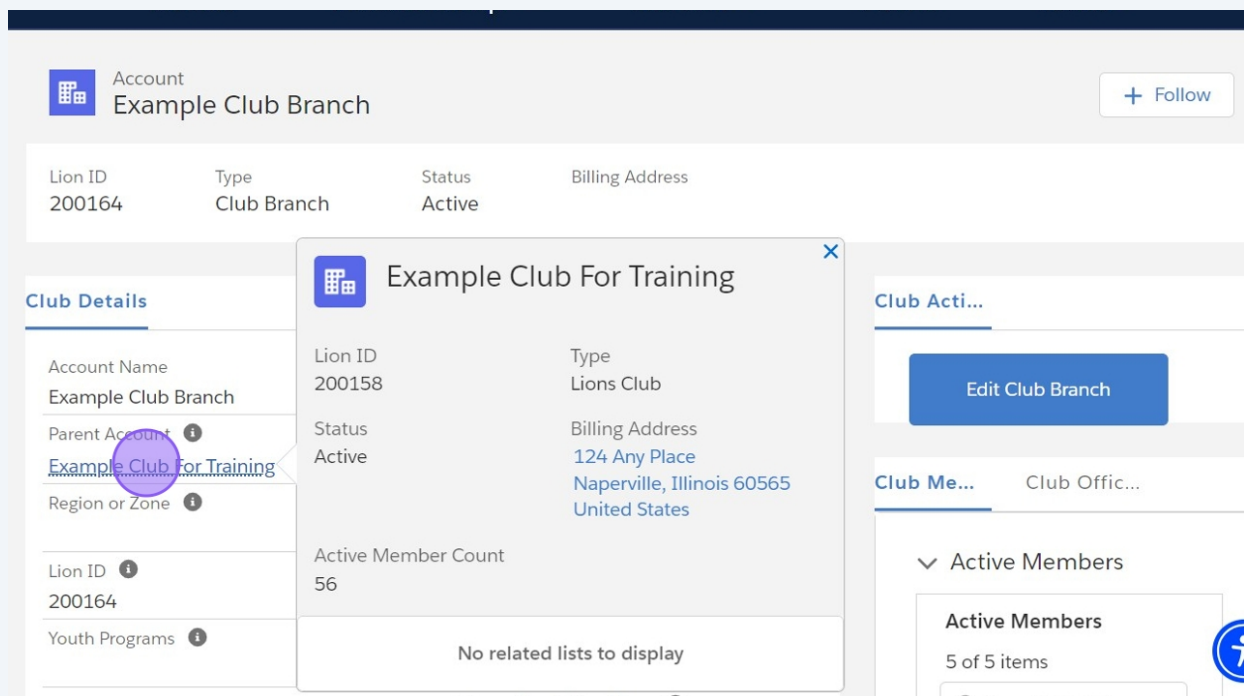
- Edit Club Details
- Add New Member
- Remove Member
- Assign Club Branch Officers



31 Click the "X" icon to close this window



32 Return to the Sponsoring Club page by clicking the link under "Parent Account"



- 33 Click "Home" to return to the landing page.

The screenshot shows the top navigation bar of the Lions Club website. The 'Home' button is highlighted with a purple circle. Below the navigation bar, there is a section for 'Account Example Club For Training' with a '+ Follow' button. Below this, there 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	56

Below the table, there are tabs for 'Club Details', 'Data Export', 'Club Statements', 'Club Service Activities', and 'More'. The 'Club Details' tab is selected, showing the 'Account Name' as 'Example Club For Training' and 'Type' as 'Lions Club'. The 'Parent Account' is 'District 1 J' and the 'Active Member Count' is '56'. On the right side, there is a 'Member ...' tab and a 'Club Acti...' tab. Below the 'Member ...' tab, there is a 'Manage Club Members' button.

- 34 This concludes the "Club Actions - Create Club Branch" Quick Guide

The screenshot shows the 'Welcome Example One!' message on the Lions Club website. Below the message, there are four navigation buttons: 'MY MEMBERSHIP' (with a person icon), 'MY CLUB' (with a house icon), 'MY CA' (with a star icon), and 'MY ASSOCIATION' (with a Lions Club logo icon). In the bottom right corner, there is a purple circle and a blue circle with a person icon.