

Gerenciar Associados do Clube - Transferir um Associado

Este guia oferece um processo passo a passo para transferir um associado de um clube para outro usando o Lion Portal, garantindo uma transição tranquila e mantendo registros precisos de associados. Ele esclarece as responsabilidades dos dirigentes atuais e novos do clube, ajudando os usuários a entender as ações necessárias de ambas as partes. Seguindo este guia, os administradores de clube podem gerenciar com eficiência as mudanças no quadro associativo, aumentando a eficácia organizacional e a satisfação dos associados.

- 1 Faça login no Lion Portal. lionportal.org

Baixar - Transferir do Antigo Clube

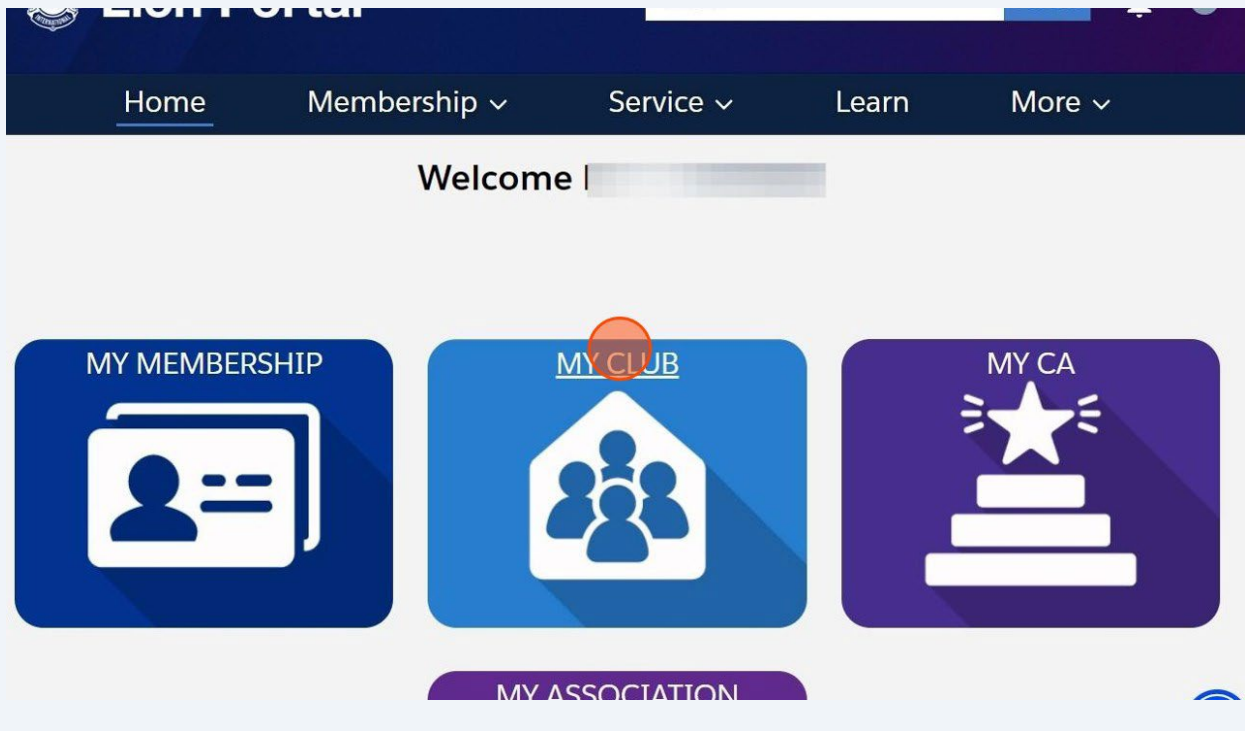


Alerta! Para transferir um associado para o seu clube, ele precisa ser baixado do clube atual. As etapas exibidas nesta seção são executadas pelo outro clube.

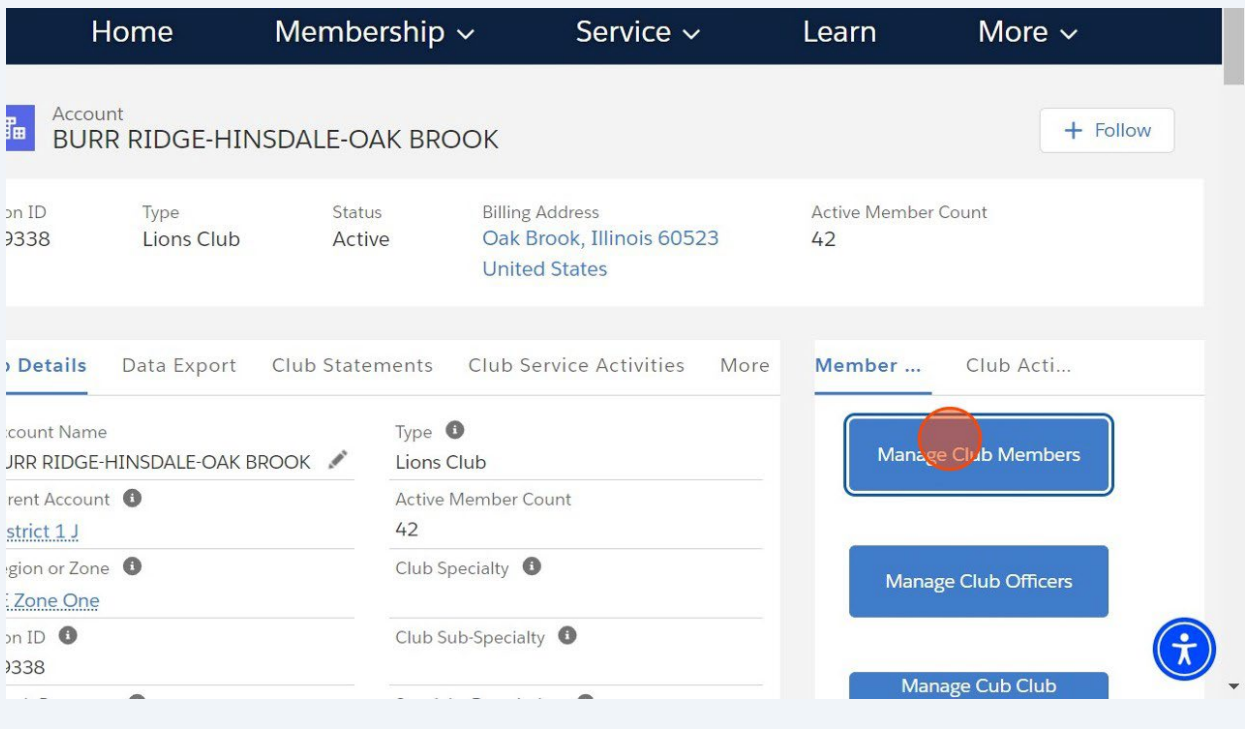


Essa etapa é realizada pelo dirigente ou administrador do clube **atual**. Depois que a afiliação do associado for baixada, o dirigente ou administrador do novo clube poderá transferir o associado para o novo clube. Isso cria um novo registro de "afiliação" para o histórico do associado.

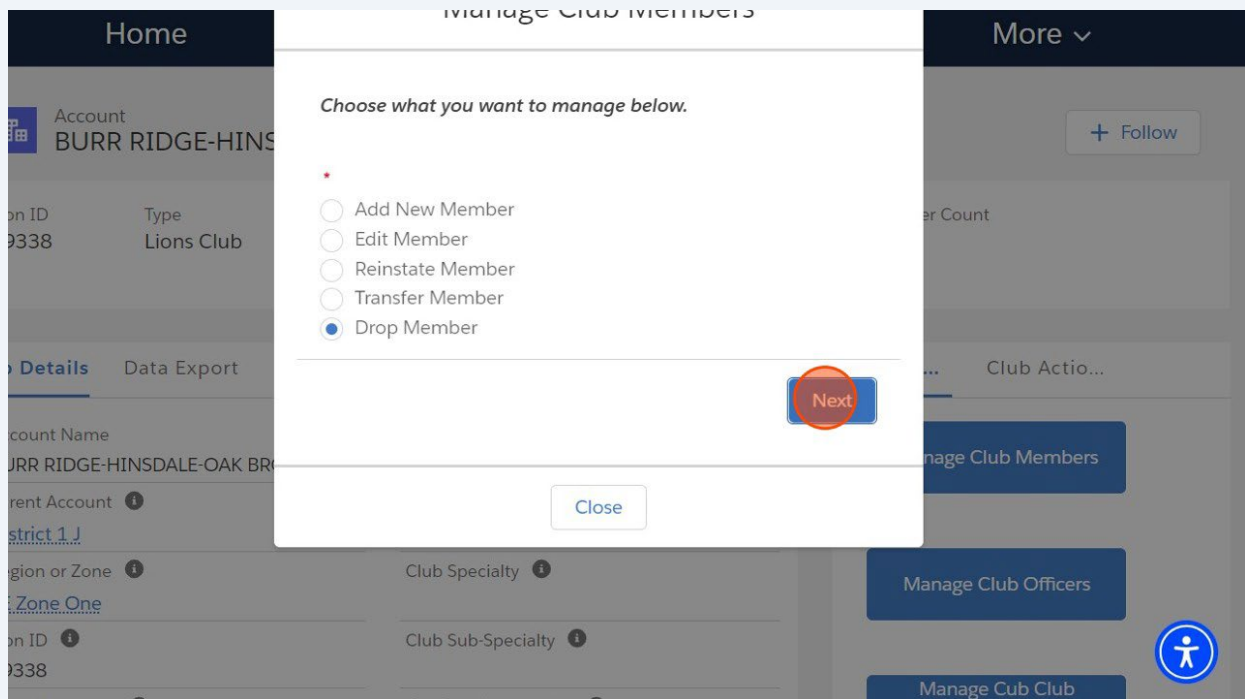
2 Clique "MEU CLUBE"



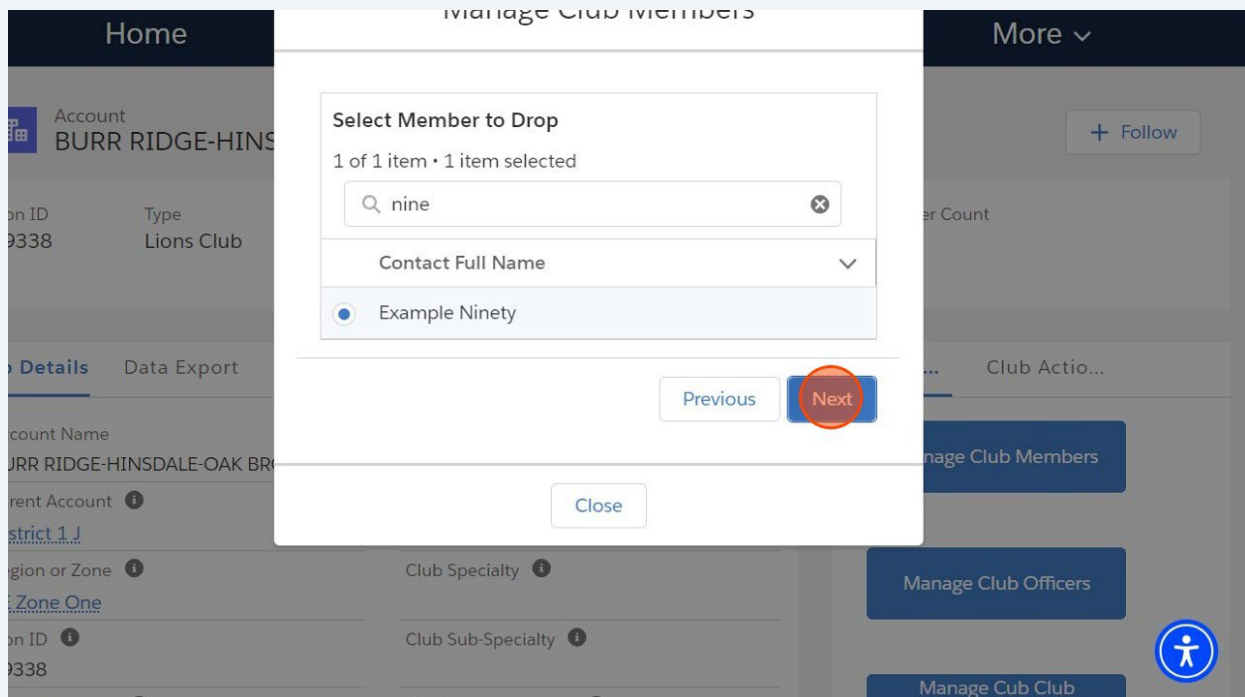
3 Clique "Gerenciar Associados do Clube"



4 Selecione o "botão de opção" "Baixar Associado" e clique "Próximo"



5 Selecione o associado a ser baixado clicando no "botão de opção" ao lado do nome do associado e clique "Próximo"



6

Digite a "Data de Término" da afiliação. Selecione a opção "Motivo da Baixa", opção "Transferido".

The screenshot shows a mobile application interface with a modal form for updating a member's information. The background shows the 'Home' screen with club details for 'Burr Ridge-Hinsdale-Oak Brook Lions Club'. The modal form contains the following fields:

- Member Name:** Example Ninety
- Member's ID:** 26691612
- * Membership End Date:** Sep 1, 2024 (with a calendar icon)
- * Drop Reason:** Transferred (with an information icon and a dropdown arrow)
- Drop Reason Details:** (empty text input field)
- Buttons:** Save (blue), Close (white)

An orange circle highlights the 'Transferred' option in the dropdown menu.

7

Os "Detalhes do Motivo da Baixa" podem ser inseridos. Clique "Salvar"

This screenshot shows the same modal form as in the previous image, but with the 'Drop Reason Details' field filled with the text 'Moving to Example Club For Training'. The 'Save' button is now highlighted with an orange circle, indicating it should be clicked.



O associado foi baixado do seu clube atual.

Adicionar - Transferir para o Novo Clube



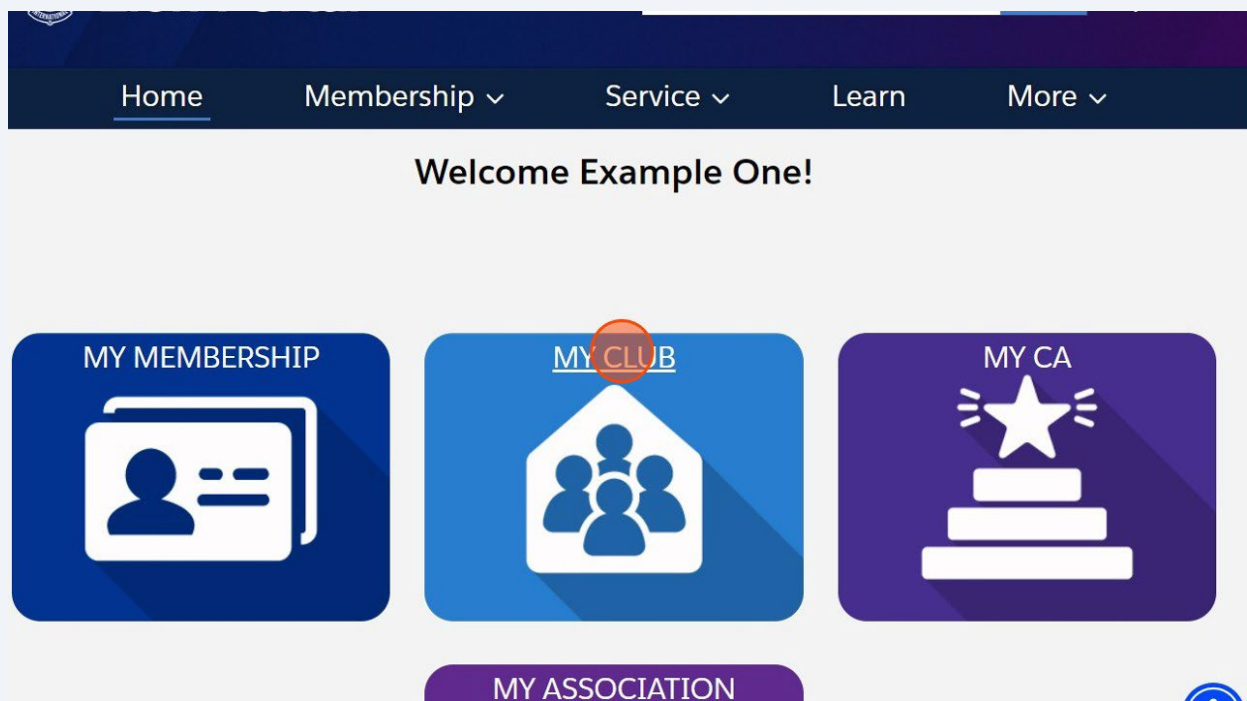
Essas etapas são realizadas pelo dirigente ou administrador do clube **atual**. Isso cria um novo registro de "Afiliação" com o novo Clube para rastrear o histórico do associado..

8

O dirigente ou administrador do clube que receberá o associado transferido deve se conectar ao portal.

9

Clique "MEU CLUBE"



10 Clique "Gerenciar Associados do Clube"

The screenshot shows the top navigation bar with 'Home', 'Membership', 'Service', 'Learn', and 'More'. Below is the club header for 'Example Club For Training' with a '+ Follow' button. A table displays club details:

Club ID	Type	Status	Billing Address	Active Member Count
00158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	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 Club Name, Parent Account, Region or Zone, Club ID, Type, Active Member Count, Club Specialty, and Club Sub-Specialty. On the right, there are buttons for 'Manage Club Members' (highlighted with a red circle) and 'Manage Club Officers', along with a user profile icon.

11 Clique no "botão de opção" ao lado de "Transferir Associado" e clique "Próximo"

The screenshot shows the 'Manage Club Members' dialog box overlaid on the club page. The dialog box contains the text 'Choose what you want to manage below.' and a list of options:

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

At the bottom of the dialog box, there is a 'Next' button (highlighted with a red circle) and a 'Close' button. The background shows the same club details as in the previous screenshot, but they are dimmed.

1

Para localizar o associado, você pode buscar por "Nome" ou "ID do Leão". Insira a data e clique "Buscar"

Please complete fields to begin new membership process

* Search by Name or Lion ID

Name
 Lion ID

* First Name: Example
* Last Name: Ninety

Previous Search Close

1

Selecione o associado, clicando no "botão de opção" ao lado do nome do associado e "Próximo"

Duplicate Contacts

1 of 1 item • 1 item selected

<input checked="" type="checkbox"/>	F. ▾	D ▾	C ▾	C ▾	L. ▾	M ▾	M ▾
<input checked="" type="checkbox"/>	Example Member Ninety	Sep 14, 1969			2669 1612	Illinois	United States

Previous Next Close

14 Confirme a afiliação do associado.

The screenshot shows a web application interface with a modal window titled "Existing Memberships". The modal displays a table with one row selected, highlighted in light blue. A red circle highlights the first row of the table. The background shows a "Home" page for "Example Club For Training" with various details and buttons like "Manage Club Members" and "Manage Club Officers".

Existing Memberships
1 of 1 item • 1 item selected

C	C	M	L	Dr...	M	D
BUR						Dro
R						p
RIDG						Tra
E-		Inact	Jun		Lion-	ns-
HINS	4933	ive	30,	Sep...	Regul	ferr
DALE	8	Mem	2020		ar	ed
-OAK		ber			[Dro	in
BRO					pped	Go
OK]	od

Close

15 Clique "Próximo"

The screenshot shows the same web application interface as in step 14, but with a blue circle highlighting the "Next" button at the bottom right of the modal window. The "Existing Memberships" table is still visible, and the "Close" button is also present.

Existing Memberships
1 of 1 item • 1 item selected

C	C	M	L	Dr...	M	D
BUR						Dro
R						p
RIDG						Tra
E-		Inact	Jun		Lion-	ns-
HINS	4933	ive	30,	Sep...	Regul	ferr
DALE	8	Mem	2020		ar	ed
-OAK		ber			[Dro	in
BRO					pped	Go
OK]	od

Next

Close

1

Digite a "Data de Início da Afiliação", selecione a opção "Tipo de Afiliação", "Categoria de Afiliação" e clique "Próximo".

Home Manage Club Members More ▾

Account Example Club For Training

* Membership Start Date Sep 10, 2024

* Membership Category Active

* Membership Type Regular Member

Next

Close

Account Name Example Club For Training

Account ID 00158 Type Lions Club

Active Member Count 60

Club Specialty Cultural

Club Sub-Specialty

Details Data Export

Follow

Manage Club Members

Manage Club Officers

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Uma mensagem verde de "Sucesso!" será exibida. Clique no ícone "X" para fechar a mensagem.

Lion Po

Success! Membership Record Created!

Search

Home Membership ▾ Service ▾ Learn More ▾

Account Example Club For Training

Follow

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

Details Data Export Club Statements Club Service Activities More

Account Name Example Club For Training Type Lions Club

Account ID 00158 Type Lions Club

Active Member Count

Member ... Club Acti...

Manage Club Members

18 A guia "Detalhes do Clube" é exibida.

The screenshot shows the 'Club Details' page for 'Example Club For Training'. The top navigation bar includes 'Home', 'Membership', 'Service', 'Learn', and 'More'. The account name is 'Example Club For Training' with a '+ Follow' button. A table displays club information: Lion ID (200158), Type (Lions Club), Status (Active), Billing Address (124 Any Place, Naperville, Illinois 60565, United States), and Active Member Count (61). Below the table, the 'Details' tab is active, showing fields for Account Name (Example Club For Training), Parent Account (strict 1 J), Region or Zone (Zone 1), Type (Lions Club), Active Member Count (61), and Club Specialty (Cultural). On the right, there are buttons for 'Manage Club Members' and 'Manage Club Officers'.

19 Clique na "Página Inicial" para retornar à página inicial do portal.

The screenshot shows the Lion Portal home page. The top navigation bar includes 'Home', 'Membership', 'Service', 'Learn', and 'More'. The 'Home' button is highlighted with a red circle. The account name is 'Example Club For Training' with a '+ Follow' button. A table displays club information: Lion ID (200158), Type (Lions Club), Status (Active), Billing Address (124 Any Place, Naperville, Illinois 60565, United States), and Active Member Count (61). Below the table, the 'Club Details' tab is active, showing fields for Account Name (Example Club For Training), Parent Account, Type (Lions Club), and Active Member Count. On the right, there is a button for 'Manage Club Members'.

20 Isso conclui o Guia Rápido "Gerenciar Associados do Clube - Transferir um Associado".

