Install and Use the Einstein Analytics Bulk Actions Package

Use this package to enable the bulk action of adding multiple leads and contacts to campaigns. Installing the package adds Apex classes to your org that make it easy to add leads and contacts to an existing campaigns or create a new campaign and add them to it.

Prerequisites

To use the Einstein Analytics Bulk Actions package, Einstein Analytics must be enabled in your org.

Additionally, you must have one or more Einstein Analytics dashboards with a details table that includes a column titled LeadOrContactId. Fields in that column must be populated with either the LeadID or ContactID, but the IDs themselves can be hidden in the table.

Install the Einstein Analytics Bulk Actions Package

1. Go to App Exchange (https://appexchange.salesforce.com/) and find the Einstein Analytics Bulk Actions package.

2. Install the package into your Salesforce org. Use the Salesforce credentials of the org where you want to install the package.

Enable Bulk Actions

1. In Analytics Studio, open a dashboard with a details table that includes a column titled `LeadOrContactId`.
2. Click the pencil icon  to edit the dashboard.
3. Select the details table with the `LeadOrContactId` column.
4. In the widget properties column on the right, check the box next to **Show widget actions**. Make sure the two boxes below that are checked, too.
5. Enter a name for the action in the **Custom Action Label** field, for example `Add to Campaign`.
6. Enter `BulkAction` in the **VisualForce Page Name** field.
7. Enter `EABulkActions` in the **Visualforce Namespace Prefix** field.
8. Click the disk icon  and save the dashboard.
9. Close the dashboard.

Use Bulk Actions

1. Open the dashboard where you enabled bulk actions.
2. Position the cursor over the dashboard, and click the arrow in the upper right corner of the dashboard details table.
3. In the menu that opens, select **Add to Campaign** or whatever label you gave the action when you enabled it.
4. To add the leads and contacts from the table to an existing campaign, click **Add** next to a campaign.
5. To add the leads and contacts from the table to a new campaign, scroll to **Create New**, enter a name and dates for the campaign, and click **Create Campaign and add Members.**