# Lions Secretary Training Instructor 2025 Zoom

Lions Members Services – contact for help with Lions Portal

- 630-468-6900
- lionssupport@lionsclubs.org

Login screen: www.lionsclubs.org (select "Lions Portal")

Show access to

- Training Videos
    - Suggest clicking "video" button
    - See video length in lower right corner
    - Point out "Navigation improvements", "managing club officers", "managing club members", "creating and managing service activities" and "data export".
- Frequently asked Questions (Quick Guides).

Show 4 Tiles

Show navigation bar

- Home option
- More option

**My Club Tile**

- Explain
    - Club Details
    - Data Export – later demonstrate downloading member list
    - Club Service Activities
    - Club statements – treasurer?
    - New club applications
- Member actions
    - Manage club members
        - Edit, add, reinstate, transfer or drop members
        - Create new member "Test Member"
        - STOP before selecting sponsor
        - Family member (do not select "Waive discount")
    - View club officers

        - Current year, past years, future years
        - Note that club administrator is listed
    - Manage club officers
        - Ensure that you select the correct Lionistic year (Current or Upcoming)
        - Officer Type
            - Officer – used for all officers other than Administrator
            - Administrator – member will have same security as the secretary (this is a good option for most clubs).
        - Title Type
            - Official – used for standard Lions officers (President, secretary, etc). LCI uses "Official" titles for sending correspondence to the club.
            - Local – these can be used for "locally" created titles (example "Sunshine fund").
        - If you are changing an officer, you must "End" the assignment of the current officer before you add the new officer.
        - You can create an "officer" address that is different than the officer's home address. I have seen this used for the Treasurer since the Treasurer's address is used as the mailing address for the club.
    - Manage delegates
    - View delegates
- Club actions
    - Get membership cards
    - Get delegate confirmation letter
    - View reports (similar reports that were found in MyLCI)
    - Create Club Branch
    - Create New Application (new club)
    - Edit club details (meeting date, location, etc)
- Club members
    - Click "view all" to see additional information.
- Instructions to export list of members

- My Club … Data Export … Member Contact Information
- Click “Export”
- Select “Details Only”
- Select Format “Excel format .xlsx”
- Click “Export”
- Popup window appears with Downloads … Click “Open File”
- Click on “Enable Editing”
- Make appropriate Excel changes (delete columns of information that you do not need). Save the file to your computer.

**Service**

- Select Service … My Activities
- My Club Activities (last 3 months) – see drop down
- Notice naming structure – suggest include month and year
- Create service activity
  - Select your club
  - I normally enter activities when they are completed
  - Enter Activity name (include month and year) and activity type
  - Click on Edit button or Click on “pencil” to edit each piece of information
  - Some information is required and some is optional. This is based on the activity type.
  - Example “Road Cleanup April 2025”
  - Save the activity (see status)
  - Message “Service activity has been saved”
  - Edit service activity to set report complete
  - Create meeting activity
  - Copy function
  - Delete function
  - Images – add to service activity
    - Open service activity
    - Select “upload images”

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- Select images (either drag and drop or use “select” button and navigate to the selected images
- Select “Upload now”
- Select “image gallery” to view uploaded images