

The 30-minute yes: what Beacon touches, and what it never will.

Beacon is the intelligence foundation for a recurring-revenue company: it reads the systems of record you already run, computes leadership's figures deterministically, and serves them — with origin, freshness and confidence attached — to people, boards, investors and AI. This brief covers everything a technical review needs to approve it. **Your team builds nothing and maintains nothing.**

ARCHITECTURE

Reads records. Keeps derived shape only.

- **Read-first connectors** to billing, CRM, marketing, accounting, HR.
- **Raw line items stay at source.** Beacon holds the aggregate shape it needs and links back to your records — no second warehouse.
- **Deterministic engine** computes every figure the same way every time; results are sealed with their inputs and version.

CREDENTIALS

Beacon never holds yours.

- Every source is connected by **your admin, in that system's own login screen** (native OAuth/app authorization).
- Beacon never asks for, stores, or completes a login. No shared passwords, no service-account sprawl.
- Each connection is **revocable in your own system**, instantly, without contacting us.

ACCESS MODEL

Roles, grants, ceilings.

- Role- and entity-scoped access; **restricted data (e.g. compensation) is its own explicit grant**, never implied by a role.
- External seats (board, investor, advisor) read **sealed figures only** — operator detail is excluded when their view is built, not filtered per request.
- Beacon **proposes** permission changes; your admin makes every change.

WRITES

Read-first. Write only with a human yes.

- **Scope is declared per system, in plain words** — e.g. "may add insight notes to accounts; may suggest field edits." Anywhere not listed is read-only.
- **Every write is a suggestion** — drafted, queued, and executed only after a person approves it.
- **Never writes to your books or billing ledger.** Ever. This is structural, not a setting.
- A request beyond the declared ceiling **never queues — it is refused and logged**, so you can watch the guardrail work.

AI BOUNDARIES

AI reasons. It never computes a figure.

- Every headline number is produced by the **deterministic engine** — reproducible, versioned, sealed. Ask twice, get the same number twice.
- AI explains, drafts and recommends. It **never invents a value, never estimates a missing one**, never acts without approval.
- Agents run **at or below the role they act under**; a fixed list of actions is refused to every agent, always, and logged.

THE FIXED LINES — TRUE IN EVERY CONFIGURATION

- 01 Never computes a headline number with AI.
- 02 Never decides, pulls a lever, or seals a decision itself.
- 03 Never overwrites a sealed record — append-only, replayable.
- 04 Never asks for or stores your credentials.
- 05 Never changes who can see what.
- 06 Never acts in your systems without a human yes.
- 07 Never writes to your books.
- 08 Never shows a number it can't trace, or guesses one it doesn't have.

YOUR TEAM'S INVOLVEMENT

TASK	NEEDED?	NOTES
Data pipelines, ETL, schema mapping	None	The data model ships standardized; sources map through guided configuration.
Warehouse build or maintenance	None	No warehouse required at this scale; Beacon coexists with one if you run it.
Custom integration code	None	Native connectors only; nothing to develop or patch.
Ongoing tickets / operations	None	Connector health is monitored; a failed source pauses its modules honestly (below).
Approving OAuth scopes at connection	~1 hour	Your admins authorize each source in its own UI; scopes are listed in plain words.
This security review	~30 min	This document + the checklist below; live session with us on request.

RELIABILITY & HONEST STATES

It stops rather than guesses.

- A module runs **only when its sources are live**. If billing is missing, the system stops rather than estimates.
- Any other missing source produces a **named, bounded limited mode** stating exactly what can and can't be read.
- Every figure carries **origin, freshness and sealed state**; sealed decisions replay exactly as they stood — an append-only audit record of every seal, approval and access change.

EXIT & REVOCABILITY

Leaving is a settings page, not a negotiation.

- Revoke any connector in the source system itself, any time.
- Revoke any reader grant (person, external seat, or connected AI) in Beacon's admin surface, any time.
- Your records were never moved; exports of derived data and the sealed history are available on request.

THE 30-MINUTE CHECKLIST

- ☐ **Scopes:** review the plain-words read/write scope list per connected system. Confirm read-only where you expect it.
- ☐ **Credentials:** confirm every connection is authorized in the source's own UI and revocable there. Beacon holds no credential of yours.
- ☐ **Data residency of raw records:** confirm invoices/line items remain in source systems; Beacon holds derived, classified data only.
- ☐ **Access ceilings:** confirm restricted-class grants (compensation), and the external-seat sealed-only ceiling.
- ☐ **AI boundary:** confirm no AI-computed figures, suggest-only agents, human-approved writes, refusal log.
- ☐ **Exit:** confirm revocation paths and export availability.

Hosting & compliance snapshot — [complete before external use]. Cloud hosting and subprocessor list, data-residency regions, encryption at rest/in transit, certification status (state current status only — no forward claims), DPA availability, and security contact. This block intentionally ships empty in the draft: every line here must be verified, not asserted.