



WEB APP ASSESSMENT REPORT

Heritage Members Portal

New Build Assessment — custom member portal, CRM & automation

Intake Ref: **NLT-2026-63342** · Date: June 4, 2026 · Priority: **STANDARD**

Prepared by NeoLab Technologies — App Rescue Division
neolabtechnologies.us · info@neolabtechnologies.us

SAMPLE REPORT — demonstration document with fictional client data

CONFIDENTIAL — prepared exclusively for the client named above.
Preliminary assessment based on intake-form information; findings are confirmed during engagement.



1. Executive Summary

Heritage Community Association needs a member portal that replaces a patchwork of spreadsheets, group texts, and a static one-page site: member registration and dues, an events calendar with RSVPs, document distribution, and an admin dashboard for three staff members. You asked for something staff can run without a technician on call — that constraint, more than any feature, shapes our recommendation.

We recommend a custom-built portal on NeoLab-managed MoorFreeUs Server hosting: a focused application with exactly your workflows (not a bloated off-the-shelf CMS), integrated CRM for member records, and automation for dues reminders and event notifications. Discovery confirms scope; below is the preliminary shape and investment range.

Client	Angela Toussaint — Heritage Community Association (<i>fictional demo client</i>)
Project	Member portal: registration, dues, events/RSVP, documents, admin dashboard
Current status	NEW BUILD — today: spreadsheets + static site, no portal
Members	~450 members, 3 staff administrators
Recommendation	Custom web application + CRM + automation, NeoLab-managed hosting
Assessment priority	STANDARD

2. What You Told Us — Intake Summary

Captured from your submission on neolabtechnologies.us. Please reply with corrections — this is the basis of our plan.

Service requested	Custom web application + CRM + automation
Organization	Community association, ~450 members, 3 admin staff
Must-haves	Member accounts & directory, online dues payment, event calendar with RSVP, document library, admin dashboard
Nice-to-haves	Email announcements, member ID cards, attendance tracking
Current tools	Excel member list, group texts, static one-page website
Payments	Dues collected by check/cash today — wants online payment
Hosting preference	"Managed — we have no IT person"
Urgency	Flexible — wants it right, targeting next quarter
Budget indicated	\$2,500–\$5,000
Ongoing care	Yes — wants NeoLab to manage everything



3. Situation Assessment & Risk Analysis

Your needs sit in the gap between "too complex for a website builder" and "too small for enterprise member-management platforms" (which run \$200–\$600/mo forever and still wouldn't match your workflows). A focused custom build costs more up front but is owned outright, costs a fraction monthly, and does exactly what your staff needs — nothing they must be trained around. The main risks in projects like this are scope drift and payment-processor onboarding time; both are handled by a fixed discovery phase and starting Stripe verification early.

Risk	Severity	What it means	Our disposition
Scope drift	MEDIUM	Member portals attract "one more feature" requests that stall launch	Fixed scope after discovery; nice-to-haves staged as Phase 2
Data migration quality	MEDIUM	Years of member data in spreadsheets with inconsistencies	Cleanup & validated import included; you approve before go-live
Payment onboarding	LOW	Stripe nonprofit/association verification can take days	Account opened during discovery, in parallel
Staff adoption	LOW	3 admins with no IT background	Simple admin UI + training session + written guide
Platform lock-in	INFO	Off-the-shelf alternatives charge per-member fees indefinitely	You own this codebase outright

4. Preliminary Technical Read

Based on your description and our experience with this class of application. Confirmed during the audit phase of the engagement.

Area	Expected finding	We will verify
Architecture	PHP 8.3 + MySQL on managed cPanel hosting — proven, low-maintenance, no build pipeline	Final stack confirmed at discovery
Member CRM	Member records, statuses, dues history, directory with privacy controls	Field list from your spreadsheet
Payments	Stripe — dues (annual/monthly) + event fees, automatic receipts	Dues structure & amounts
Automation	Dues-reminder emails, event notifications, RSVP confirmations	Cadence & templates with staff
Admin dashboard	Member management, event creation, document upload, payment reports	Workflow walkthrough with your 3 admins



5. Recommended Plan

Phase	Work	Outcome
Phase 1 — Discovery	Workflow sessions with staff; data review; fixed spec & quote	Signed scope, no surprises
Phase 2 — Build	Portal, CRM, payments, automations; weekly preview links	Working app you watch take shape
Phase 3 — Migrate & train	Clean + import member data; staff training; written admin guide	Staff runs it confidently
Phase 4 — Launch & care	DNS, SSL, branded email; go-live; managed care begins	Live portal, fully managed

6. Recommended Package & Investment

Preliminary range based on your intake; the discovery phase converts this into a fixed quote you approve before build begins.

Item	Scope	Investment
Custom portal build	Member portal + admin dashboard as scoped above	\$2,500–\$3,800 (<i>fixed after discovery</i>)
CRM setup	Member records system, data cleanup & import	from \$497 (<i>included in range above</i>)
Automation workflows	Dues reminders, event & RSVP notifications	from \$297 (<i>included in range above</i>)
Managed hosting + email	MoorFreeUs Server, SSL, branded email for staff	from \$59/mo equivalent
Multi-Site Care (<i>recommended</i>)	Full management: monitoring, backups, updates, support	\$199/mo

Preliminary project range: \$2,500–\$3,800 one-time, within your indicated budget — plus managed care monthly. Fixed quote issued at end of discovery.

Pricing is preliminary and confirmed in a fixed written quote before any work begins. No payment is due until you approve the quote.

7. What Happens Next

1. Reply to confirm interest, or book the discovery call from the link in your email.
2. Send a copy of your member spreadsheet (any state — cleanup is our job) so discovery is concrete.
3. We deliver a fixed-scope spec and quote at the end of discovery; nothing is billed until you approve it.
4. Target timeline from approval to launch: 4–6 weeks, ahead of your next-quarter goal.



8. Assumptions & Scope Notes

- Estimate assumes the must-have list above; nice-to-haves are staged as a Phase 2 quote.
- Online payments via Stripe; processor fees (~2.9% + 30¢) are separate from NeoLab fees.
- Member data arrives in spreadsheet form; no migration from a legacy database system.
- This is a demonstration report — client, organization, and details are fictional.

This assessment was generated from your intake submission and reviewed by a NeoLab engineer. It is valid for 14 days. Questions? Reply to the email this report arrived with, or write info@neolabtechnologies.us.