SPRING POINT SOLUTIONS · TECH BLOG · ISSUE 02

Meet Beacon: Your Shop's AI Assistant, Built Into WebMB

What Beacon is, how it works, why your data is safe — and when it arrives.

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01 THE BIG PICTURE

The Way You Interact With Your ERP Is Changing

In May 2026, McKinsey published a paper titled "The End of ERP As We Know It: Five Ways AI Is Disrupting ERP". Their core finding was not about technology — it was about interaction. AI is not just changing how enterprise software is built. It is changing how you use it.

The prediction is specific: instead of navigating menus and running reports, users will ask questions and get answers. The software becomes invisible. The outcome stays.

Every major ERP vendor read that paper. Every one of them is now announcing an AI assistant.

The difference with Beacon is that we did not read the paper and then start building. Beacon was already under development when the paper came out. And it was built specifically for motor repair ERP — not adapted from a generic enterprise template. *"We were not quiet about AI because we were behind. We were quiet because we were working." — Troy D. Locke, Co-Founder | CEO, Spring Point — EASA 2026*

Where Beacon Is Going

The January 2027 launch is the starting point, not the destination.

The first release is focused on one thing: making your data accessible without a report or a phone call. Ask a question, get an answer, backed by your live shop data.

What comes after that is proactive intelligence — Beacon surfacing things you did not know to ask. Flagging at-risk jobs before you walk in Monday morning. Identifying patterns that would never surface in a standard report. Deeper analysis: quoted versus actual job performance, technician productivity, margin by customer, receivables aging, financial trends.

And further out, with your explicit authorization: guided actions. Flagging a job for priority review. Drafting a customer follow-up based on job status. When Beacon takes any action on your behalf, it will go through the same authorization model as everything else in WebMB — same permissions, same access controls, same division scoping. No bypass. Every irreversible action requires your confirmation.

We will communicate each phase clearly before it ships — not as a vague roadmap, but as specific capabilities with honest timelines.

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02 OWNERS & OPERATORS

What Beacon Does for Your Shop

Beacon is a chat assistant built directly into the WebMB screen you already use. You type a question. Beacon reads your actual shop data and gives you a direct answer.

You do not navigate to it. You do not log into a separate tool. You do not need to learn anything new. If you can type a question, you can use Beacon.

Here is what it can answer at launch:

Operational questions:

- "What jobs are stalled this week?" — Beacon scans open jobs for activity gaps and surfaces the ones that have stopped moving, before a customer calls to ask.
- "Which jobs are at risk of missing their deadline?" — Beacon flags jobs where the trajectory suggests they will not ship on time, so you can get ahead of it.

- "How is the shop performing financially this month?" — A financial summary in a sentence, not a spreadsheet.
- "What is the breakdown of activity across open jobs?" — Job activity patterns across the shop floor, on demand.
- "What are our open receivables right now?" — AR aging detail on demand, without pulling a report.
- "What new jobs came in this week?" — Intake summary across the shop.

WebMB how-to questions:

- "How do I post a transaction?"
- "What does the WIP report calculate?"
- "Walk me through the end-of-month close process."
- "What does the QM hold status mean?"

These are answered from our curated WebMB knowledge base — documentation, workflows, field definitions, and resolved support cases, all searchable by Beacon in real time.

The launch question set covers the most common daily needs for shop owners, operations managers, and controllers. The question inventory grows with each release — deeper analysis, profitability trends, technician performance, and more follow in subsequent phases.

Watch Beacon in Action

Watch Video Now

What Beacon Does Not Do — At Launch

The initial release is read-only by design. Beacon answers questions — it does not post transactions, close jobs, or modify records. This is a deliberate choice: build the foundation on trust before expanding capability.

Future releases will add guided actions — for example, flagging a job for priority review or drafting a customer follow-up. When that happens, every action will go through the same authorization model as WebMB: your session, your menu-level permissions, your division scoping. Beacon will not have an elevated access path, and it will not take any irreversible action without your explicit confirmation.

Beacon also does not replace WebMB screens or act as a persistent dashboard. Answers live in the conversation, not on a page you pin and return to.

If Beacon does not know the answer — because the question falls outside its knowledge base or beyond its current tool set — it says so and routes you to support:
888-382-7835 or support@springpt.com.

Your Data Is Safe

When people hear "AI has access to my financial data," a fair question follows: how far does that access go?

> *"Think of Beacon as a knowledgeable colleague who can look things up — but only in the same locked filing cabinet you have access to, using lookups our engineering team has reviewed and approved. There is no back door."*

Beacon cannot do anything you are not already allowed to do in WebMB. If your account cannot see a division's financial data, Beacon cannot show it to you either. The same permission controls that govern your WebMB access govern Beacon.

Beacon also does not invent its own questions to ask your database. The lookups it performs are written by our engineers, not generated by AI. The AI decides which approved lookup to run and what safe inputs to pass — it cannot reach beyond that defined set.

When Will Beacon Be Available?

Beacon is currently in development. We are targeting a rollout beginning September 2026, with full availability by January 2027 — aligned with the broader WebMB modernization milestone announced in Issue 01.

We will begin releasing capabilities ahead of the full launch so customers can start using Beacon before the year is out. If you want to be among the first, email support@springpt.com or contact your account manager now — we will reach out as early access opens.

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03 TECHNICAL OPERATIONS

How Beacon Works

Beacon is a RAG (Retrieval-Augmented Generation) architecture with parameterized data access, permission-aware tooling, and security as the first design constraint. Here is an accurate, non-marketing summary of the request flow.

1. **User submits a question** — via the WebMB chat drawer. No new login or context switch required.
2. **Knowledge base search** — Beacon runs a vector similarity search against a curated set of Markdown articles — WebMB features, workflows, field definitions, and support case history — stored as embeddings in pgvector on Aurora Postgres.
3. **Tool selection and execution** — For data questions, Beacon selects one preapproved tool from a fixed set and executes it with parameterized queries against the customer SQL Server database. The AI selects the tool and supplies safe input parameters. It does not write SQL.
4. **Response synthesis** — AWS Bedrock (Claude Sonnet) synthesizes a response from KB results and tool output. Every conversation turn is persisted to Postgres.
   Sessions survive pod restarts without losing context.

The Security Model — What Is Actually True

This is not a list of security marketing claims. It is a description of specific design decisions made before the first line of production code was written.

The AI never generates SQL. Every data query Beacon executes was written by a Spring Point engineer, reviewed, and deployed as a fixed parameterized query. The model decides which query to run and what values to pass — nothing else. This eliminates the class of risk where an AI generates a malicious or out-of-scope database query.

Authorization is enforced at the tool layer. Every tool call goes through the same menu-level authorization used across WebMB. If a user account does not have access to a module, the tool call is rejected — Beacon cannot route around it.

Division-level data scoping is respected. If your account is scoped to specific divisions in WebMB, that scoping applies to every Beacon data query. There is no elevated access path.

System behavior is locked at deployment. The system prompt that governs Beacon's behavior is a version-controlled file deployed with the API. It cannot be modified at runtime and is not stored in a database where it could be altered without a code deployment.

Authentication to the AI model uses AWS IAM only. There are no API keys in the system that could be leaked or rotated incorrectly. Access to the underlying model is governed by the same IAM role that governs the rest of the service's AWS access.

What Beacon Will Be Able to Do at Launch

The following capabilities are built and in active testing. This is the confirmed launch set — not a wishlist.

TOOL	WHAT IT DOES	LAUNCH TARGET
Open Job Summary	Summarizes open jobs by status and activity	Sept 2026 – Jan 2027
Stalled Job Detection	Identifies jobs with no recent activity	Sept 2026 – Jan 2027
At-Risk Job Flagging	Flags jobs at risk of missing committed deadlines	Sept 2026 – Jan 2027
Job Activity Breakdown	Activity pattern breakdown across the shop floor	Sept 2026 – Jan 2027
New Job Intake Summary	New jobs received by week across the shop	Sept 2026 – Jan 2027
Financial & AR Summary	Revenue, billing state, and AR aging on demand	Sept 2026 – Jan 2027
WebMB How-To Assistant	Answers procedural questions from the curated knowledge base	Sept 2026 – Jan 2027

Additional capabilities will be announced with explicit target quarters as development progresses.

The Knowledge Base

The knowledge base is a curated set of Markdown articles covering WebMB features, screen-by-screen workflows, field definitions, and resolved support cases. Articles are converted to vector embeddings and stored in pgvector on Aurora Postgres.

The KB is updated continuously. Adding or updating articles does not require a code deployment or an API restart — the new content is ingested and searchable on the next embedding run.

Beacon's answers are grounded in retrieved KB content and pre-approved tool output.
It does not answer from general AI knowledge. When the KB has no relevant result, Beacon acknowledges the gap and routes to support. An unconfident but honest answer is better than a confident wrong one.

Beacon is the beginning of a shift in how you interact with WebMB — from navigation to conversation. It is built to be useful at launch and to get sharper as your data grows and your questions shape it.

To request early access: support@springpt.com · 888-382-7835

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