

WorldVenture Technology Stack

Date: 2026-10-24. Version 1.6. Scope: current state.

Linked IDs

Type	ID
Leadership diagram	leadership.svg, leadership.pdf
Tech partner landscape	tech-partners.svg, tech-partners.pdf
Tech partner integration view	tech-integration.svg, tech-integration.pdf
Component model (source of truth)	stack-model.json
Generator	build_diagrams.py
Browser viewer	index.html
Plan and scoping record	PLAN.md
Source repos	ww-salesforce-custom, WorldVenture_SFDX, wegive/integration

1. Purpose

This document describes the WorldVenture technology stack from an application and data view. It serves two audiences. Section 3 is for leadership and the board. Section 4 is for technology partners. The diagrams show the current state only. Section 6 lists what the diagrams omit.

2. How to read the diagrams

- **Domains.** Six business domains group the applications: Finance, Fundraising (Partner Advancement), Global Initiatives, Global Workers, Paraclete (Member Care), and HR Ministries.
- **Enterprise / Shared.** A seventh group holds platforms and services that every domain uses.
- **Platform layer.** The bottom band shows the vendor platforms the applications run on.
- **Data stores.** Cylinders show where each kind of record lives and which system is the system of record.
- **Color.** Blue cards are custom-built. Amber cards are packaged software or SaaS.
- **Links.** Each packaged or SaaS card carries a link to the vendor site. Salesforce has no link. Links work in the SVG, HTML, and PDF files.
- **Arrows (integration view).** Solid arrows are integrations WorldVenture builds and operates. Dashed arrows are vendor-managed connectors or email delivery.

Component counts, current state:

Group	Custom-built	Packaged / SaaS
Finance	6	2

Group	Custom-built	Packaged / SaaS
Fundraising	1	5
Global Initiatives	3	2
Global Workers	1	2
Paraclete (Member Care)	0	1
HR Ministries	0	2
Enterprise / Shared	0	5
Total	11	19

3. Leadership view

3.1 Three systems of record

Three systems hold the records that matter most.

1. **Salesforce** holds every constituent: donors, churches, workers, leads, and cases. It also holds commitments and payments.
2. **Accounting Seed** holds the general ledger. It runs inside Salesforce as a packaged product. Every cash receipt, bank deposit, journal entry, and disbursement lives here.
3. **WeGive** holds online giving: donors who give online, recurring plans, transactions, and payouts. It also runs donor communications and donor journeys, and its native connector writes donors into Salesforce.

All other applications read from these three systems or write into them.

3.2 The donation-to-cash path

A donor gives on WeGive. A payment processor (Finix, Payrix, or Stripe) settles the gift and pays out to the bank. A custom integration on Microsoft Azure moves each gift into Salesforce as a cash receipt. Offline gifts take a second path. Finance staff process checks, EFT transfers, and remittance notices in Gift Groups, a custom app on Salesforce and Accounting Seed. These gifts come from individuals, churches, IRA QCD administrators, DAF administrators, employer match programs, and foundations. Gift Groups sends the payment batches to the Wells Fargo commercial bank portal for deposit. It moves each recurring plan into a commitment. It moves each processor payout into an Accounting Seed bank deposit. Finance closes the books in Accounting Seed. Statement applications read the cash receipts and send giving statements to donors each quarter and on demand.

3.3 Where custom software concentrates

Eleven of thirty components are custom-built. Ten of the eleven live in two places: the Salesforce platform and Microsoft Azure. The tenth, Catalyst, is an Excel workbook for major donor tracking. Custom software exists where WorldVenture's process is unique: offline gift processing (Gift Groups), expense reports and check requests (WVER), worker budgets, giving statements, the worker intranet (GMC), missionary candidate intake, worker support calculation, and the WeGive integration.

3.4 Packaged software covers the common ground

Fifteen components are packaged or SaaS. They cover accounting, online giving, payment processing, email marketing, donor screening, counseling records, payroll, training, board communications, and collaboration. Microsoft 365 provides email, Teams, SharePoint, OneDrive, Copilot, and identity through Entra ID.

3.5 Key messages for leadership

- The stack is a packaged core with custom software at the edges. The custom layer encodes WorldVenture's own processes.
- Salesforce is the hub. Most domains depend on it, so Salesforce changes have wide reach.
- The WeGive integration is the critical operational path. It moves money data every day and feeds the general ledger.
- Several SaaS tools have no system integration today: Paycor Payroll, TheraManager, Clip, BoardEffect, Slack. They run as islands.

4. Technology partner view

4.1 Finance

Component	Build	Hosting	Data
Accounting Seed	Packaged	Salesforce managed packages AcctSeed, AcctSeedERP	General ledger, cash receipts, bank deposits, journal entries, GLAV designations
Gift Groups	Custom	Salesforce + Accounting Seed	Offline donations: checks, EFT transfers, remittance notices from individuals, churches, IRA QCD and DAF administrators, employer match programs, foundations. Creates cash receipts and bank deposits.
Wells Fargo Commercial Bank Portal	SaaS	Vendor bank portal	Receives batches of offline payments for deposit. Salesforce holds WF Payment Manager records and reports.
WVER Expense Reports & Check Requests	Custom	Salesforce Angular SPA + Apex. Used by global workers and Finance.	Expense_Report__c, Expense_Line__c; posts Cash Disbursements and Journal Entries
Worker Budgets	Custom	Salesforce custom objects. Separate app from WVER. Used by global workers and Finance.	Financial_Budget__c, Financial_Budget_Lines__c
Quarterly Giving Statements	Custom	Salesforce Angular app + NestJS API in Docker, Postgres, Redis	Reads Cash Receipts by Apex REST
On-demand Donor	Custom	Azure Container Apps, Azure MySQL, Mailgun,	Reads Cash Receipts by Apex REST

Component	Build	Hosting	Data
Statements		Cloudflare Turnstile	
WeGive to Salesforce Integration	Custom	Azure Functions (Python 3.13, Premium EP1), Azure MySQL Flexible Server, Key Vault, App Insights	Staging tables wg_staging_*, watermarks, mappings

4.2 Fundraising (Partner Advancement)

Component	Build	Hosting	Data
<u>WeGive Donation Platform</u>	SaaS	Vendor, donate.worldventure.com	Online giving, recurring plans, donor portal, donor communications, donor journeys, payouts. Native Salesforce integration writes Accounts and Contacts.
<u>Finix, Payrix, Stripe</u>	SaaS	Vendor	Settlement and payouts behind WeGive. Stripe handles Apple Pay and Google Pay.
<u>Mailchimp + MC4SF</u>	SaaS	Vendor + Salesforce managed package MC4SF	Audiences sync hourly by the scheduled job "Mailchimp Hourly Sync"
<u>DonorSearch</u>	SaaS	Vendor portal	Ratings import into WV_CA_Profile__c. No API callout.
Catalyst	Custom	Excel	Major donor screening and tracking
worldventure.com	Packaged + custom plugin	<u>WordPress</u>	Pulls public ministry, project, and people records from Salesforce

4.3 Global Initiatives

Component	Build	Hosting	Data
Missionary Candidate Intake	Custom	WordPress CRM Perks (GoForm), Salesforce Apex	Lead, Quiz_Result__c
<u>ServiceReef</u>	SaaS	Vendor	Candidate-to-appointee process. No integration.
Candidate Pipeline	Custom	Salesforce custom objects, Apex, flows	Applications, references, interview answers, lead conversion
Worker Support & Transitions	Custom	Salesforce Apex and flows	Support configuration, compensation calculation, transitions, onboarding
<u>Google Forms, Sheets, and Docs</u>	SaaS	Google Workspace	Global worker periodic reporting. No integration.

4.4 Global Workers

Component	Build	Hosting	Data
Global Member Community (GMC)	Custom	Salesforce Experience Cloud, Angular apps, Visualforce	Worker statements, account balance, worker documents, household, emergency contacts
<u>Donor Elf</u>	SaaS	Vendor	Nightly read-only sync through a Salesforce connected app and a read-only integration user
<u>SharePoint Intranet</u>	Packaged	Microsoft 365	Intranet content and documents

4.5 Paraclete (Member Care)

Component	Build	Hosting	Data
<u>TheraManager</u>	SaaS	Vendor	Counseling and member care records. No integration.

4.6 HR Ministries

Component	Build	Hosting	Data
<u>Paycor Payroll</u>	SaaS	Vendor	Payroll. No integration.
<u>SharePoint HR Files</u>	Packaged	Microsoft 365	Personnel files and HR documents.

4.7 Enterprise / Shared

Component	Build	Notes
Salesforce Sales & Service Cloud	SaaS	Production org worldventure.my.salesforce.com. API version 51.0 in the custom repo.
<u>Microsoft 365</u>	SaaS	Exchange, Teams, SharePoint, OneDrive, Copilot. Entra ID identity.
<u>Slack</u>	SaaS	Technology partner communications
<u>Clip Training</u>	SaaS	Technology and compliance training
<u>BoardEffect</u>	SaaS	Board portal for the president's office

4.8 Integration patterns

Pattern	Where it applies
Polling with watermarks	Azure Functions pull WeGive payments, plans, and payouts on timers. MySQL stores the watermark per stream.
Webhooks	WeGive sends donor-created, plan-created, and capture events to Azure Functions for fraud checks.
REST upsert by external ID	Functions upsert Cash Receipts and Commitments by WeGive IDs. Bank deposits post through custom Apex REST.

Pattern	Where it applies
Vendor-managed connector	The WeGive native Salesforce connector writes Accounts and Contacts. MC4SF syncs Mailchimp.
Scheduled read-only extract	Donor Elf reads giving data nightly.
File import	DonorSearch ratings load by file.
Callback from Salesforce	Apex calls Azure Functions <code>VerifyPayout*</code> before bank deposit creation.

4.9 Well-architected notes

- **Operational excellence.** The Azure integration ships through GitHub Actions. Structured JSON logs carry a correlation ID per run. Grafana dashboards and Teams cards report pipeline health. Salesforce metadata deploys with the `sf` CLI.
- **Security.** Azure services use managed identity and `DefaultAzureCredential`. Secrets live in Key Vault. Salesforce integration users hold scoped permission sets. Donor Elf is read-only.
- **Reliability.** Single-flight blob leases prevent overlapping runs. Watermarks make polling idempotent. Payout verification runs a three-way check before a bank deposit posts.
- **Performance efficiency.** The integration stages data in MySQL and writes to Salesforce in batches. This keeps Salesforce API use predictable.
- **Cost optimization.** Production runs on a Premium EP1 plan. Dev runs on Flex Consumption. Most domains use SaaS with no custom hosting.

4.10 Platform layer

Platform	Role
Salesforce Platform	Apex, Experience Cloud, Visualforce, managed packages (AcctSeed, MC4SF, strovi, Rollup Helper, Duplicate Check, Conga, Spanning)
Microsoft Azure	Functions, Container Apps, MySQL Flexible Server, Key Vault, Storage, App Insights, Log Analytics, Azure OpenAI
Microsoft 365 / Entra ID	Identity, collaboration, documents
GitHub	Source control, CI/CD
Grafana Cloud	Dashboards and alerting through a private data connect agent

5. Data stores and systems of record

Store	System of record for	Technology
Salesforce CRM	Donors, churches, leads, cases, commitments, payments, worker profiles	Salesforce

Store	System of record for	Technology
Accounting Seed Ledger	GL, cash receipts, bank deposits, journal entries, GLAV designations	Salesforce managed package
WeGive	Online donors, recurring plans, transactions, payouts	Vendor SaaS
Azure MySQL (integration)	Sync staging, watermarks, donor and plan mapping, bank deposit prep	Azure MySQL Flexible Server
Statement databases	Statement jobs and PDFs	Postgres, Redis (quarterly); Azure MySQL (on-demand)
SharePoint / OneDrive	Documents and intranet content	Microsoft 365
Paycor	Payroll	Vendor SaaS
Mailchimp	Audiences and campaigns	Vendor SaaS

6. Not shown

The diagrams show the current state only. These items exist but do not appear.

- **Paycor HR.** Licensed by HR Ministries. Not implemented.
- **Project Apostolos.** The reimaged GMC on modern SharePoint. Future state. A dedicated diagram will cover it.
- **WVER successors.** An expense management tool will replace the expense report part of WVER. A move to Accounting Seed Accounts Payable will replace the check request part.
- **Rehosts in progress.** React versions of WVER, Fund Team, and Worker Household. An Azure rehost of quarterly statements, planned live Q4 2026.
- **Nonprofit Cloud.** Design only, in a sandbox.
- **Retired.** Partner Community (redirects to WeGive since 2026-08-07), BluePay, Skyvia ETL, the AWS statement generator.
- **AI case triage.** Azure OpenAI and Claude classify Salesforce cases inside the integration Function App.

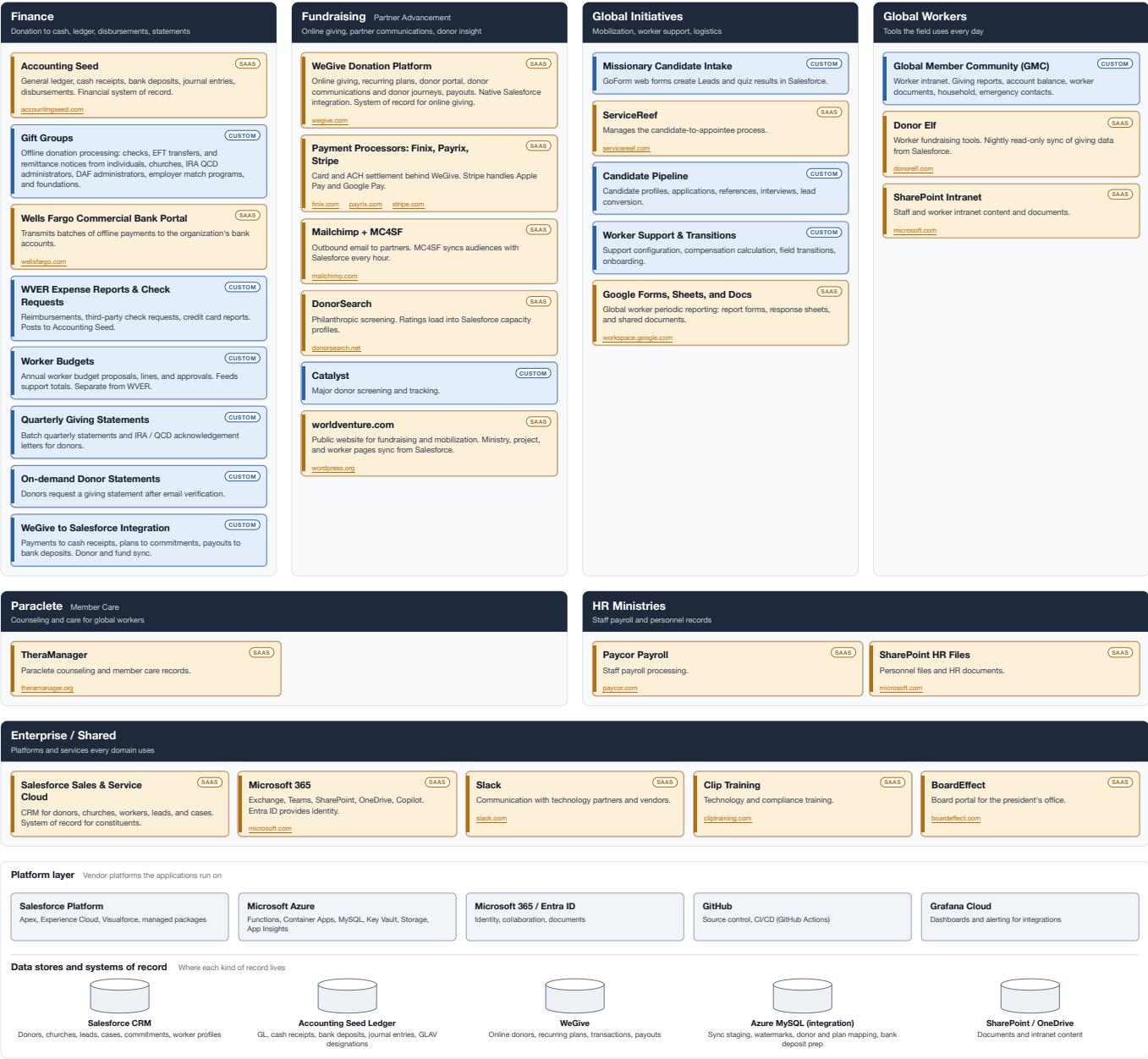
7. Maintenance

1. Edit `stack-model.json`. Add, remove, or change components, data stores, and flows.
2. Run `python3 build_diagrams.py`. It rewrites the three SVG files and `index.html`.
3. Open `index.html` in a browser and inspect.
4. Run `./export_pdf.sh` to refresh the PDF files.

WorldVenture Technology Stack

Leadership view - Current state. Applications and data, grouped by business domain.

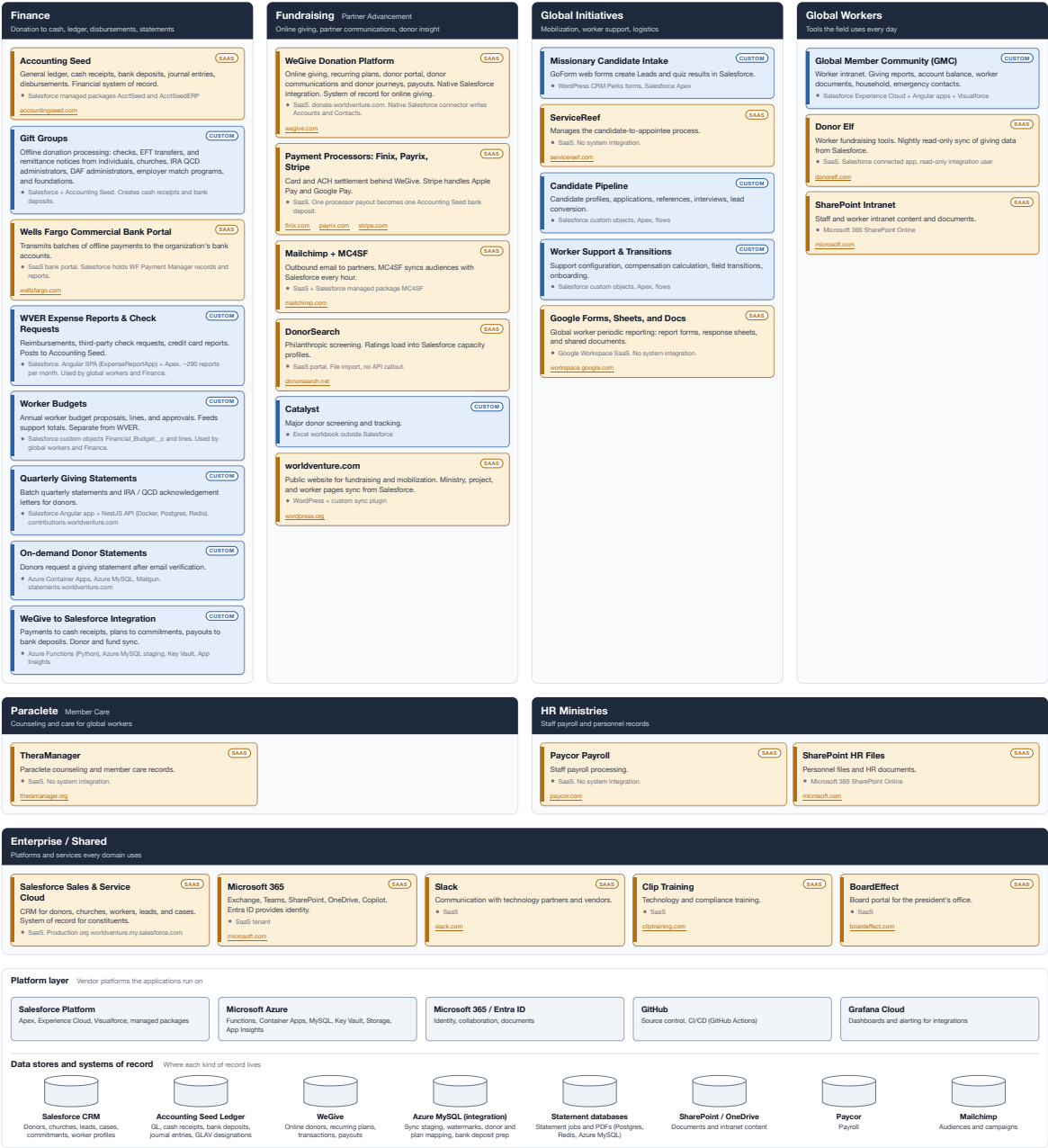
📦 Packaged / SaaS 🛠 Custom-built
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WorldVenture Technology Stack

Technology partner view - Current state. Applications and data, grouped by business domain.

 Packaged / SaaS  Custom-built
Version 1.6 - 2028-10-24



Technology partner view · How donations, data, and documents move between systems

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- WorldVenture Technology · Source: stack-model.json · Solid arrows: WorldVenture-managed integration. Dashed arrows: vendor-managed connector or email delivery.