



Case Flagger

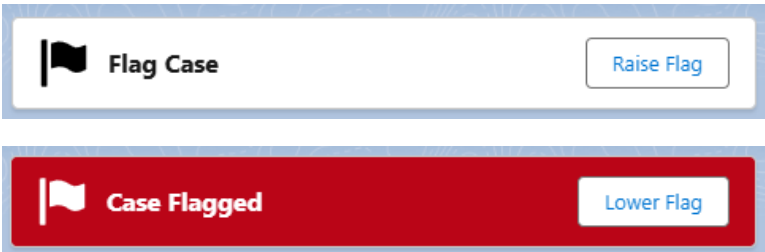
Installation and Configuration

Guide

Package Ver. 1.2

What is included

In this app you get a lightning component that acts as the visual indicator on a record that the case record has been flagged. This component also has a button that will allow a user to manually raise or lower the flag if needed.



There is also a flow that will control raising and lowering the flag based on email activity on a case record. This flow cannot be edited but the instructions below will tell you how to deactivate this if desired.

Along with these there are also two custom fields on the case object. One is a checkbox that is the controlling field of the app. This field is called Flag and it does not need to be included on page layouts but this field will be useful for filtering custom listviews or building alternative automation. The second field is called Flag Icon. This one simply displays a flag image when a case record has been flagged. This field is primarily used to display the flag on listviews and in reports.

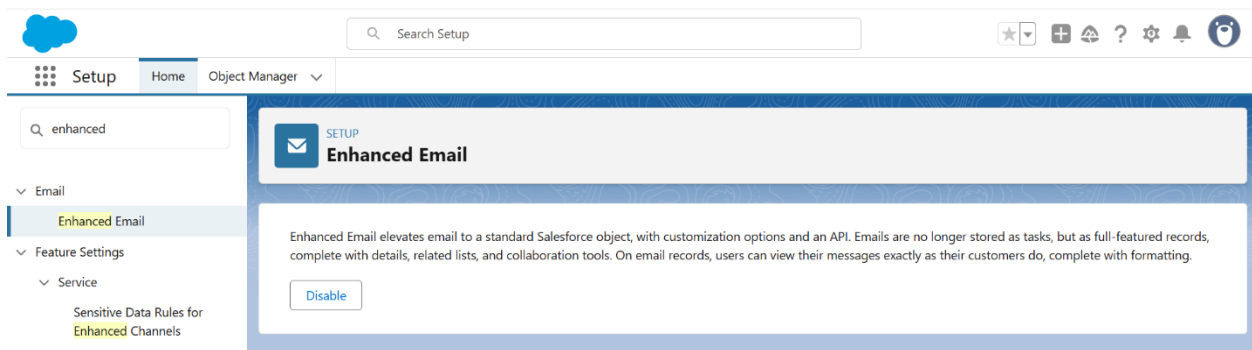
Flag	BullitIP_Flag__c	Checkbox
Flag Icon	BullitIP_Flag_Icon__c	Formula (Text)

Before Installation

Prior to installation there are a couple of settings that need to be turned on in your Salesforce instance. These settings are: Enhanced Emails and Email-to-Case. Without these settings you won't be able to receive emails to your cases and the automatic flag raising feature will not function properly.

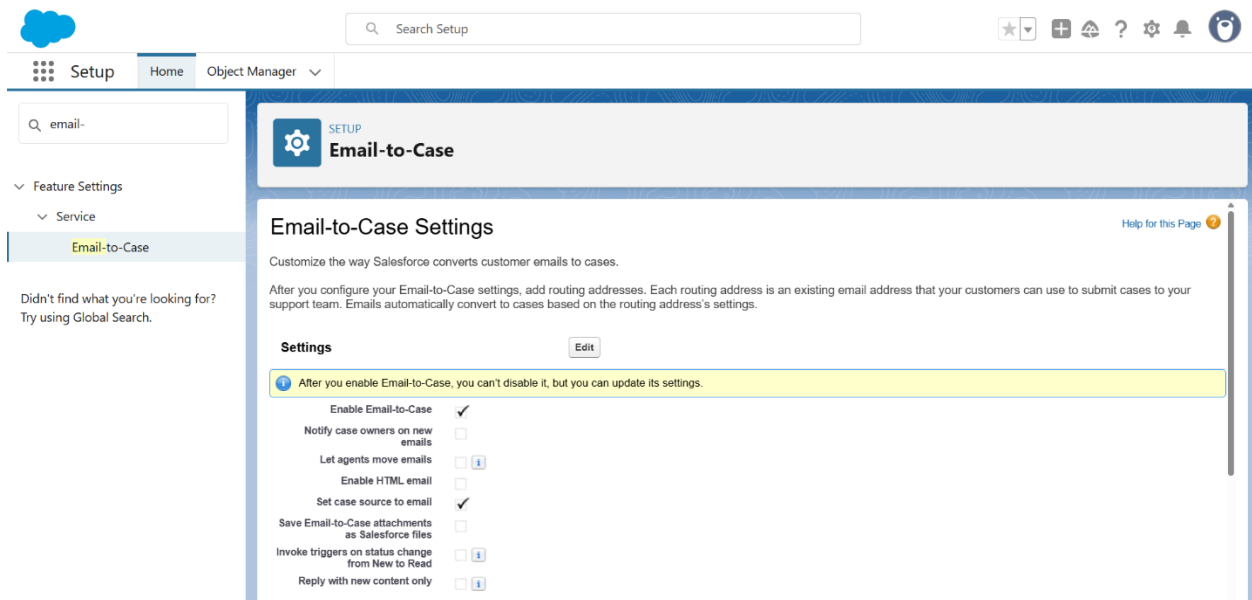
Turning on Enhanced Emails

To turn on Enhanced Emails go to Setup and go to Email > Enhanced Email in the left panel or enter Enhanced Email in the Quick Find box. In most Salesforce instances this should already be turned on and your screen should look like the screenshot below. If it is not hit the button to enable it.



Turning on Email-to-Case

To turn on Email-to-Case while in Setup go to Feature Settings > Service > Email-to-Case or enter Email-to-Case in the Quick Find box. On this page check if the option for “Enable Email-to-Case” is checked. If it is not click edit and make sure that box is checked. You can also check any other the other boxes that apply to what you wish to do with Email-to-Case but for the sake of this package just the first checkbox will do.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. The left sidebar shows the navigation menu with "Setup" selected, and "Email-to-Case" highlighted under the "Service" category. The main content area is titled "Email-to-Case Settings" and includes a description: "Customize the way Salesforce converts customer emails to cases. After you configure your Email-to-Case settings, add routing addresses. Each routing address is an existing email address that your customers can use to submit cases to your support team. Emails automatically convert to cases based on the routing address's settings." Below this is a "Settings" section with a list of checkboxes. The "Enable Email-to-Case" checkbox is checked, while the others are unchecked. A yellow information banner at the top of the settings list states: "After you enable Email-to-Case, you can't disable it, but you can update its settings."

Setup Home Object Manager

Search Setup

email-

Feature Settings

Service

Email-to-Case

Didn't find what you're looking for?
Try using Global Search.

SETUP
Email-to-Case

Email-to-Case Settings [Help for this Page](#)

Customize the way Salesforce converts customer emails to cases.

After you configure your Email-to-Case settings, add routing addresses. Each routing address is an existing email address that your customers can use to submit cases to your support team. Emails automatically convert to cases based on the routing address's settings.

Settings [Edit](#)

After you enable Email-to-Case, you can't disable it, but you can update its settings.

Enable Email-to-Case	☒
Notify case owners on new emails	☐
Let agents move emails	☐ ⓘ
Enable HTML email	☐
Set case source to email	☒
Save Email-to-Case attachments as Salesforce files	☐
Invoke triggers on status change from New to Read	☐ ⓘ
Reply with new content only	☐ ⓘ

Installation

Now your org is ready for the Case Flagger package to be installed. Go to the Salesforce AppExchange listing and click “Get It Now.” After this follow the onscreen instructions and click Install. It is recommended to install for all users.



Install CaseFlagger

By Bullit Software



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
CaseFlagger	Bullit Software	ver 1.2	1.2

Description
Case flagging component and email flow

Additional Details [View Components](#)

When the installation is done you should see the Case Flagger package under Installed packages as seen in the screenshot below.

Setup

Home

Object Manager

Search Setup

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially enabled as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Salesforce Standard Data Model	Salesforce	1.87	sst	2025-04-09, 1:40 a.m.		0	0	0	Not Passed
Uninstall	CDPSilverline	Salesforce	3.14	cdpsilverline	2025-04-09, 1:26 a.m.	✓	0	0	0	Passed
Uninstall	CaseFlagger	Bullit Software	1.2	BullBP	2025-04-11, 10:47 a.m.	✓	0	0	0	Not Passed

Post install configuration

Add the Component to your Lightning Record Page

After the Case Flagger package has been installed the lightning component will need to be added to your case lightning record pages. To do this go to setup -> Object Manager -> Case -> lightning record pages and click on the record page you are currently using.



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Setup

Home

Object Manager

 **Object Manager**

55+ Items, Sorted by Label

[Schema Builder](#)

[Create](#)

Authorization Form Consent	AuthorizationFormConsent	Standard Object
Authorization Form Data Use	AuthorizationFormDataUse	Standard Object
Authorization Form Text	AuthorizationFormText	Standard Object
Business Brand	BusinessBrand	Standard Object
Campaign	Campaign	Standard Object
Campaign Member	CampaignMember	Standard Object
Card Payment Method	CardPaymentMethod	Standard Object
Case	Case	Standard Object
Collaboration Room	CollaborationRoom	Standard Object
Communication Subscription	CommSubscription	Standard Object
Communication Subscription Channel Type	CommSubscriptionChannelType	Standard Object
Communication Subscription Consent	CommSubscriptionConsent	Standard Object
Communication Subscription Timing	CommSubscriptionTiming	Standard Object
Consumption Rate	ConsumptionRate	Standard Object



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Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Lightning Record Pages

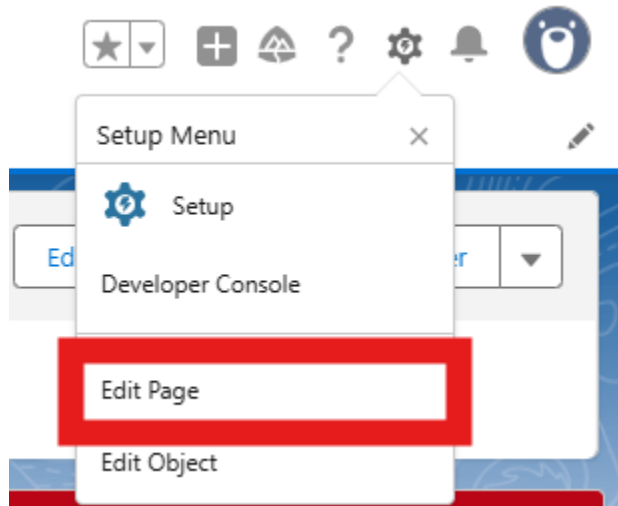
1 Items, Sorted by Label

New

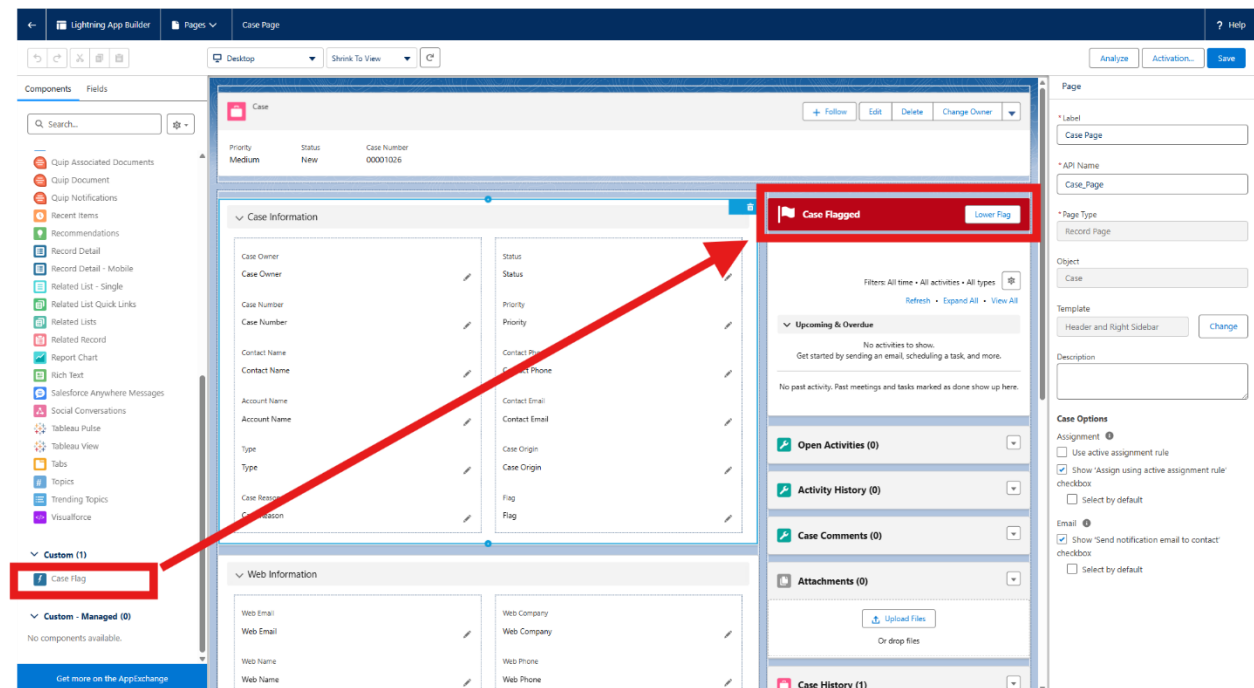
View Page Assignments

LABEL	ORG DEFAULT	APP DEFAULT	OTHER ASSIGNMENTS	MODIFIED BY
Case Page	Desktop, Phone			User User, 4/14/2025, 8:29 AM

If you have not set up a lightning page and are using the default page you can navigate to a case record in your system and click the gear icon and select Edit page.

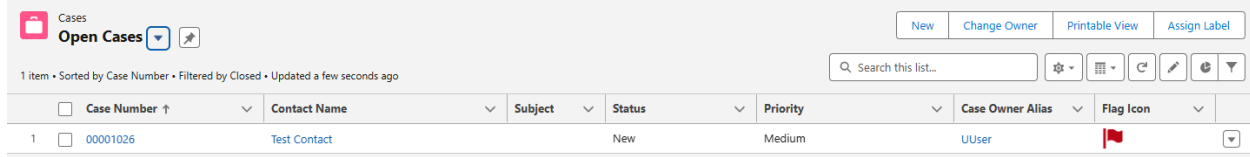


From here you can drag the CaseFlag component onto your record page in whatever position you prefer and save your changes.



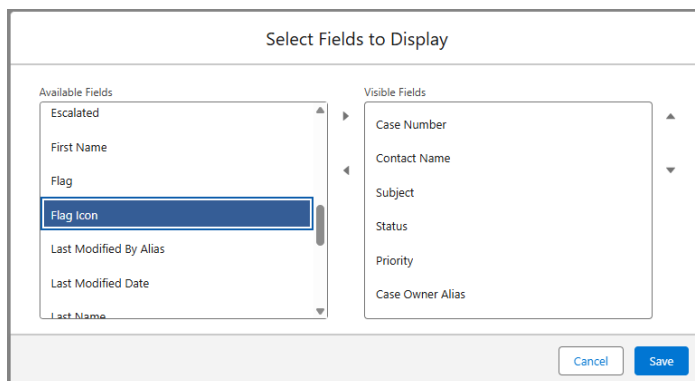
Configuring Listviews

To have the flag appear on listviews you can add the Flag Icon field to any case listview and when the flag is raised on a case it will show a flag icon.



	Case Number ↑	Contact Name	Subject	Status	Priority	Case Owner Alias	Flag Icon
1	00001026	Test Contact		New	Medium	UUser	

To do this click the gear icon on the right hand side of the screen next to the “Search this list...” box. When you click the gear a menu will appear. One of the options is “Select Fields to Display.” Select this option and you will be presented with the screen shown below. Select the fields you want to show and click save. It is important to note that this can only be done on your custom listviews. If you are currently viewing the “Recently Viewed” listview the option to add fields will not be selectable.



Select Fields to Display

Available Fields

Escalated
First Name
Flag
Flag Icon
Last Modified By Alias
Last Modified Date
Last Name

Visible Fields

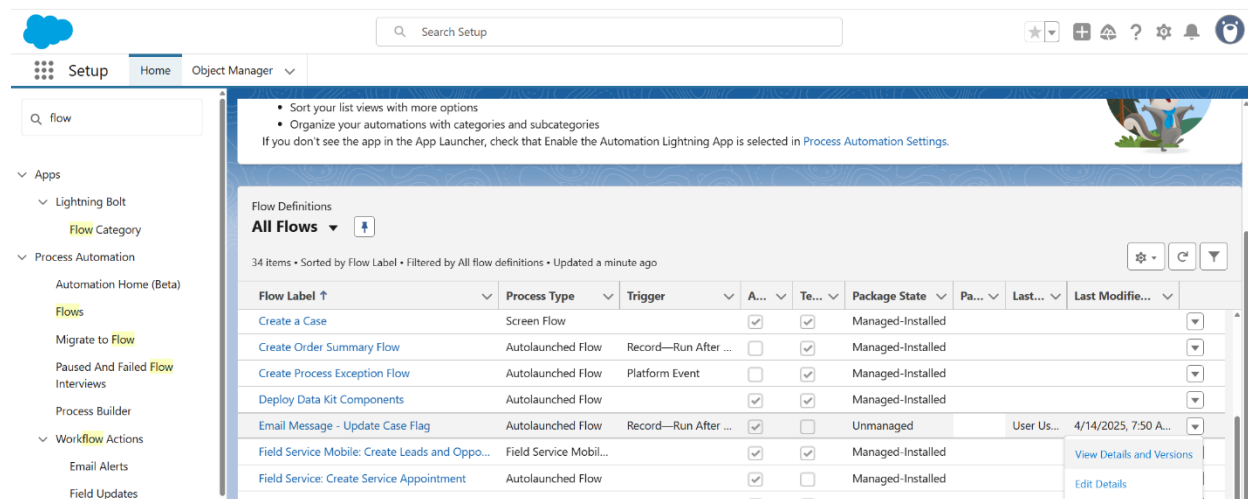
Case Number
Contact Name
Subject
Status
Priority
Case Owner Alias

CancelSave

If you wish to filter any listviews we recommend setting up the filter using the flag checkbox field. For this you click the icon on the right hand side that looks like a funnel which will open the listview filters. Select Add Filter and add as many filters as you like. When you are done don't forget to click Save.

Turn off flag updates on email

If you wish to stop emails from updating the flag on cases go to Setup -> Process Automation -> Flows. Find the “Email Message - Update Case Flag” flow and click the arrow and select “View Details and Versions.”



Once on this screen click deactivate next to the flow version.

Flow

Email Message - Update Case Flag

[Help for this Page](#)

[« Back to List: Flows](#)

Flow Detail

[Edit](#) [Open](#) [Run](#) [Delete](#)

Flow Label	Email Message - Update Case Flag	Flow API Name	Email_Message_Update_Case_Flag
Description	Namespace Prefix: BullitIP		
		Type	Autolaunched Flow
Environments	Default	URL	/flow/BullitIP/Email_Message_Update_Case_Flag
Active Version	1	Activated/Deactivated By	User User, 4/14/2025, 7:50 AM
Trigger	Record—Run After Save	Created By	User User, 4/14/2025, 7:50 AM
Modified By	User User, 4/14/2025, 7:50 AM		

Flow Versions

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Progress Status	Run in Mode
Open Run Deactivate	Email Message - Update Case Flag	1		Flow Builder	4/14/2025, 7:50 AM	Autolaunched Flow	Active	Activated	Default Mode

If in the future you wish to reactivate the flow follow the same steps and select activate.

Creating Custom Criteria for Flagging Cases

If you wish for the flag to automatically be raised based on criteria other than or alongside incoming emails you can build a flow that updates the Case Flag (Flag__c) field. If you do not know how Salesforce Flow Builder works it is recommended you check out Salesforce's Trailhead learning tool.