Insert organizational hierarchy variables into your action

Pipe in data from an organizational hierarchy to your action.

Prerequisites:

- Create a rule
- Add an org hierarchy

By leveraging contextual attributes in organizational hierarchies, you can tie rules to the organization's structure rather than specific individuals or resources. This lets you create a few rules that can handle different situations flexibly and close the feedback loop more efficiently, instead of many rules for specific scenarios.

Example

You are a clothing store with multiple locations. A customer calls your support line about a defective item they purchased at your Vancouver location. The agent opens a case. After two days with no action, the action emails the Vancouver store's manager about the pending case.

The action is configured to email a particular node in the organization's structure. It pipes in the manager's email associated with the Vancouver store, as defined in the organizational hierarchy. Since the organizational hierarchy contains the contact information for all locations of your business, you only need to configure one action to handle the same situation across all locations. If the manager of one store changes, you can update the organizational hierarchy with the new manager's email, without needing to make changes to the rule.

1. When setting up an action, click the **Insert Variable** button.

2. Click the **Hierarchy** tab.
3. In the **Hierarchy** field, select the hierarchy.
4. Select the **Level** to pipe in.
    - **Parent**: Pipe in the attribute associated with the parent of the selected node.
    - **Self**: Pipe in the attribute associated with the selected node.
5. In the **Attribute** field, select the custom attribute from your organizational hierarchy.

    Example

    Select **Email** to pipe in the email address associated with that node.

6. To identify the node, in the **Data Source** field, select the appropriate data source.

Data Source type	Description
Survey	1. In the **Data Source** field, select **Survey** to add in survey

	question responses. 2. In **Survey Name**, select a survey. 3. Select a question in the **Question** field. **Note:** The **Question** field will display the question text if available. If there is no question text, it will display the question name.
Profile Variable	1. In the **Data Source** field, select **Profile Variable** to add in profile variables. 2. In **Field**, select a profile variable. **Note:** This data source also contains profile variables created from the following integrations: • Microsoft Dynamics 365 • Marketo • SAP SuccessFactors • HubSpot • BambooHR
BambooHR	**Note:** To see this data source, you must install the BambooHR integration. 1. In **Field**, select a BambooHR field. 2. Select an answer.
Salesforce Case	**Note:** To see this data source, you must install the Salesforce Case integration. 1. In **Field**, select a Salesforce case field. 2. Select an answer.
Salesforce Contact	**Note:** To see this data source, you must install the Salesforce Contact integration. 1. In the **Data Source** field, select **Salesforce Contact**.

	2. In **Field**, select a salesforce contact field.
SAP Sales Order	**Note:** To see this data source, you must install the SAP S/4HANA integration. 1. In the **Data Source** field, select **SAP Sales Order**. 2. In **Field**, select a SAP sales order field.

7. Click **Save**.

Related information

Insert data source variables into your action

Create an email action

Create an Alida Case action

Create a Salesforce case action

Create a Slack message action

Create an Event Driven Survey action

Create a Custom Action

Alida.