



Developer Guide

Org Shape for Scratch Orgs

Pilot, Winter '19



@salesforcedocs

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What Is Org Shape for Scratch Orgs?

What if you could create a scratch org that mimics the shape of your production org, and the scratch org magically knows about all the features and settings that your production org contains? The Salesforce DX Org Shape for Scratch Orgs pilot introduces a new feature to create scratch orgs using your production org's shape.

If you're already familiar with Salesforce DX, you know the power of scratch orgs—they are empty, ephemeral, and are easy to spin up. Currently, you need to know which features and settings you want to configure in your scratch org.

But in reality, you may not even be aware of all the awesome stuff that comprises your production org. Your production org is chock full of features and settings that you've added over time. You've been provisioning and deprovisioning settings, enabling and disabling features, and so on. And no doubt, you've had several rounds of app server upgrades.

But you do know one thing—you need to develop and test new features and functionality using an environment that mimics the features, limits, and settings of your production org without the extraneous data and metadata. With one simple command, you can capture your production org's shape, then easily spin up scratch orgs based on it.

This. Changes. Everything.

Get Started

Once you join the pilot, we'll enable the Org Shape For Scratch Orgs pilot feature in your production org. If you need help, post in the [Org Shape for Scratch Orgs pilot group](#) in the Trailblazer community.

Org Shape Works with Only Supported Scratch Org Editions

Because scratch orgs support only Developer, Enterprise, Professional and Group editions, the Org Shape feature can only be used on production orgs that are one of these four editions. We plan to expand this supported edition list in the future.

Next: Create an org shape that you can reference in the [scratch org definition file](#).

Create an Org Shape

Create an org shape to mimic the baseline setup (features, limits, and settings) of your production org without the extraneous data and metadata. Each production org can have only one active org shape at a time. If the features, settings, or licenses of that org change, you can capture those updates by recreating the org shape.

Note: Follow these steps if your Dev Hub and production org are the same. If they are not the same, see [If Your Dev Hub Org Is Different from Your Production Org](#).

1. Authorize your pilot-enabled production org, set an alias for it, and set it as your default Dev Hub.
\$ sfdx force:auth:web:login -a <alias> -d
2. Create an org shape for this org.
\$ sfdx force:org:shape:create -u <dev hub username/alias>
Successfully enqueued ShapeRepresentation creation for ID 3SRB0000000000LOAQ.
This command kicks off an asynchronous process to create the org shape.
3. Check the status of the shape:create command.
\$ sfdx force:org:shape:list

```
=== Org Shapes
  ALIAS  USERNAME  ORG ID  SHAPE STATUS  CREATED BY  CREATED DATE
-----
DevHub  me@my.org  00DB123000Ifx5MAC  InProgress  me@my.org  2018-10-06T19:07:11.000+0000
```

You can use the org shape once it's Active:

```
=== Org Shapes
  ALIAS  USERNAME  ORG ID  SHAPE STATUS  CREATED BY  CREATED DATE
-----
DevHub  me@my.org  00DB123000Ifx5MAC  Active  me@my.org  2018-10-06T19:07:11.000+0000
```

Only one org shape is active at a time for the production org. If you run the `shape:create` command again for this org, the previous shape is deleted and replaced.

You can delete the org shape if you no longer want to create scratch orgs based on this shape. To delete an org shape:

```
sfdx force:org:shape:delete -u <username/alias>
```

Next:

[Create a scratch org using the org shape](#)

Create a Scratch Org Based on an Org Shape

Once you create an org shape, you can create scratch orgs using the org shape.

Update the Scratch Org Definition File

The scratch org definition is the blueprint for your scratch org. In addition to the features, limits, and settings of the org shape, you can choose additional features and settings in the scratch definition file to build the exact scratch org that you want.

For more information on creating scratch orgs and the scratch org definition file, see [Scratch Orgs](#) in the *Salesforce DX Developer Guide*.

In the scratch org definition, indicate `sourceOrg` instead of `edition`. The `sourceOrg` is the org ID for the org whose shape you created. For purposes of this pilot, it's the ID of the production org.

Important: Be sure to remove edition in your scratch org definition.

```
{
  "orgName": "Acme",
  "sourceOrg": "00DB1230000Ifx5MAC",
  "features": ["Communities", "ServiceCloud", "Chatbot"],
  "settings": {
    "orgPreferenceSettings": {
      "networksEnabled": true,
      "s1DesktopEnabled": true,
      "s1EncryptedStoragePref2": false
    },
    "omniChannelSettings": {
      "enableOmniChannel": true
    }
  }
}
```

Create a Scratch Org

Now, you're ready to create a scratch org based on your org shape.

Prerequisites:

- You updated the scratch org definition with the production org ID.
- You have created a Salesforce DX project.
- You have authorized into your Dev Hub (production) org.

From within your project directory, run:

```
$ sfdx force:org:create -f config/shape-scratch-def.json -a NewFeature
--setdefaultusername
```

If Your Dev Hub Org Is Different from Your Production Org

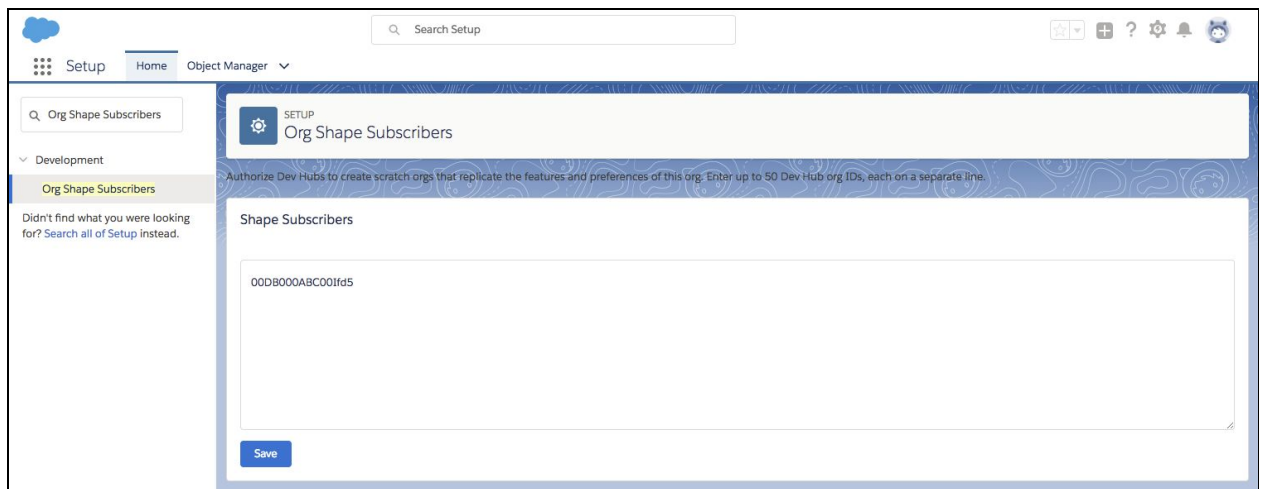
If you have multiple production orgs and you've enabled Dev Hub on one of those orgs, you can create scratch orgs based on another production org's shape. For this scenario, we'll need to enable the pilot on the other production org. Post a request on the [Org Shape for Scratch Orgs pilot Chatter group](#) to get the feature enabled.

You don't need to perform this extra step if the Dev Hub org you're using to create scratch orgs is your pilot-enabled production org.

If not, authorize the Dev Hub org to be a subscriber of the org shape.

Prerequisites: You need to be an admin of the org in which you created the shape to authorize a Dev Hub org.

1. Log into the org whose shape you have created, in this case, your production org.
2. From Setup, enter **Org Shape Subscribers** in the Quick Find box, then select **Org Shape Subscribers**.
3. Enter the 15-character Dev Hub org ID on a new line. If necessary, omit the last 3 digits of the Dev Hub org ID.



4. Click **Save**.

You have now provided your Dev Hub access to use your production org's shape. You'll indicate your production org's ID as the `sourceOrg` in the scratch org definition file to create scratch orgs.

Considerations for Pilot

Features That Don't Get Enabled as Part of Org Shape

Some features don't get enabled as part of org shape. If these features are supported in scratch orgs (see [Scratch Org Definition Configuration Values](#)), you can specify them in the scratch org definition file in addition to `sourceOrg`.

- Person Accounts