Tech Stack & Architecture Overview

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Core Platforms

- **CRM & Help Desk:** Salesforce (SFDC) - includes case management for IT.
- **Phones:** RingCentral (note: potential consolidation to Teams).
- **File Server:** Egnyte - file storage and sharing.
- **Email & Identity Management:** Office 365 / Azure.
- **Databases:** Snowflake and AzureSQL.
- **Knowledgebase**: KnowledgeOwl (KO).
- **System Management:** Kaseya/Datto RMM.
- **Web Hosting:** WordPress hosted on GoDaddy.
- **Forms:** FormAssembly.
- **Marketing/Email:** Salesforce Marketing Cloud (SFMC).
- **Lead Generation & Firmographics:** Dun & Bradstreet (D&B) and ZoomInfo.
- **AI Platform**: Claude. ChatGPT and Gemini are used in special use cases.

Data Storage & Management

- **Snowflake:** Primary data warehouse; supports relational and embedded data, AI toolsets. Snowflake is used for staging and analytics.
- **Azure & SQL Server:** On-prem SQL Server is being phased out. AzureSQL is used for OLTP uses.

Automation, Integration, & Middleware & Orchestration

- **Jitterbit:** Preferred for high-volume data movement.
- **Automation Platforms:** n8n.
- **Custom APIs:** Used where needed for internal processes.
- **Salesforce-integrated Tools:** Adobe Sign for e-signature workflows; Conga for document generation and merging.

Monitoring, Security, & Compliance

- **Kaseya One:** RMM, antivirus, EDR, etc.

- **Azure:** Basic email security.
- **Avigilon:** Physical security (locks and cameras).
- **KnowBe4:** Cybersecurity training and phishing simulations.
- **ActivTrak:** Productivity monitoring.
- **VisualPing**: Used to monitor settlement and agency websites for changes.

Collaboration & Communication

- **Primary Tools:** Microsoft Teams and RingCentral (RingCentral under review for removal).
- **File Sharing:** Egnyte.
- **Sales Resource Center:** SharePoint site for internal/external sales document sharing.

Custom Development

- **CIR Process:** Jitterbit and SQL used to ingest company hierarchies from D&B into Salesforce.
- **FRSUP Web Scraper:** Scrapes agency websites for unclaimed property; integrates via Jitterbit and AzureSQL into Salesforce.
- **External Development Teams:** Provided by InfoBeans (Salesforce and Marketing Cloud).
- **AI Coding Platform:** To be determined.

Version Control & Deployment

- **Current Status:** Git.
- **Potential Tools:** IDEs to be determined.