

Lead routing handover example

Free two-page sample | Shirasu Systems | v1.0.0

Fictional training case. All people, accounts, events and outcomes below are invented. These are simulated expected results, not evidence from a running n8n instance.

Project: DEMO-LR-01. Client Northstar Demo Supplies. Agency Alder Demo Studio. Workflow Lead routing demo, revision LR-1.2.0. Timezone Europe/London. n8n-oriented training design; no running instance is asserted.

One acceptance test AC 01

Before: empty sandbox CRM and route-event ledger for DEMO-1001. Submit one webhook: lead_id DEMO-1001; email sam@example.com; region UK. UK routes to UK Sales; other non-empty regions route to Triage.

Expected within 60 seconds: one CRM record keyed DEMO-1001 with owner UK Sales, one route event and no failure alert. Priya Shah reviews CRM, event ledger and alert queue. Fictional observation on 28 October 2026: record at 10:00:12, event at 10:00:14, no alert at 10:01:00. Simulated Pass.

Use this on your handover

Write your workflow version and timezone. Replace the fixture with an approved synthetic input. State the exact expected counts and timing. Have the client reviewer run it and record actual observation, date and evidence location. A sample result is not your client acceptance.

Safe change boundary

Maya may pause or resume the trigger and replay one verified failed lead under RC-01. She may view execution logs. Routing rules, credentials, lead_id logic, data retention, alert destinations, workflow nodes and concurrency settings require Noah to assess a change and Priya to authorize it before deployment.

What the full pack adds

The paid pack adds editable closeout, account/dependency and test records, a complete fictional case, instructions and a client acceptance checklist. This sample stands alone as a small handover exercise. No email or call is needed to use these two pages.

Recovery and support ownership

Fictional training case. All people, accounts, events and outcomes below are invented. These are simulated expected results, not evidence from a running n8n instance.

One recovery exercise RC 01

In a sandbox only, simulate CRM HTTP 503 before any write for DEMO-1002, sam@example.com, region UK. Automatic retry is disabled in this fictional design. Expected: zero CRM records and zero route events; one alert to Eli in OPS-DEMO within 5 minutes.

1. Maya pauses the sandbox trigger, records the failed execution ID and confirms the failure happened before any CRM write. Query the CRM for DEMO-1002 and check the route-event ledger. Expected before replay: zero CRM records and zero route events.
2. Eli confirms CRM connectivity is restored. Maya replays the original DEMO-1002 payload once, with the same immutable lead_id. She does not create a new lead ID or bulk-retry executions.
3. Verify one CRM record with owner UK Sales and exactly one route event. Run AC-02 with the same payload again: totals remain one record and one route event. Record evidence and reviewer before resuming the trigger.

Stop condition: if a prior write, notification or delivery state is unknown, or counts exceed one, stop replay, keep the trigger paused and escalate to Noah and Priya. Preserve logs. Do not delete records or clear the deduplication ledger to force a pass.

Support ownership

Operator: Maya Chen, maya@example.com. **Failure recipient:** Eli Brooks, eli@example.com, queue OPS-DEMO. **Workflow support:** Noah Reed, noah@example.com. **Client decision:** Priya Shah, priya@example.com.

Fictional workflow support: weekdays 09:00-17:00 Europe/London through 27 November 2026; acknowledge within one business day. If Eli does not acknowledge within 30 business minutes, Maya calls Priya using the client directory. Outside hours, pause uncertain replay and use manual intake. These are example terms for the agency and client to replace.

Pack help: lattice@shirasusystems.com, Lattice AI customer support. Product-use help only. Do not send credentials, private client data or card details. The pack does not install, debug or maintain workflows.