

# NAVIGATING THE LION PORTAL

This document contains step-by-step written instructions for an introduction to the Lions International new Salesforce Lion Portal.

**Created by District 2-E 2 - GLT Deb Cashen**  
*(With a little help from my Pal Rick Chvalovsky at LCI)*

*(After going through the Lion Portal Training please let me know how we could offer more information that will help you become familiar with this new service. This document will be available on the [www.lions2e2.org](http://www.lions2e2.org) website for sharing with other club members.)*

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# UPDATE CLUB DETAILS & VIEW CLUB REPORTS

**How To Edit the Club's Details** (Club Specialty, Club Website, and Meeting Location), please follow these steps:

- Login to the Lion Portal
- Select My Club
- Under Club Actions, Select **Edit Club Details** button
- Enter the needed information in the fields
- Select Next to Save the changes made

The screenshot shows the 'Club Details' page in the Lion Portal. The left sidebar contains tabs for 'Club Details', 'Data Export', 'Club Statements', 'Club Service Activities', and 'Club Financial Details'. The main content area is split into two columns. The left column contains fields for Account Name (COLLEYVILLE), Parent Account (District 2 E2), Region or Zone (6), Lion ID (41446), and Youth Programs. The right column contains fields for Type (Lions Club), Active Member Count (206), Club Specialty, Club Sub-Specialty, Specialty Description, Charter Established Date (6/1/1982), and Website (http://www.colleyvillelions.com/). Below these fields are expandable sections for 'Club Details' and 'Address'. On the right side, there is a 'Club Actions' panel with buttons for 'Get Membership Cards', 'Get Delegate Confirmation Letter', 'View Reports', 'Create Club Branch', 'Create New Application', and 'Edit Club Details'. Two red arrows point to the 'View Reports' and 'Edit Club Details' buttons.

**How to View Club Reports**, please follow these steps:

- Sign into the Lion Portal.
- Select **My Club**
  - Can also Search for a club by Name or ID to navigate to another club account page
- Select the **Club Actions** tab (on the right side of screen)
- Select the **View Reports** button (right side of screen)
- Select a Report from the drop-down menu (i.e., Club Roster, Club Officer Report)
- Select Submit to View the selected Report

*Note - All reports are PDF's by default. Some reports have an Excel Format option. Select the Excel Format check box if you want the report in an Excel Format.*

**Both actions are found under “Club Actions”**

# HOW TO UPDATE CLUB OFFICERS

**How To update the Club's Officers**, please follow these steps:

- Login to the Lion Portal
- Select My Club
- Under Member Actions, Select Manage Club Officers
- Select Create New Assignment, then Next
- Select Current or Upcoming Lion Year, then Next
- For Officer Type, select Officer

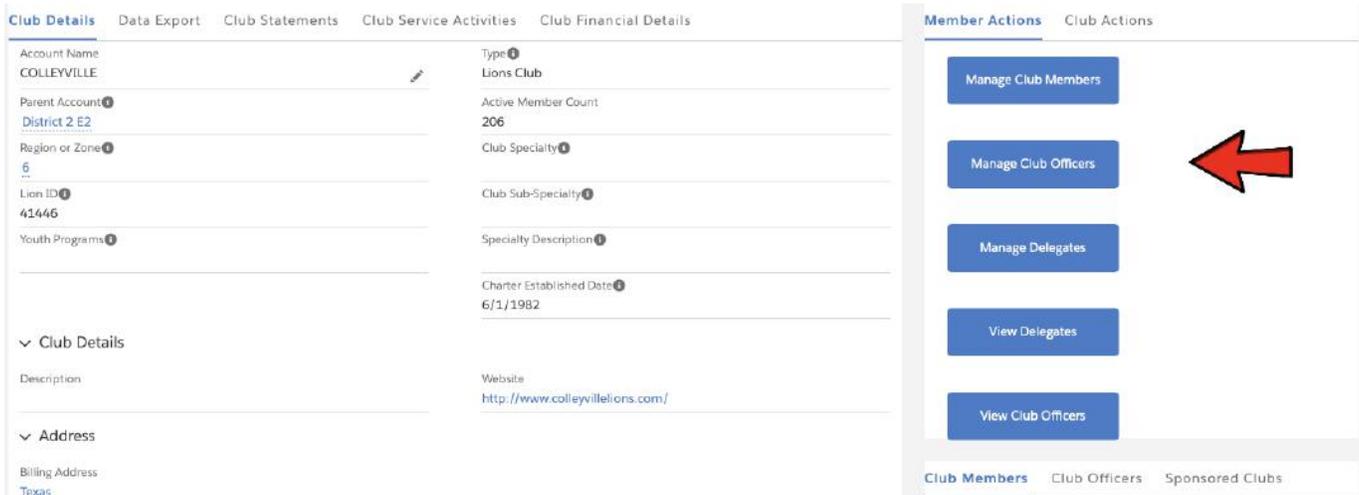
*Note - Select Administrator type to assign a Club Administrator*

- For Title Type, select Official, then Next

*Note - Select Local to create a Local title*

- Select an Officer Title from the drop-down menu and Select an Active Member to Assign the title too
- Select Next to complete the assignment

Repeat these steps to assign all the needed officers.



**PLEASE NOTE:** The only officers that will show up under the “Officer’s Report” are those that are entered as “Official” – A drop down menu will appear and you can choose from that list. If you choose “Local” those officers will show up under your “Club Officers” on the page above, but they will not show up on the report. The report is used by District Staff to create the directory, for Zone Chairs to keep their records, and for the District Communication that goes directly to the President, Secretary and Treasurer.

# HOW TO ADD, EDIT, TRANSFER OR DROP MEMBERS

**How To Add, Edit, Transfer or Drop a New Member to the Club**, please follow these steps:

- Login to the Lion Portal
- Select My Club
- Under Member Actions, Select Manage Club Members
- Select Add, Edit, Transfer or Delete a New Member, then Next
- Enter First Name, Last Name, Date of Birth, and Gender, then select Search

*Note - A Duplicate Contact may be found that matches the information entered. Select the Contact if it is the same as the contact being created. This prevents creating a new member record for previous members.*

- Enter the rest of the Contact information (Address, Email, Phone, etc.), then Next
- If Adding, Enter a New Membership Start Date and Membership Type, Select Next
- All other tasks – just check the box, Edit, Transfer, or Drop and follow the menus.

*Note - Start Date can only be within 3 months (Current month and back 2 months)*

- Search for Member Sponsor by Name or ID
  - Select Searched Sponsor, then Next
  - Select Next to confirm Sponsor

New Member has been successfully added.

The screenshot displays the Lion Portal interface. On the left, the 'Club Details' section is visible, showing information for 'COLLEYVILLE' Lions Club, including Parent Account (District 2 E2), Region or Zone (5), Lion ID (41446), and Charter Established Date (6/1/1982). On the right, the 'Member Actions' sidebar is shown, containing buttons for 'Manage Club Members', 'Manage Club Officers', 'Manage Delegates', 'View Delegates', and 'View Club Officers'. A red arrow points to the 'Manage Club Members' button. At the bottom of the sidebar, there are tabs for 'Club Members', 'Club Officers', and 'Sponsored Clubs'.

# HOW TO VIEW CLUB STATEMENTS

**How To View Statements**, please follow these steps:

- Login to the Lion Portal
- Select My Club
- Select the Club Statements tab
- Under the View Statements column, Select the PDF icon to view the given months statement

The Club Treasurer will have multiple options to Pay the Statement

- Pay with Paypal button
- Pay with Credit/Debit Card or eCheck button



The screenshot displays the Lion Portal interface. The top navigation bar includes 'Club Details', 'Data Export', 'Club Statements', 'Club Service Activities', and 'Club Financial Details'. The 'Club Details' section is active, showing information for 'COLLEYVILLE' (Type: Lions Club, Active Member Count: 206). The 'Member Actions' sidebar on the right contains buttons for 'Manage Club Members', 'Manage Club Officers', 'Manage Delegates', 'View Delegates', and 'View Club Officers'. At the bottom of the sidebar, there are tabs for 'Club Members', 'Club Officers', and 'Sponsored Clubs'.

**PLEASE NOTE:** There are multiple options to view your club statements.

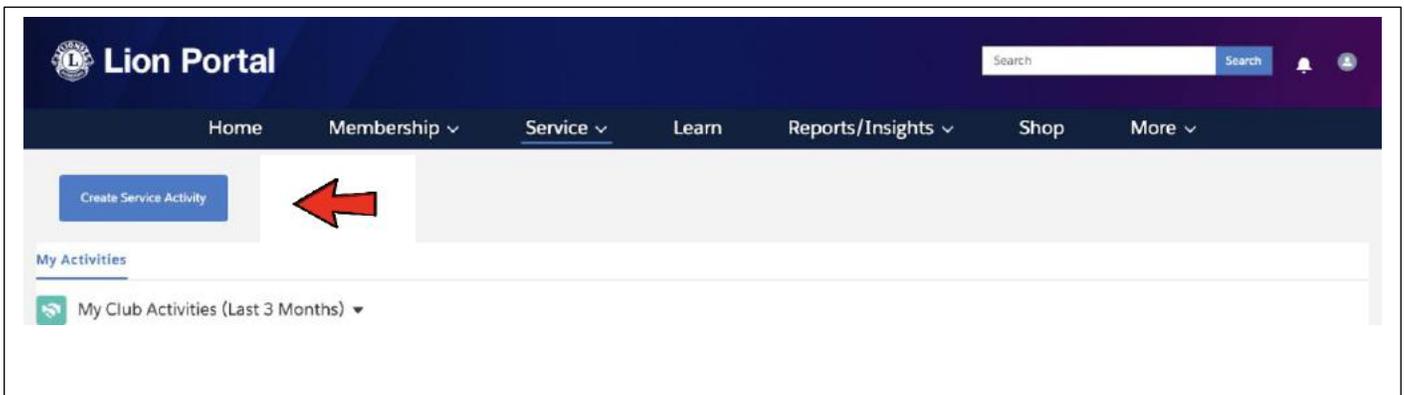
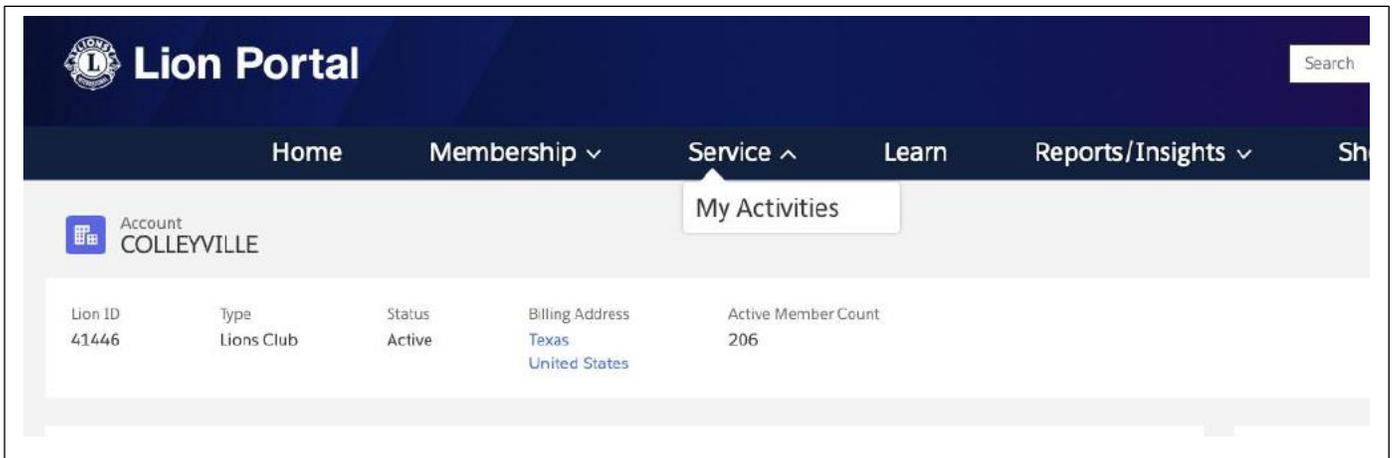
# CREATING SERVICE REPORTS

## How to Create/Report a Service Activity.

1. Log into the Lion Portal
2. Click **Service - My Activities** from the top menu.
3. Select **Create Service Activity** button
4. Select option from 'Select from my specific area' (Leo/Lion/District/Multiple District) OR Select 'Search for Club or District' (*not an option for all officers*)
5. Select Next
6. Enter the activity details.

## ENTER THE DETAILS OF THE SERVICE ACTIVITY:

- Enter a title for the Service Activity
- Select the Activity Type from the drop-down menu: (1) Donation (2) Fundraiser (3) Meeting (4) Service Project.
- Select **Next**
- Select **Edit** button [top-right] OR click the Pencil icon per field to add details.
- Enter the required fields.
- Select Report Complete check box if you are Reporting the Activity. Leave the check box blank if you are creating a Future Activity
- Click “**Save**” when done.

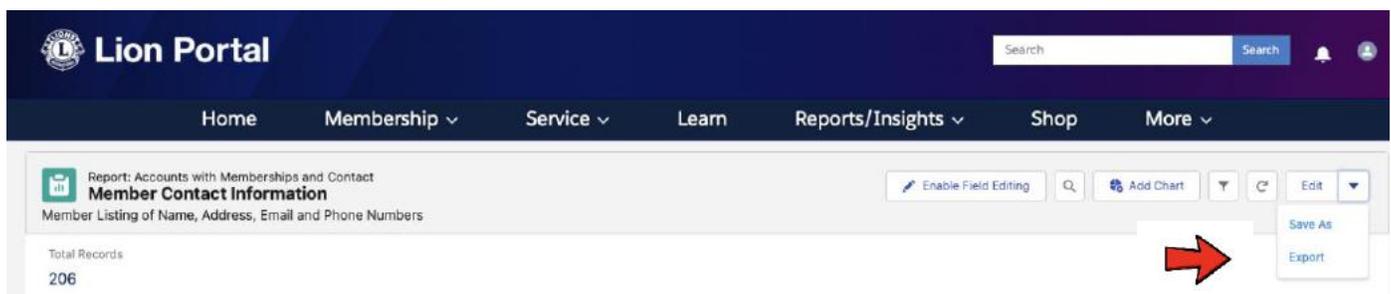
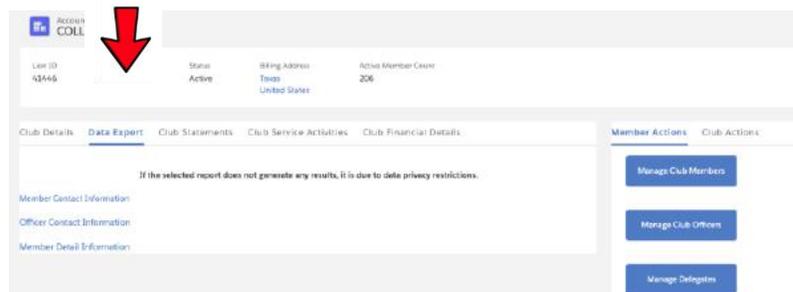


# HOW TO DATA EXPORT

## How To Download Club Data from Lion Portal

- Login to the Lion Portal
- Select My Club
- Select “Data Export”
- You have 3 choices:
  - Member Contact Information
  - Office Contact Information
  - Member Detail Information
- Select your choice, then Next
- In the far right menu, select “Edit” then “Export”
- You will see “Export View” – select “Excel Format.xlsx”, then Next
- Select “Export” – your download will go to your Downloads

This format will allow you to change the size of the cells to fit the information, choose which way to sort your data depending upon your needs, and save the date to your desktop. *Other choices do not give you the flexibility the Excel Format does, but don't hesitate to explore – you might prefer that format.*



# NAVIGATING THE LION PORTAL

Speaking from experience, this has been a sharp learning curve for me and for those who contacted me for some assistance. The Lions International Staff (particularly my pal Rick), have been extremely helpful and patient as we all make this transition.

*Be patient.* They are still working through some bugs. They are designing a working website for 1.4 million Lions working in 46,000 clubs located in more than 200 countries around the world. Did you know Lions information is published in 11 different languages.

Getting the Lion Portal up and functioning has been quite a challenge – and yet, we are Lions – Where there is a need, there is a Lion!

If you continue to have difficulty navigating the Lion Portal there is a help line on the Home Page of the Lion Portal.

The screenshot shows the Lion Portal home page with the following elements:

- Welcome to the Lion Portal**: A header section with a yellow underline.
- Text**: "We have taken the functionality of MyLion, MyLCI, Insights and other tools and combined them into one cohesive and consistent experience – the Lion Portal." and "These resources and FAQs will help make sure that you and your fellow Lions and Leos keep current on Lion Portal news."
- Navigation Buttons**: Three blue buttons labeled "Frequently Asked Questions", "Training Videos", and "Helpful Resources".
- Announcements**: A section with a yellow underline stating "There are no new announcements".
- DONATE**: A yellow button in the top right corner.
- QUICK LINKS**: A grey header for a list of links including "Lions Clubs International Convention", "Global Action Team", "Melvin Jones Fellowship", and "Lions Quest".
- Contact Members Services**: Text providing "Email: lionssupport@lionsclubs.org" and "Phone: (+001) 630-468-6900".
- Lion Support**: A blue button in the bottom right corner.

**You can also contact your local District 2-E2 Global Action Team Coordinators:**

Global Leadership Team Coordinator Deb Cashen – [colleyvilleliondeb@gmail.com](mailto:colleyvilleliondeb@gmail.com)  
Global Service Team Coordinator Deborah Cottle – [dcottle@temporah.com](mailto:dcottle@temporah.com)