

Esta guía es esencial para cualquier persona que desee crear una Filial de Club a través del Lion Portal, ya que proporciona un proceso paso a paso que garantiza que se cumplan todos los requisitos necesarios. Destaca los papeles clave necesarios, como el Enlace y los Dirigentes de club de Filial, al tiempo que orienta a los usuarios a través del proceso de presentación y aprobación. Además, la guía describe cómo administrar y ver la Filial de club una vez que se crea, lo que la convierte en un recurso integral para la organización eficaz del club. Al seguir esta guía, los usuarios pueden navegar de manera eficiente para crear y gestionar su Filial de club, mejorando el alcance y el impacto de su club.

1 Iniciar sesión en el Lion Portal lionportal.org

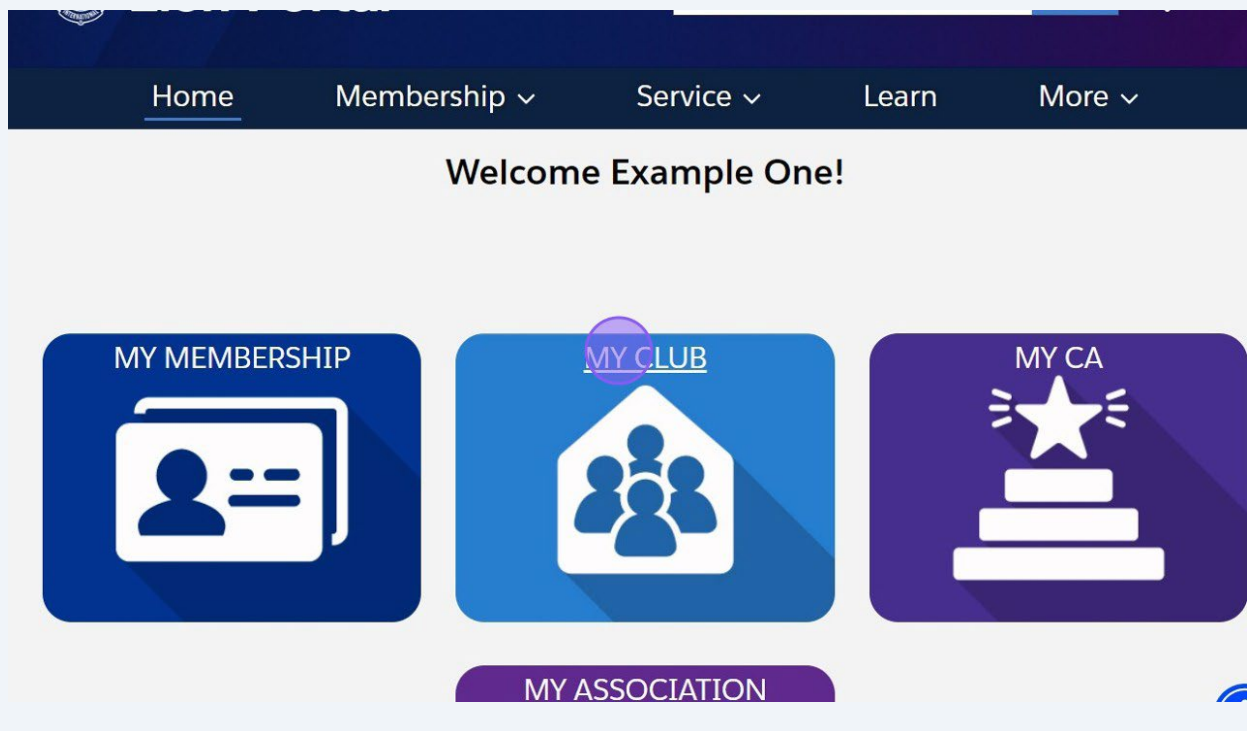


Consejo, esta guía explica cómo establecer una Filial de club. Para establecer un club filial:

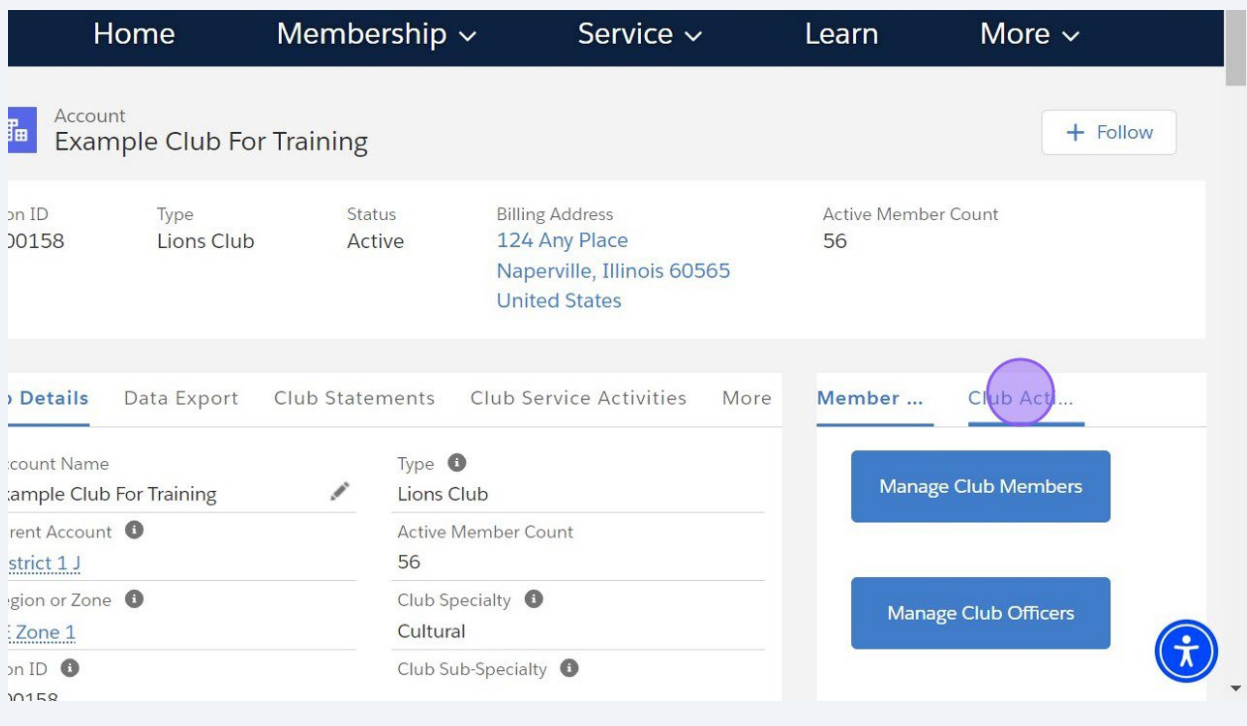
- Se requiere un mínimo de cinco (5) socios
- Debe asignarse un Enlace Filial que no sea socio de la Filial de club
- Los funcionarios del club filial, el presidente, el secretario y el tesorero deben estar asignados y ser socios del club filial.

Cuando LCI aprueba la Filial de club, pasa de "pendiente" a "activa"

2 Haga clic en "MI CLUB"



3 Haga clic en "Acciones del club"



Crear La Filial de club

4 Haga clic en "Crear Filial del club"

Account Name Example Club For Training	Type Lions Club
Parent Account District 1 J	Active Member Count 56
Region or Zone SE Zone 1	Club Specialty Cultural
Lion ID 200158	Club Sub-Specialty
Youth Programs	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 Introduzca la información sobre la Filial de club. Los campos con un "*" rojo son obligatorios.

United States

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 Continúe desplazándose por el formulario, agregando datos.

The screenshot shows a web application interface with a modal window titled "Create Club Branch". The modal contains the following sections:

- Please enter New Club Branch Details.**
 - * Branch Name:** Text input field containing "Example Club Branch".
 - Branch Specialty:** Dropdown menu with "Life-Stage/Experience" selected.
 - Branch Sub-Specialty:** Dropdown menu with "-- none selected --" selected.
- Club Branch Meeting Information (Optional)**
 - Meeting Street:** Text input field.
 - Meeting City:** Text input field.
 - Meeting Zip Code:** Text input field.
 - Meeting State/Prov:** Text input field.
 - Meeting Country:** Text input field.
 - Meeting Place:** Text input field.

A purple circle highlights the vertical scrollbar on the right side of the modal window.

7 Cuando se complete la introducción de datos, haga clic en "Next" (Siguiente) para continuar.

The screenshot shows the same "Create Club Branch" modal window, but with more data entered and the "Next" button highlighted with a purple circle.

- Meeting Country:** Text input field.
- Meeting Place:** Text input field containing "Community House".
- Meeting Week of the Month:** List box with options: First, Second (highlighted), Third, Fourth, Fifth.
- Meeting Local Place:** Text input field.
- Meeting Day:** Dropdown menu with "Tuesday" selected.
- Meeting Time:** Dropdown menu with "11:30" selected.
- Online Meeting:** Unchecked checkbox.

A purple circle highlights the "Next" button at the bottom right of the modal window.



Consejo En este paso se añaden los Dirigentes y el Enlace. Se mostrará una lista de los socios en cada cargo. Seleccione el socio haciendo clic en el nombre.

8

Seleccionar el Enlace

United States

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--

Details Data Export

Account Name
Sample Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
Zone 1

Location ID ⓘ
00158

Membership Programs ⓘ

Club Details
Description

Membership Cards

Get Delegate

Confirmation Letter

View Reports

Create Club Branch

9 Seleccionar al Presidente

The screenshot shows a 'Create Club Branch' dialog box overlaid on a club details page. The dialog has two main sections: 'Assign a Branch Liaison Officer to the Primary Club' and 'Assign Club Branch Officers'. In the first section, 'Example Eight' is selected for the Branch Liaison. In the second section, 'Example Forty-Four' is selected for the Branch President, which is highlighted with a purple circle. Other options for Branch Secretary and Branch Treasurer are set to '--None--'. The background page shows club details like 'Sample Club For Training' and various action buttons like 'Membership Cards', 'Get Delegate', 'Confirmation Letter', 'View Reports', 'Create Club Branch', and 'Create New Application'.

10 Seleccionar el Secretario

This screenshot is similar to the previous one, showing the 'Create Club Branch' dialog box. In this step, 'Example Forty-Five' is selected for the Branch Secretary, highlighted with a purple circle. The Branch President remains 'Example Forty-Four', and the Branch Liaison is still 'Example Eight'. The Branch Treasurer remains '--None--'. The background page is the same as in the previous screenshot, showing the club details and various action buttons.

11 Seleccionar el Tesorero

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

* Branch Liaison
Example Eight

Assign Club Branch Officers

* Branch President
Example Forty-Four

* Branch Secretary
Example Forty-Five

* Branch Treasurer
Example Forty-Six

Previous Continue

Membership Cards

Get Delegate

Confirmation Letter

View Reports

Create Club Branch

Create New Application

Edit Club Details

12 Haga clic en "Continuar"

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

* Branch Liaison
Example Eight

Assign Club Branch Officers

* Branch President
Example Forty-Four

* Branch Secretary
Example Forty-Five

* Branch Treasurer
Example Forty-Six

Previous Continue

Membership Cards

Get Delegate

Confirmation Letter

View Reports

Create Club Branch

Create New Application

Edit Club Details

13 Seleccionar el cuarto socio de la Filial de club

United States

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 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
--None--

* Would you like to add additional Members?
 Yes
 No

Previous Next

14 Seleccionar el quinto socio de la Filial de 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

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
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

15 Se pueden añadir socios adicionales seleccionando el botón de radio "Sí"

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 Haga clic en "Siguiete" cuando se hayan añadido todos los socios Filiales de club.

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



Consejo Se mostrará un mensaje verde indicando que la Filial de club ha sido creada y enviada a la oficina internacional para su aprobación. Haga clic en el icono "X" para cerrar el mensaje.

Ver La Filial de club

17 Haga clic en "Más"

The screenshot displays a web interface for managing club branches. On the left, the 'Club Details' section includes fields for 'Description' and 'Website'. Below this, the 'Address' section is divided into 'Billing Address' and 'Shipping Address', both containing the text '24 Any Place, Naperville, Illinois 60565, United States'. The 'Meeting Location 1' section contains fields for 'Meeting Place' (with a dropdown arrow), 'Meeting Local Place' (containing 'टाउन सेंटर'), 'Meeting Week of Month' (with a dropdown arrow), and 'Meeting Local Street' (with a dropdown arrow). On the right, a sidebar contains three blue buttons: 'Create Club Branch', 'Create New Application', and 'Edit Club Details'. Below these buttons is a menu with three items: 'Club Me...', 'Club Offic...', and 'More' (highlighted with a purple circle). The 'More' menu is expanded, showing a dropdown for 'Active Members' with a search bar and a list of items. At the bottom of the sidebar, there is a blue circular icon with a white person silhouette.

18 Haga clic en "Clubes patrocinados"

The screenshot displays a user interface for club management. On the left, there is a 'Club Details' form with fields for 'Description', 'Website', 'Address', 'Billing Address', and 'Meeting Location 1'. The 'Meeting Location 1' section includes fields for 'Meeting Place', 'Meeting Local Place', 'Meeting Week of Month', and 'Meeting Local Street'. On the right, there are three blue buttons: 'Create New Application', 'Edit Club Details', and a partially visible 'Club Me...'. Below these buttons is a dropdown menu with the following items: 'Sponsored Clubs' (highlighted with a purple circle), 'Active Members' (with a sub-menu showing '56 of 56 items' and a search bar), and 'More'. At the bottom right, there is a blue circular icon with a white person silhouette.



Consejo En "Clubes patrocinados" se enumeran todos los tipos de patrocinios de su club. Esto incluye:

- Clubes Filiales
- Clubes Leo
- Solicitud de formación de nuevo club

19 Se muestra una lista de los clubes patrocinados. Haga clic en el botón de radio junto al club

Springfield, Illinois 60565
United States

Shipping Address
24 Any Place
Springfield, Illinois 60565
United States

Meeting Location 1

Meeting Place ⓘ Town Center	Meeting Local Place ⓘ टाउन सेंटर
Meeting Week of Month ⓘ 1st	Meeting Local Street ⓘ
Meeting Day ⓘ Monday	Meeting Local City ⓘ
Meeting Time ⓘ 7:00	Meeting Local Zip Code ⓘ
Meeting Street ⓘ 155 Town Road	Meeting Local State or Prov ⓘ IL
Meeting City ⓘ Springfield	Meeting Local Country ⓘ US


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

▼ Sponsored Clubs

1 of 1 item • 0 items selected

Search this list...

<input type="checkbox"/>	N ▼	T. ▼	S. ▼	Ch.
<input type="checkbox"/>	Example Club Branch	Club Branch	Pending Approval	

View 

20 Haga clic en "Ver" para ver los detalles.

Springfield, Illinois 60565
United States

Shipping Address
24 Any Place
Springfield, Illinois 60565
United States

Meeting Location 1

Meeting Place ⓘ Town Center	Meeting Local Place ⓘ टाउन सेंटर
Meeting Week of Month ⓘ 1st	Meeting Local Street ⓘ
Meeting Day ⓘ Monday	Meeting Local City ⓘ
Meeting Time ⓘ 7:00	Meeting Local Zip Code ⓘ
Meeting Street ⓘ 155 Town Road	Meeting Local State or Prov ⓘ IL
Meeting City ⓘ Springfield	Meeting Local Country ⓘ US


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

▼ Sponsored Clubs

1 of 1 item • 1 item selected

Search this list...

<input checked="" type="checkbox"/>	N ▼	T. ▼	S. ▼	Ch.
<input checked="" type="checkbox"/>	Example Club Branch	Club Branch	Pending Approval	

View 

21 Se muestra la página del club patrocinado seleccionado.

Nota: el "estado" es "pendiente de aprobación". Cuando se apruebe, el "estado" será "activo"

Account Example Club Branch + Follow

Lion ID	Type	Status	Billing Address
200164	Club Branch	Pending Approval	

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 Haga clic en "Ver todo" para ver una lista más grande de los socios

Meeting Location 1

Meeting Place	Community House	Meeting Local Place	
Meeting Week of Month		Meeting Local Street	
Meeting Day		Meeting Local City	
Meeting Time		Meeting Local Zip Code	
Meeting Street		Meeting Local State or Prov	
Meeting City		Meeting Local Country	
Meeting State or Prov		Online Meeting 1	

Example Forty-Seven	Regular	lionfa.ke.co	167-78
Example Forty-Four	Regular	lionfa.ke.co	134-45

[View All](#)

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



Consejo Cuando un socio de su club es asignado a la Filial de club, su "tipo de Afiliación" mostrará "Filial" en su "tipo de Aumento de Afiliación".

2

Se muestra la lista de socios del club asignados a la Filial de club. Haga clic en el enlace para volver a la página de Filial de club.

The screenshot shows the Lion Portal interface. At the top, there is a dark blue header with the Lion Portal logo and name on the left, a search bar in the center, and notification and user icons on the right. Below the header is a navigation menu with links for Home, Membership, Service, Learn, and More. The main content area displays the breadcrumb path "Accounts > Example Club Branch" and the title "Club Branch Members". Below the title, it indicates "5 items · Updated a few seconds ago" and provides options for settings, refresh, and filter. A table lists the members with columns for Contact Full Name, Membership, Start Date, Email, Membership Type, Membership Number, and a dropdown menu. A purple circle highlights the "Example Club Branch" breadcrumb link.

	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 Haga clic en "Dirigentes de club"

Home Membership ▾ Service ▾ Learn More ▾

Account Example Club Branch + Follow

Branch ID	Type	Status	Billing Address
00164	Club Branch	Pending Approval	

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 Sub-Specialty ⓘ
Branch ID ⓘ	Specialty Description ⓘ
00164	
Auth Programs ⓘ	

Club Acti...

[Edit Club Branch](#)

Club Me... Club Offi...

▼ Active Members

Active Members

5 of 5 items

25 Ahora se muestran los dirigentes "activos" y "pasados". Desplácese hacia abajo hasta "Ver todo".

Branch ID	Type	Status	Billing Address
00164	Club Branch	Pending Approval	

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 Sub-Specialty ⓘ
Branch ID ⓘ	Specialty Description ⓘ
00164	
Auth Programs ⓘ	

Club Mem... Club Offi...

▼ Active Officers

Active Officers

4 of 4 items

Search this list...

Exam	Bran	zuser	
ple	ch	044	(630)
Forty-	Presi	@lio	134-
Four	dent	nfake	4555
		.com	
Exam	Bran	zuser	
ple	ch	045	(630)
Forty-	Secre	@lio	145-
Five	tary	nfake	5666

26 Haga clic en "Ver todo" para ver una lista más grande de dirigentes.

Meeting Week of Month ⓘ

Meeting Day ⓘ

Meeting Time ⓘ

Meeting Street ⓘ

Meeting City ⓘ

Meeting State or Prov ⓘ

Meeting Zip Code ⓘ

Meeting Country ⓘ

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 Location 2

Meeting 2 Place ⓘ

Meeting 2 Local Place ⓘ

Non-Active Officers

0 of 0 items

Search this list...

Na...	Title	End D...
No items to display.		

View All

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

27 Se muestra la lista de los dirigentes.

Haga clic en el enlace "OTA-#####" para ver los detalles de la "Asignación de títulos de oficina" (OTA).

Haga clic en el enlace de Nombre del club para volver a la página del club

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 ▾



¡Alerta! No se pueden realizar modificaciones en la Filial de club mientras esté en estado "Pendiente de aprobación". Si necesita hacer cambios, comuníquese con el Centro de Servicio al Socio.

28 Esta nueva Filial de club ha sido aprobada por LCI y ahora muestra el "estado" como activo

The screenshot shows a web application interface for a club branch. At the top, there is a dark blue navigation bar with the following items: Home, Membership (with a dropdown arrow), Service (with a dropdown arrow), Learn, and More (with a dropdown arrow). To the right of the navigation bar is a search bar with the text "Search" and a "Search" button, along with a notification bell icon and a user profile icon.

Below the navigation bar, there is a section for the club branch profile. It features a blue square icon with a white grid pattern, followed by the text "Account Example Club Branch" and a "+ Follow" button. Below this is a table with the following columns: Lion ID, Type, Status, and Billing Address. The data row shows: Lion ID 200164, Type Club Branch, Status Active (circled in purple), and Billing Address.

Below the table, there are two main sections: "Club Details" and "Club Acti...". The "Club Details" section is divided into two columns. The left column contains: Account Name (Example Club Branch with an edit icon), Parent Account (Example Club For Training with an info icon), and Region or Zone (with an info icon). The right column contains: Type (Club Branch with an info icon), Active Member Count (0), and Club Specialty (with an info icon). The "Club Acti..." section contains a blue "Edit Club Branch" button. Below this, there are tabs for "Club Me..." and "Club Offic...", and a dropdown menu for "Active Members".

29 Haga clic en "Editar Filial del club" para ver las acciones disponibles.

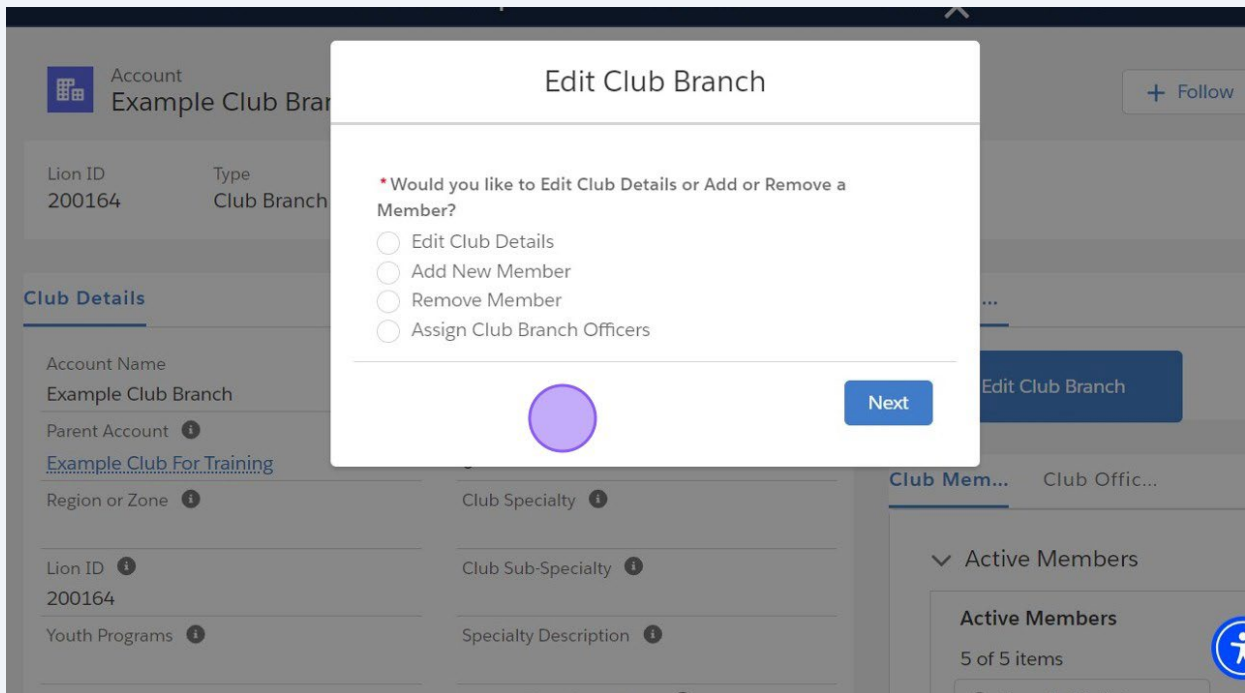
The screenshot displays a user interface for a club branch account. At the top, there is a header for 'Account Example Club Branch' with a '+ Follow' button. Below this is a table with columns for 'Branch ID', 'Type', 'Status', and 'Billing Address'. The first row shows '00164', 'Club Branch', and 'Active'. The main content area is divided into two sections: 'Details' on the left and 'Club Acti...' on the right. The 'Details' section contains several input fields for 'Account Name', 'Parent Account', 'Region or Zone', 'Branch ID', and 'Enrollment Programs', along with corresponding labels like 'Type', 'Active Member Count', 'Club Specialty', 'Club Sub-Specialty', and 'Specialty Description'. The 'Club Acti...' section features a prominent blue button labeled 'Edit Club Branch' which is circled in purple. Below this, there are tabs for 'Club Me...' and 'Club Offic...', and a section for 'Active Members' showing '5 of 5 items' and a person icon.



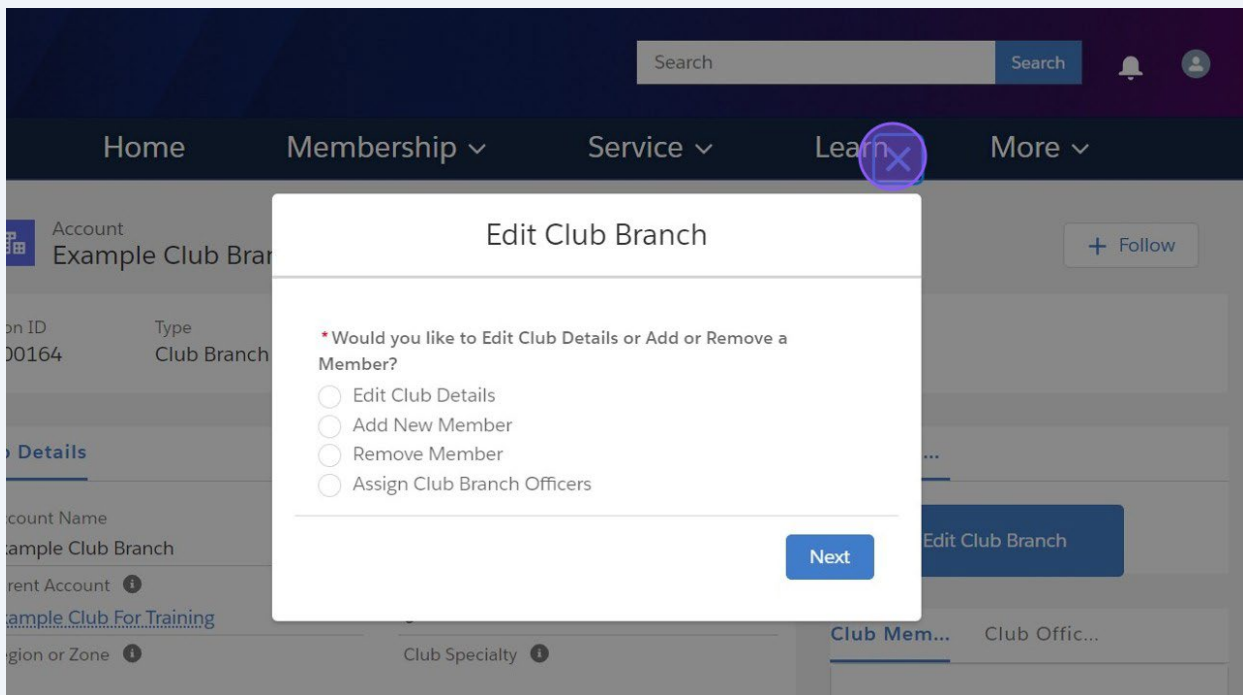
¡Alerta! Para ser añadido a la nómina de Filiales de club, la persona debe ser socio del club. Añadir a la persona al Club patrocinador (Club matriz) utilizando el proceso "Añadir socio". El nuevo socio estará entonces disponible para la lista "Editar Filial de club - Añadir nuevo socio".

30 Estas son las acciones disponibles:

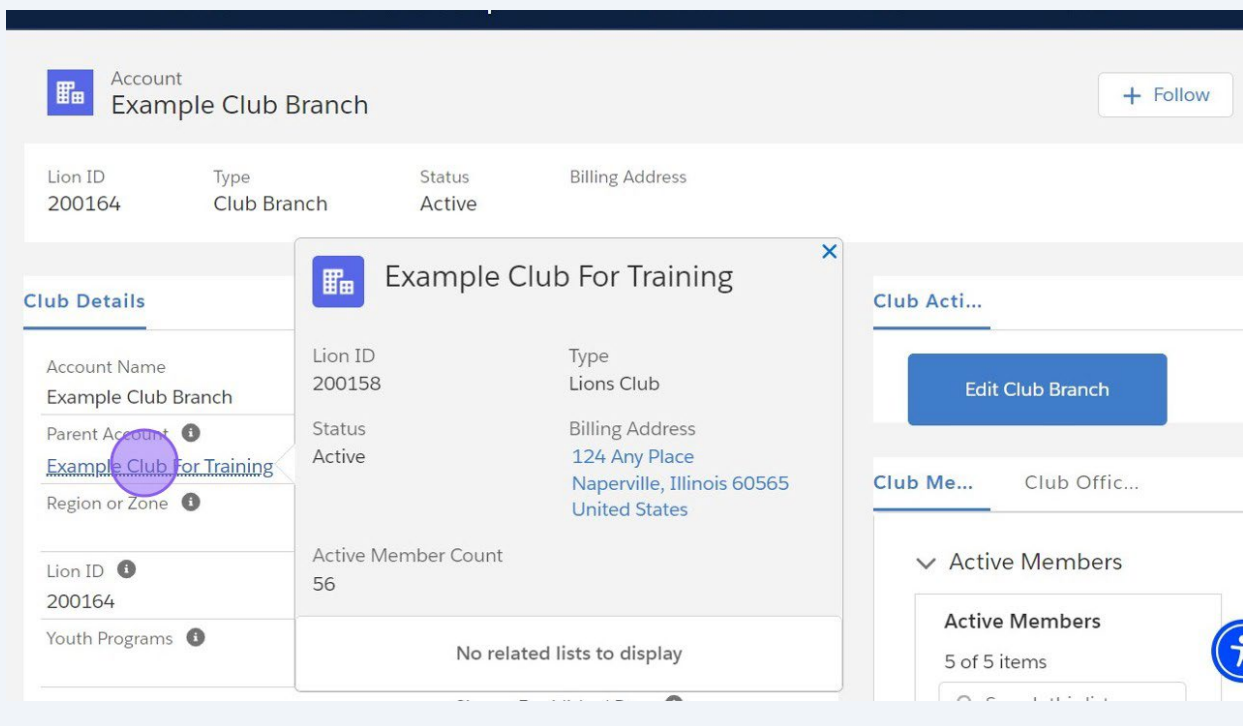
- Editar los detalles del club
- Ingresar a nuevos socios
- Eliminar socio
- Asignar dirigentes a la filial de club



31 Haga clic en el icono "X" para cerrar esta ventana



32 Vuelva a la página de Club patrocinador haciendo clic en el enlace bajo "Cuenta matriz"



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

The screenshot shows a web application interface. At the top, there is a search bar with the text "Search" and a "Search" button. Below the search bar is a navigation menu with the following items: "Home" (highlighted with a purple circle), "Membership", "Service", "Learn", and "More". Below the navigation menu, there is a section for the 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 active, showing the following information:

Account Name	Type
Example Club For Training	Lions Club
Parent Account	Active Member Count
District 1 J	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 Esto concluye la guía rápida "Acciones del club - Crear Filial del club"

The screenshot shows a dashboard titled "Welcome Example One!". Below the title, there are four navigation buttons:

- MY MEMBERSHIP**: A blue button with a white icon of a person and a document.
- MY CLUB**: A blue button with a white icon of a house and three people.
- MY CA**: A purple button with a white icon of a star and a podium.
- MY ASSOCIATION**: A purple button with a white icon of the Lions Club logo.

At the bottom right, there is a purple circle and a blue icon of a person.