

La gestione dei soci del club - Aggiungere un socio al club

Questa guida è essenziale per tutti coloro che si occupano della gestione dei soci del club, in particolare per l'aggiunta di nuovi soci Lions che pagano una quota intera. Fornisce istruzioni chiare e dettagliate per la procedura, compresa la creazione di una matricola socio (identificativo Lions) unica per identificare lo storico associativo di un individuo. Questa guida consente agli utenti di navigare in modo efficiente all'interno del Lion Portal e favorisce un accurato inserimento dei dati dei soci per garantire una buona organizzazione e comunicazione. In generale, la guida facilita il processo di aggiunta dei soci, garantendo una gestione più efficiente dei soci da parte dei responsabili del club.



Suggerimento! Questa guida rapida spiega come aggiungere un nuovo socio Lions che paga la quota intera.

Per aggiungere un socio familiare, consultare la sezione "Gestione dei soci del club - Aggiungere un socio familiare".

Per aggiungere un socio studente, consultare la sezione "Gestione dei soci del club - Altri tipi di soci".



Suggerimento! Quando si aggiunge un socio a un club, viene creato un record personale a cui viene assegnata una matricola, o "Identificativo (ID) socio", talvolta indicato come "Identificativo (ID) Lion". Questo codice identificativo è personale e identificherà il socio per tutto il suo percorso Lionistico.

Ogni volta che un Socio cambia il suo rapporto con l'associazione, viene creato un record per tenere traccia di tale cambiamento nel suo storico associativo. Ad esempio:

- Da socio regolare a socio familiare
 - Abbandono e successivo reinserimento o trasferimento di club
 - Associazione presso un altro club oltre al club principale
- Il codice identificativo appare come: MEMBER#0011943930

Lion Portal

twenty-three Search

Home Membership Service Learn Reports/Insights Shop More

Contact Example Member Twenty-Three **Lion Member ID** + Follow

Primary Affiliation Example Club For Training Member ID 26691573 Email zuser023@lionfake.com Phone (630) 101-1213

History Of Memberships

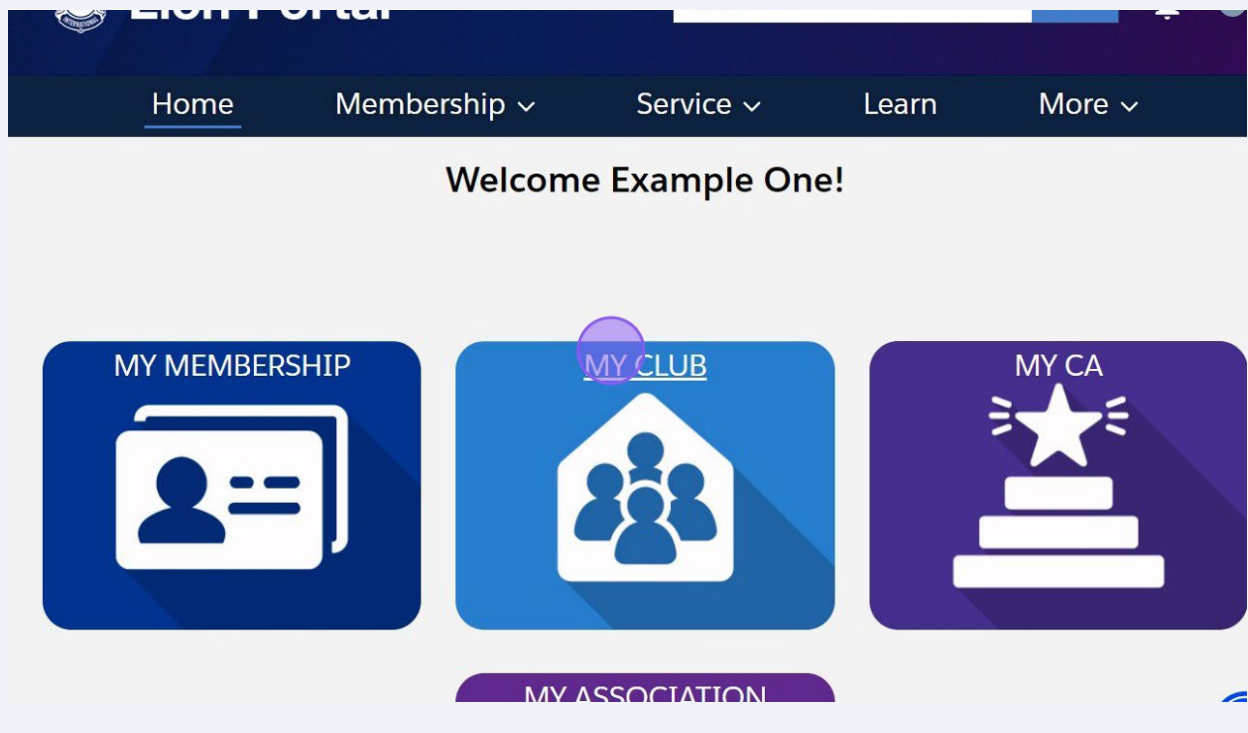
Contact Members Services
Email: lionssupport@lionsclubs.org
Phone: (+001) 630-468-6900

Club Memberships (4)
4 Items - Sorted by Start Date - Updated a few seconds ago

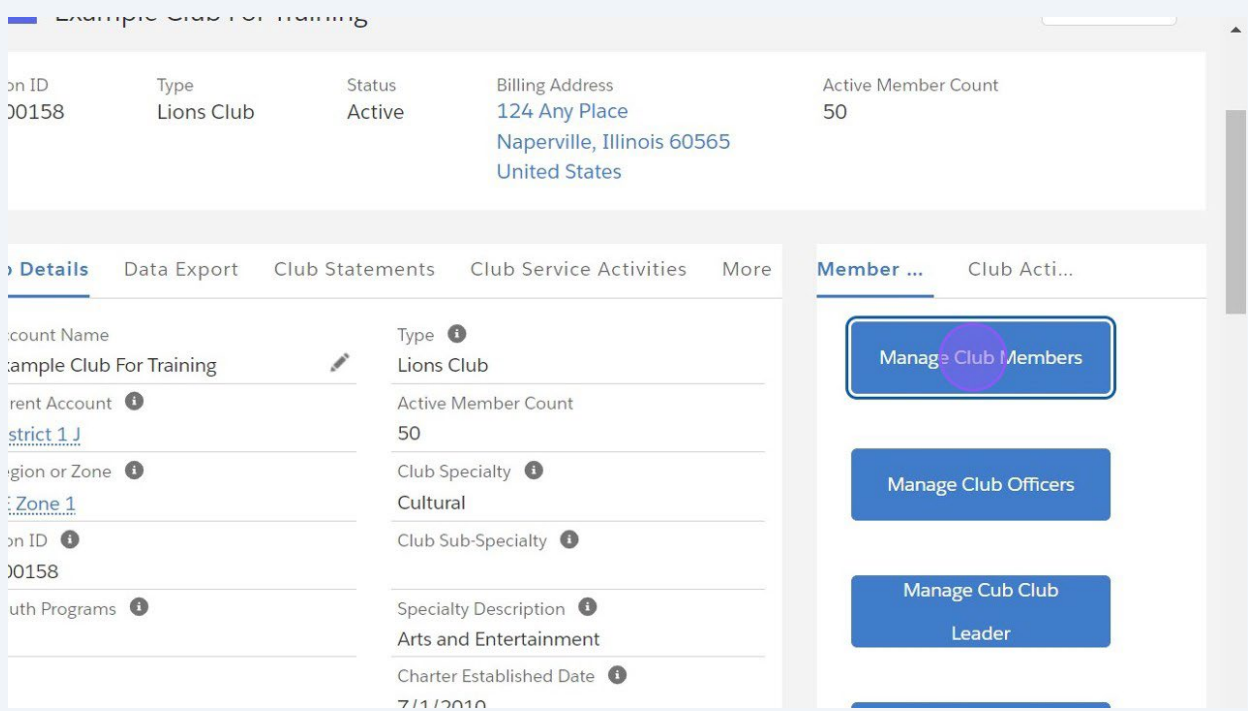
	Club Name	Memberships	Start Date	End
1	Example Club ...	Lion-Charter-R...	8/1/2010	6/30
2	BURR RIDGE-H...	Lion-Associate-...	7/5/2015	6/30
3	Example Club ...	Lion-Charter-Fa...	7/1/2017	12/...
4	Example Club ...	Lion-Charter-R...	12/16/2021	

1 Accedere al Lion Portal lionportal.org

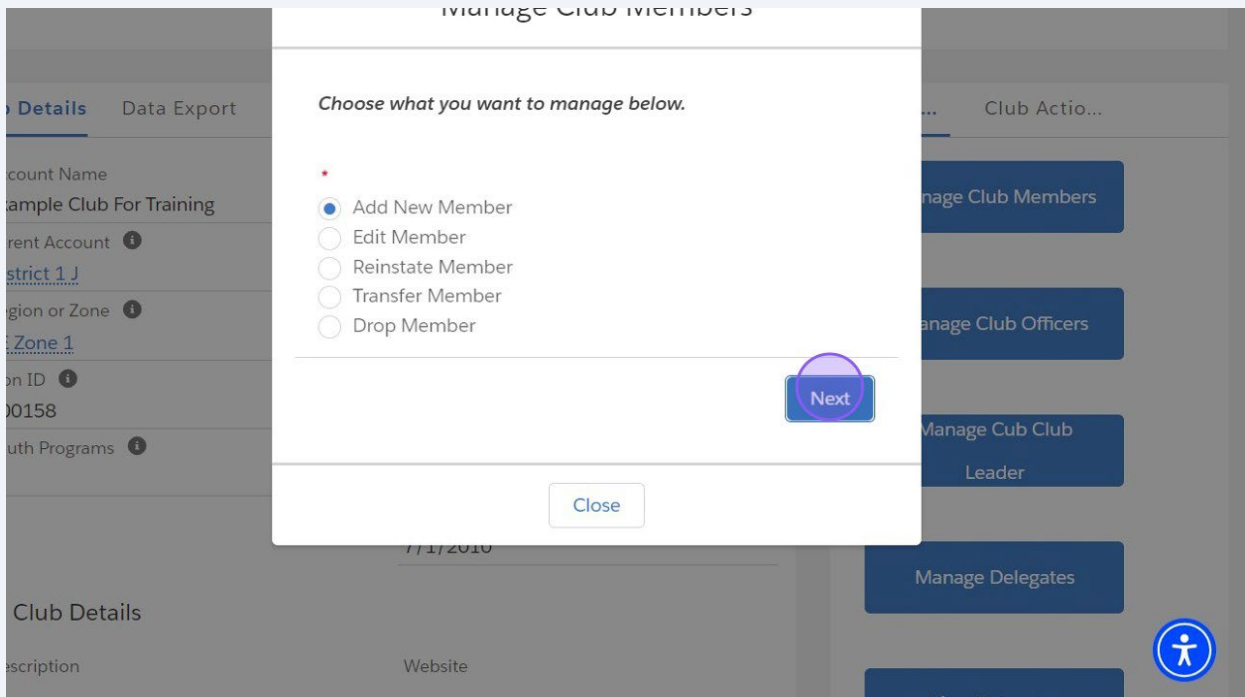
2 Cliccare su "IL MIO CLUB"



3 Cliccare su "Gestisci soci del club".

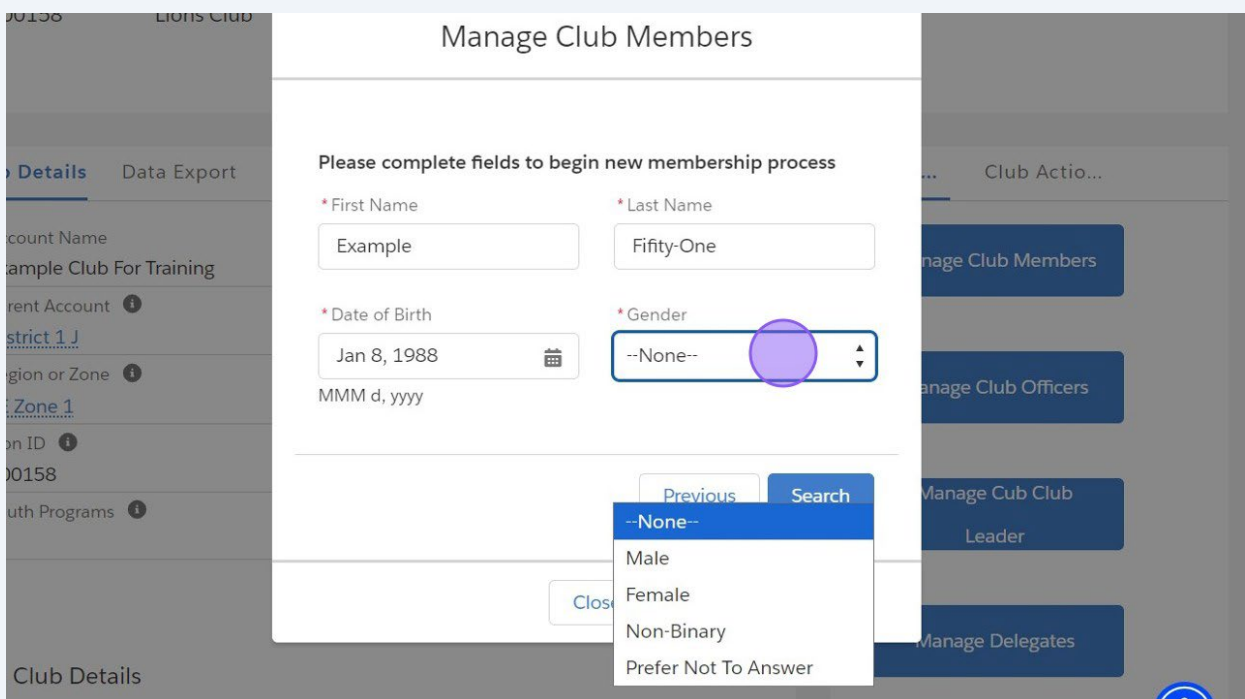


4 Selezionare "Aggiungi nuovo socio" e clicca su "Avanti".



5 Per iniziare il processo, inserire i dati richiesti

6 Cliccare sull'elenco.





Suggerimento! Il sistema cercherà di verificare che non si tratti di un duplicato. Se non ci sono potenziali duplicati, si passerà alla fase di inserimento dell'indirizzo.

7 Cliccare su "Ricerca".

Please complete fields to begin new membership process

* First Name	Example	* Last Name	Fifty-One
* Date of Birth	Jan 8, 1988	* Gender	Male

MMM d, yyyy

Previous Search Close

8 Iniziare a inserire altri dati

Manage Club Members

Create New Contact

* First Name	Middle Name	Prefix	* Gender
Exempl			Male
* Last Name	Nickname	Suffix	* Date of Birth
Fifty-Oi			Jan 8

MMM d, yyyy

*Address Fields Required

Address	Primary Email
Country	you@exempl
--None--	Secondary Email

Close

9 Per aggiungere l'indirizzo, selezionare prima il Paese.

The screenshot shows a 'Manage Club Members' modal form. The 'Country' dropdown menu is highlighted with a purple circle, indicating it is the next step in the process. The form includes fields for Address, City, State/Province, Zip/Postal Code, Primary Email, Secondary Email, Mobile Phone, Work Phone, and Home Phone. A red asterisk indicates that address fields are required.

10 Cliccare su "Paese" per scorrere l'elenco e selezionare il Paese.

The screenshot shows the 'Manage Club Members' modal form with the 'Country' dropdown menu open. The list of countries is visible, and 'United States' is highlighted with a purple circle, indicating it has been selected. The list includes Tunisia, Turkey, Turks and Caicos Islands, Uganda, Ukraine, United Arab Emirates, United Kingdom, and United States.

11 Inserire i dati aggiuntivi per questo socio.

***Address Fields Required**

Address

Country: United States

Street: 462 Spring Way

City: Naperville

State/Province: Illir

Zip/Postal Code: |

Primary Email: zFiftyone@fa

Secondary Email: you@exampl

Mobile Phone: 630 942-223

Work Phone:

Home Phone:

Close

12 Cliccare su "Avanti".

Naperville

Illir

Zip/Postal Code: 60565

Home Phone:

Occupation: Business/Co

Spouse/Companion Full Name: Companion f

Previous

Next

Close

13 Inserire la data di ingresso nell'associazione e la "Categoria associativa".

The screenshot shows a modal window titled "Manage Club Members" overlaid on a background of club details. The form contains the following fields:

- * Membership Start Date:** A date picker set to "Sep 1, 2024". Below it, the format "MMM d, yyyy" is indicated.
- * Membership Type:** A dropdown menu currently showing "--None--". A purple circle highlights this dropdown, and another purple circle highlights the "Next" button below it. A dropdown menu is open, listing the following options: "--None--", "Regular Member", "Family Member", "Leo Lion Member", "Young Adult Member", and "Student Member".

Buttons for "Next" and "Close" are visible at the bottom of the modal.

14 Cliccare su "Avanti".

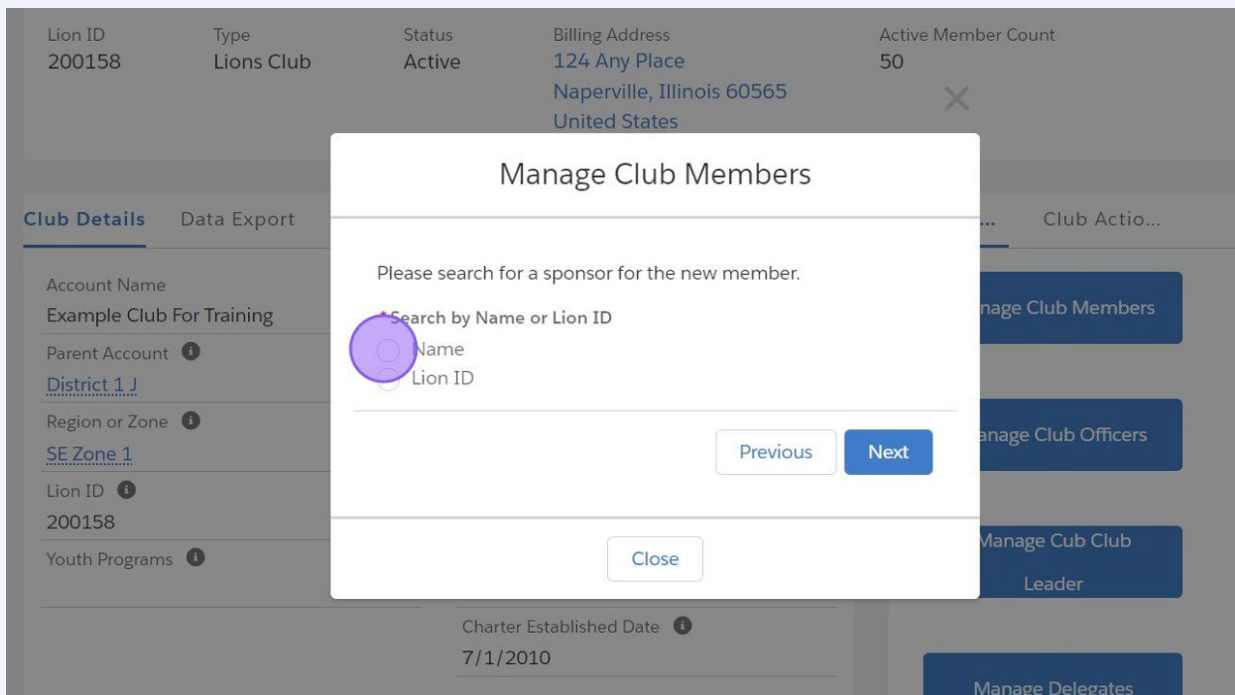
The screenshot shows the same "Manage Club Members" modal window. The form fields are now filled out:

- * Membership Start Date:** "Sep 1, 2024" (format: "MMM d, yyyy").
- * Membership Category:** A dropdown menu set to "Active".
- * Membership Type:** A dropdown menu set to "Regular Member".

A purple circle highlights the "Next" button, which is labeled "Avanti" in the original image. The "Close" button is also visible at the bottom of the modal.

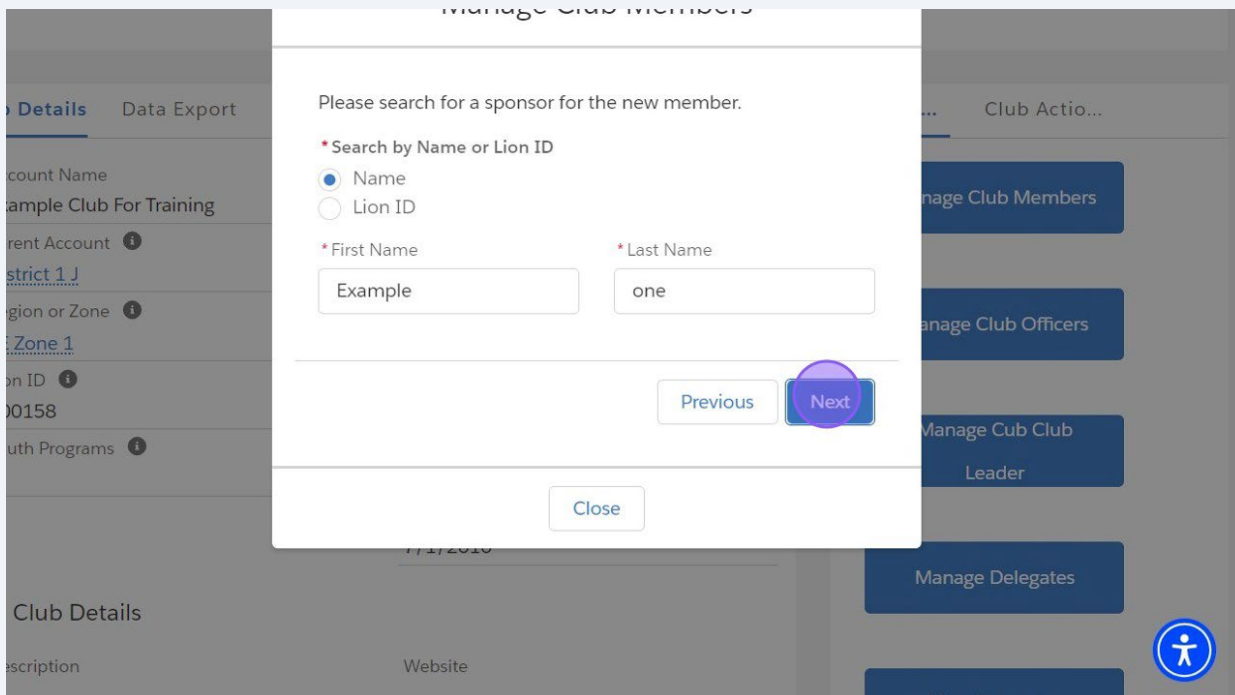
15

Aggiungere lo sponsor del socio. Per cercare uno sponsor per nome, selezionare "Nome" e cliccare su Avanti

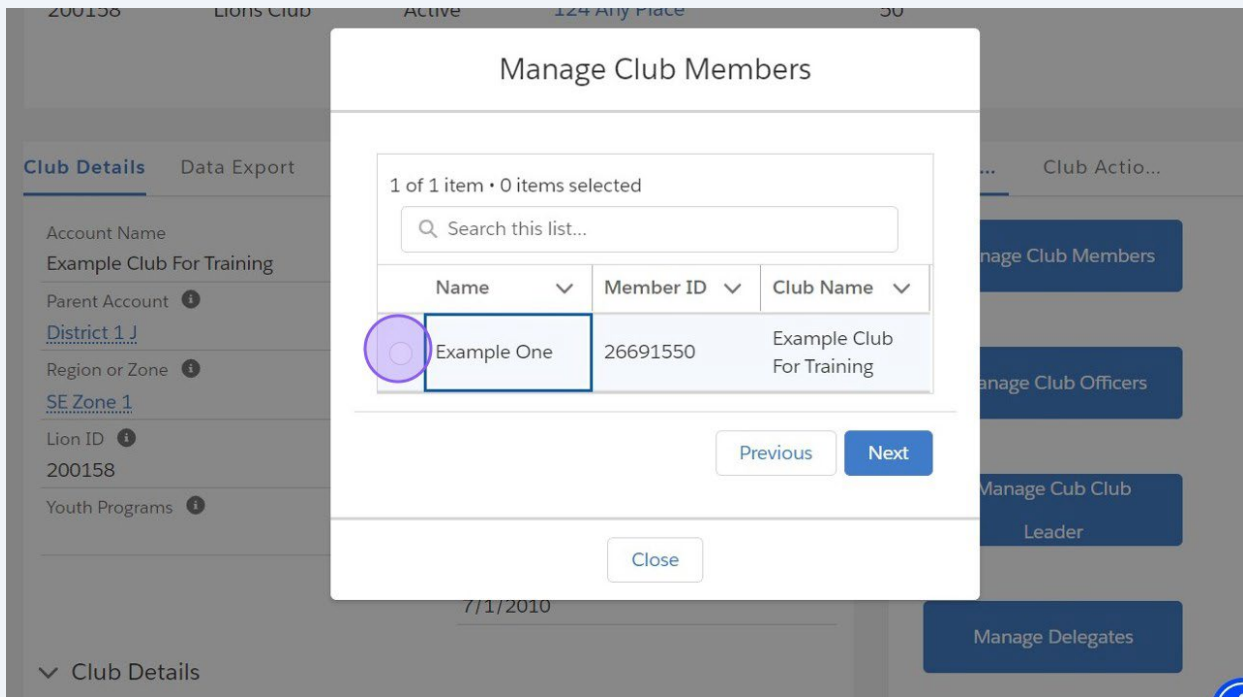


16

Digitare il nome e fare clic su "Avanti"

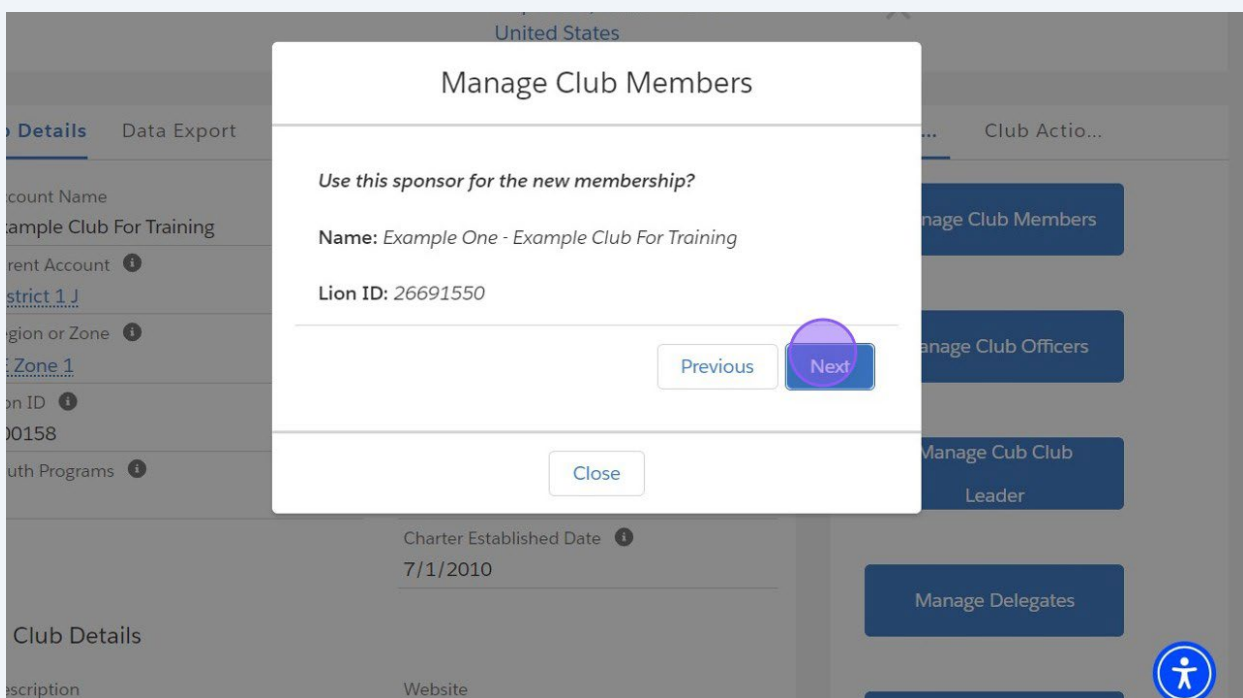


17 Selezionare il socio dall'elenco e cliccare su "Avanti"



Attenzione! Se non si tratta dello sponsor corretto, cliccare su "Indietro" per tornare alla ricerca dello sponsor.

18 Confermare di aver selezionato lo sponsor corretto e cliccare su "Avanti".



19

Un messaggio in verde apparirà nella parte superiore dello schermo a conferma dell'avvenuto inserimento. Quindi si tornerà alla pagina "Dettagli del

Visualizza soci e dettagli associativi

20

Sotto "Visualizza soci", cliccare su "Visualizza tutti".

Main Center Meeting Week of Month ⓘ 1st Meeting Day ⓘ Monday Meeting Time ⓘ 7:00 Meeting Street ⓘ 15 Town Road Meeting City ⓘ Naperville Meeting State or Prov ⓘ Meeting Zip Code ⓘ 60565 Meeting Country ⓘ United States Meeting Location 2 Meeting 2 Place ⓘ Meeting 2 Local Place ⓘ	टाउन सेंटर Meeting Local Street ⓘ ४५५ टाउन रोड Meeting Local City ⓘ नेपरविल Meeting Local Zip Code ⓘ Meeting Local State or Prov ⓘ IL Meeting Local Country ⓘ संयुक्त राज्य अमेरिका Online Meeting 1 ⓘ <input type="checkbox"/> Online Meeting 1 Place ⓘ Online Meeting 1 Address ⓘ Meeting 2 Local Place ⓘ	<table border="1"> <thead> <tr> <th>N. ▾</th> <th>M ▾</th> <th>M ▾</th> <th>M ▾</th> </tr> </thead> <tbody> <tr> <td>Exam ple Twelv e</td> <td>Lion- Chart er- Regul ar [Activ e]</td> <td>zuser 012@ lionfa ke.co m</td> <td>(63 0) 890 -12 34</td> </tr> <tr> <td>Exam ple Five</td> <td>Lion- Chart er- Regul ar [Activ e]</td> <td>zuser 005@ lionfa ke.co m</td> <td>(63 0) 123 -45 67</td> </tr> <tr> <td></td> <td>Lion- Chart er- Regul ar [Activ e]</td> <td>zuser 000@ lionfa ke.co m</td> <td>(63 0) 123 -45 67</td> </tr> </tbody> </table>	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 Five	Lion- Chart er- Regul ar [Activ e]	zuser 005@ lionfa ke.co m	(63 0) 123 -45 67		Lion- Chart er- Regul ar [Activ e]	zuser 000@ lionfa ke.co m	(63 0) 123 -45 67
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 Five	Lion- Chart er- Regul ar [Activ e]	zuser 005@ lionfa ke.co m	(63 0) 123 -45 67															
	Lion- Chart er- Regul ar [Activ e]	zuser 000@ lionfa ke.co m	(63 0) 123 -45 67															



Suggerimento! È possibile ingrandire o rimpicciolire le colonne cliccando e trascinando la colonna come mostrato di seguito

21 Viene mostrato l'elenco soci.

Lion Portal Search [Search] [User Icon]

Home Membership Service Learn More

Accounts > Example Club For Training
Club Members

50+ items • Sorted by Contact Full Name • Updated a few seconds ago

	Con...	Mem...	Email	Phone	Lion J...	Start ...	E...	Mem...	Mem...
1	Example ...	Lion-Cha...	zuser008...	(630) 45...	7/1/2010	7/1/2010	Active M...	MEMBER...	▼
2	Example ...	Lion-Cha...	zuser018...	(630) 55...	7/1/2010	7/1/2010	Active M...	MEMBER...	▼
3	Example ...	Lion-Cha...	zuser011...	(630) 78...	7/1/2010	7/1/2010	Active M...	MEMBER...	▼
4	Example ...	Lion-Reg...	zfiftyone...	630 942...	9/1/2024	9/1/2024	Active M...	MEMBER...	▼
5	Example ...	Lion-Cha...	zuser015...	(630) 22...	7/1/2010	7/1/2010	Active M...	MEMBER...	▼
6	Example ...	Lion-Stu...	zuser050...	(630) 18...	6/14/20...	6/14/20...	Active M...	MEMBER...	▼

22 Per visualizzare i dettagli del tipo di associazione, cliccare sul corrispondente codice identificativo in blu.

Home Membership Service Learn More

Accounts > Example Club For Training
Club Members

50+ items • Sorted by Contact Full Name • Updated a few seconds ago

	Contact Full Name ↑	Mem...	Email	Phone	Lion J...	Start ...	E...	Mem...	Mem...
1	Example Eight	Lion-Cha...	zuser008...	(630) 45...	7/1/2010	7/1/2010	Active M...	M	▲
2	Example Eighteen	Lion-Cha...	zuser018...	(630) 55...	7/1/2010	7/1/2010	Active M...	M	
3	Example Eleven	Lion-Cha...	zuser011...	(630) 78...	7/1/2010	7/1/2010	Active M...	M	
4	Example Fifty-One	Lion-Reg...	zfiftyone...	630 942...	9/1/2024	9/1/2024	Active M...	M	
5	Example Fifteen	Lion-Cha...	zuser015...	(630) 22...	7/1/2010	7/1/2010	Active M...	M	
6	Example Fifty	Lion-Stu...	zuser050...	(630) 18...	6/14/20...	6/14/20...	Active M...	M	
7	Example Five	Lion-Cha...	zuser005...	(630) 12...	7/1/2010	7/1/2010	Active M...	M	
8	Example Forty	Lion-Reg...	zuser040...	(630) 89...	6/14/20...	6/14/20...	Active M...	M	

23

Saranno visualizzati i dettagli del tipo di associazione.

Contact	Club	Club Branch	Membership Full Type
Example Fifty-One	Example Club For Training		Lion-Regular [Active]

Membership Details	
Club <i>i</i>	Membership Status <i>i</i>
Example Club For Training	Active Member
Contact <i>i</i>	Membership Type
Example Fifty-One	Lion
Club Branch <i>i</i>	Membership Category <i>i</i>
	Active
Relationship Type <i>i</i>	Program <i>i</i>
	Regular
Membership Sponsor <i>i</i>	Add Type <i>i</i>
Example Member One	New

Membership Details

On Join Date *i*

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

No related lists to display

24

Scorrere per visualizzare ulteriori dettagli.

Start Date <i>i</i>	
1/2024	
End Date <i>i</i>	
Total Years <i>i</i>	
05	

Hierarchies

Membership Club	Constitutional Area
Example Club For Training	U.S. and Affiliates, Bermuda and Bahamas
LCIF Constitutional Area	LCIF Constitutional Area
LCIF Constitutional Area 1	LCIF Constitutional Area 1
LCIF Group	LCIF Group
LCIF Group E - Area 1	LCIF Group C - Area 1
LCIF District	District
LCIF District 1	District 1 J
LCIF Region	Zone
LCIF Region	SE Zone 1

25 Cliccare sul link sotto "Contatti" per visualizzare i dettagli del socio.

Contact Example Fifty-One	Club Example Club For Training	Club Branch	Membership Full Type Lion-Regular [Active]
--	---	-------------	---

Details

Club ⓘ
[Example Club For Tra](#)

Contact ⓘ
[Example Fifty-One](#)

Club Branch ⓘ

Relationship Type ⓘ
Regular

Membership Sponsor ⓘ
[Example Member One](#)

Add Type ⓘ
New

Membership Details

Lion Join Date ⓘ

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

No related lists to display

26 Vengono mostrati i dettagli relativi al socio.

Primary Affiliation Example Club For Training	Member ID 26691601	Email zfiftyone@fake.com	Phone 630 942-2233
--	-----------------------	---	-----------------------

Name Example Fifty-One	Spouse Name ⓘ Companion Fifty-One
Primary Affiliation ⓘ Example Club For Training	Birthday ⓘ January 8
Nickname ⓘ M-Man	Birthdate 1/8/1988
Gender ⓘ Male	Occupation ⓘ Business/Consultant/Service Provider

Local Language Information

First Name (Local)

Middle Name (Local)

Last Name (Local)

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

Club Me... (1) [Settings] [Refresh]

1 item · Sorted by Start Date · Updated a few seconds ago

Club Name	Membershi...
1 Example Club ...	Lion-Regular [Active]

View All



Members Sponsored (0)

27 Scorrere per visualizzare ulteriori dettagli.


✓ Contact Information

Mailing Address	Local Address
462 Spring Way Naperville, Illinois 60565 United States	
Preferred Phone ⓘ	
Mobile	
Home Phone	Preferred Email ⓘ
	Personal
Mobile	Personal Email ⓘ
630 942-2233	zfiftyone@fake.com
Work Phone ⓘ	Work Email ⓘ
Other Phone	Alternate Email ⓘ
	Fax



Officer Titles (0)



28 Cliccare su "Home" per tornare alla pagina di destinazione.



Lion Portal

Search




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

Contact [Example Fifty-One](#) [+ Follow](#)

Primary Affiliation	Member ID	Email	Phone
Example Club For Training	26691601	zfiftyone@fake.com	630 942-2233

Name	Spouse Name ⓘ
Example Fifty-One	Companion Fifty-One
Primary Affiliation ⓘ	Birthday ⓘ
Example Club For Training	January 8
Nickname ⓘ	Birthdate
M-Man	1/8/1988

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

 Club Me... (1)  

1 item · Sorted by Start Date · Updated a few seconds ago

29 Questo conclude la Guida rapida "La gestione dei soci di club - Aggiungere un socio nel club".

