

Gerenciar associados do clube - Editar dados dos associados



Este guia é essencial para os Dirigentes de Clube, pois oferece um processo simples para atualizar as informações dos associados no Lion Portal. Ele descreve as permissões necessárias, instruções passo a passo para editar detalhes pessoais e de contato e ressalta dicas importantes, como o prazo limitado para alterar um patrocinador de afiliação. Ao utilizar este guia, os dirigentes de clube podem gerenciar com eficiência os dados dos associados, garantindo registros precisos e uma administração eficaz do clube.



Dica! Os detalhes dos associados podem ser atualizados a qualquer momento pelos Dirigentes do Clube que possuem permissão para gerenciar os associados. Os cargos dos dirigentes do clube são: Presidente de Clube, Secretário de Clube, Tesoureiro de Clube.

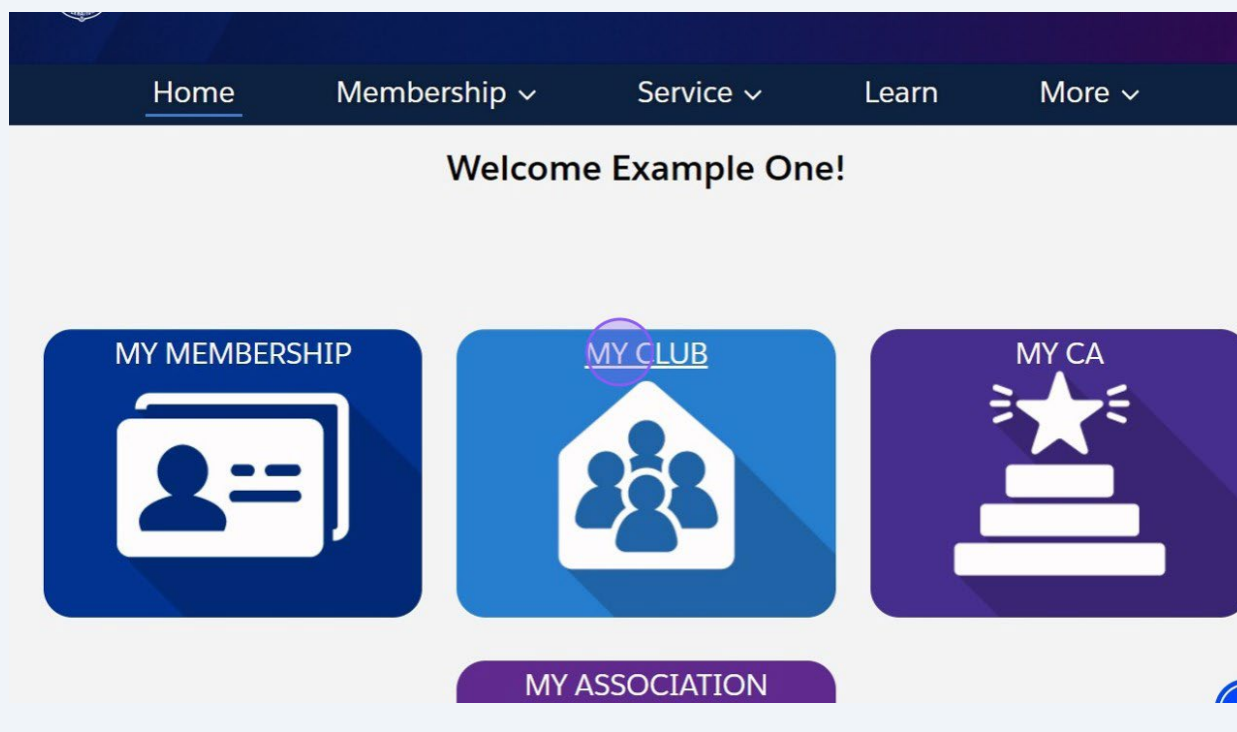
Os Administradores de Distrito e de Distrito Múltiplo podem editar os detalhes dos Associados dos clubes que fazem parte de sua estrutura. Nesse nível, primeiro selecione o clube a ser gerenciado.

1

Faça o login no Lion Portal. lionportal.org

2

Clique "MEU CLUBE"



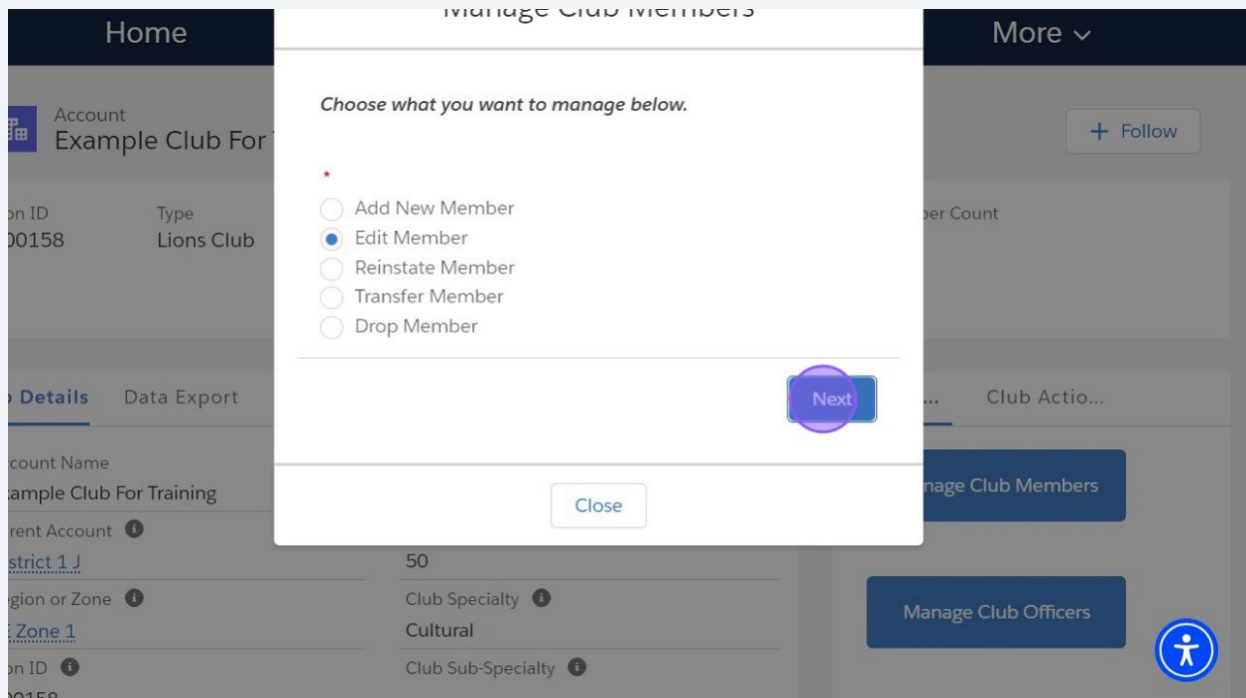
3 Clique "Gerenciar Associados do Clube"

The screenshot shows the top navigation bar with 'Home', 'Membership', 'Service', 'Learn', and 'More'. Below is the account header for 'Example Club For Training' with a '+ Follow' button. A table displays club details: Lion ID 200158, Type Lions Club, Status Active, Billing Address 124 Any Place, Naperville, Illinois 60565, United States, and Active Member Count 50. 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, Parent Account, Region or Zone, Lion ID, Type (Lions Club), Active Member Count (50), Club Specialty (Cultural), and Club Sub-Specialty. On the right, there are buttons for 'Manage Club Members' and 'Manage Club Officers', with the first button circled in purple.

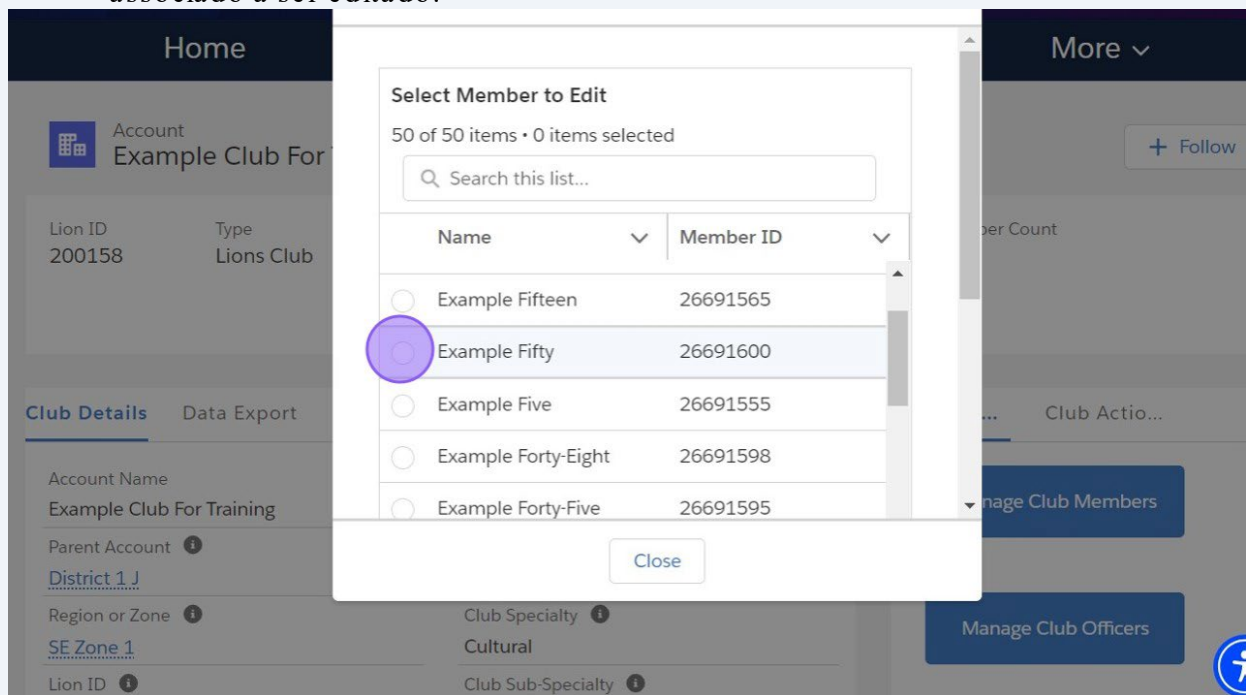
4 Este Guia Rápido mostra as funções de "Editar Associados"

The screenshot shows the 'Manage Club Members' modal window overlaid on the portal. The modal title is 'Manage Club Members' and it contains the instruction 'Choose what you want to manage below.' followed by a list of radio button options: 'Add New Member', 'Edit Member', 'Reinstate Member', 'Transfer Member', and 'Drop Member'. The 'Add New Member' option is selected and circled in purple. At the bottom of the modal are 'Next' and 'Close' buttons. The background shows the portal interface with the 'Manage Club Members' button from the previous screenshot also circled in purple.

5 Seleccione "Editar Asociado" e Clique "Avançar"

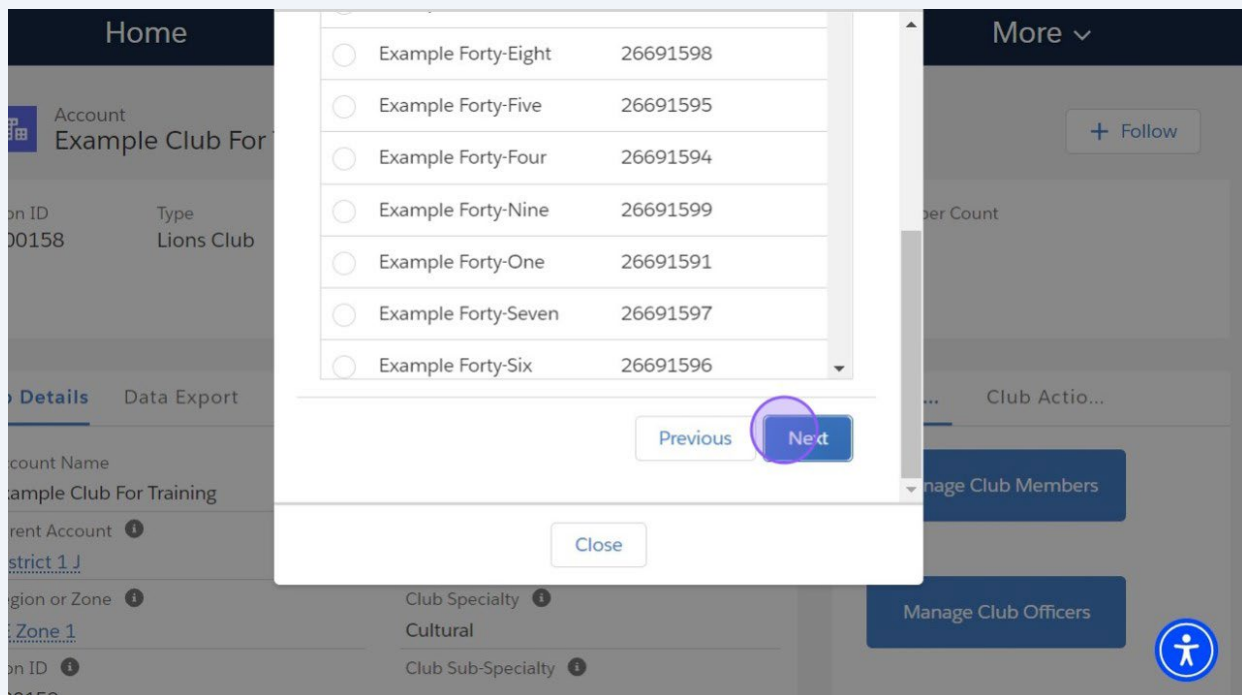


6 Percorra a lista ou busque pelo associado. Pesquisar pelo nome do associado (parte do nome ou ID de associado). Seleccione o botão de opção próximo ao associado a ser editado.



7

Clique "Próximo"



Dica! Editar Opções do Associado:

- Detalhes pessoais - Nome, gênero, ocupação, aniversário (atualização única), apelido, companheiro
- Detalhes de contato - números de telefone, e-mail
- Endereço - endereço postal do associado
- Tipo de Afiliação - altere os detalhes sobre o tipo/programa de afiliação
- Patrocinador da Afiliação - O patrocinador pode ser trocado nos primeiros 90 dias

8 Seleccione o botão de opção e clique "Avançar"

Home

Account
Example Club For Training

Lion ID 200158 Type Lions Club

Details Data Export

Account Name
Example Club For Training

Parent Account
District 1 J

Region or Zone
Zone 1

Lion ID 200158

Club Specialty
Cultural

Club Sub-Specialty

More ▾

+ Follow

Member Name:
Example Fifty

Member's ID: 26691600

Select the type of member information you want to edit:

- Personal Details
- Contact Details
- Address Details
- Membership Type
- Membership Sponsor

Next

Close

9 Clique cada campo para alterar os dados.

Lion Portal

Home

Account
Example Club For Training

Lion ID 200158 Type Lions Club

Club Details Data Export

Account Name
Example Club For Training

Parent Account
District 1 J

Search

More ▾

+ Follow

Member Count

Club Action...

Manage Club Members

Manage Club Officers

Manage Club Members

26691600

Address

Country
United States

Street

City
Naperville

State/Province
Illinois

Zip/Postal Code
60564

Close

10

quando concluir as atualizações, clique "Avançar"

Country
United States

Street
462 Elm St

City
Naperville

State/Province
Illinois

Zip/Postal Code
60564

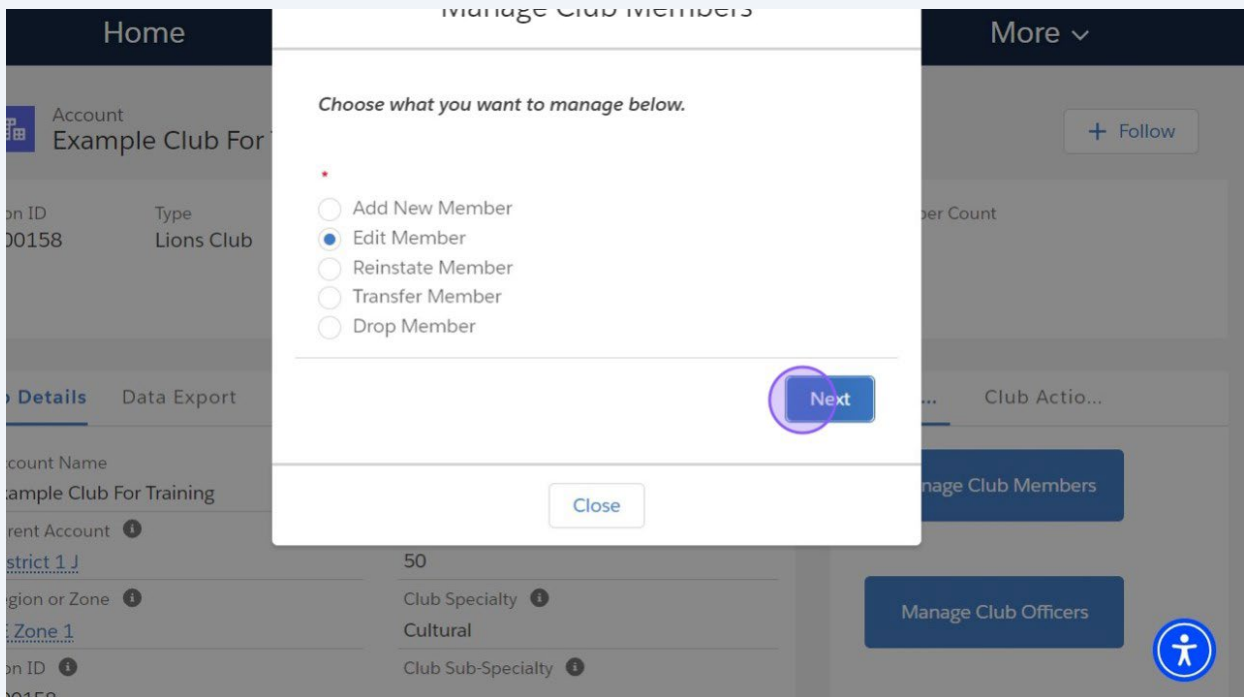
Previous Next Close



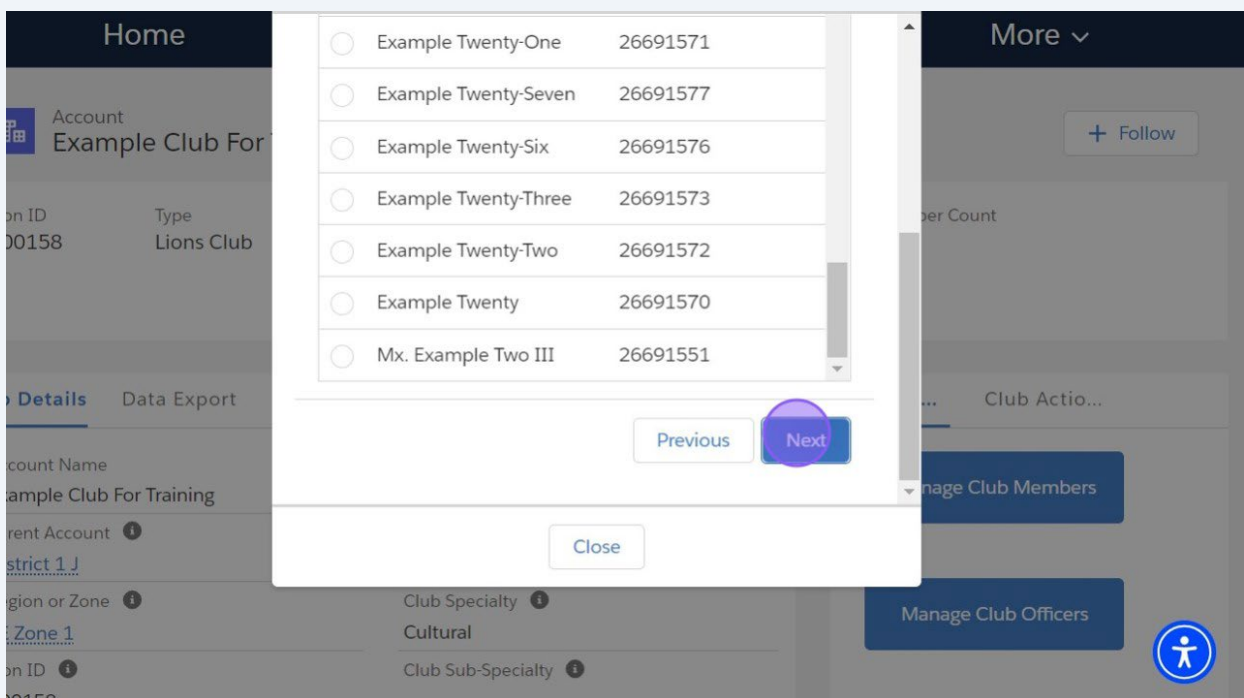
Dica! A próxima seção mostra os dados que podem ser editados:

- Editar associado
- Detalhes pessoais

11 Seleccione "Editar Asociado" e clique "Avançar"



12 Seleccione os Associados e clique "Avançar"



13 Selecione "Detalhes Pessoais" e clique "Avançar"

Home

Account
Example Club For

Member ID: 00158 Type: Lions Club

Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ

District 1 J

Region or Zone ⓘ Club Specialty ⓘ
Zone 1 Cultural

Member ID ⓘ Club Sub-Specialty ⓘ
00158

More ▾

+ Follow

Member Count

Club Actio...

Manage Club Members

Manage Club Officers

Next

Close

Member Name:
Example Fifty

Member's ID: 26691600

Select the type of member information you want to edit:

- Personal Details
- Contact Details
- Address Details
- Membership Type
- Membership Sponsor

14 Clique nos campos de dados que deseja modificar e insira os novos dados

Lion Portal

Home

Account
Example Club For

Member ID: 00158 Type: Lions Club

Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ

District 1 J

Region or Zone ⓘ Club Specialty ⓘ
Zone 1 Cultural

Member ID ⓘ Club Sub-Specialty ⓘ
00158

More ▾

+ Follow

Member Count

Club Actio...

Manage Club Members

Manage Club Officers

Close

Member Name:
Example Fifty

Member's ID:
26691600

Salutation

First Name
Example

Middle Name
Member

Last Name

15 Clique nos campos de dados que deseja modificar e insira os novos dados

Home

Account
Example Club For Training

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

Lion ID 200158

Club Specialty
Cultural

Club Sub-Specialty

More ▾

+ Follow

Member Count

Club Actio...

Manage Club Members

Manage Club Officers

Gender
Male

Date of Birth
Oct 10, 2003

MMM d, yyyy

Occupation
Education/Training

Spouse Name
Companion Fifty

Previous Next

Close

16 Selecione "Detalhes de Contato" e clique "Avançar"

Home

Account
Example Club For Training

on ID 200158 Type Lions Club

Details Data Export

Account Name
Example Club For Training

Parent Account
District 1 J

Region or Zone
Zone 1

on ID 200158

Club Specialty
Cultural

Club Sub-Specialty

More ▾

+ Follow

Member Count

Club Actio...

Manage Club Members

Manage Club Officers

Member Name:
Example Fifty

Member's ID: 26691600

Select the type of member information you want to edit:

Personal Details

Contact Details

Address Details

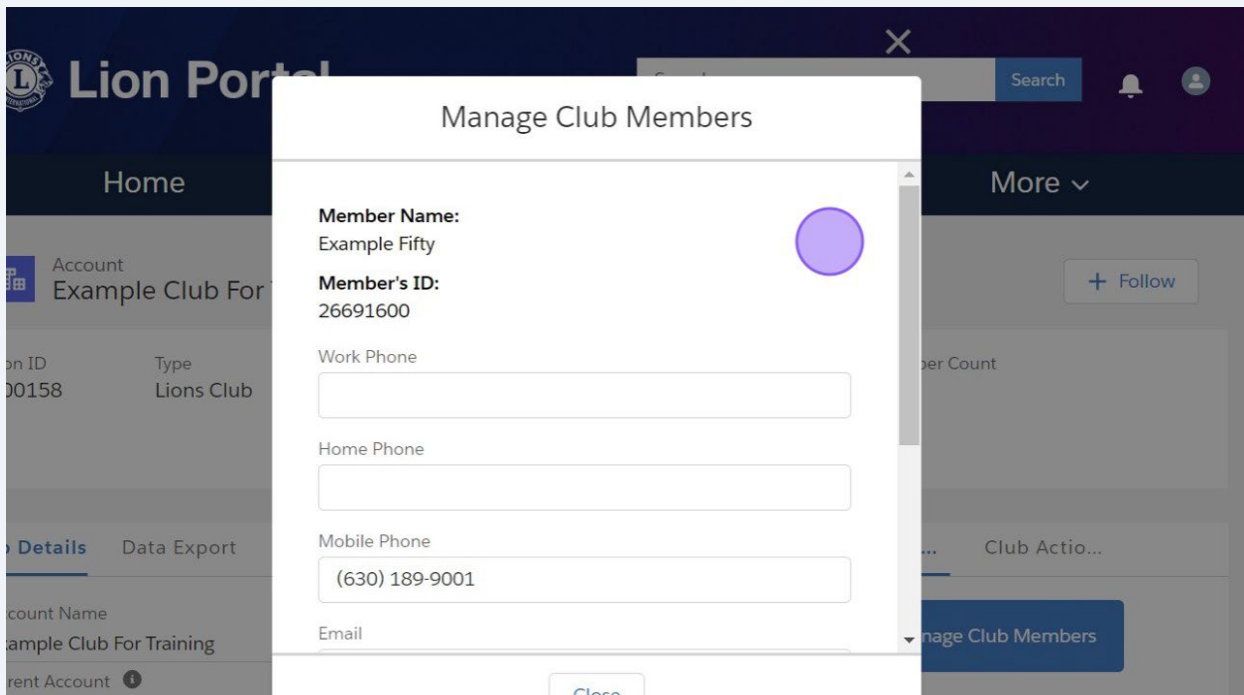
Membership Type

Membership Sponsor

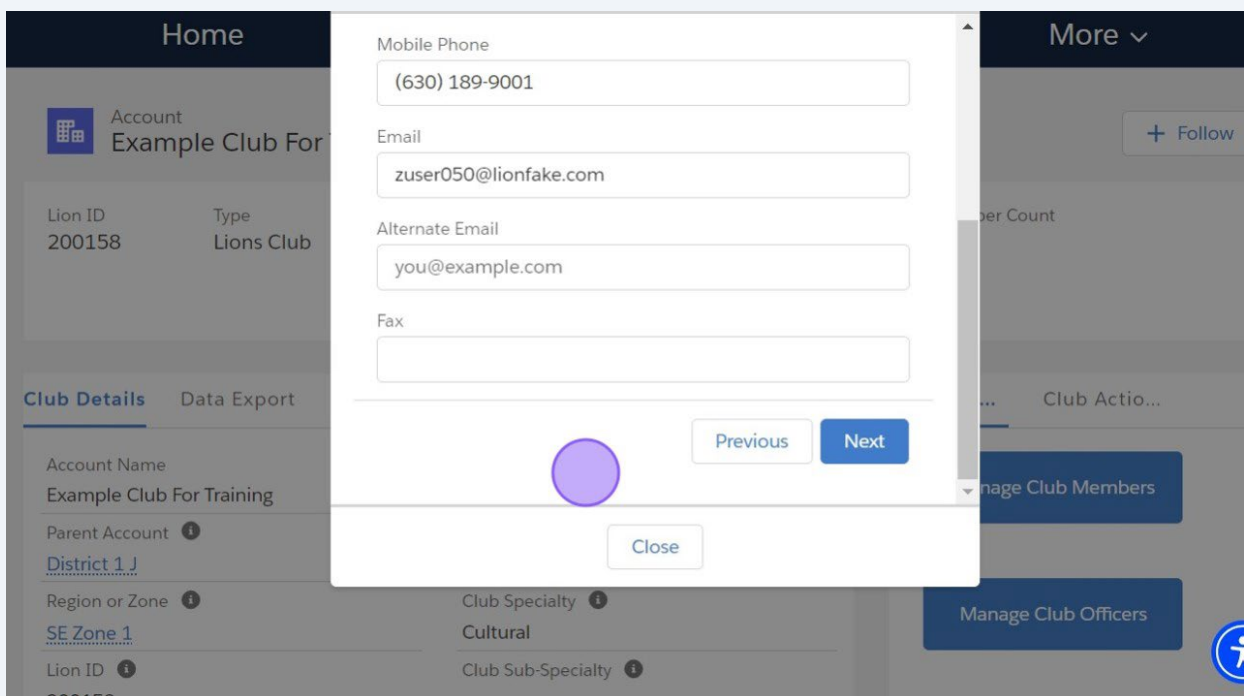
Next

Close

17 Clique nos campos de dados que deseja modificar e insira os novos dados



18 Clique nos campos de dados que deseja modificar e insira os novos dados





Alerta! O Patrocinador do Associado só pode ser alterado durante os primeiros 90 dias de afiliação.

Para fazer correções no histórico, entre em contato com o Centro de Atendimento aos Associados para obter assistência.



Dica! Para obter etapas detalhadas de busca e selecionar o patrocinador, consulte o Guia Rápido "Gerenciar Associados do Clube - Adicionar um associado"

19

Selecione "Patrocinador da Afiliação" e Clique "Avançar"

The screenshot shows a mobile application interface with a modal dialog box open. The background is a member profile page for "Example Club For Training". The modal dialog has the following content:

- Member Name:** Example Fifty
- Member's ID:** 26691600
- Select the type of member information you want to edit:
- Personal Details
- Contact Details
- Address Details
- Membership Type
- Membership Sponsor

At the bottom of the modal, there is a "Next" button (highlighted with a purple circle) and a "Close" button. The background page shows fields for "Account Name", "Club Specialty" (Cultural), and "Club Sub-Specialty".

20 Clique "Fechar" para sair do fluxo "Editar Associado"

Home

More ▾

Account
Example Club For Training

Lion ID 200158 Type Lions Club

Member Name:
Example Fifty

Member's ID: 26691600

Select the type of member information you want to edit:

- Personal Details
- Contact Details
- Address Details
- Membership Type
- Membership Sponsor

Next

Close

Club Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
SE Zone 1

Lion ID ⓘ
200158

Club Specialty ⓘ
Cultural

Club Sub-Specialty ⓘ

+ Follow

Member Count

Club Actio...

Manage Club Members

Manage Club Officers

👤

21 Para retornar à página de destino, clique na "Página inicial"

Lion Portal

Search Search

Home Membership ▾ Service ▾ Learn More ▾

Account
Example Club For Training

+ Follow

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	50

Club Details Data Export Club Statements Club Service Activities More

Member ... Club Acti...

Account Name
Example Club For Training

Type ⓘ
Lions Club

Parent Account ⓘ

Active Member Count

Manage Club Members

