

Exception-Handling Agent Playbook

Logistics and ops - when an agent may act vs escalate

CTA word: PLAYBOOK

Built for exception queues: short-ships, ASN mismatches, carrier delays, inventory holds, invoice disputes. Fill with your codes.

1. Exception taxonomy

For each code note: meaning, auto-resolve Y/N, escalate-to, SLA.

Start with EX-01 through EX-05.

2. Decision tree

1. Classify the exception.
2. If auto-resolve = N -> open approval gate, stop.
3. If auto-resolve = Y -> check thresholds (value, customer tier, safety).
4. If over threshold -> escalate.
5. Else act, write audit row, notify channel.

3. Context the agent must load

- Order / shipment / ASN identifiers
- Customer tier and contract notes
- Prior exceptions on the same entity (last 30 days)
- Carrier / vendor performance flag if any

4. Allowed actions (edit for your stack)

- Reprioritize pick / wave
- Create a hold
- Request a corrected ASN
- Draft (not send) a customer note for human send
- Never: invent inventory, change price, waive fee without gate

5. Escalation packet

- One-line summary
- Recommended action + alternatives
- Risk if delayed
- Links into the system of record

6. Feedback loop

- Every override tagged: wrong class / wrong action / missing context / policy gap
- Weekly: top override reasons update taxonomy or thresholds

7. Anti-patterns

- Letting the agent be helpful outside the taxonomy
- Silent retries that double-write
- Escalating everything or nothing

Pair with GATES and READY.

