

# Sample Decision Rules and Test Cases

Routing rules, stop conditions, and edge case coverage

Example artifact, not client specific

NXTCATALYST

# Purpose

Define the rules that drive routing and follow-up, then prove the system works under real conditions.

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, Sample artifact, not client specific

# Rules Catalog

1

## Required Fields

Must have name plus phone or email

- If missing, route to Manual Review
- Create task for data completion
- Block automated outreach until validated

2

## Duplicate Detection

Match on phone, email, or (name + company)

- Merge record automatically
- Preserve attribution history
- Notify owner of merge event

# Rules Catalog

1

## Priority Scoring (Example)

### Score modifiers:

- +3 high intent source (call, demo request)
- +2 valid phone, +1 valid email
- -3 spam indicators or invalid number

### Score bands:

- 4 to 6 = Priority
- 2 to 3 = Standard
- 0 to 1 = Low intent
- Below 0 = Disqualify or review

# Rules Catalog

1

## Routing

- Priority to senior rep or fastest available
- Standard to round robin with capacity check
- Low intent to nurture, no booking push
- Fallback to queue if all reps at capacity

2

## SLA Escalation

- No first response in 10 min, alert manager
- No activity in 24 hrs, reassign or escalate
- Log all escalation events for review
- Track SLA compliance by rep and team

## R6: Stop Conditions

→ **Booked**

Stop follow-up, mark as converted

→ **Disqualified**

Stop follow-up, log reason

→ **Reply Received**

Pause automation, notify owner immediately

📄 Stop conditions prevent double-touch and protect handoffs.

# Test Cases

T1	Valid new lead	Form + phone	Assigned, first response within SLA
T2	Missed call	Missed call event	Priority route, callback + SMS
T3	Missing contact	Blank phone/email	Manual review queue + task
T4	Duplicate	Same email	Merge, same owner, log event

# Test Cases

T5	Spam	Spam pattern	Disqualify, no outreach
T6	Capacity full	Owner maxed	Fallback owner + alert
T7	Tool outage	CRM down	Queue + retry + ops alert
T8	Late reply	Reply day 3	Pause automation, notify owner

# Acceptance Criteria

## All test cases pass before launch

Every scenario must execute correctly under controlled conditions with documented results and no blocking failures.

## All failures produce an alert and a safe fallback

System must degrade gracefully, notify operations immediately, and route to manual processes when automation fails.

NXTCatalyst, Sample artifact, not client specific

Version 0.1 (Sample), Example only, not client specific