

Gestionar socios del club - Añadir un socio del club Lion Portal

Esta guía es esencial para cualquier persona que participe en la gestión de la afiliación del club, específicamente para añadir nuevos socios Leones que paguen cuotas completas. Proporciona información clara, instrucciones paso a paso para el proceso, incluyendo la creación de un número de socio único que haga seguimiento del historial de afiliación de una persona. Al seguir esta guía, los usuarios pueden navegar eficazmente por el Lion Portal y asegurarse de que los registros de los socios sean precisos, lo cual es crucial para mantener la organización y comunicación del club. En general, simplifica el proceso de aumento de socios, lo que facilita a los administradores de clubes la gestión eficaz de sus socios.



Consejo Esta guía rápida muestra cómo añadir un nuevo socio León que sea un socio que pague cuotas completas.

Para añadir un socio familiar, consulte la sección "Gestionar socios del club - Añadir un socio familiar"

Para añadir un socio estudiante, consulte "Gestionar socios del club - Otros tipos de socios"



Consejo Cuando se añade un socio a un club, se crea el registro de la persona a esta persona se le asigna un "número de socio" a veces también llamado "número de socio". Esta identificación es única para la persona y permanece con ella durante su trayectoria Leonística.

Cada vez que un socio cambia su relación de afiliación, se crea un registro de historial único para hacer seguimiento del historial del Aumento de Afiliación. Estos incluyen cambios como:

- Aumento de Afiliación regular a Aumento de Afiliación familiar
- Darse de baja y luego reincorporar o trasladar clubes
- Tener una asociación con otro club además del club principal

Este número de seguimiento tiene el siguiente aspecto: **NUMERO DE SOCIO: 26691573**

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**

Name Example Member Twenty-Three Spouse Name Companion Twenty-Three
Primary Affiliation Example Club For Training Birthday September 9
Nickname Birthdate 9/9/1972
Gender Male Occupation Accounting

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

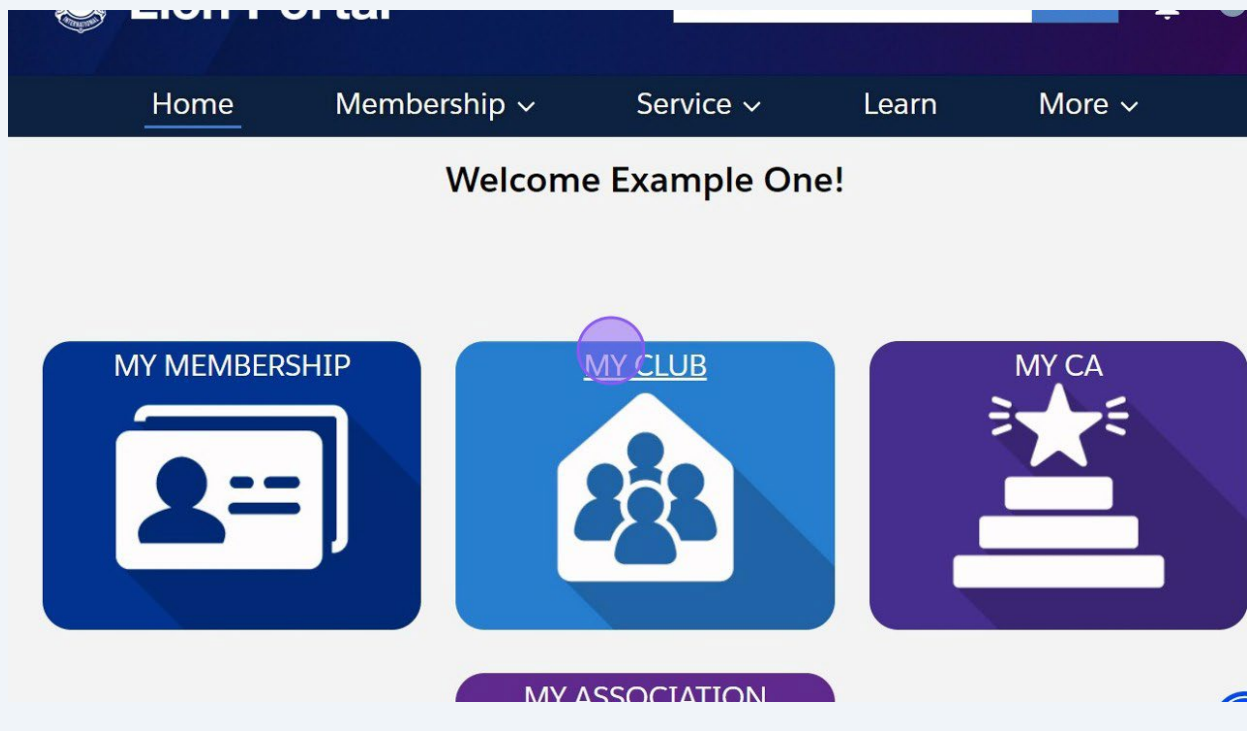
	Club Name	Membershi...	Start Date	End
1	Example Club ...	Lion-Charter-R...	8/1/2010	6/30
2	BURR RIDGE-H...	Lion-Associate-...	7/5/2015	6/30
3	Example Club ...	Lion-Charter-Fa...	7/1/2017	12/...
4	Example Club ...	Lion-Charter-R...	12/16/2021	

View All

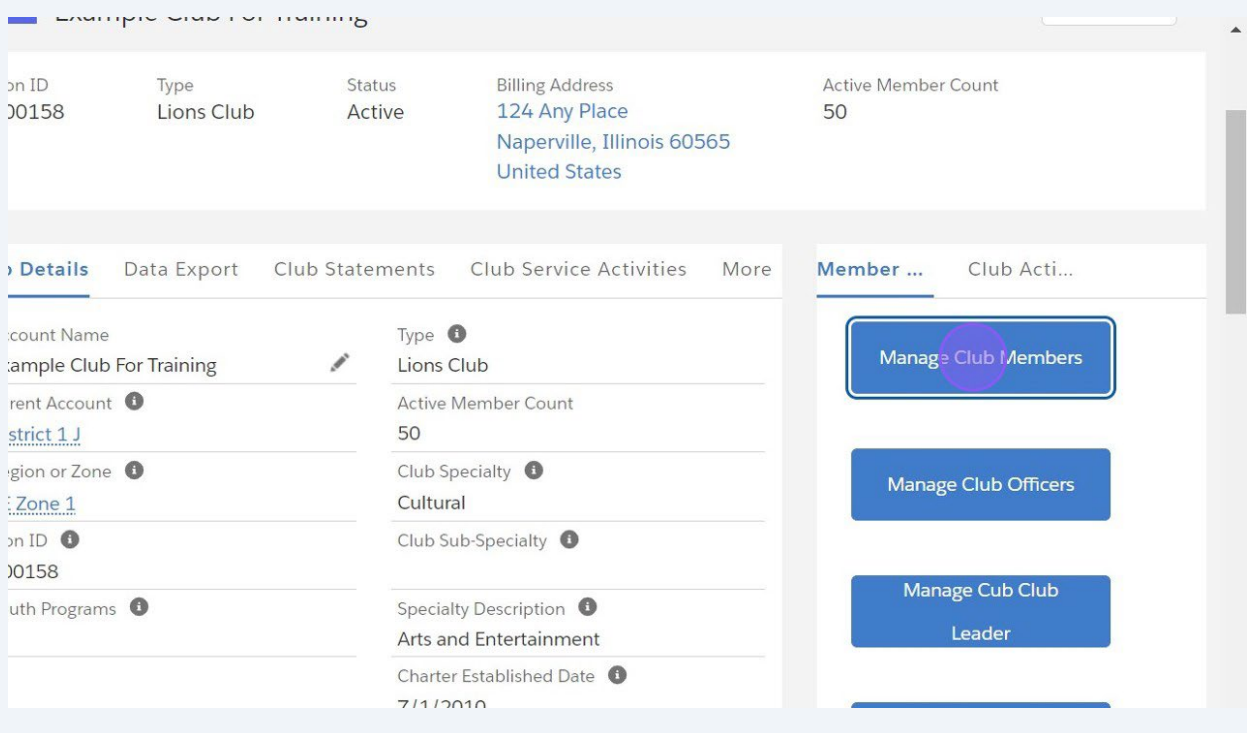
1

Inicie sesión en el Lion Portal. lionportal.org

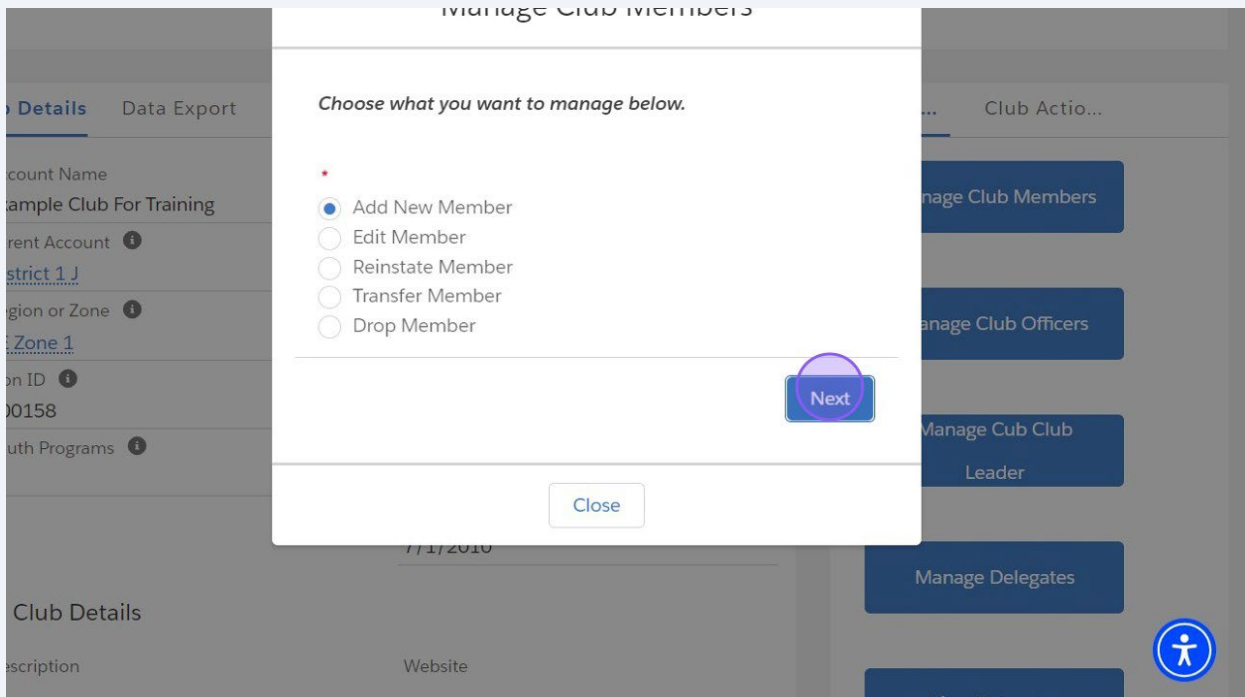
2 Haga clic en "MI CLUB"



3 Haga clic en "Administrar socios del club"



4 Seleccione "Añadir socio nuevo" y haga clic en "Siguiente"



5 Para iniciar el proceso, introduzca los datos necesarios

6 Haga clic en este menú desplegable.

The screenshot shows a web interface for managing club members. The main heading is "Manage Club Members". Below it, a message reads "Please complete fields to begin new membership process". There are four input fields: "First Name" (containing "Example"), "Last Name" (containing "Fifty-One"), "Date of Birth" (containing "Jan 8, 1988" with a calendar icon and the format "MMM d, yyyy"), and "Gender" (containing "--None--"). A purple circle highlights the "Gender" dropdown menu, which is open and shows options: "--None--", "Male", "Female", "Non-Binary", and "Prefer Not To Answer". At the bottom of the form, there are "Previous" and "Search" buttons. The background shows a sidebar with "Details" and "Data Export" tabs, and a list of club actions like "Manage Club Members", "Manage Club Officers", "Manage Club Club Leader", and "Manage Delegates".

i Consejo El sistema buscará para asegurarse de que no se trata de un duplicado. Si no hay duplicados potenciales, se le llevará al paso de introducir dirección.

7 Haga clic en "Buscar"

Please complete fields to begin new membership process

* First Name	<input type="text" value="Example"/>	* Last Name	<input type="text" value="Fifty-One"/>
* Date of Birth	<input type="text" value="Jan 8, 1988"/>	* Gender	<input type="text" value="Male"/>

MMM d, yyyy

8 Empezar a introducir datos adicionales

Manage Club Members

Create New Contact

* First Name	Middle Name	Prefix	* Gender
<input type="text" value="Exempl"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Male"/>
* Last Name	Nickname	Suffix	* Date of Birth
<input type="text" value="Fifty-Or"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Jan 8"/>

MMM d, yyyy

*Address Fields Required

Address	Primary Email
Country	<input type="text" value="you@exempl"/>
<input type="text" value="--None--"/>	Secondary Email

9 Para añadir la dirección, seleccione primero el país

The screenshot shows the 'Manage Club Members' 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. The background shows the 'Club Details' section with information for 'Example Club For Training'.

10 Haga clic en el botón "País" para bajar la lista de países y seleccionar el país

The screenshot shows the 'Manage Club Members' form with the 'Country' dropdown menu open. The 'United States' option is highlighted with a purple circle, indicating it is the selected country. The dropdown menu lists several countries: Tunisia, Turkey, Turks and Caicos Islands, Uganda, Ukraine, United Arab Emirates, United Kingdom, and United States. The background shows the 'Club Details' section with information for 'Example Club For Training'.

11 introduzca los datos adicionales de este socio

The screenshot shows a modal form titled "Address Fields Required" overlaid on a "Club Details" page. The form contains the following fields:

- Address:** Country (United States), Street (462 Spring Way), City (Naperville), State/Province (Illir), Zip/Postal Code (empty).
- Contact Information:** Primary Email (zfiftyone@fa), Secondary Email (you@exampl), Mobile Phone (630 942-223), Work Phone (empty), Home Phone (empty).

A purple circle highlights the Zip/Postal Code field. A "Close" button is at the bottom of the modal.

12 Haga clic en "Siguiente"

This screenshot shows the same modal form as in step 11, but with the "Next" button highlighted by a purple circle. The "Zip/Postal Code" field now contains the value "60565". The "Occupation" dropdown is set to "Business/Co", and the "Spouse/Companion Full Name" field contains "Companion f". The "Previous" and "Next" buttons are at the bottom of the modal, with "Next" being the highlighted one. A "Close" button is also present at the bottom.

13 Introduzca la fecha de inicio de la afiliación y el "tipo de socio"

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 field, and a dropdown menu is open below it, listing the following options: "--None--", "Regular Member", "Family Member", "Leo Lion Member", "Young Adult Member", and "Student Member".

At the bottom right of the modal, there is a blue "Next" button. At the bottom center, there is a "Close" button. The background shows "Club Details" for "Example Club For Training" with fields for Parent Account (District 1 J), Region or Zone (SE Zone 1), and Lion ID (200158).

14 Haga clic en "Siguiente"

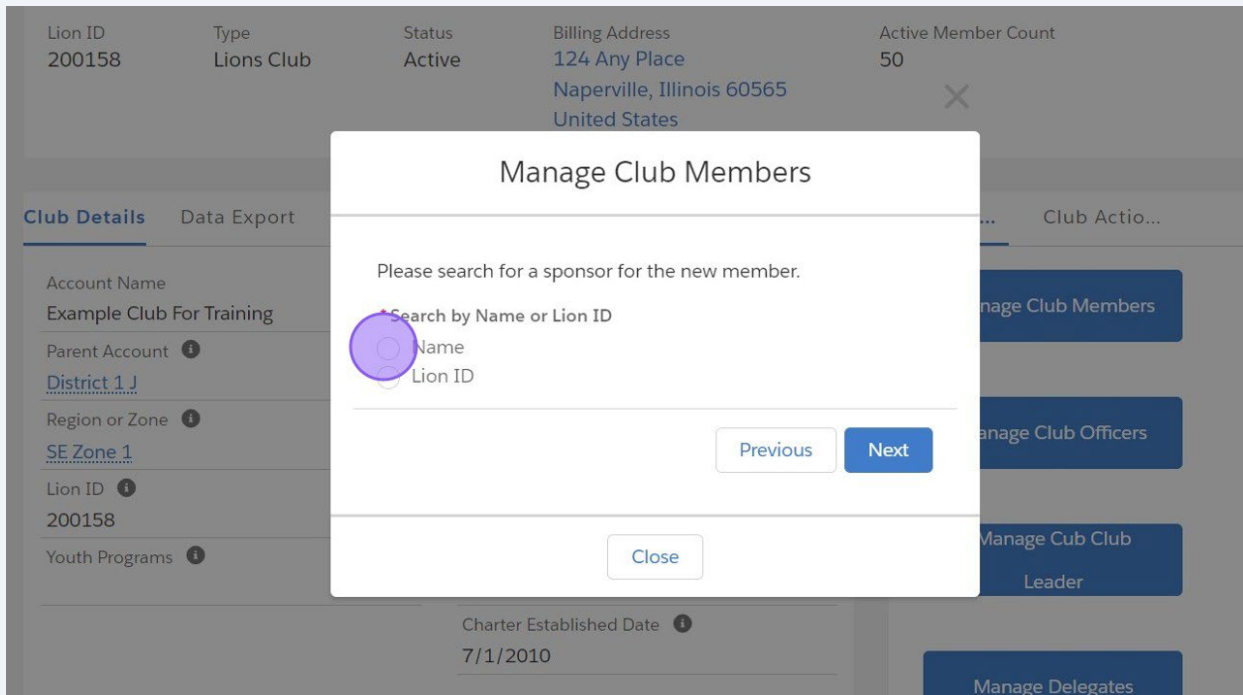
This screenshot shows the same "Manage Club Members" modal window. The form fields are now filled out:

- * 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 blue "Next" button at the bottom right of the modal. A "Close" button is located at the bottom center. The background shows the same club details as in the previous screenshot.

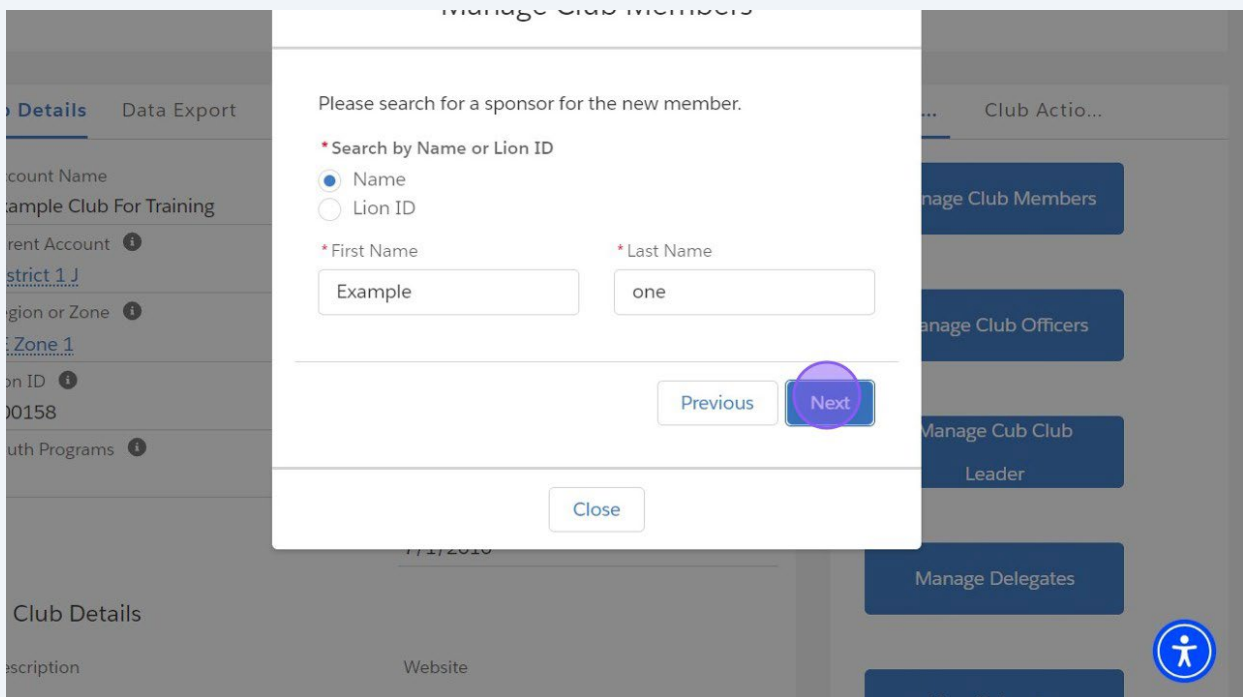
1

Añadir el patrocinador del socio. Para buscar patrocinador por nombre, seleccione "Nombre" y haga clic en siguiente



16

Escriba el nombre y haga clic en "Siguiente"



17 Seleccione el socio de la lista y haga clic en "Siguiente"

Manage Club Members

1 of 1 item • 0 items selected

Search this list...

Name	Member ID	Club Name
Example One	26691550	Example Club For Training

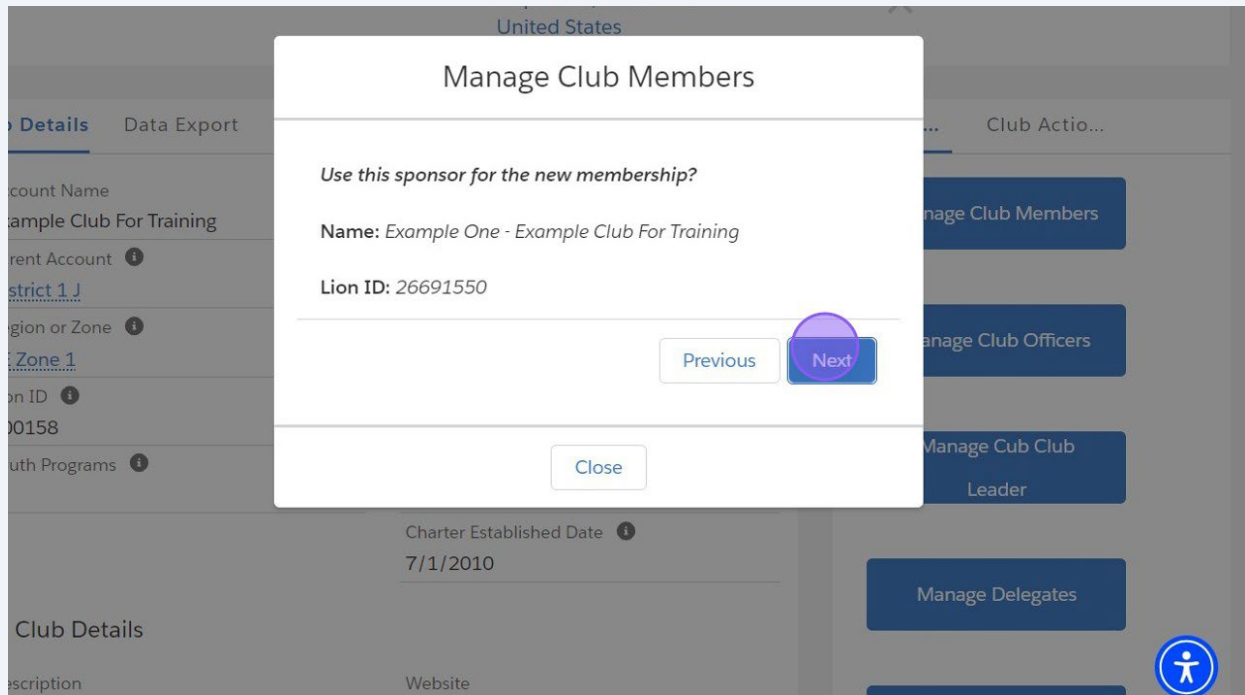
Previous Next

Close



¡Alerta! Si no es el patrocinador correcto, haga clic en "Anterior" para volver al paso de búsqueda de patrocinador.

- 18 Confirme que ha seleccionado el socio patrocinador correcto y haga clic en "Siguiente"



- 1 Aparecerá un mensaje de Éxito Verde en la parte superior de la pantalla y volverá a la página de "Detalles del club"

Ver el socio y sus detalles de afiliación

20 En "Ver socios" haga clic en "Ver todo"

town 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 ⓘ

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 ⓘ

Online Meeting 1 Place ⓘ

Online Meeting 1 Address ⓘ

Meeting 2 Local Place ⓘ

N. ▾	M ▾	M ▾	M ▾
Example Twelve	Lion-Chart Regular [Active]	zuser012@lionfa.ke.com	(630) 890-1234
Example Five	Lion-Chart Regular [Active]	zuser005@lionfa.ke.com	(630) 123-4567
Example	Lion-Chart Regular [Active]	zuser000@lionfa.ke.com	(630) 123-4567

[View](#) ⓘ



Consejo Puede hacer las columnas más grandes o más pequeñas haciendo clic y arrastrando la columna como se muestra a continuación

21 Se muestra la lista de socios

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...	▼

2 Para ver los detalles del tipo de Aumento de Afiliación, haga clic en el sistema azul de identificación de esta afiliación

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	

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Se muestran los detalles del tipo de Aumento de Afiliación

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



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

Desplácese para ver detalles adicionales

Start Date ⁱ	
1/2024 	
End Date ⁱ	
Total Years 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
Multiple District	District
Multiple District 1	District 1 J
Region	Zone
Region	SE Zone 1

25 Haga clic en el enlace bajo "Contacto" para ver los detalles 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 Se muestran detalles sobre el 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

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

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

[View All](#)



Members Sponsored (0)

27 Desplácese para ver más detalles


✓ 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 Haga clic en "Inicio" para volver a la página de inicio



Lion Portal






[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 Con esto concluye la Guía rápida para administrar socios del club: agregar un socio del club

