CONTENTS

Chapter 1: How Salesforce Developer Experience Changes the Way You Work ↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓→
<table>
<thead>
<tr>
<th>Contents</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>EinsteinArticleRecommendations</td>
<td>56</td>
</tr>
<tr>
<td>EinsteinBuilderFree</td>
<td>56</td>
</tr>
<tr>
<td>EmbeddedLoginForIE</td>
<td>56</td>
</tr>
<tr>
<td>EmpPublishRateLimit::&lt;value&gt;</td>
<td>56</td>
</tr>
<tr>
<td>EnablePRM</td>
<td>57</td>
</tr>
<tr>
<td>EnableManagedConfUI</td>
<td>57</td>
</tr>
<tr>
<td>Entitlements</td>
<td>57</td>
</tr>
<tr>
<td>EventLogFile</td>
<td>57</td>
</tr>
<tr>
<td>ExternalIdentityLogin</td>
<td>57</td>
</tr>
<tr>
<td>ExternalSharing</td>
<td>57</td>
</tr>
<tr>
<td>FieldAuditTrail</td>
<td>57</td>
</tr>
<tr>
<td>FieldService</td>
<td>57</td>
</tr>
<tr>
<td>FinancialServicesCommunityUser::&lt;value&gt;</td>
<td>58</td>
</tr>
<tr>
<td>FinancialServicesUser::&lt;value&gt;</td>
<td>58</td>
</tr>
<tr>
<td>FlowSites</td>
<td>58</td>
</tr>
<tr>
<td>ForceComPlatform</td>
<td>58</td>
</tr>
<tr>
<td>GenericStreaming</td>
<td>58</td>
</tr>
<tr>
<td>GenStreamingEventsPerDay::&lt;value&gt;</td>
<td>58</td>
</tr>
<tr>
<td>HealthCloudUser</td>
<td>58</td>
</tr>
<tr>
<td>HighVelocitySales</td>
<td>58</td>
</tr>
<tr>
<td>HoursBetweenCoverageJob::&lt;value&gt;</td>
<td>59</td>
</tr>
<tr>
<td>IdentityProvisioningFeatures</td>
<td>59</td>
</tr>
<tr>
<td>IgnoreQueryParamWhitelist</td>
<td>59</td>
</tr>
<tr>
<td>IndustriesActionPlan</td>
<td>59</td>
</tr>
<tr>
<td>IndustriesManufacturing</td>
<td>59</td>
</tr>
<tr>
<td>IndustriesManufacturingCmty</td>
<td>59</td>
</tr>
<tr>
<td>IndustriesMfgAccountForecast</td>
<td>59</td>
</tr>
<tr>
<td>InsightsPlatform</td>
<td>60</td>
</tr>
<tr>
<td>Interaction</td>
<td>60</td>
</tr>
<tr>
<td>IoT</td>
<td>60</td>
</tr>
<tr>
<td>JigsawUser</td>
<td>60</td>
</tr>
<tr>
<td>Knowledge</td>
<td>60</td>
</tr>
<tr>
<td>LegacyLiveAgentRouting</td>
<td>60</td>
</tr>
<tr>
<td>LightningSalesConsole</td>
<td>60</td>
</tr>
<tr>
<td>LightningScheduler</td>
<td>60</td>
</tr>
<tr>
<td>LightningServiceConsole</td>
<td>61</td>
</tr>
<tr>
<td>ListCustomSettingCreation</td>
<td>61</td>
</tr>
<tr>
<td>LiveAgent</td>
<td>61</td>
</tr>
<tr>
<td>LiveMessage</td>
<td>61</td>
</tr>
<tr>
<td>Macros</td>
<td>61</td>
</tr>
<tr>
<td>MarketingUser</td>
<td>61</td>
</tr>
<tr>
<td>MaxApexCodeSize</td>
<td>61</td>
</tr>
<tr>
<td>MaxAudTypeCriterionPerAud</td>
<td>61</td>
</tr>
<tr>
<td>MaxCustomLabels::&lt;value&gt;</td>
<td>62</td>
</tr>
</tbody>
</table>
MaxFavoritesAllowed:<value> ............................................. 62
MaxNoOfLexThemesAllowed:<value> .............................. 62
MaxStreamingTopics:<value> ............................................ 62
MaxUserNavItemsAllowed:<value> ................................. 62
MaxUserStreamingChannels:<value> ...................... 62
MedVisDescriptorLimit:<value> ........................................... 62
MobileExtMaxFileSizeMB:<value> ............................... 63
MobileSecurity ............................................................. 63
MultiCurrency ............................................................... 63
MultiLevelMasterDetail .................................................. 63
MutualAuthentication ...................................................... 63
NumPlatformEvents:<value> ............................................. 63
ObjectLinking ............................................................... 63
OutboundMessageHTTPSession ....................................... 63
PardotScFeaturesCampaignInfluence ............................... 64
PersonAccounts ........................................................... 64
PlatformCache ............................................................. 64
PlatformConnect ........................................................... 64
PlatformEncryption ......................................................... 64
PlatformEventsPerDay ..................................................... 64
ProcessBuilder .............................................................. 64
ProductsAndSchedules .................................................... 64
RecordTypes ................................................................. 65
RefreshOnInvalidSession ................................................ 65
S1ClientComponentCacheSize .......................................... 65
SalesCloudEinstein ........................................................ 65
SalesforceContentUser ..................................................... 65
SalesforceIdentityForCommunities .................................... 65
SalesUser ..................................................................... 65
SAML20SingleLogout ....................................................... 65
SCIMProtocol ................................................................. 65
SecurityEventEnabled ..................................................... 65
ServiceCloud ................................................................. 66
ServiceUser .................................................................. 66
SessionIdInLogEnabled ................................................... 66
SingleSignOn ................................................................. 66
Sites .......................................................................... 66
SocialCustomerService .................................................... 66
StateAndCountryPicklist .................................................. 66
StreamingAPI ................................................................. 66
StreamingEventsPerDay:<value> ................................. 66
SubPerStreamingChannel:<value> ................................. 67
SubPerStreamingTopic ....................................................... 67
SustainabilityCloud .......................................................... 67
Contents

TerritoryManagement .................................................. 67
TimeSheetTemplateSettings .......................................... 67
TransactionFinalizers .................................................. 67
WavePlatform .............................................................. 68
Workflow ................................................................. 68
WorkflowFlowActionFeature .......................................... 68
WorkThanksPref .......................................................... 68
Scratch Org Settings .................................................... 68
Create Scratch Orgs ..................................................... 69
Select the Salesforce Release for a Scratch Org ..................... 71
Salesforce DX Project Structure and Source Format ................. 73
Push Source to the Scratch Org ....................................... 78
   How to Exclude Source When Syncing or Converting ............. 81
Assign a Permission Set ............................................... 82
Ways to Add Data to Your Scratch Org ............................... 83
   Example: Export and Import Data Between Orgs ................. 84
Pull Source from the Scratch Org to Your Project ................. 85
Track Changes Between the Project and Scratch Org ............... 86
Scratch Org Users ....................................................... 87
   Create a Scratch Org User ......................................... 88
   User Definition File for Customizing a Scratch Org User ....... 89
   Generate or Change a Password for a Scratch Org User ....... 90
Manage Scratch Orgs from Dev Hub ................................. 91

Chapter 7: Sandboxes .................................................... 92
Authorize in to Your Production Org ................................. 93
Create a Sandbox Definition File (Beta) ......................... 93
Create, Clone, or Delete a Sandbox (Beta) ....................... 95

Chapter 8: Development ............................................... 98
Develop Against Any Org ............................................. 100
Create Lightning Apps and Aura Components ....................... 103
Create Lightning Web Components .................................. 103
Create an Apex Class ................................................ 104
Create an Apex Trigger ............................................. 104
Testing ................................................................. 104
View Apex Debug Logs ............................................. 105
Apex Debugger ......................................................... 106

Chapter 9: Build and Release Your App ............................ 107
Build and Release Your App with Metadata API ................... 109
   Develop and Test Changes Locally ............................. 111
   Build and Test the Release Artifact ......................... 112
   Test the Release Artifact in a Staging Environment ....... 112
Release Your App to Production .............................................................. 113
Cancel a Metadata Deployment ............................................................ 114

Chapter 10: First-Generation Managed Packages ......................................... 115
Build and Release Your App with Managed Packages .................................... 116
  Packaging Checklist .............................................................................. 116
  Deploy the Package Metadata to the Packaging Org ................................ 117
  Create a Beta Version of Your App ......................................................... 118
  Install the Package in a Target Org ......................................................... 119
  Create a Managed Package Version of Your App ..................................... 119
View Information About a Package ........................................................... 120
  View All Package Versions in the Org ..................................................... 121
  Package IDs ......................................................................................... 121

Chapter 11: Second-Generation Managed Packages .......................................... 122
What’s a Package? .................................................................................... 123
Comparison of 2GP and 1GP Managed Packages ......................................... 123
Namespaces ............................................................................................ 124
  Create and Register Your Namespace .................................................. 125
Package IDs and Aliases .......................................................................... 126
Before You Create Second-Generation Managed Packages ........................ 126
  Know Your Orgs .................................................................................. 127
Workflow for Second-Generation Packages ............................................... 128
Configure Packages ................................................................................ 129
  Project Configuration File for Packages ............................................... 130
  Keywords .............................................................................................. 134
  Package Installation Key ........................................................................ 134
  Customize Package Installs and Uninstalls Using Scripts .......................... 135
  Share Release Notes and Post-Install Instructions ................................... 136
Best Practices for Second-Generation Managed Packages ............................ 136
Frequently Used Packaging Operations ...................................................... 137
Create a Package .................................................................................... 137
  Generate the Package ........................................................................... 138
  Generate a Package Version ................................................................. 138
  Create a Patch Version ......................................................................... 140
  Package Ancestors ............................................................................... 141
  Package Upgrades in Second-Generation Managed Packaging ................. 143
Code Coverage for 2GP Managed Packages ............................................. 144
Release a Second-Generation Managed Package ....................................... 145
Update a Package Version ....................................................................... 145
  View Package Details ........................................................................... 146
Install a Package ..................................................................................... 146
  Install Packages with the CLI ............................................................... 147
  Install Packages from a URL ............................................................... 148
Contents

Sample Jenkinsfile ..................................................... 188
Continuous Integration with Travis CI ................................. 189
Sample CI Repos for Org Development Model ............................. 190
Sample CI Repos for Package Development Model ...................... 190

Chapter 14: Troubleshoot Salesforce DX ................................. 192
CLI Version Information .................................................. 193
Run CLI Commands on macOS Sierra (Version 10.12) .................... 193
Error: No defaultdevhubusername org found ............................ 193
Unable to Work After Failed Org Authorization ......................... 194
Error: Lightning Experience-Enabled Custom Domain Is Unavailable 194

Chapter 15: Limitations for Salesforce DX ............................... 196
CHAPTER 1

How Salesforce Developer Experience Changes the Way You Work

Salesforce Developer Experience (DX) is a new way to manage and develop apps on the Lightning Platform across their entire life cycle. It brings together the best of the Lightning Platform to enable source-driven development, team collaboration with governance, and new levels of agility for custom app development on Salesforce.

Highlights of Salesforce DX include:

- Your tools, your way. With Salesforce DX, you use the developer tools you already know.
- The ability to apply best practices to software development. Source code and metadata exist outside of the org and provide more agility to develop Salesforce apps in a team environment. Instead of the org, your version control system is the source of truth.
- A powerful command-line interface (CLI) removes the complexity of working with your Salesforce org for development, continuous integration, and delivery.
- Flexible and configurable scratch orgs that you build for development and automated environments. This new type of org makes it easier to build your apps and packages.
- You can use any IDE or text editor you want with the CLI and externalized source.
- Salesforce Extensions for VS Code to accelerate app development. These tools provide features for working with scratch orgs, Apex, Lightning components, and Visualforce.

Are You Ready to Begin?

Here’s the basic order for doing your work using Salesforce DX. These workflows include the most common CLI commands. For all commands, see the Salesforce CLI Command Reference.

- Enable Dev Hub and install Salesforce CLI in Salesforce DX Setup Guide
- Use a Sample Repo to Get Started on page 2
- Create an Application on page 2
- Migrate or Import Existing Source on page 3

SEE ALSO:

Salesforce DX (Salesforce Developer Center Web Site)
Salesforce DX = UX for Developers (Salesforce Developer Blog)
Salesforce CLI Command Reference
Use a Sample Repo to Get Started

The quickest way to get going with Salesforce DX is to clone the sfdx-simple GitHub repo. Use its configuration files and Salesforce application to try some commonly used Salesforce CLI commands.

1. Open a terminal or command prompt window, and clone the sfdx-simple GitHub sample repo using HTTPS or SSH.

   ```
   git clone https://github.com/forcedotcom/sfdx-simple.git
   --or--
   git clone git@github.com:forcedotcom/sfdx-simple.git
   ```

2. Change to the sfdx-simple project directory.

   ```
   cd sfdx-simple
   ```

3. Authorize your Developer Hub (Dev Hub) org, set it as your default, and assign it an alias.

   ```
   sfdfx force:auth:web:login --setdefaultdevhubusername --setalias DevHub
   ```

   Enter your Dev Hub org credentials in the browser that opens. After you log in successfully, you can close the browser.

4. Create a scratch org using the config/project-scratch-def.json file, set the username as your default, and assign it an alias.

   ```
   sfdfx force:org:create --setdefaultusername -f config/project-scratch-def.json --setalias my-scratch-org
   ```

5. Push source and tests, located in the force-app directory, to the scratch org.

   ```
   sfdfx force:source:push
   ```

6. Run Apex tests.

   ```
   sfdfx force:apex:test:run --resultformat human
   ```

7. Open the scratch org and view the pushed metadata under Most Recently Used.

   ```
   sfdfx force:org:open
   ```

SEE ALSO:
- Sample Repository on GitHub
- Authorization
- Create Scratch Orgs
- Push Source to the Scratch Org
- Testing

Create an Application

Follow the basic workflow when you are starting from scratch to create and develop an app that runs on the Lightning Platform.

1. Set up your project. on page 16
Migrate or Import Existing Source

Use the Metadata API to retrieve the code, and then convert your source for use in a Salesforce DX project.

Tip: If your current repo follows the directory structure that is created from a Metadata API retrieve, you can skip the retrieve step and go directly to converting the source.

1. Set up your project. on page 16
2. Retrieve your metadata. on page 18
3. Convert the metadata formatted source you just retrieved to source format. on page 20
4. Authorize the Developer Hub org for the project. on page 25
5. Configure your local project. on page 22
6. Create a scratch org. on page 69
7. Push the source from your project to the scratch org. on page 78
8. Develop the app. on page 98
9. Pull the source to sync your project and scratch org. on page 85
10. Run tests. on page 104
11. Add, commit, and push changes. Create a pull request.

Deploy your app using one of the following methods:

• Build and release your app with managed packages on page 116
• Build and release your app using the Metadata API on page 109
CHAPTER 2  Salesforce CLI Configuration and Tips

In this chapter ...

- CLI Runtime Configuration Values
- Environment Variables
- Salesforce DX Usernames and Orgs
- Override or Add Definition File Options at the Command Line
- CLI Parameter Resolution Order
- Support for JSON Responses
- Log Messages and Log Levels
- CLI Deprecation Policy

Use the Salesforce command-line interface (CLI) for most Salesforce DX tasks. These tasks include authorizing a Dev Hub org, creating a scratch org, synchronizing source code between your scratch orgs and VCS, and running tests.

You can start using the CLI right after you install it.

The CLI commands are grouped into top-level topics. For example, the force top-level topic is divided into topics that group commands by functionality, such as the `force:org` commands to manage your orgs.

Run `--help` at each level to get more information.

```
sfdx --help // lists all top-level topics
sfdx force --help // lists all the topics under force
sfdx force:org --help // lists all the commands in the topic force:org
sfdx force:org:open --help // detailed info about the force:org:open command
```

Run this command to view all available commands in the `force` topic.

```
sfdx force:doc:commands:list
```

SEE ALSO:

* Salesforce DX Setup Guide*
CLI Runtime Configuration Values

You can set CLI runtime configuration values for your current project or for all projects. You can set two kinds of configuration values: global and local. Global values apply to all projects on your computer. Local values apply to a specific project. Local values override global values when commands are run from within a Salesforce DX project directory.

To set a configuration value for the current project:

```
sfdx force:config:set name=<value>
```

For local configuration values, you must issue this command from within the Salesforce DX project directory.

To set the value for all your projects:

```
sfdx force:config:set name=<value> --global
```

You can issue global commands anywhere or within any project, yet they apply to all the Salesforce CLI commands you run.

You can view the local and global configuration values that you have set. The output lists the local values for the project directory from which you are running the command and all global values.

```
sfdx force:config:list
```

<table>
<thead>
<tr>
<th>Config Name</th>
<th>Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>apiVersion</td>
<td>47.0</td>
<td>Local</td>
</tr>
<tr>
<td>defaultdevhubusername</td>
<td><a href="mailto:my-dev-hub@force.com">my-dev-hub@force.com</a></td>
<td>Global</td>
</tr>
</tbody>
</table>

To return one or more previously set configuration values, use `force:config:get`. It is often useful to specify JSON output for this command for easier parsing in a continuous integration (CI) environment. For example, to return the value of `defaultusername` and `defaultdevhubusername`:

```
sfdx force:config:get defaultusername defaultdevhubusername --json
```

To unset a configuration value, set it to no value. For example, to unset the `instanceUrl` configuration value:

```
sfdx force:config:set instanceUrl=```

Note: Alternately, you can set all CLI configuration values as environment variables. Environment variables override configuration values.

You can set these CLI configuration values.

**apiVersion**

The API version for a specific project or all projects. Normally, the CLI assumes that you're using the same version of the CLI as the Dev Hub org.

Let's say you decide to use the pre-release version of the CLI (v43 in Summer ’18). But your Dev Hub org is running the current API version (v42 in Spring ’18). In this case, set this value to match the API version of your Dev Hub org (v42).

This example sets the API version for all projects (globally).

```
sfdx force:config:set apiVersion=42.0 --global
```

Be sure not to confuse this CLI configuration value with the `sourceApiVersion` on page 22 project configuration value, which has a similar name.
Environment variable: SFDX_API_VERSION

SFDX_API_VERSION=42.0

defaultusername
The username for an org that all commands run against by default.

```
sfdx force:config:set defaultusername=test-scratch-org@example.com
```

Environment variable: SFDX_DEFAULTUSERNAME

SFDX_DEFAULTUSERNAME=test-scratch-org@example.com

defaultdevhubusername
The username for an org that all commands run against by default.

```
sfdx force:config:set defaultdevhubusername=my-dev-hub@devhub.org
```

Environment variable: SFDX_DEFAULTDEVHUBUSERNAME

SFDX_DEFAULTDEVHUBUSERNAME=my-dev-hub@devhub.org

disableTelemetry
By default, the CLI collects usage information, user environment information, and crash reports. This option enables you to opt out.

```
sfdx force:config:set disableTelemetry=true
```

Environment variable: SFDX_DISABLE_TELEMETRY

instanceUrl
The URL of the Salesforce instance that is hosting your org.

```
```

Environment variable: SFDX_INSTANCE_URL

SFDX_INSTANCE_URL=https://yoda.my.salesforce.com

restDeploy
If true, the CLI uses Metadata REST API for deployments. By default, Salesforce CLI uses SOAP. Deployments using REST aren’t bound by the 39 MB .zip file size limit that applies to SOAP deployments.

```
sfdx force:config:set restDeploy=true
```

Environment variable: SFDX_REST_DEPLOY

SFDX_REST_DEPLOY=true

SEE ALSO:

- CLI Parameter Resolution Order
- Salesforce DX Usernames and Orgs
- Authorization
- Use an Existing Access Token Instead of Authorizing
# Environment Variables

You can set environment variables to configure some values that Salesforce CLI and Salesforce DX tooling use. Environment variables override CLI runtime configuration values. To set an environment variable for only the command you’re running:

```
SFDX_API_VERSION=44.0 sfdx force:org:create -<options>
```

## Salesforce CLI Environment Variables

<table>
<thead>
<tr>
<th>Environment Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORCE_OPEN_URL</td>
<td>Specifies the web page that opens in your browser when you run <code>force:org:open</code>. For example, to open Lightning Experience, set to <code>lightning</code>. Equivalent to the <code>--path</code> parameter of <code>force:org:open</code>.</td>
</tr>
<tr>
<td>FORCE_SHOW_SPINNER</td>
<td>Set to <code>true</code> to show a spinner animation on the command line when running asynchronous CLI commands. Default is <code>false</code>.</td>
</tr>
<tr>
<td>FORCE_SPINNER_DELAY</td>
<td>Specifies the speed of the spinner in milliseconds. Default is 60.</td>
</tr>
<tr>
<td>SFDX_API_VERSION</td>
<td>The API version for a specific project or all projects. Normally, the Salesforce CLI assumes that you’re using the same version of the CLI as your production org. However, let’s say you decide to use the pre-release version of the CLI (v43 in Summer ’18), but your production org is running the current API version (v42 in Spring ’18). In this case, you’d want to set this value to match the API version of your production org (v42).</td>
</tr>
</tbody>
</table>
| SFDX_CODE_COVERAGE_REQUIREMENT       | Specifies the code coverage percentages that are displayed in green when you run `force:apex:test:run` or `force:apex:test:report` with the `--codecoverage` parameter.

If the code coverage percentage for an Apex test is equal to or higher than this setting, it is displayed in green. If the percent is lower, it is displayed in red. Applies only to human-readable output. Default is 70%.

<p>| SFDX_CONTENT_TYPE                    | All CLI commands output results in JSON format.                                                                                          |
| SFDX_DEFAULTUSERNAME                 | Specifies the username of your default org so you don’t have to use the <code>--targetusername</code> CLI parameter. Overrides the value of the <code>defaultusername</code> runtime configuration value. |
| SFDX_DISABLE_AUTOUPDATE or SFDX_AUTOUPDATE_DISABLE (either var works) | Set to <code>true</code> to disable the auto-update feature of the CLI. By default, the CLI periodically checks for and installs updates. |
| SFDX_DISABLE_TELEMETRY               | Set to <code>true</code> to disable the CLI from collecting usage information, user environment information, and crash reports. |</p>
<table>
<thead>
<tr>
<th>Environment Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFDX_DOMAIN_RETRY</td>
<td>Specifies the time, in seconds, that the CLI waits for the Lightning Experience custom domain to resolve and become available in a newly-created scratch org. The default value is 240 (4 minutes). Set the variable to 0 to bypass the Lightning Experience custom domain check entirely.</td>
</tr>
<tr>
<td>SFDX_JSON_TO_STDOUT</td>
<td>Sends messages when Salesforce CLI commands fail to stdout instead of stderr. Setting this environment variable to <code>true</code> is particularly helpful for scripting use cases. Example: <code>SFDX_JSON_TO_STDOUT=true</code></td>
</tr>
<tr>
<td>SFDX_LOG_LEVEL</td>
<td>Sets the level of messages that the CLI writes to the log file.</td>
</tr>
<tr>
<td>SFDX_MDAPI_TEMP_DIR</td>
<td>Places the files (in metadata format) in the specified directory when you run some CLI commands, such as <code>force:source:&lt;name&gt;</code>. Retaining these files can be useful for several reasons. You can debug problems that occur during command execution. You can use the generated <code>package.xml</code> when running subsequent commands, or as a starting point for creating a manifest that includes all the metadata you care about.</td>
</tr>
<tr>
<td>SFDX_NPM_REGISTRY</td>
<td>Sets the URL to a private npm server, where all packages that you publish are private. We support only repositories that don't require authentication. Example: <code>SFDX_NPM_REGISTRY=http://mypkgs.myclient.com/npm/my_npm_pkg</code></td>
</tr>
<tr>
<td>SFDX_PRECOMPILE_ENABLE</td>
<td>Set to <code>true</code> to enable Apex pre-compile before the tests are run. This variable works with the <code>force:apex:test:run</code> command. Default is <code>false</code>. <strong>Important</strong>: The duration of an Apex test pre-compilation can be inconsistent. As a result, runs of the same Apex tests are sometimes quick and other times they time out. We recommend that you set this variable to <code>true</code> only if your Apex tests (without pre-compile) activate multiple concurrent Apex compilations that consume many system resources.</td>
</tr>
<tr>
<td>Environment Variable</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SFDX_PROJECT_AUTOPROJECT_DISABLE_FOR_PACKAGE_CREATE</td>
<td>For force:package:create, disables automatic updates to the sfdx-project.json file.</td>
</tr>
<tr>
<td>SFDX_USE_GENERIC_UNIX_KEYCHAIN</td>
<td>(Linux and macOS only) Set to true if you want to use the generic UNIX keychain instead of the Linux libsecret library or macOS keychain. Specify this variable when using the CLI with ssh or &quot;headless&quot; in a CI environment.</td>
</tr>
</tbody>
</table>

**General Environment Variables**

<table>
<thead>
<tr>
<th>Environment Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTTP_PROXY</td>
<td>If you receive an error when you install or update the Salesforce CLI on a computer that's behind a firewall or web proxy, set this environment variable. Use the URL and port of your company proxy, for example: <a href="http://username:pwd@proxy.company.com:8080">http://username:pwd@proxy.company.com:8080</a></td>
</tr>
<tr>
<td>HTTPS_PROXY</td>
<td>If you receive an error when you install or update the Salesforce CLI on a computer that's behind a firewall or web proxy, set this environment variable. Use the URL and port of your company proxy, for example: <a href="http://username:pwd@proxy.company.com:8080">http://username:pwd@proxy.company.com:8080</a></td>
</tr>
<tr>
<td>NODE_EXTRA_CA_CERTS</td>
<td>Installs your self-signed certificate. Indicate the fully qualified path to the certificate file name. Then run sfdx update. See NODE_EXTRA_CA_CERTS=file for more details.</td>
</tr>
</tbody>
</table>
Salesforce DX Usernames and Orgs

Many CLI commands connect to an org to complete their task. For example, the `force:org:create` command, which creates a scratch org, connects to a Dev Hub org. The `force:source:push` and `pull` commands synchronize source code between your project and a scratch org. In each case, the CLI command requires a username to determine which org to connect to. Usernames are unique within the entire Salesforce ecosystem and have a one-to-one association with a specific org.

Note: The examples in this topic might refer to CLI commands that you are not yet familiar with. For now, focus on how to specify the usernames, configure default usernames, and use aliases. The CLI commands are described later.

When you create a scratch org, the CLI generates a username. The username looks like an email address, such as test-wkpmfnm5z13@example.com. You do not need a password to connect to or open a scratch org, although you can generate one later with the `force:user:password:generate` command.

Salesforce recommends that you set a default username for the orgs that you connect to the most during development. The easiest way to do this is when you authorize a Dev Hub org or create a scratch org. Specify the `--setdefaultdevhubusername` or `--setdefaultusername` parameter, respectively, from within a project directory. You can also create an alias to give the usernames more readable names. You can use usernames or their aliases interchangeably for all CLI commands that connect to an org.

These examples set the default usernames and aliases when you authorize an org and then when you create a scratch org.

```
sfdx force:auth:web:login --setdefaultdevhubusername --setalias my-hub-org
sfdx force:org:create --definitionfile my-org-def.json --setdefaultusername --setalias my-scratch-org
```

To verify whether a CLI command requires an org connection, look at its parameter list with the `--help` parameter. Commands that have the `--targetdevhubusername` parameter connect to the Dev Hub org. Similarly, commands that have `--targetusername` connect to scratch orgs, sandboxes, and so on. This example displays the parameter list and help information about `force:org:create`.

```
sfdx force:org:create --help
```

When you run a CLI command that requires an org connection and you don’t specify a username, the command uses the default. To see your default usernames, run `force:org:list` to display all the orgs you’ve authorized or created. The default Dev Hub and scratch orgs are marked on the left with (D) and (U), respectively.

Let’s run through a few examples to see how this works. This example pushes source code to the scratch org that you’ve set as the default.

```
sfdx force:source:push
```
To specify an org other than the default, use `--targetusername`. For example, let’s say you created another scratch org with alias `my-other-scratch-org`. It’s not the default but you still want to push source to it.

```
sfdx force:source:push --targetusername my-other-scratch-org
```

This example shows how to use the `--targetdevhubusername` parameter to specify a non-default Dev Hub org when creating a scratch org.

```
sfdx force:org:create --targetdevhubusername jdoe@mydevhub.com --definitionfile my-org-def.json --setalias yet-another-scratch-org
```

### More About Setting Default Usernames

If you’ve already created a scratch org, you can set the default username with the `force:config:set` command from your project directory.

```
sfdx force:config:set defaultusername=test-wvkpnfm5z113@example.com
```

The command sets the value locally, so it works only for the current project. To use the default username for all projects on your computer, specify the `--global` parameter. You can run this command from any directory. Local project defaults override global defaults.

```
sfdx force:config:set defaultusername=test-wvkpnfm5z113@example.com --global
```

The process is similar to set a default Dev Hub org, except you use the `defaultdevhubusername` config value.

```
sfdx force:config:set defaultdevhubusername=jdoe@mydevhub.com
```

### More About Aliasing

Use the `force:alias:set` command to set an alias for an org or after you’ve authorized an org. You can create an alias for any org: Dev Hub, scratch, production, sandbox, and so on. So when you issue a command that requires the org username, using an alias for the org that you can easily remember can speed up things.

```
sfdx force:alias:set my-scratch-org=test-wvkpnfm5z113@example.com
```

An alias also makes it easy to set a default username. The previous example of using `force:config:set` to set `defaultusername` now becomes much more digestible when you use an alias rather than the username.

```
sfdx force:config:set defaultusername=my-scratch-org
```

Set multiple aliases with a single command by separating the name-value pairs with a space.

```
sfdx force:alias:set org1=<username> org2=<username>
```

You can associate an alias with only one username at a time. If you set it multiple times, the alias points to the most recent username. For example, if you run the following two commands, the alias `my-org` is set to `test-wvkpnfm5z113@example.com`.

```
sfdx force:alias:set my-org=test-blahdiblah@whoanellie.net
sfdx force:alias:set my-org=test-wvkpnfm5z113@example.com
```

To view all aliases that you’ve set, use one of the following commands.

```
sfdx force:alias:list
sfdx force:org:list
```
To remove an alias, set it to nothing.

```
sfdx force:alias:set my-org=
```

## List All Your Orgs

Use the `force:org:list` command to display the usernames for the orgs that you’ve authorized and the active scratch orgs that you’ve created.

```
sfdx force:org:list
```

<table>
<thead>
<tr>
<th>ALIAS</th>
<th>USERNAME</th>
<th>ORG ID</th>
<th>CONNECTED STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>DD-ORG</td>
<td><a href="mailto:jdoe@dd-204.com">jdoe@dd-204.com</a></td>
<td>00D...OEA</td>
<td>Connected</td>
</tr>
<tr>
<td>(D) devhuborg</td>
<td><a href="mailto:jdoe@mydevhub.com">jdoe@mydevhub.com</a></td>
<td>00D...MAC</td>
<td>Connected</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ALIAS</th>
<th>SCRATCH ORG NAME</th>
<th>USERNAME</th>
<th>ORG ID</th>
<th>EXPIRATION DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>my-scratch</td>
<td>Your Company</td>
<td><a href="mailto:test-wvkm5z113@example.com">test-wvkm5z113@example.com</a></td>
<td>00D...UAI</td>
<td>2017-06-13</td>
</tr>
<tr>
<td>(U) scratch208</td>
<td>Your Company</td>
<td><a href="mailto:test-wvkm5z113@example.com">test-wvkm5z113@example.com</a></td>
<td>00D...UAY</td>
<td>2017-06-13</td>
</tr>
</tbody>
</table>

The top section of the output lists the non-scratch orgs that you’ve authorized, including Dev Hub orgs, production orgs, and sandboxes. The output displays the usernames that you specified when you authorized the orgs, their aliases, their IDs, and whether the CLI can connect to it. A (D) on the left points to the default Dev Hub org username.

The lower section lists the active scratch orgs that you’ve created and their usernames, org IDs, and expiration dates. A (U) on the left points to the default scratch org username.

To view more information about scratch orgs, such as the create date, instance URL, and associated Dev Hub org, use the `--verbose` parameter.

```
sfdx force:org:list --verbose
```

Use the `--clean` parameter to remove non-active scratch orgs from the list. The command prompts you before it does anything.

```
sfdx force:org:list --clean
```

SEE ALSO:
- Authorization
- Scratch Org Definition File
- Create Scratch Orgs
- Generate or Change a Password for a Scratch Org User
- Push Source to the Scratch Org

## Override or Add Definition File Options at the Command Line

Some CLI commands, such as `force:org:create` and `force:user:create`, use a JSON definition file to determine the characteristics of the org or user they create. The definition file contains one or more options. You can override some options by specifying them as name-value pairs at the command line. You can also specify options that aren’t in the definition file. This technique allows multiple users or continuous integration jobs to share a base definition file and then customize options when they run the command.
Let’s say you use the following JSON definition file to create a scratch org. By default, the scratch org definition is named `project-scratch-def.json`.

```json
{
  "orgName": "Acme",
  "country": "US",
  "edition": "Enterprise",
  "hasSampleData": "true",
  "features": ["MultiCurrency", "AuthorApex"],
  "settings": {
    "mobileSettings": {
      "enableS1EncryptedStoragePref2": true
    },
    "chatterSettings": {
      "enableChatter": true
    },
    "nameSettings": {
      "enableNameSuffix": false
    }
  }
}
```

To create an Enterprise Edition scratch org that uses all the options in the file, run this command.

```
sfdx force:org:create --definitionfile project-scratch-def.json
```

You can then use the same definition file to create a Developer Edition scratch org that doesn’t have sample data by overriding the `edition` and `hasSampleData` options.

```
sfdx force:org:create --definitionfile project-scratch-def.json edition=Developer hasSampleData=false
```

Use commas to separate multiple array values, and enclose them in double quotes. For example, to change the `features` option:

```
sfdx force:org:create --definitionfile project-scratch-def.json features="MultiCurrency,PersonAccounts"
```

This example shows how to add the `adminEmail` option, which doesn’t exist in the definition file.

```
sfdx force:org:create --definitionfile project-scratch-def.json adminEmail=john@doe.org
```

⚠️ **Note:** You can’t override options whose values are JSON objects, such as `settings`.

**SEE ALSO:**
- CLI Parameter Resolution Order
- Create Scratch Orgs
- Create a Scratch Org User

## CLI Parameter Resolution Order

Because you can specify parameters for a given CLI command in several ways, it’s important to know the order of parameter resolution. The CLI resolves command-line parameters and arguments, definition files, environment variables, and settings in this order:
1. Command-line parameters and arguments, such as `--loglevel`, `--targetusername`, or `sandboxName=FullSbx`.

2. Parameters and options listed in a file specified on the command line. An example is a scratch org definition in a file specified by the `--definitionfile` parameter of `force:org:create`. If you indicate a parameter or an argument on the command line that differs from what exists in the definition file, the command line takes precedence.

3. Environment variables, such as `SFDX_LOG_LEVEL`.

4. Local CLI configuration values, such as `defaultusername` or `defaultdevhubusername`. To view the local values, run `force:config:list` from your project directory.

5. Global CLI configuration values. To view the global values, run `force:config:list` from any directory.

Remember, command-line parameters are at the top of the precedence list. For example, if you set the `SFDX_LOG_LEVEL` environment variable to `INFO` but you specify `--loglevel DEBUG` when running a command, the log level is `DEBUG`.

If you specify the `--targetusername` parameter for a specific CLI command, the CLI command connects to an org with that username. It does not connect to the org previously set using `defaultusername`.

SEE ALSO:
- Override or Add Definition File Options at the Command Line
- CLI Runtime Configuration Values
- Environment Variables

### Support for JSON Responses

Salesforce CLI commands typically display their output to the console (stdout) in non-structured, human-readable format. Messages written to the log file (stderr) are always in JSON format.

To view the console output in JSON format, specify the `--json` parameter for a particular CLI command.

```
sfdx force:org:display --json
```

Most CLI commands support JSON output. To confirm, run the command with the `--help` parameter to view the supported parameters.

To get JSON responses to all Salesforce CLI commands without specifying the `--json` option each time, set the `SFDX_CONTENT_TYPE` environment variable.

```
export SFDX_CONTENT_TYPE=JSON
```

### Log Messages and Log Levels

Salesforce CLI writes all log messages to the `USER_HOME_DIR/.sfdx/sfdx.log` file. CLI invocations append log messages to this running log file. Only errors are output to the terminal or command window from which you run the CLI.

**Important:** The files in the `USER_HOME_DIR/.sfdx` directory are used internally by Salesforce CLI. Do not remove or edit them.

The default level of log messages is `warn`. You can set the log level to one of the following, listed in order of least to most information. The level is cumulative: for the `debug` level. The `--loglevel` parameter supports parameter values in only lowercase (due to the migration to oclif). To assist you with the transition, we support uppercase parameters in Spring ‘19 but plan to deprecate support for them in Summer ‘19.

- error
You can change the log level in two ways, depending on what you want to accomplish.

To change the log level for the execution of a single CLI command, use the `--loglevel` parameter. Changing the log level in this way does not affect subsequent CLI use. This example specifies debug-level log messages when you create a scratch org.

```shell
sfdx force:org:create --definitionfile config/project-scratch-def.json --loglevel debug --setalias my-scratch-org
```

To globally set the log level for all CLI commands, set the `SFDX_LOG_LEVEL` environment variable. For example, on UNIX:

```shell
export SFDX_LOG_LEVEL=debug
```

**Note:** Salesforce CLI gathers diagnostic information about its use and reports it to Salesforce so that the development team can investigate issues. The type of information includes command duration and command invocation counts.

## CLI Deprecation Policy

Salesforce deprecates CLI commands and parameters when, for example, the underlying API changes.

The Salesforce CLI deprecation policy is:

- Salesforce can deprecate a command or parameter in any major update of the `salesforcedx` plug-in.
- Salesforce removes the deprecated command or parameter in the next major release of the `salesforcedx` plug-in. For example, if Salesforce deprecates a command in version 41, it does not appear in version 42.
- If you use a command or parameter that’s been deprecated but not yet removed, you get a warning message in `stderr` when you specify human-readable output. If you specify JSON output, the warning is presented as a property. The message includes the plug-in version of when the command or parameter will be removed. The command help also includes deprecation information when appropriate.
- When possible, Salesforce provides a functional alternative to the deprecated command or parameter.
- Salesforce announces new and upcoming deprecated commands and parameters in the release notes.
CHAPTER 3

Project Setup

In this chapter ...

- Sample Repository on GitHub
- Create a Salesforce DX Project
- Create a Salesforce DX Project from Existing Source
- Retrieve Source from an Existing Managed Package
- Retrieve Unpackaged Source Defined in a package.xml File
- Convert the Metadata Source to Source Format
- Link a Namespace to a Dev Hub Org
- Salesforce DX Project Configuration

Salesforce DX introduces a new project structure for your org’s metadata (code and configuration), your org templates, your sample data, and all your team’s tests. Store these items in a version control system (VCS) to bring consistency to your team’s development processes. Retrieve the contents of your team’s repository when you’re ready to develop a new feature.

You can use your preferred VCS. Most of our examples use Git.

You have different options to create a Salesforce DX project depending on how you want to begin.

| Use the Sample Repository on GitHub on page 17 | Explore the features of Salesforce DX using one of our sample repos and your own VCS and toolset. |
| Create a Salesforce DX Project from Existing Source on page 18 | Start with an existing Salesforce app to create a Salesforce DX project. |
| Create a Salesforce DX Project on page 17 | Create an app on the Lightning Platform using a Salesforce DX project. |
Sample Repository on GitHub

If you want to check out Salesforce DX features quickly, start with the `sfdx-simple` GitHub repo. It contains an example of the project configuration file (`sfdx-project.json`), a simple Salesforce app, and Apex tests.

Cloning this repo creates the directory `sfdx-simple`. See the repo’s Readme for more information.

Assuming that you’ve already set up Git, use the `git clone` command to clone the master branch of the repo from the command line.

To use HTTPS:

```
git clone https://github.com/forcedotcom/sfdx-simple.git
```

To use SSH:

```
git clone git@github.com:forcedotcom/sfdx-simple.git
```

If you don’t want to use Git, download a `.zip` file of the repository’s source using Clone, or download on the GitHub website. Unpack the source anywhere on your local file system.

Tip: To check out more complex examples, see the Sample Gallery.

It contains sample apps that show what you can build on the Salesforce platform. They’re continuously updated to incorporate the latest features and best practices.

SEE ALSO:

- `sfdx-simple` Sample GitHub Repo
- `dreamhouse-sfdx` Sample GitHub Repo

Create a Salesforce DX Project

A Salesforce DX project has a specific structure and a configuration file that identifies the directory as a Salesforce DX project.

Before you create your project, first decide if you are following org-based or package-based project development model.

If you’re following org-based development, change to the directory where you want the DX project located. Then run `force:project:create --n MyProject --manifest` to generate your project with a default manifest (`package.xml`) file.

If you’re following package-based development, you can create a project with minimal (empty) or expanded (standard) scaffolding. The default is `standard`, which provides extended scaffolding to facilitate moving source to and from your orgs.

1. Change to the directory where you want the DX project located.
2. Create the DX project.

```
force:project:create -n MyProject --template standard
```

If you don’t indicate an output directory, the project directory is created in the current location. You can also specify the default package directory to target when syncing source to and from the scratch org. If you don’t indicate a default package directory, this command creates a default package directory, `force-app`.

The default `--template` value, `empty`, creates a project with these sample configuration files to get you started.

- `.forceignore`
• config/project-scratch-def.json
• sfdx-project.json

If you select expanded scaffolding (--template standard), you get a complete directory structure that takes the guesswork out of where to put your source. It also provides these files that are especially helpful when using Salesforce Extensions for VS Code.

• .gitignore: Makes it easier to start using Git for version control.
• .prettierrc and .prettierignore: Make it easier to start using Prettier to format your Aura components.
• .vscode/extensions.json: Causes Visual Studio Code, when launched, to prompt you to install the recommended extensions for your project.
• .vscode/launch.json: Configures Replay Debugger, making it more discoverable and easier to use.
• .vscode/settings.json: By default, this file has one setting, for push or deploy on save, which is set to false. You can change this value or add other settings.

If you select --template analytics, you get all helpful VS Code files but the project scaffolding contains only one directory: /force-app/main/default/waveTemplates.

Example:

```bash
sfdx force:project:create --projectname mywork --template standard
sfdx force:project:create --projectname mywork --defaultpackagedir myapp
```

Next steps:

• (Optional) Register the namespace with the Dev Hub org.
• Configure the project (sfdx-project.json). If you use a namespace, update this file to include it.
• Create a scratch org definition that produces scratch orgs that mimic the shape of another org you use in development, such as sandbox, packaging, or production. The config directory of your new project contains a sample scratch org definition file (project-scratch-def.json).

SEE ALSO:
- Create a Salesforce DX Project from Existing Source
- Salesforce DX Project Configuration
- Link a Namespace to a Dev Hub Org
- Scratch Org Definition File
- How to Exclude Source When Syncing or Converting

Create a Salesforce DX Project from Existing Source

If you are already a Salesforce developer or ISV, you likely have existing source in a managed package in your packaging org or some application source in your sandbox or production org. Before you begin using Salesforce DX, retrieve the existing source and convert it to the source format.

Tip: If your current repo follows the directory structure that is created from a Metadata API retrieve, you can skip to converting the metadata format after you create a Salesforce DX project.

1. Create a Salesforce DX project.
2. Create a directory for the metadata retrieve. You can create this directory anywhere.

```bash
mkdir mdapipkg
```

3. Retrieve your metadata source.

<table>
<thead>
<tr>
<th>Format of Current Source</th>
<th>How to Retrieve Your Source for Conversion</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are a partner who has your source already defined as a managed package in your packaging org.</td>
<td>Retrieve Source from an Existing Managed Package on page 19</td>
</tr>
<tr>
<td>You have a <code>package.xml</code> file that defines your unpackaged source.</td>
<td>Retrieve Unpackaged Source Defined in a <code>package.xml</code> File on page 20</td>
</tr>
</tbody>
</table>

SEE ALSO:
- Convert the Metadata Source to Source Format
- Create a Salesforce DX Project

## Retrieve Source from an Existing Managed Package

If you’re a partner or ISV who already has a managed package in a packaging org, you’re in the right place. You can retrieve that package, unzip it to your local project, and then convert it to source format, all from the CLI.

Before you begin, create a Salesforce DX project.

1. In the project, create a folder to store what’s retrieved from your org, for example, `mdapipkg`.

2. Retrieve the metadata.

```bash
sfdx force:mdapi:retrieve -s -r ./mdapipkg -u <username> -p <package name>
```

The username can be a username or alias for the target org (such as a packaging org) from which you’re pulling metadata. The `-s` parameter indicates that you’re retrieving a single package. If your package name contains a space, enclose the name in single quotes.

```bash
-p 'Test Package'
```

3. Check the status of the retrieve.

When you run `force:mdapi:retrieve`, the job ID, target username, and retrieve directory are stored, so you don’t have to specify these required parameters to check the status. These stored values are overwritten when you run the `force:mdapi:retrieve` again.

```bash
sfdx force:mdapi:retrieve:report
```

If you want to check the status of a different retrieve operation, specify the retrieve directory and job ID on the command line, which overrides any stored values.

4. Unzip the zip file.

5. (Optional) Delete the zip file.
After you finish, convert the metadata to source format.

**SEE ALSO:**
- Create a Salesforce DX Project
- Convert the Metadata Source to Source Format

## Retrieve Unpackaged Source Defined in a package.xml File

If you already have a `package.xml` file, you can retrieve it, unzip it in your local project, and convert it to source format. You can do all these tasks from the CLI. The `package.xml` file defines the source you want to retrieve.

But what if you don’t have a `package.xml` file already created? See Sample package.xml Manifest Files in the Metadata API Developer Guide.

**Note:** If you already have the source in metadata format, you can skip these steps and go directly to converting it to source format.

1. In the project, create a folder to store what’s retrieved from your org, for example, `mdapipkg`.
2. Retrieve the metadata.

   ```
sfdx force:mdapi:retrieve -r ./mdapipkg -u <username> -k ./package.xml
   
   The username can be the scratch org username or an alias. The `-k` parameter indicates the path to the `package.xml` file, which is the unpackaged manifest of components to retrieve.
   
   3. Check the status of the retrieve.
      When you run `force:mdapi:retrieve`, the job ID, target username, and retrieve directory are stored, so you don’t have to specify these required parameters to check the status. These stored values are overwritten when you run the `force:mdapi:retrieve` again.

      ```
sfdx force:mdapi:retrieve:report
      
      If you want to check the status of a different retrieve operation, specify the retrieve directory and job ID on the command line, which overrides any stored values.
   
   4. Unzip the zip file.
   
   5. (Optional) Delete the zip file.
      After you retrieve the source and unzip it, you no longer need the zip file, so you can delete it.
      After you finish, convert from metadata format to source format.

**SEE ALSO:**
- Convert the Metadata Source to Source Format

## Convert the Metadata Source to Source Format

After you retrieve the source from your org, you can complete the configuration of your project and convert the metadata source to source format.

The convert command ignores all files that start with a “dot,” such as `.DS_Store`. To exclude more files from the convert process, add a `.forceignore` file.
1. Convert metadata format to source format. Let’s say you created a directory called `mdapi_project` when you retrieved the metadata.

   ```
   sfdx force:mdapi:convert --rootdir mdapi_project --outputdir tmp_convert
   ```

   The `--rootdir` parameter is the name of the directory that contains the metadata source.

   If you don’t indicate an output directory with the `--outputdir` parameter, the converted source is stored in the default package directory indicated in the `sfdx-project.json` file. If the output directory is located outside of the project, you can indicate its location using an absolute path.

   2. To indicate which package directory is the default, update the `sfdx-project.json` file.

   If there are two or more files with the same file name yet they contain different contents, the output directory contains duplicate files. Duplicate files can occur if you convert the same set of metadata more than once. The `mdapi:convert` process identifies these files with a `.dup` file extension. The `source:push` and `source:pull` commands ignore duplicate files, so you’ll want to resolve them. You have these options:

   - Choose which file to keep, then delete the duplicate.
   - Merge the files, then delete the other.

   Next steps:
   - Authorize the Dev Hub org and set it as the default
   - Configure the Salesforce DX project
   - Create a scratch org

   **SEE ALSO:**
   - How to Exclude Source When Syncing or Converting
   - Salesforce DX Project Configuration
   - Authorization
   - Create Scratch Orgs

---

## Link a Namespace to a Dev Hub Org

To use a namespace with a scratch org, you must link the Developer Edition org where the namespace is registered to a Dev Hub org. Complete these tasks before you link a namespace.

- If you don’t have an org with a registered namespace, create a Developer Edition org that is separate from the Dev Hub or scratch orgs. If you already have an org with a registered namespace, go to Step 1.
- In the Developer Edition org, create and register the namespace.

   **Important:** Choose namespaces carefully. If you’re trying out this feature or need a namespace for testing purposes, choose a disposable namespace. Don’t choose a namespace that you want to use in the future for a production org or some other real use case. Once you associate a namespace with an org, you can’t change it or reuse it.

1. Log in to your Dev Hub org as the System Administrator or as a user with the Salesforce DX Namespace Registry permissions.

   **Tip:** Make sure your browser allows pop-ups from your Dev Hub org.

2. (Required) If you have not already done so, define and deploy a My Domain name.
Tip: Why do you need a My Domain? A My Domain adds a subdomain to your Salesforce org URL so that it’s unique. As part of the Namespace Registry linking process, you’ll be logging into two distinct orgs simultaneously (your Dev Hub org and your Developer Edition org), and your browser can’t reliably distinguish between the two without a My Domain.

You receive an email when your domain name is ready for testing. It can take a few minutes.

3. From the App Launcher menu, select **Namespace Registries**.

4. Click **Link Namespace**.
   If you don’t see the **Link Namespace** button, make sure your My Domain is deployed to users.
   a. From Setup, enter My Domain in the Quick Find box, then select My Domain.
   b. Do you see the status as Domain Deployed to Users? If not, click **Deploy to Users**.
      Log out of your Dev Hub org, then open it again.

5. Log in to the Developer Edition org in which your namespace is registered using the org’s System Administrator’s credentials.
You cannot link orgs without a namespace, sandboxes, scratch orgs, patch orgs, and branch orgs to the Namespace Registry.

To view all the namespaces linked to the Namespace Registry, select the **All Namespace Registries** view.

SEE ALSO:
Create a Developer Edition Org
Lightning Aura Components Developer Guide: Create a Namespace in Your Org
Salesforce DX Setup Guide: Add Salesforce DX Users
Salesforce Help: Define Your Domain Name
Salesforce Help: My Domain
Salesforce Help: Test and Deploy Your New My Domain Subdomain

Salesforce DX Project Configuration

The project configuration file `sfdx-project.json` indicates that the directory is a Salesforce DX project. The configuration file contains project information and facilitates the authentication of scratch orgs and the creation of second-generation packages. It also tells the CLI where to put files when syncing between the project and scratch org.

We provide sample `sfdx-project.json` files in the sample repos for creating a project using the CLI or Extensions for VS Code.

Note: Are you planning to create second-generation packages? When you’re ready, add packaging-specific configuration options to support package creation. See **Configure Packages**.

We recommend that you check in this file with your source.

```json
{
    "packageDirectories" : [
        { "path": "force-app", "default": true},
        { "path": "unpackaged" },
        { "path": "utils" }
    ],
    "namespace": "",
    "sfdcLoginUrl" : "https://login.salesforce.com",
    "sourceApiVersion": "44.0"
}
```
You can manually edit these parameters.

**oauthLocalPort (optional)**

By default, the OAuth port is 1717. However, change this port if this port is already in use, and you plan to create a connected app in your Dev Hub org to support JWT-based authorization. Also, don’t forget to follow the steps in Create a Connected App to change the callback URL.

**packageDirectories (required)**

Package directories indicate which directories to target when syncing source to and from the scratch org. These directories can contain source from your managed package, unmanaged package, or unpackaged source, for example, ant tool or change set. Keep these things in mind when working with package directories.

- The location of the package directory is relative to the project. Don’t specify an absolute path. The following two examples are equivalent.

  ```json
  "path": "helloWorld"
  "path" : "./helloWorld"
  ```

- You can have only one default path (package directory). If you have only one path, we assume it’s the default, so you don’t have to explicitly set the `default` parameter. If you have multiple paths, you must indicate which one is the default.

- The CLI uses the default package directory as the target directory when pulling changes in the scratch org to sync the local project. This default path is also used when creating second-generation packages.

- If you do not specify an output directory, the default package directory is also where files are stored during source conversions. Source conversions are both from metadata format to source format, and from source format to metadata format.

**plugins (optional)**

To use the plug-ins you develop using the Salesforce Plugin Generator with your Salesforce DX project, add a plugins section to the `sfdx-project.json` file. In this section, add configuration values and settings to change your plug-ins’ behavior.

```json
"plugins": {
  "yourPluginName": {
    "timeOutValue": "2"
  },
  "yourOtherPluginName": {
    "yourCustomProperty": true
  }
}
```

Store configuration values for only those values that you want to check in to source control for the project. These configuration values affect your whole development team.

**namespace (optional)**

The global namespace that is used with a package. The namespace must be registered with an org that is associated with your Dev Hub org. This namespace is assigned to scratch orgs created with the `org:create` command. If you’re creating an unlocked package, you have the option to create a package with no namespace.

**Important:** Register the namespace with Salesforce and then connect the org with the registered namespace to the Dev Hub org.

**sfdcLoginUrl (optional)**

The login URL that the `force:auth` commands use. If not specified, the default is `login.salesforce.com`. Override the default value if you want users to authorize to a specific Salesforce instance. For example, if you want to authorize into a sandbox org, set this parameter to `test.salesforce.com`. 
If you do not specify a default login URL here, or if you run `force:auth` outside the project, you specify the instance URL when authorizing the org.

**sourceApiVersion (optional)**

The API version that the source is compatible with. The default is the same version as the Salesforce CLI.

The `sourceApiVersion` determines the fields retrieved for each metadata type during `source:push`, `source:pull`, or `source:convert`. This field is important if you’re using a metadata type that has changed in a recent release. You’d want to specify the version of your metadata source. For example, an icon field was added to the CustomTab for API version 14.0. If you retrieve components for version 13.0 or earlier, you’ll see errors when running the source commands because the components do not include the icon field.

Be sure not to confuse this project configuration value with the `apiVersion` on page 22 CLI runtime configuration value, which has a similar name.

SEE ALSO:

- Link a Namespace to a Dev Hub Org
- Authorization
- How to Exclude Source When Syncing or Converting
- Pull Source from the Scratch Org to Your Project
- Push Source to the Scratch Org
The Dev Hub org allows you to create, delete, and manage your Salesforce scratch orgs. After you set up your project on your local machine, you authorize with the Dev Hub org before you can create a scratch org.

You can also authorize other existing orgs, such as sandbox or packaging orgs, to provide more flexibility when using CLI commands. For example, after developing and testing an application using scratch orgs, you can deploy the changes to a centralized sandbox. Or, you can export a subset of data from an existing production org and import it into a scratch org for testing purposes.

You authorize an org only once. To switch between orgs during development, specify your username for the org. Use either the `--targetusername` (or `--targetdevhubusername`) CLI command parameter, set a default username, or use an alias.

You have some options when configuring authentication depending on what you’re trying to accomplish.

- We provide the OAuth Refresh Token flow, also called web-based flow, through a global out-of-the-box connected app. When you authorize an org from the command line, you enter your credentials and authorize the global connected app through the Salesforce web browser authentication flow.

- For continuous integration or automated environments in which you don’t want to manually enter credentials, use the OAuth JSON Web Tokens (JWT) Bearer Token flow, also called JWT-based flow. This authentication flow is ideal for scenarios where you cannot interactively log in to a browser, such as a continuous integration script.

**Important:** If your Dev Hub org is configured with high assurance (stepped up) authentication, Salesforce prompts the user to verify identity. This verification process means that you can’t use the JWT flow and Salesforce CLI for headless authentication.

SEE ALSO:

- Authorize an Org Using the Web-Based Flow
- Authorize an Org Using the JWT-Based Flow
- Salesforce DX Usernames and Orgs
Authorize an Org Using the Web-Based Flow

To authorize an org with the web-based flow, all you do is run a CLI command. Enter your credentials in a browser, and you’re up and running!

Authorization requires a connected app. We provide a connected app that is used by default. If you need more security or control, such as setting the refresh token timeout or specifying IP ranges, you can optionally create a connected app.

1. (Optional) Create a connected app if you require more security and control than offered by the provided connected app. Enable OAuth settings for the new connected app. Make note of the consumer key because you need it later.

2. If the org you are authorizing is on a My Domain subdomain, update your project configuration file (sfdx-project.json). Set the sfdcLoginUrl parameter to your My Domain login URL. If you are authorizing a sandbox, set the parameter to https://test.salesforce.com. For example:

```
"sfdcLoginUrl" : "https://test.salesforce.com"

"sfdcLoginUrl" : "https://somethingcool.my.salesforce.com"
```

Alternatively, use the --instanceurl parameter of the `force:auth:web:login` command, as shown in the next step, to specify the URL.

3. Run the `force:auth:web:login` CLI command. If you are authorizing a Dev Hub org, use the --setdefaultdevhubusername parameter if you want the Dev Hub org to be the default for commands that accept the --targetdevhubusername parameter.

```
sfdx force:auth:web:login --setdefaultdevhubusername --setalias my-hub-org

sfdx force:auth:web:login --setalias my-sandbox
```

If you are using your own connected app, use the --clientid parameter. For example, if your client identifier (also called the consumer key) is 04580y4051234051 and you are authorizing a Dev Hub org:

```
sfdx force:auth:web:login --clientid 04580y4051234051 --setdefaultdevhubusername --setalias my-hub-org
```

To specify a login URL other than the default, such as https://test.salesforce.com:

```
```

**Important:** Use the --setdefaultdevhubusername parameter only when authorizing a Dev Hub org. Do not use it when authorizing to other orgs, such as a sandbox.

4. In the browser window that opens, sign in to your org with your credentials.

5. Close the browser window, unless you want to explore the org.

SEE ALSO:

- Create a Connected App
- Salesforce DX Project Configuration

Authorize an Org Using the JWT-Based Flow

Continuous integration (CI) environments are fully automated and don’t support the human interactivity of a web-based flow. In these environments, you must use the JSON web tokens (JWT) to authorize an org.
The JWT-based authorization flow requires first generating a digital certificate and creating a connected app. You execute these tasks only once. After that, you can authorize the org in a script that runs in your CI environment.

For information about using JWT-based authorization with Travis CI, see the Continuous Integration Using Salesforce DX Trailhead module.

**Important:** If your Dev Hub org is configured with high assurance (stepped up) authentication, Salesforce prompts the user to verify identity. This verification process means that you can’t use the JWT flow and Salesforce CLI for headless authentication.

1. If you do not have your own private key and digital certificate, use OpenSSL to create the key and a self-signed certificate. It is assumed in this task that your private key file is named `server.key` and your digital certificate is named `server.crt`.

2. Create a connected app, and configure it for Salesforce DX.
   
   This task includes uploading the `server.crt` digital certificate file. Make note of the consumer key when you save the connected app because you need it later.

3. If the org you are authorizing is not hosted on `https://login.salesforce.com`, update your project configuration file (`sfdx-project.json`).
   
   Set the `sfdcLoginUrl` parameter to the login URL. Examples of other login URLs are your custom subdomain or `https://test.salesforce.com` for sandboxes. For example:
   ```json
   "sfdcLoginUrl": "https://test.salesforce.com"
   ```

   **Important:** If you specify a My Domain subdomain for the login URL, use the version that ends in `my.salesforce.com` instead of the URL you see in Lightning Experience (`.lightning.force.com`). To verify the valid My Domain URL, from Setup, enter *My Domain* in the Quick Find box, then select *My Domain*.
   
   Alternatively, you can use the `--instanceurl` parameter of the `force:auth:jwt:grant` command to specify the URL. This value overrides the login URL you specified in the `sfdx-project.json` file. See the next step for an example.

4. Run the `force:auth:jwt:grant` CLI command.
   
   Specify the client identifier from your connected app (also called the consumer key), the path to the private key file (`server.key`), and the JWT authentication username. When you authorize a Dev Hub org, set it as the default with the `--setdefaultdevhubusername` parameter. For example:
   ```bash
   sfdx force:auth:jwt:grant --clientid 04580y4051234051 \
   --jwtkeyfile /Users/jdoe/JWT/server.key --username jdoe@acdxgs0hub.org \
   --setdefaultdevhubusername --setalias my-hub-org
   ```
   
   This example shows how to use the `--instanceurl` parameter to specify an org hosted on `https://test.salesforce.com` rather than the default `https://login.salesforce.com`:
   ```bash
   sfdx force:auth:jwt:grant --clientid 04580y4051234051 \
   --jwtkeyfile /Users/jdoe/JWT/server.key --username jdoe@acdxgs0hub.org \
   --instanceurl https://test.salesforce.com
   ```
   
   You can authorize a scratch org using the same client identifier (consumer key) and private key file that you used to authorize its associated Dev Hub org. Set the `--instanceurl` parameter to `https://test.salesforce.com` and the `--username` parameter to the administrator user displayed after you create the scratch org with
Authorize a Scratch Org
If you configured your Dev Hub to support the JWT-based authorization flow, you can use the same digital certificate and private key to authorize an associated scratch org. This method is useful for continuous integration (CI) systems that must authorize scratch orgs after creating them, but don’t have access to the scratch org’s access token.

SEE ALSO:
Create a Private Key and Self-Signed Digital Certificate
Create a Connected App
Salesforce DX Project Configuration
Trailhead: Continuous Integration Using Salesforce DX (Create a Connected App)
Trailhead: Build an Automated CI/CD Pipeline with GitLab
Salesforce Help: Set up Two-Factor Authentication
Create, Clone, or Delete a Sandbox (Beta)

Authorize a Scratch Org
If you configured your Dev Hub to support the JWT-based authorization flow, you can use the same digital certificate and private key to authorize an associated scratch org. This method is useful for continuous integration (CI) systems that must authorize scratch orgs after creating them, but don’t have access to the scratch org’s access token.

It is assumed in this task that:
• You previously authorized your Dev Hub org using the JWT-based flow.
• The private key file you used when authorizing your Dev Hub org is accessible and located in /Users/jdoe/JWT/server.key.
• You’ve created a scratch org and have its administration user’s username, such as test-wvkpnfm5z113@example.com.

1. Copy the consumer key from the connected app that you created in your Dev Hub org.
   a. Log in to your Dev Hub org.
   b. From Setup, enter App Manager in the Quick Find box to get to the Lightning Experience App Manager.
   c. Locate the connected app in the apps list, then click View, and select View.
   d. In the API (Enable OAuth Settings) section, copy the Consumer Key to your clipboard. The consumer key is a long string of numbers, letters, and characters, such as 3MVG9szVa2Rx_sqBb444p50Yj (example shortened for clarity.)

2. Run the `force:auth:jwt:grant` CLI command. The `--clientid` and `--jwtkeyfile` parameter values are the same as when you ran the command to authorize a Dev Hub org. Set `--username` to the scratch org’s admin username and set `--instanceurl` to https://test.salesforce.com. For example:

```
sfdx force:auth:jwt:grant --clientid 3MVG9szVa2Rx_sqBb444p50Yj \ 
--jwtkeyfile /Users/jdoe/JWT/server.key --username test-wvkpnfm5z113@example.com \ 
--instanceurl https://test.salesforce.com
```
If you get an error that the user is not approved, it means that the scratch org information has not yet been replicated to https://test.salesforce.com. Wait a short time and try again.

SEE ALSO:
- Authorize an Org Using the JWT-Based Flow
- Connected Apps
- Create Scratch Orgs

Create a Private Key and Self-Signed Digital Certificate

The JWT-based authorization flow requires a digital certificate and the private key used to sign the certificate. You upload the digital certificate to the custom connected app that is also required for JWT-based authorization. You can use your own private key and certificate issued by a certification authority. Alternatively, you can use OpenSSL to create a key and a self-signed digital certificate.

This process produces two files.

- **server.key**—The private key. You specify this file when you authorize an org with the `force:auth:jwt:grant` command.
- **server.crt**—The digital certification. You upload this file when you create the connected app required by the JWT-based flow.

1. If necessary, install OpenSSL on your computer.
   
   To check whether OpenSSL is installed on your computer, run this command.
   ```bash
   which openssl
   ```

2. In Terminal or a Windows command prompt, create a directory to store the generated files, and change to the directory.
   ```bash
   mkdir /Users/jdoe/JWT
   cd /Users/jdoe/JWT
   ```

3. Generate a private key, and store it in a file called **server.key**.
   ```bash
   openssl genrsa -des3 -passout pass:SomePassword -out server.pass.key 2048
   openssl rsa -passin pass:SomePassword -in server.pass.key -out server.key
   ```
   You can delete the **server.pass.key** file because you no longer need it.

4. Generate a certificate signing request using the **server.key** file. Store the certificate signing request in a file called **server.csr**. Enter information about your company when prompted.
   ```bash
   openssl req -new -key server.key -out server.csr
   ```
5. Generate a self-signed digital certificate from the server.key and server.csr files. Store the certificate in a file called server.crt.

```bash
openssl x509 -req -sha256 -days 365 -in server.csr -signkey server.key -out server.crt
```

SEE ALSO:
- OpenSSL: Cryptography and SSL/TLS Tools
- Create a Connected App
- Authorize an Org Using the JWT-Based Flow

## Create a Connected App

If you use JWT-based authorization, you must create your own connected app in your Dev Hub org. You can also create a connected app for web-based authorization if you require more security than provided with our connected app. For example, you can create a connected app to set the refresh token timeout or specify IP ranges.

You create a connected app using Setup in your Dev Hub org. These steps assume that you are using Lightning Experience.

JWT-based authorization requires a digital certificate, also called a digital signature. You can use your own certificate or create a self-signed certificate using OpenSSL.

**Note:** The steps marked **JWT only** are required only if you are creating a connected app for JWT-based authorization. They are optional for web-based authorization.

1. Log in to your Dev Hub org.
2. From Setup, enter **App Manager** in the Quick Find box to get to the Lightning Experience App Manager.
3. In the top-right corner, click **New Connected App**.
4. Update the basic information as needed, such as the connected app name and your email address.
5. Select **Enable OAuth Settings**.
6. (Device auth flow only) Select **Enable for Device Flow** to use device authentication flow.

   If port 1717 (the default) is already in use on your local machine, specify an available one instead. Make sure to also update your `sfdx-project.json` file by setting the `oauthLocalPort` property to the new port. For example, if you set the callback URL to `http://localhost:1919/OauthRedirect`:

   ```json
   "oauthLocalPort" : "1919"
   ```

8. (JWT only) Select **Use digital signatures**.
9. (JWT only) Click **Choose File** and upload the `server.crt` file that contains your digital certificate.
10. Add these OAuth scopes:
    - **Access and manage your data (api)**
    - **Perform requests on your behalf at any time (refresh_token, offline_access)**
    - **Provide access to your data via the Web (web)**
11. Click **Save**.
Important: Make note of the consumer key because you need it later when you run a `force:auth` command.

12. (JWT only) Click Manage.
13. (JWT only) Click Edit Policies.
14. (JWT only) In the OAuth Policies section, select Admin approved users are pre-authorized for Permitted Users, and click OK.
15. (JWT only) Click Save.
16. (JWT only) Click Manage Profiles and then click Manage Permission Sets. Select the profiles and permission sets that are pre-authorized to use this connected app. Create permission sets if necessary.

SEE ALSO:
- Create a Private Key and Self-Signed Digital Certificate
- Trailhead: Create Your Connected App (Continuous Integration Using Salesforce DX Module)
- Connected Apps
- Authorization
- Salesforce Help: Set up Two-Factor Authentication

Use an Existing Access Token Instead of Authorizing

When you authorize into an org using the `force:auth` commands, the Salesforce CLI takes care of generating and refreshing all tokens, such as the access token. But sometimes you want to run a few CLI commands against an existing org without going through the entire authorization process. In this case, you must provide the access token and instance URL of the org.

1. Use `force:config:set` to set the `instanceUrl` config value to the Salesforce instance that hosts the existing org to which you want to connect.
   
   ```
   sfdx force:config:set instanceUrl=https://na35.salesforce.com
   ```

2. When you run the CLI command, use the org’s access token as the value for the `--targetusername` parameter rather than the org’s username.
   
   ```
   sfdx force:mdapi:deploy --deploydir <md-dir> --targetusername <access-token>
   ```

   The CLI does not store the access token in its internal files. It uses it only for this CLI command run.

Authorization Information for an Org

You can view information for all orgs that you have authorized and the scratch orgs that you have created.

Use this command to view authentication information about an org.

```
 sfdx force:org:display --targetusername <username>
```

If you have set a default username, you don’t have to specify the `--targetusername` parameter. To display the usernames for all the active orgs that you’ve authorized or created, use `force:org:list`.
If you have set an alias for an org, you can specify it with the `--targetusername` parameter. This example uses the `my-scratch` alias.

```bash
sfdx force:org:display --targetusername my-scratch-org
```

--- Org Description

<table>
<thead>
<tr>
<th>KEY</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Token</td>
<td>&lt;long-string&gt;</td>
</tr>
<tr>
<td>Alias</td>
<td>my-scratch-org</td>
</tr>
<tr>
<td>Client Id</td>
<td>SalesforceDevelopmentExperience</td>
</tr>
<tr>
<td>Created By</td>
<td><a href="mailto:joe@mydevhub.org">joe@mydevhub.org</a></td>
</tr>
<tr>
<td>Created Date</td>
<td>2017-06-07T00:51:59.000+0000</td>
</tr>
<tr>
<td>Dev Hub Id</td>
<td><a href="mailto:jdoe@fabdevhub.org">jdoe@fabdevhub.org</a></td>
</tr>
<tr>
<td>Edition</td>
<td>Developer</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>2017-06-14</td>
</tr>
<tr>
<td>Id</td>
<td>00D9A000000008cKm</td>
</tr>
<tr>
<td>Instance Url</td>
<td><a href="https://page-power-5849-dev-ed.cs46.my.salesforce.com">https://page-power-5849-dev-ed.cs46.my.salesforce.com</a></td>
</tr>
<tr>
<td>Org Name</td>
<td>Your Company</td>
</tr>
<tr>
<td>Status</td>
<td>Active</td>
</tr>
<tr>
<td>Username</td>
<td><a href="mailto:test-apraqvkwhcml@example.com">test-apraqvkwhcml@example.com</a></td>
</tr>
</tbody>
</table>

To get more information, such as the Salesforce DX authentication URL, include the `--verbose` parameter. However, `--verbose` displays the Sfdx Auth Url only if you authenticated to the org using `force:auth:web:login` and not `force:auth:jwt:grant`.

```bash
sfdx force:org:display -u my-scratch-org --verbose
```

--- Org Description

<table>
<thead>
<tr>
<th>KEY</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Token</td>
<td>&lt;long-string&gt;</td>
</tr>
<tr>
<td>Alias</td>
<td>my-scratch-org</td>
</tr>
<tr>
<td>Client Id</td>
<td>SalesforceDevelopmentExperience</td>
</tr>
<tr>
<td>Created By</td>
<td><a href="mailto:joe@mydevhub.org">joe@mydevhub.org</a></td>
</tr>
<tr>
<td>Created Date</td>
<td>2017-06-07T00:51:59.000+0000</td>
</tr>
<tr>
<td>Dev Hub Id</td>
<td><a href="mailto:jdoe@fabdevhub.org">jdoe@fabdevhub.org</a></td>
</tr>
<tr>
<td>Edition</td>
<td>Developer</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>2017-06-14</td>
</tr>
<tr>
<td>Id</td>
<td>00D9A000000008cKm</td>
</tr>
<tr>
<td>Instance Url</td>
<td><a href="https://page-power-5849-dev-ed.cs46.my.salesforce.com">https://page-power-5849-dev-ed.cs46.my.salesforce.com</a></td>
</tr>
<tr>
<td>Org Name</td>
<td>Your Company</td>
</tr>
<tr>
<td>Status</td>
<td>Active</td>
</tr>
<tr>
<td>Username</td>
<td><a href="mailto:test-apraqvkwhcml@example.com">test-apraqvkwhcml@example.com</a></td>
</tr>
</tbody>
</table>

**Note:** To help prevent security breaches, the `force:org:display` output doesn’t include the org’s client secret or refresh token. If you need these values, perform an OAuth flow outside of the Salesforce CLI.

**SEE ALSO:**
- OAuth 2.0 Web Server Authentication Flow
- Salesforce DX Usernames and Orgs
Log Out of an Org

For security purposes, you can use the Salesforce CLI to log out of any org you’ve previously authorized. This practice prevents other users from accessing your orgs if you don’t want them to.

⚠️ Important: The only way to access an org after you log out of it is with a password. By default, new scratch orgs contain one administrator with no password. Therefore, to access a scratch org again after you log out of it, set a password for at least one user. Otherwise, you lose all access to the scratch org. If you don’t want to access the scratch org again, rather than log out of it, we recommend that you delete it with `force:org:delete`.

To log out of an org, use `force:auth:logout`. This example uses the alias `my-hub-org` to log out.

```
sfdx force:auth:logout --targetusername my-hub-org
```

To log out of all your orgs, including scratch orgs, use the `--all` parameter.

```
sfdx force:auth:logout --all
```

To access an org again, other than a scratch org, reauthorize it.

When you log out of an org, it no longer shows up in the `force:org:list` output. If you log out of a Dev Hub org, the associated scratch orgs show up only if you specify the `--all` parameter.
CHAPTER 5  Metadata Coverage

Launch the Metadata Coverage report to determine supported metadata for scratch org source tracking purposes. The Metadata Coverage report is the ultimate source of truth for metadata coverage across several channels. These channels include Metadata API, scratch org source tracking, unlocked packages, second-generation managed packages, classic managed packages, and more.

You are no longer required to log in to an org to see the Metadata Coverage report. For more information, see Metadata Types in the Metadata API Developer Guide.

Hard-Deleted Components in Unlocked Packages

Components of these metadata types are hard-deleted from the target install org when deleted from an unlocked package.

- ApexClass
- ApexComponent
- ApexPage
- ApexTrigger
- AuraDefinitionBundle
- BrandingSet
- CompactLayout
- CustomPermission
- Dashboard
- Document
- EmailServicesFunction
- EmailTemplate
- EmbeddedServiceBranding
- EmbeddedServiceConfig
- EmbeddedServiceLiveAgent
- ExternalServiceRegistration
- FeatureParameterBoolean
- FeatureParameterDate
- FeatureParameterInteger
- FlexiPage
- HomePageLayout
- InstalledPackage
Metadata Coverage

- IntegrationHubSettings
- IntegrationHubSettingsType
- Layout
- LicenseDefinition
- LightningComponentBundle
- LightningExperienceTheme
- ListView
- LiveChatAgentConfig
- LiveChatButton
- LiveChatSensitiveDataRule
- NamedCredential
- NetworkBranding
- MatchingRule
- PermissionSet
- Profile
- PermissionSetGroup
- PermissionSetLicense
- QuickAction
- RemoteSiteSetting
- Report
- StaticResource
- UserLicense
- WaveApplication
- WaveDashboard
- WaveDataflow
- WaveDataset
- WaveLens
- WaveRecipe
- WaveTemplateBundle
- WaveXmd
- WorkflowFlowAction
- WorkflowRule
- WorkflowTask(Task)

SEE ALSO:
- Components Available in Managed Packages (ISVForce Guide)
- Metadata Types (Metadata API Developer Guide)
CHAPTER 6

Scratch Orgs

The scratch org is a source-driven and disposable deployment of Salesforce code and metadata. A scratch org is fully configurable, allowing developers to emulate different Salesforce editions with different features and preferences. You can share the scratch org configuration file with other team members, so you all have the same basic org in which to do your development.

Scratch orgs drive developer productivity and collaboration during the development process, and facilitate automated testing and continuous integration. You can use the CLI or IDE to open your scratch org in a browser without logging in. You might spin up a new scratch org when you want to:

- Start a new project.
- Start a new feature branch.
- Test a new feature.
- Start automated testing.
- Perform development tasks directly in an org.
- Start from “scratch” with a fresh new org.

Note: Partners can create partner edition scratch orgs: Partner Developer, Partner Enterprise, Partner Group, and Partner Professional. This feature is available only if creating scratch orgs from a Dev Hub in a partner business org. See Supported Scratch Org Editions for Partners in the ISVforce Guide for details.

Scratch Orgs Created in Government Cloud or Public Cloud

The Dev Hub org instance determines where scratch orgs are created.

- Scratch orgs created from a Dev Hub org in Government Cloud are created in a Government Cloud instance.
- Scratch orgs created from a Dev Hub org in Public Cloud are created on a Public Cloud instance.

Scratch Org Allocations and Considerations

To ensure optimal performance, your Dev Hub org edition determines your scratch org allocations. These allocations determine how many scratch orgs you can create daily, and how many can be active at a
given point. By default, Salesforce deletes scratch orgs and their associated ActiveScratchOrg records from your Dev Hub org when a scratch org expires. A scratch org expires in 7 days unless you set a duration when you create it.

Scratch orgs have these storage limits:

- 200 MB for data
- 50 MB for files

To try out scratch orgs, sign up for a Developer Edition org on Salesforce Developers, then enable Dev Hub.

<table>
<thead>
<tr>
<th>Edition</th>
<th>Active Scratch Org Allocation</th>
<th>Daily Scratch Org Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developer Edition or trial</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Enterprise Edition</td>
<td>40</td>
<td>80</td>
</tr>
<tr>
<td>Unlimited Edition</td>
<td>100</td>
<td>200</td>
</tr>
<tr>
<td>Performance Edition</td>
<td>100</td>
<td>200</td>
</tr>
</tbody>
</table>

**Note:** If you are a partner or ISV, your scratch org allocations might be different. See the ISVforce Guide for details.

### List Active and Daily Scratch Orgs

To view how many scratch orgs you have allocated, and how many you have remaining:

```
sfdx force:limits:api:display -u <Dev Hub username or alias>
```

<table>
<thead>
<tr>
<th>NAME</th>
<th>REMAINING</th>
<th>MAXIMUM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ActiveScratchOrgs</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ConcurrentAsyncGetReportInstances</td>
<td>200</td>
<td>200</td>
</tr>
<tr>
<td>ConcurrentSyncReportRuns</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>DailyApiRequests</td>
<td>14994</td>
<td>100000</td>
</tr>
<tr>
<td>DailyAsyncApexExecutions</td>
<td>250000</td>
<td>250000</td>
</tr>
<tr>
<td>DailyBulkApiRequests</td>
<td>10000</td>
<td>10000</td>
</tr>
<tr>
<td>DailyDurableGenericStreamingApiEvents</td>
<td>10000</td>
<td>10000</td>
</tr>
<tr>
<td>DailyDurableStreamingApiEvents</td>
<td>10000</td>
<td>10000</td>
</tr>
<tr>
<td>DailyGenericStreamingApiEvents</td>
<td>10000</td>
<td>10000</td>
</tr>
<tr>
<td><strong>DailyScratchOrgs</strong></td>
<td>80</td>
<td>80</td>
</tr>
<tr>
<td>DailyStreamingApiEvents</td>
<td>10000</td>
<td>10000</td>
</tr>
<tr>
<td>DailyWorkflowEmails</td>
<td>75</td>
<td>75</td>
</tr>
<tr>
<td>DataStorageMB</td>
<td>1073</td>
<td>1073</td>
</tr>
<tr>
<td>DurableStreamingApiConcurrentClients</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>FileStorageMB</td>
<td>1073</td>
<td>1073</td>
</tr>
<tr>
<td>HourlyAsyncReportRuns</td>
<td>1200</td>
<td>1200</td>
</tr>
<tr>
<td>HourlyDashboardRefreshes</td>
<td>200</td>
<td>200</td>
</tr>
<tr>
<td>HourlyDashboardResults</td>
<td>5000</td>
<td>5000</td>
</tr>
<tr>
<td>Feature</td>
<td>Limit 1</td>
<td>Limit 2</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------</td>
<td>---------</td>
</tr>
<tr>
<td>HourlyDashboardStatuses</td>
<td>999999999</td>
<td>999999999</td>
</tr>
<tr>
<td>HourlyODataCallout</td>
<td>10000</td>
<td>10000</td>
</tr>
<tr>
<td>HourlySyncReportRuns</td>
<td>500</td>
<td>500</td>
</tr>
<tr>
<td>HourlyTimeBasedWorkflow</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>MassEmail</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>PermissionSets</td>
<td>1489</td>
<td>1500</td>
</tr>
<tr>
<td>SingleEmail</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>StreamingApiConcurrentClients</td>
<td>20</td>
<td>20</td>
</tr>
</tbody>
</table>
Scratch Org Definition File

The scratch org definition file is a blueprint for a scratch org. It mimics the shape of an org that you use in the development life cycle, such as sandbox, packaging, or production.

The settings and configuration options associated with a scratch org determine its shape, including:

- **Edition**—The Salesforce edition of the scratch org, such as Developer, Enterprise, Group, or Professional.
- **Add-on features**—Functionality that is not included by default in an edition, such as multi-currency.
- **Settings**—Org and feature settings used to configure Salesforce products, such as Chatter and Communities.

By default, scratch orgs are empty. They don’t contain much of the sample metadata that you get when you sign up for an org, such as a Developer Edition org, the traditional way. Some of the things not included in a scratch org are:

- Custom objects, fields, indexes, tabs, and entity definitions
- Sample data
- Sample Chatter feeds
- Dashboards and reports
- Workflows
- Picklists
- Profiles and permission sets
- Apex classes, triggers, and pages

Setting up different scratch org definition files allows you to easily create scratch orgs with different shapes for testing. For example, you can turn Chatter on or off in a scratch org by setting the ChatterEnabled org preference in the definition file. If you want a scratch org with sample data and metadata like you're used to, add this option: `hasSampleData`.

We recommend that you keep this file in your project and check it in to your version control system. For example, create a team version that you check in for all team members to use. Individual developers could also create their own local version that includes the scratch org definition parameters. Examples of these parameters include email and last name, which identify who is creating the scratch org.

Scratch Org Definition File Name

You indicate the path to the scratch org configuration file when you create a scratch org with the `force:org:create` CLI command.

- If you’re using Salesforce CLI on the command line, you can name this file whatever you like and locate it anywhere the CLI can access.
- If you’re using Salesforce Extensions for VS Code, make sure that the scratch org definition file is located in the `config` folder and its name ends in `scratch-def.json`.

If you’re using a sample repo or creating a Salesforce DX project, the sample scratch org definition files are located in the `config` directory. You can create different configuration files for different org shapes or testing scenarios. For easy identification, name the file something descriptive, such as `devEdition-scratch-def.json` or `packaging-org-scratch-def.json`.

Scratch Org Definition File Options

Here are the options you can specify in the scratch org definition file:

<table>
<thead>
<tr>
<th>Name</th>
<th>Required?</th>
<th>Default If Not Specified</th>
</tr>
</thead>
<tbody>
<tr>
<td>orgName</td>
<td>No</td>
<td>Company</td>
</tr>
<tr>
<td>Name</td>
<td>Required?</td>
<td>Default If Not Specified</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>country</td>
<td>No</td>
<td>Dev Hub’s country. If you want to override this value, enter the two-character, upper-case ISO-3166 country code (Alpha-2 code). You can find a full list of these codes at several sites, such as: <a href="https://www.iso.org/obp/ui/#search">https://www.iso.org/obp/ui/#search</a>. This value sets the locale of the scratch org.</td>
</tr>
<tr>
<td>username</td>
<td>No</td>
<td><a href="mailto:test-unique_identifier@example.com">test-unique_identifier@example.com</a></td>
</tr>
<tr>
<td>adminEmail</td>
<td>No</td>
<td>Email address of the Dev Hub user making the scratch org creation request</td>
</tr>
<tr>
<td>edition</td>
<td>Yes</td>
<td>None. Valid entries are Developer, Enterprise, Group, or Professional</td>
</tr>
<tr>
<td>description</td>
<td>No</td>
<td>None. 2000-character free-form text field. The description is a good way to document the scratch org’s purpose. You can view or edit the description in the Dev Hub. From App Launcher, select Scratch Org Info or Active Scratch Orgs, then click the scratch org number.</td>
</tr>
<tr>
<td>hasSampleData</td>
<td>No</td>
<td>Valid values are true and false. False is the default, which creates an org without sample data.</td>
</tr>
<tr>
<td>language</td>
<td>No</td>
<td>Default language for the country. To override the language set by the Dev Hub locale, see Supported Languages for the codes to use in this field.</td>
</tr>
<tr>
<td>features</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>release</td>
<td>No</td>
<td>Same Salesforce release as the Dev Hub org. Options are preview or previous. Can use only during Salesforce release transition periods.</td>
</tr>
<tr>
<td>settings</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>&lt;custom field API name&gt;</td>
<td>No</td>
<td>None. Useful for Dev Ops use cases where you want to track extra information on the ScratchOrgInfo object. First, create the custom field, then reference it in the scratch org definition by its API name.</td>
</tr>
</tbody>
</table>

### Sample Scratch Org Definition File

Here's what the scratch org definition JSON file looks like. For more information on features and settings, see Scratch Org Definition Configuration Values.

```json
{
    "orgName": "Acme",
    "edition": "Enterprise",
    "features": ["Communities", "ServiceCloud", "Chatbot"],
    "settings": {
        "communitiesSettings": {
            "enableNetworksEnabled": true
        }
    }
}
```
"mobileSettings": { "enableS1EncryptedStoragePref2": true },
"omniChannelSettings": { "enableOmniChannel": true },
"caseSettings": { "systemUserEmail": "support@acme.com" }
}]

Some features, such as Communities, can require a combination of a feature and a setting to work correctly for scratch orgs. This code snippet sets both the feature and associated setting.

"features": ["Communities"],
"settings": { "communitiesSettings": { "enableNetworksEnabled": true }, ...

Create a Custom Field for ScratchOrgInfo

You can add more options to the scratch org definition to manage your Dev Ops process. To do so, create a custom field on the ScratchOrgInfo object. (ScratchOrgInfo tracks scratch org creation and deletion.)

⚠️ Important: If you're making these changes directly in your production org, proceed with the appropriate levels of caution. The ScratchOrgInfo object is not available in sandboxes or scratch orgs.

1. In the Dev Hub org, create the custom field.
   a. From Setup, enter Object Manager in the Quick Find box, then select Object Manager.
   b. Click Scratch Org Info.
   c. In Fields & Relationships, click New.
   d. Define the custom field, then click Save.

2. After you create the custom field, you can pass it a value in the scratch org definition file by referencing it with its API name.

Let's say you create two custom fields called workitem and release. Add the custom fields and associated values to the scratch org definition:

```json
{
    "orgName": "MyCompany",
    "edition": "Developer",
    "workitem__c": "W-12345678",
    "release__c": "June 2018 pilot",
    "settings": {
        "omniChannelSettings": { "enableOmniChannel": true
    }
}
```
3. Create the scratch org.

**Scratch Org Definition Configuration Values**

The scratch org definition file contains the configuration values that determine the shape of the scratch org.

**Supported Editions**

The Salesforce edition of the scratch org. Possible values are:
- Developer
- Enterprise
- Group
- Professional

**Supported Features**

You can enable these add-on features in a scratch org. Features aren’t case-sensitive. You can indicate them as all-caps, or how we define them here (for readability purposes). If a feature is followed by `<value>`, it requires that you specify a value as an incremental allocation or limit.

You can specify multiple feature values in a comma-delimited list in the scratch org definition file.

```
"features": ["MultiCurrency", "AuthorApex"],
```

- **AddCustomApps:<value>**
  Increases the maximum number of custom apps allowed in an org. Indicate a value from 1-30.

- **AddCustomObjects:<value>**
  Increases the maximum number of custom objects allowed in the org. Indicate a value from 1-30.

- **AddCustomRelationships:<value>**
  Increases the maximum number of custom relationships allowed on an object. Indicate a value from 1-30.

- **AddCustomTabs:<value>**
  Increases the maximum number of custom tabs allowed in an org. Indicate a value from 1-30.

- **AddDataComCRMRecordCredit:<value>**
  Increases record import credits assigned to a user in your scratch org. Indicate a value from 1-30.

- **AddInsightsQueryLimit:<value>**
  Increases the size of your Einstein Analytics query results. Indicate a value from 1-30 (multiplier is 10). Setting the quantity to 6 increases the query results to 60.

- **AdditionalFieldHistory:<value>**
  Increases the number of fields you can track history for beyond the default, which is 20 fields. Indicate a value between 1-40.

- **AnalyticsAdminPerms**
  Enables all permissions required to administer the Analytics platform, including permissions to enable creating Analytics templated apps and Analytics Apps.
API
Enables access to the Salesforce APIs (REST, SOAP, Bulk, Bulk 2.0) even in scratch orgs where the edition normally doesn't have API access.

AuthorApex
Enables you to access and modify Apex code in a scratch org. Enabled by default in Enterprise and Developer Editions.

BigObjectsBulkAPI
Enables the scratch org to use BigObjects in the Bulk API.

CalloutSizeMB:<value>
Increases the maximum size of an Apex callout. Indicate a value between 3-12.

CascadeDelete
Provides lookup relationships with the same cascading delete functionality previously only available to master-detail relationships. To prevent records from being accidentally deleted, cascade-delete is disabled by default.

CaseClassification
Enables Einstein Case Classification. Case Classification offers recommendations to your agents so they can select the best value. You can also automatically save the best recommendation and route the case to the right agent.

ChangeDataCapture
Enables Change Data Capture, if the scratch org edition doesn't automatically enable it.

Chatbot
Enables deployment of Bot metadata into a scratch org, and allows you to create and edit bots.

CMSMaxContType
Limits the number of distinct content types you can create within Salesforce CMS to 21.

CMSMaxNodesPerContType
Limits the maximum number of child nodes (fields) you can create for a particular content type to 15.

CMSUnlimitedUse
Enables unlimited content records, content types, and bandwidth usage in Salesforce CMS.

Communities
Allows the org to create a customer community. To use Communities, you must also include communitiesSettings > enableNetworksEnabled in the settings section of your scratch org definition file.

ConAppPluginExecuteAsUser
Enables the pluginExecutionUser field in the ConnectedApp Metadata API object.

ConCStreamingClients:<value>
Increases the maximum number of concurrent clients (subscribers) across all channels and for all event types (API version 36.0 and earlier). Indicate a value between 20-4,000.

ConnectedAppToolingAPI
Enables the use of connected apps with the Tooling API.

ConsolePersistenceInterval:<value>
Increases how often console data is saved, in minutes. Indicate a value between 0-500. To disable auto save, set the value to 0.

ContactsToMultipleAccounts
Enables the contacts to multiple accounts feature. This feature lets you relate a contact to two or more accounts.

ContractApprovals
Enables contract approvals, which allow you to track contracts through an approval process.
CPQ
Enables the necessary licensed features required to install the Salesforce CPQ managed package. Doesn’t install the package automatically.

CustomNotificationType
Allows the org to create custom notification types, which are used to send custom desktop and mobile notifications.

DataComDnbAccounts
Provides a license to Data.com account features.

DataComFullClean
Provides a license to Data.com cleaning features, and allows users to turn on auto fill clean settings for jobs.

DataMaskUser
Provides 30 Data Mask permission set licenses. This permission set enables access to an installed Salesforce Data Mask package.

DebugApex
Enables Apex Interactive Debugger. You can use it to debug Apex code by setting breakpoints and checkpoints, and inspecting your code to find bugs.

DefaultWorkflowUser
Sets the scratch org admin as the default workflow user.

DeferSharingCalc
Allows admins to suspend group membership and sharing rule calculations and to resume them later.

DensityValue
The default density for the org. The display density setting determines how densely content is displayed and where field labels are located.

DevelopmentWave
Enables Einstein Analytics development in a scratch org. It assigns five platform licenses and five EA platform licenses to the org, along with assigning the permission set license to the admin user. It also enables the Analytics Templates and Einstein Discovery features.

DeviceTrackingEnabled
Enables Device Tracking.

DisableManageIdConfAPI
Limits access to the LoginIP and ClientBrowser API objects to allow view or delete only.

Division
Turns on the Manage Divisions feature under Company Settings. Divisions let you segment your organization’s data into logical sections, making searches, reports, and list views more meaningful to users. Divisions are useful for organizations with extremely large amounts of data.

DocumentChecklist
Enables Document Tracking and Approval features, and adds the Document Checklist permission set. Document tracking features let you define documents to upload and approve, which supports processes like loan applications or action plans.

DurableClassicStreamingAPI
Enables Durable PushTopic Streaming API (API version 37.0 and later).

DurableGenericStreamingAPI
Enables Durable Generic Streaming API (API version 37.0 and later).

DynamicClientCreationLimit
Allows the org to register up to 100 OAuth 2.0 connected apps through the dynamic client registration endpoint.
**EinsteinAnalyticsPlus**
Provides one Einstein Analytics Plus license.

**EinsteinArticleRecommendations**
Provides licenses for Einstein Article Recommendations. Einstein Article Recommendations uses data from past cases to identify Knowledge articles that are most likely to help your customer service agents address customer inquiries.

**EinsteinBuilderFree**
Provides a license that allows admins to create one enabled prediction with Einstein Prediction Builder. Einstein Prediction Builder is custom AI for admins

**EmbeddedLoginForIE**
Provides JavaScript files that support Embedded Login in IE11.

**EmpPublishRateLimit:<value>**
 Increases the maximum number of standard-volume platform event notifications published per hour. Indicate a value between 1,000-10,000.

**EnablePRM**
Enables the partner relationship management permissions for the org.

**EnableManageIdConfUI**
Enables access to the LoginIP and ClientBrowser API objects to verify a user’s identity in the UI.

**Entitlements**
Enables entitlements. Entitlements are units of customer support in Salesforce, such as phone support or web support. They’re typically used to represent terms in service agreements.

**EventLogFile**
Enables API access to your org’s event log files. The event log files contain information about your org’s operational events that you can use to analyze usage trends and user behavior.

**ExternalIdentityLogin**
Allows the scratch org to use External Identity features associated with your license.

**ExternalSharing**
Enables admins to set separate organization-wide defaults for internal and external users.

**FieldAuditTrail**
Enables Field Audit Trail for the org and allows a total 60 tracked fields. 20 fields are tracked by default for all orgs, and 40 more are tracked with Field Audit Trail.

**FieldService**
Provides the Field Service license.

**FinancialServicesCommunityUser:<value>**
Adds the Financial Services Community permission set license, and enables access to Financial Services community components and objects. Indicate a value between 1-10.

**FinancialServicesUser:<value>**
Adds the Financial Services Cloud Standard permission set license. This permission set enables access to Lightning components and the standard version of Financial Services Cloud. Also provides access to the standard Salesforce objects and custom Financial Services Cloud objects. Indicate a value between 1-10.

**FlowSites**
Enables the use of flows in Salesforce Sites and customer portals.
ForceComPlatform
Adds one Salesforce Platform user license.

GenericStreaming
Enables Generic Streaming API (API version 36.0 and earlier).

GenStreamingEventsPerDay:<value>
Increases the maximum number of delivered event notifications within a 24-hour period, shared by all CometD clients, with generic streaming (API version 36.0 and earlier). Indicate a value between 10,000-50,000.

HealthCloudUser
Adds one user license to access Health Cloud features.

HighVelocitySales
Provides High Velocity Sales licenses. High Velocity Sales optimizes the inside sales process with a high-productivity workspace. Sales managers can create custom sales processes that guide reps through handling different types of prospects. And sales reps can rapidly handle prospects with a prioritized list and other productivity-boosting features.

HoursBetweenCoverageJob:<value>
The frequency (in hours) when the sharing inheritance coverage report can be run for an object. Indicate a value between 1-24.

IdentityProvisioningFeatures
Enables use of Salesforce Identity User Provisioning.

IgnoreQueryParamWhitelist
Ignores whitelisting rules for query parameter filter rules. If enabled, you can add any query parameter to the URL.

IndustriesActionPlan
Provides a license for Action Plans. Action Plans allow you to define the tasks or document checklist items for completing a business process.

IndustriesManufacturing
Enables Sales Agreements. With Sales Agreements, you can negotiate purchase and sale of products over a continued period. You can also get insights into products, prices, discounts, and quantities. And track your planned and actual quantities and revenues with real-time updates from orders and contracts.

IndustriesManufacturingCmty
Provides the Manufacturing Sales Agreement for the Community permission set license, which is intended for the usage of partner community users. It also provides access to the Manufacturing community template for admins users to create communities.

IndustriesMfgAccountForecast
Enables Account Forecast. With Account Forecast, you can generate forecasts for your accounts based on orders, opportunities, and sales agreements. You can also get create formulas to calculate your forecasts as per the requirements of your company.

InsightsPlatform
Enables the Einstein Analytics Platform license.

Interaction
Enables flows. A flow is the part of Lightning Flow that collects data and performs actions in your Salesforce org or an external system. Lightning Flow provides two types of flows: screen flows and autolaunched flows.

IoT
Enables IoT so the scratch org can consume platform events to perform business and service workflows using orchestrations and contexts.

JigsawUser
Provides one license to Jigsaw features.
Knowledge
Enables Salesforce Knowledge and gives your website visitors, clients, partners, and service agents the ultimate support tool. Create and manage a knowledge base with your company information, and securely share it when and where it’s needed. Build a knowledge base of articles that can include information on process, like how to reset your product to its defaults, or frequently asked questions.

LegacyLiveAgentRouting

LightningSalesConsole
Adds one Lightning Sales Console user license.

LightningScheduler
Enables Lightning Scheduler. Lightning Scheduler gives you tools to simplify appointment scheduling in Salesforce. Create a personalized experience by scheduling customer appointments—in person, by phone, or by video—with the right person at the right place and time.

LightningServiceConsole
Assigns the Lightning Service Console License to your scratch org so you can use the Lightning Service Console and access features that help manage cases faster.

ListCustomSettingCreation
Enables list as a setting type option on the New Custom Setting Definition page. A List type defines application-level data, such as country codes, that is stored in the application cache.

LiveAgent
Enables Chat for Service Cloud. Use web-based chat to quickly connect customers to agents for real-time support.

LiveMessage
Enables Messaging for Service Cloud. Use Messaging to quickly support customers using apps such as SMS text messaging and Facebook Messenger.

Macros
Enables macros in your scratch org. After enabling macros, add the macro browser to the Lightning Console so you can configure predefined instructions for commonly used actions and apply them to multiple posts at the same time.

MarketingUser
Provides access to the Campaigns object. Without this setting, Campaigns are read-only.

MaxApexCodeSize
Limits the non-test, unmanaged Apex code size (in MB). To use a value greater than the default value of 10, contact Salesforce Customer Support.

MaxAudTypeCriterionPerAud
Limits the number of audience type criteria available per audience. The default value is 10.

MaxCustomLabels:<value>
Limits the number of custom labels (measured in thousands). Setting the limit to 10 enables the scratch org to have 10,000 custom labels. Indicate a value between 1-15.

MaxFavoritesAllowed:<value>
Increases the number of Favorites allowed. Favorites allow users to create a shortcut to a Salesforce Page. Users can view their Favorites by clicking the Favorites list dropdown in the header. Indicate a value between 0-200.

MaxNoOfLexThemesAllowed:<value>
Increases the number of Themes allowed. Themes allow users to configure colors, fonts, images, sizes, and more. Access the list of Themes in Setup, under Themes and Branding. Indicate a value between 0-300.
**MaxStreamingTopics:** <value>
Increases the maximum number of delivered PushTopic event notifications within a 24-hour period, shared by all CometD clients. Indicate a value between 40-100.

**MaxUserNavItemsAllowed:** <value>
Increases the number of navigation items a user can add to the navigation bar. Indicate a value between 0-500.

**MaxUserStreamingChannels:** <value>
Increases the maximum number of user-defined channels for generic streaming. Indicate a value between 20-1,000.

**MedVisDescriptorLimit:** <value>
Increases the number of sharing definitions allowed per record for sharing inheritance to be applied to an object. Indicate a value between 150-1,600.

**MobileExtMaxFileSizeMB:** <value>
Increases the file size (in megabytes) for Field Service Lightning Mobile extensions. Indicate a value between 1-2,000.

**MobileSecurity**
Enables Enhanced Mobile Security. With Enhanced Mobile Security, you can control a range of policies to create a security solution tailored to your org's needs. You can limit user access based on operating system versions, app versions, and device and network security. You can also specify the severity of a violation.

**MultiCurrency**
Enables the scratch org to set up and use multiple currencies in opportunities, forecasts, quotes, reports, and other data.

**MultiLevelMasterDetail**
Allows the creation of a special type of parent-child relationship between one object (the child, or "detail") and another object (the parent, or "master").

**MutualAuthentication**
Requires client certificates to verify inbound requests for mutual authentication.

**NumPlatformEvents:** <value>
Increases the maximum number of platform event definitions that can be created. Indicate a value between 5-20.

**ObjectLinking**
Create rules to quickly link channel interactions to objects such as contacts, leads, or person accounts for customers (Beta).

**OutboundMessageHTTPSession**
Enables using HTTP endpoint URLs in outbound message definitions that have the Send Session ID option selected.

**PardotScFeaturesCampaignInfluence**
Enables additional campaign influence models (first touch, last touch, and even distribution) for Pardot users.

**PersonAccounts**
Enables person accounts in your scratch org.

**PlatformCache**
Enables Platform Cache and allocates a 3 MB cache. The Lightning Platform Cache layer provides faster performance and better reliability when caching Salesforce session and org data.

**PlatformConnect**
Enables Salesforce Connect and allows your users to view, search, and modify data that's stored outside your Salesforce org.

**PlatformEncryption**
Shield Platform Encryption encrypts data at rest. You can manage key material and encrypt fields, files, and other data.
PlatformEventsPerDay
Increases the maximum number of delivered standard-volume platform event notifications within a 24-hour period, shared by all CometD clients. Indicate a value between 10,000-50,000.

ProcessBuilder
Enables Process Builder, a Lightning Flow tool that helps you automate your business processes.

ProductsAndSchedules
Enables product schedules in your scratch org. Enabling this feature lets you create default product schedules on products. Users can also create schedules for individual products on opportunities.

RecordTypes
Enables Record Type functionality. Record Types let you offer different business processes, picklist values, and page layouts to different users.

RefreshOnInvalidSession
Enables automatic refreshes of Lightning pages when the user's session is invalid. If, however, the page detects a new token, it tries to set that token and continue without a refresh.

S1ClientComponentCacheSize
Allows the org to have up to 5 pages of caching for Lightning Components.

SalesCloudEinstein
Enables Sales Cloud Einstein features. Sales Cloud Einstein bring artificial intelligence to every step of the sales process.

SalesforceContentUser
Enables access to Salesforce content features.

SalesforceIdentityForCommunities
Adds Salesforce Identity components, including login and self-registration, to Experience Builder. This feature is required for Aura components.

SalesUser
Provides a license for Sales Cloud features.

SAML20SingleLogout
Enables usage of SAML 2.0 single logout.

SCIMProtocol
Enables access support for the SCIM protocol base API.

SecurityEventEnabled
Enables access to security events in Event Monitoring.

ServiceCloud
Assigns the Service Cloud license to your scratch org, letting you choose how your customers reach you -- by email, phone, social media, online communities, chat, text, and more.

ServiceUser
Adds one Service Cloud User license, and allows access to Service Cloud features.

SessionIdInLogEnabled
Enables Apex debug logs to include session IDs. If disabled, session IDs are replaced with "SESSION_ID_REMOVED" in debug logs.

SingleSignOn
Enables the configuration and use of single sign-on.
Sites
Enables Salesforce Sites, which allows you to create public websites and applications that are directly integrated with your Salesforce org. Users aren’t required to log in with a username and password.

SocialCustomerService
Enables Social Customer Service, sets post defaults, and either activates the Starter Pack or signs into your Social Studio account.

StateAndCountryPicklist
Enables state and country picklists. State and country picklists let users select states and countries from predefined, standardized lists, instead of entering state and country data into text fields.

StreamingAPI
Enables Streaming API.

StreamingEventsPerDay:<value>
Increases the maximum number of delivered PushTopic event notifications within a 24-hour period, shared by all CometD clients (API version 36.0 and earlier). Indicate a value between 10,000-50,000.

SubPerStreamingChannel:<value>
Increases the maximum number of concurrent clients (subscribers) per generic streaming channel (API version 36.0 and earlier). Indicate a value between 20-4,000.

SubPerStreamingTopic
Increases the maximum number of concurrent clients (subscribers) per PushTopic streaming channel (API version 36.0 and earlier). Indicate a value between 20-4,000.

SustainabilityCloud
Provides the permission set licenses and permission sets required to install and configure Sustainability Cloud. To enable or use Einstein Analytics and Analytics templates, include the DevelopmentWave scratch org feature.

TerritoryManagement
TerritoryManagement enables the original territory management feature, which is scheduled for retirement for all customers as of Summer '21. We encourage you to migrate to the Enterprise Territory Management (Territory2) scratch org setting to enable Enterprise Territory Management.

TimeSheetTemplateSettings
Time Sheet Templates let you configure settings to create time sheets automatically. For example, you can create a template that sets start and end dates. Assign templates to user profiles so that time sheets are created for the right users.

TransactionFinalizers
Enables you to implement and attach Apex Finalizers to Queueable Apex jobs.

WavePlatform
Enables the Wave Platform license.

Workflow
Enables Workflow so you can automate standard internal procedures and processes.

WorkflowFlowActionFeature
Allows you to launch a flow from a workflow action.

WorkThanksPref
Enables the give thanks feature in Chatter.
AddCustomApps:<value>
Increases the maximum number of custom apps allowed in an org. Indicate a value from 1-30.

Supported Quantities
1-30, Multiplier: 1

AddCustomObjects:<value>
Increases the maximum number of custom objects allowed in the org. Indicate a value from 1-30.

Supported Quantities
1-30, Multiplier: 1

AddCustomRelationships:<value>
Increases the maximum number of custom relationships allowed on an object. Indicate a value from 1-30.

Supported Quantities
1-30, Multiplier: 5

AddCustomTabs:<value>
Increases the maximum number of custom tabs allowed in an org. Indicate a value from 1-30.

Supported Quantities
1-30, Multiplier: 1

AddDataComCRMRecordCredit:<value>
Increases record import credits assigned to a user in your scratch org. Indicate a value from 1-30.

Supported Quantities
1-30, Multiplier: 1

AddInsightsQueryLimit:<value>
Increases the size of your Einstein Analytics query results. Indicate a value from 1-30 (multiplier is 10). Setting the quantity to 6 increases the query results to 60.

Supported Quantities
1-30, Multiplier: 10

AdditionalFieldHistory:<value>
Increases the number of fields you can track history for beyond the default, which is 20 fields. Indicate a value between 1-40.

Supported Quantities
1-40, Multiplier: 1

More Information
Previous name: AddHistoryFieldsPerEntity.
AnalyticsAdminPerms

Enables all permissions required to administer the Analytics platform, including permissions to enable creating Analytics templated apps and Analytics Apps.

More Information

See Set Up the Einstein Analytics Platform in Salesforce Help for more information.

API

Enables access to the Salesforce APIs (REST, SOAP, Bulk, Bulk 2.0) even in scratch orgs where the edition normally doesn’t have API access.

More Information

See Salesforce editions with API access for more information.

AuthorApex

Enables you to access and modify Apex code in a scratch org. Enabled by default in Enterprise and Developer Editions.

More Information

For Group and Professional Edition orgs, this feature is disabled by default. Enabling the AuthorApex feature lets you edit and test your Apex classes.

BigObjectsBulkAPI

Enables the scratch org to use BigObjects in the Bulk API.

More Information

See Big Objects Implementation Guide for more information.

CalloutSizeMB:<value>

Increases the maximum size of an Apex callout. Indicate a value between 3-12.

Supported Quantities

3-12, Multiplier: 1

CascadeDelete

Provides lookup relationships with the same cascading delete functionality previously only available to master-detail relationships. To prevent records from being accidentally deleted, cascade-delete is disabled by default.

CaseClassification

Enables Einstein Case Classification. Case Classification offers recommendations to your agents so they can select the best value. You can also automatically save the best recommendation and route the case to the right agent.
**ChangeDataCapture**
Enables Change Data Capture, if the scratch org edition doesn't automatically enable it.

**Chatbot**
Enables deployment of Bot metadata into a scratch org, and allows you to create and edit bots.

**More Information**
To use this feature, turn on **Enable Einstein Features** in the Dev Hub org to accept the Terms of Service.
See Einstein Bots in Salesforce Help for more information.

**CMSMaxContType**
Limits the number of distinct content types you can create within Salesforce CMS to 21.

**CMSMaxNodesPerContType**
Limits the maximum number of child nodes (fields) you can create for a particular content type to 15.

**CMSUnlimitedUse**
Enables unlimited content records, content types, and bandwidth usage in Salesforce CMS.

**Communities**
Allows the org to create a customer community. To use Communities, you must also include communitiesSettings > enableNetworksEnabled in the settings section of your scratch org definition file.

**More Information**
Available in Enterprise and Developer scratch orgs.

**ConAppPluginExecuteAsUser**
Enables the pluginExecutionUser field in the ConnectedApp Metadata API object.

**ConcStreamingClients:<value>**
Increases the maximum number of concurrent clients (subscribers) across all channels and for all event types (API version 36.0 and earlier). Indicate a value between 20-4,000.

**Supported Quantities**
20-4,000, Multiplier: 1

**ConnectedAppToolingAPI**
Enables the use of connected apps with the Tooling API.
ConsolePersistenceInterval:<value>

Increases how often console data is saved, in minutes. Indicate a value between 0-500. To disable auto save, set the value to 0.

Supported Quantities

0-500, Multiplier: 1

ContactsToMultipleAccounts

Enables the contacts to multiple accounts feature. This feature lets you relate a contact to two or more accounts.

ContractApprovals

Enables contract approvals, which allow you to track contracts through an approval process.

CPQ

Enables the necessary licensed features required to install the Salesforce CPQ managed package. Doesn't install the package automatically.

More Information

For additional information and configuration steps, see Manage Your Quotes with CPQ in Salesforce Help.

CustomNotificationType

Allows the org to create custom notification types, which are used to send custom desktop and mobile notifications.

More Information

See Send Custom Notifications in Salesforce Help for more information.

DataComDnbAccounts

Provides a license to Data.com account features.

DataComFullClean

Provides a license to Data.com cleaning features, and allows users to turn on auto fill clean settings for jobs.

DataMaskUser

Provides 30 Data Mask permission set licenses. This permission set enables access to an installed Salesforce Data Mask package.

More Information

For additional installation and configuration steps, see Install the Managed Package in Salesforce Help.

DebugApex

Enables Apex Interactive Debugger. You can use it to debug Apex code by setting breakpoints and checkpoints, and inspecting your code to find bugs.
DefaultWorkflowUser
Sets the scratch org admin as the default workflow user.

DeferSharingCalc
Allows admins to suspend group membership and sharing rule calculations and to resume them later.
More Information
Requires configuration using the Setup menu in the scratch org. See Defer Sharing Calculations in Salesforce Help.

DensityValue
The default density for the org. The display density setting determines how densely content is displayed and where field labels are located.

DevelopmentWave
Enables Einstein Analytics development in a scratch org. It assigns five platform licenses and five EA platform licenses to the org, along with assigning the permission set license to the admin user. It also enables the Analytics Templates and Einstein Discovery features.

DeviceTrackingEnabled
Enables Device Tracking.

DisableManageIdConfAPI
Limits access to the LoginIP and ClientBrowser API objects to allow view or delete only.

Division
Turns on the Manage Divisions feature under Company Settings. Divisions let you segment your organization's data into logical sections, making searches, reports, and list views more meaningful to users. Divisions are useful for organizations with extremely large amounts of data.

DocumentChecklist
Enables Document Tracking and Approval features, and adds the Document Checklist permission set. Document tracking features let you define documents to upload and approve, which supports processes like loan applications or action plans.
More Information

DurableClassicStreamingAPI
Enables Durable PushTopic Streaming API (API version 37.0 and later).
More Information
Available in Enterprise and Developer Edition scratch orgs.

DurableGenericStreamingAPI
Enables Durable Generic Streaming API (API version 37.0 and later).
More Information
Available in Enterprise and Developer Edition scratch orgs.

DynamicClientCreationLimit
Allows the org to register up to 100 OAuth 2.0 connected apps through the dynamic client registration endpoint.

EinsteinAnalyticsPlus
Provides one Einstein Analytics Plus license.

EinsteinArticleRecommendations
Provides licenses for Einstein Article Recommendations. Einstein Article Recommendations uses data from past cases to identify Knowledge articles that are most likely to help your customer service agents address customer inquiries.
More Information
Available in Enterprise Edition scratch orgs.
Requires configuration using the Setup menu in the scratch org.
See Set Up Einstein Article Recommendations in Salesforce Help for more information.

EinsteinBuilderFree
Provides a license that allows admins to create one enabled prediction with Einstein Prediction Builder. Einstein Prediction Builder is custom AI for admins
More Information
For configuration steps, see Einstein Prediction Builder in Salesforce Help.

EmbeddedLoginForIE
Provides JavaScript files that support Embedded Login in IE11.

EmpPublishRateLimit:<value>
Increases the maximum number of standard-volume platform event notifications published per hour. Indicate a value between 1,000-10,000.
Supported Quantities
1,000-10,000, Multiplier: 1
EnablePRM
Enables the partner relationship management permissions for the org.

EnableManageIdConfUI
Enables access to the LoginIP and ClientBrowser API objects to verify a user's identity in the UI.

Entitlements
Enables entitlements. Entitlements are units of customer support in Salesforce, such as phone support or web support. They're typically used to represent terms in service agreements.

EventLogFile
Enables API access to your org's event log files. The event log files contain information about your org's operational events that you can use to analyze usage trends and user behavior.

ExternalIdentityLogin
Allows the scratch org to use External Identity features associated with your license.

ExternalSharing
Enables admins to set separate organization-wide defaults for internal and external users.

More Information
Not available in Group Edition.
See External Organization-Wide Defaults Overview in Salesforce Help for more information.

FieldAuditTrail
Enables Field Audit Trail for the org and allows a total 60 tracked fields. 20 fields are tracked by default for all orgs, and 40 more are tracked with Field Audit Trail.

More Information
Previous name: RetainFieldHistory

FieldService
Provides the Field Service license.

More Information
See Enable Field Service Lightning in Salesforce Help for more information.
FinancialServicesCommunityUser:<value>

Adds the Financial Services Community permission set license, and enables access to Financial Services community components and objects. Indicate a value between 1-10.

**Supported Quantities**

1-10, Multiplier: 1

FinancialServicesUser:<value>

Adds the Financial Services Cloud Standard permission set license. This permission set enables access to Lightning components and the standard version of Financial Services Cloud. Also provides access to the standard Salesforce objects and custom Financial Services Cloud objects. Indicate a value between 1-10.

**Supported Quantities**

1-10, Multiplier: 1

FlowSites

Enables the use of flows in Salesforce Sites and customer portals.

ForceComPlatform

Adds one Salesforce Platform user license.

GenericStreaming

Enables Generic Streaming API (API version 36.0 and earlier).

**More Information**

Available in Enterprise and Developer Edition scratch orgs.

GenStreamingEventsPerDay:<value>

 Increases the maximum number of delivered event notifications within a 24-hour period, shared by all CometD clients, with generic streaming (API version 36.0 and earlier). Indicate a value between 10,000-50,000.

**Supported Quantities**

10,000-50,000, Multiplier: 1

HealthCloudUser

Adds one user license to access Health Cloud features.

HighVelocitySales

Provides High Velocity Sales licenses. High Velocity Sales optimizes the inside sales process with a high-productivity workspace. Sales managers can create custom sales processes that guide reps through handling different types of prospects. And sales reps can rapidly handle prospects with a prioritized list and other productivity-boosting features.
**HoursBetweenCoverageJob:**<value>

The frequency (in hours) when the sharing inheritance coverage report can be run for an object. Indicate a value between 1-24.

**Supported Quantities**
1-24, Multiplier: 1

**IdentityProvisioningFeatures**

Enables use of Salesforce Identity User Provisioning.

**IgnoreQueryParamWhitelist**

Ignores whitelisting rules for query parameter filter rules. If enabled, you can add any query parameter to the URL.

**IndustriesActionPlan**

Provides a license for Action Plans. Action Plans allow you to define the tasks or document checklist items for completing a business process.

**More Information**

Previous name: ActionPlan.

For more information and configuration steps, see Enable Actions Plans in Salesforce Help.

**IndustriesManufacturing**

Enables Sales Agreements. With Sales Agreements, you can negotiate purchase and sale of products over a continued period. You can also get insights into products, prices, discounts, and quantities. And track your planned and actual quantities and revenues with real-time updates from orders and contracts.

**More Information**

See Track Sales Compliance with Sales Agreements in Salesforce Help for more information.

**IndustriesManufacturingCmty**

Provides the Manufacturing Sales Agreement for the Community permission set license, which is intended for the usage of partner community users. It also provides access to the Manufacturing community template for admins users to create communities.

**More Information**

See Improve Partner Collaboration with Communities in Salesforce Help for more information.

**IndustriesMfgAccountForecast**

Enables Account Forecast. With Account Forecast, you can generate forecasts for your accounts based on orders, opportunities, and sales agreements. You can also get create formulas to calculate your forecasts as per the requirements of your company.

**More Information**

See Create Account Forecasts to Enhance Your Planning in Salesforce Help for more information.
**InsightsPlatform**
Enables the Einstein Analytics Platform license.

**Interaction**
Enables flows. A flow is the part of Lightning Flow that collects data and performs actions in your Salesforce org or an external system. Lightning Flow provides two types of flows: screen flows and autolaunched flows.

*More Information*
Requires configuration in the Setup menu of the scratch org.

**IoT**
Enables IoT so the scratch org can consume platform events to perform business and service workflows using orchestrations and contexts.

*More Information*
Requires configuration in the Setup menu of the scratch org.

**JigsawUser**
Provides one license to Jigsaw features.

**Knowledge**
Enables Salesforce Knowledge and gives your website visitors, clients, partners, and service agents the ultimate support tool. Create and manage a knowledge base with your company information, and securely share it when and where it’s needed. Build a knowledge base of articles that can include information on process, like how to reset your product to its defaults, or frequently asked questions.

*More Information*
See Salesforce Knowledge in Salesforce Help for more information.

**LegacyLiveAgentRouting**

**LightningSalesConsole**
Adds one Lightning Sales Console user license.

**LightningScheduler**
Enables Lightning Scheduler. Lightning Scheduler gives you tools to simplify appointment scheduling in Salesforce. Create a personalized experience by scheduling customer appointments—in person, by phone, or by video—with the right person at the right place and time.
More Information

See Manage Appointments with Lightning Scheduler in Salesforce Help for more information.

LightningServiceConsole
Assigns the Lightning Service Console License to your scratch org so you can use the Lightning Service Console and access features that help manage cases faster.

More Information
See Lightning Service Console in Salesforce Help for more information.

ListCustomSettingCreation
Enables list as a setting type option on the New Custom Setting Definition page. A List type defines application-level data, such as country codes, that is stored in the application cache.

LiveAgent
Enables Chat for Service Cloud. Use web-based chat to quickly connect customers to agents for real-time support.

LiveMessage
Enables Messaging for Service Cloud. Use Messaging to quickly support customers using apps such as SMS text messaging and Facebook Messenger.

Macros
Enables macros in your scratch org. After enabling macros, add the macro browser to the Lightning Console so you can configure predefined instructions for commonly used actions and apply them to multiple posts at the same time.

More Information
See Set Up and Use Macros in Salesforce Help for more information.

MarketingUser
Provides access to the Campaigns object. Without this setting, Campaigns are read-only.

MaxApexCodeSize
Limits the non-test, unmanaged Apex code size (in MB). To use a value greater than the default value of 10, contact Salesforce Customer Support.

MaxAudTypeCriterionPerAud
Limits the number of audience type criteria available per audience. The default value is 10.
**MaxCustomLabels:<value>**
Limits the number of custom labels (measured in thousands). Setting the limit to 10 enables the scratch org to have 10,000 custom labels. Indicate a value between 1-15.

**Supported Quantities**
1-15, Multiplier: 1,000

**MaxFavoritesAllowed:<value>**
Increases the number of Favorites allowed. Favorites allow users to create a shortcut to a Salesforce Page. Users can view their Favorites by clicking the Favorites list dropdown in the header. Indicate a value between 0-200.

**Supported Quantities**
0-200, Multiplier: 1

**MaxNoOfLexThemesAllowed:<value>**
Increases the number of Themes allowed. Themes allow users to configure colors, fonts, images, sizes, and more. Access the list of Themes in Setup, under Themes and Branding. Indicate a value between 0-300.

**Supported Quantities**
0-300, Multiplier: 1

**MaxStreamingTopics:<value>**
Increases the maximum number of delivered PushTopic event notifications within a 24-hour period, shared by all CometD clients. Indicate a value between 40-100.

**Supported Quantities**
40-100, Multiplier: 1

**MaxUserNavItemsAllowed:<value>**
Increases the number of navigation items a user can add to the navigation bar. Indicate a value between 0-500.

**Supported Quantities**
0-500, Multiplier: 1

**MaxUserStreamingChannels:<value>**
Increases the maximum number of user-defined channels for generic streaming. Indicate a value between 20-1,000.

**Supported Quantities**
20-1,000, Multiplier: 1

**MedVisDescriptorLimit:<value>**
Increases the number of sharing definitions allowed per record for sharing inheritance to be applied to an object. Indicate a value between 150-1,600.
 Scratch Orgs

Supported Quantities
150-1,600, Multiplier: 1

MobileExtMaxFileSizeMB:<value>
Increases the file size (in megabytes) for Field Service Lightning Mobile extensions. Indicate a value between 1-2,000.

Supported Quantities
1-2,000, Multiplier: 1

MobileSecurity
Enables Enhanced Mobile Security. With Enhanced Mobile Security, you can control a range of policies to create a security solution tailored to your org’s needs. You can limit user access based on operating system versions, app versions, and device and network security. You can also specify the severity of a violation.

MultiCurrency
Enables the scratch org to set up and use multiple currencies in opportunities, forecasts, quotes, reports, and other data.

More Information
See Considerations for Enabling Multiple Currencies in Salesforce Help.

MultiLevelMasterDetail
Allows the creation a special type of parent-child relationship between one object (the child, or "detail") and another object (the parent, or "master").

MutualAuthentication
Requires client certificates to verify inbound requests for mutual authentication.

NumPlatformEvents:<value>
Increases the maximum number of platform event definitions that can be created. Indicate a value between 5-20.

Supported Quantities
5-20, Multiplier: 1

ObjectLinking
Create rules to quickly link channel interactions to objects such as contacts, leads, or person accounts for customers (Beta).

OutboundMessageHTTPSession
Enables using HTTP endpoint URLs in outbound message definitions that have the Send Session ID option selected.
PardotScFeaturesCampaignInfluence
Enables additional campaign influence models (first touch, last touch, and even distribution) for Pardot users.

PersonAccounts
Enables person accounts in your scratch org.

More Information
Available in Enterprise and Developer Edition scratch orgs.

PlatformCache
Enables Platform Cache and allocates a 3 MB cache. The Lightning Platform Cache layer provides faster performance and better reliability when caching Salesforce session and org data.

More Information
See Platform Cache in the Apex Developer Guide for more information.

PlatformConnect
Enables Salesforce Connect and allows your users to view, search, and modify data that’s stored outside your Salesforce org.

PlatformEncryption
Shield Platform Encryption encrypts data at rest. You can manage key material and encrypt fields, files, and other data.

PlatformEventsPerDay
Increases the maximum number of delivered standard-volume platform event notifications within a 24-hour period, shared by all CometD clients. Indicate a value between 10,000-50,000.

Supported Quantities
10,000-50,000, Multiplier: 1

ProcessBuilder
Enables Process Builder, a Lightning Flow tool that helps you automate your business processes.

More Information
Requires configuration in the Setup menu of the scratch org.
See Lightning Process Builder in Salesforce Help for more information.

ProductsAndSchedules
Enables product schedules in your scratch org. Enabling this feature lets you create default product schedules on products. Users can also create schedules for individual products on opportunities.
**RecordTypes**
Enables Record Type functionality. Record Types let you offer different business processes, picklist values, and page layouts to different users.

**RefreshOnInvalidSession**
Enables automatic refreshes of Lightning pages when the user’s session is invalid. If, however, the page detects a new token, it tries to set that token and continue without a refresh.

**S1ClientComponentCacheSize**
Allows the org to have up to 5 pages of caching for Lightning Components.

**SalesCloudEinstein**
Enables Sales Cloud Einstein features. Sales Cloud Einstein bring artificial intelligence to every step of the sales process.

**More Information**
Available in Enterprise Edition scratch orgs.
See [Sales Cloud Einstein](https://help.salesforce.com) in Salesforce Help for more information.

**SalesforceContentUser**
Enables access to Salesforce content features.

**SalesforceIdentityForCommunities**
Adds Salesforce Identity components, including login and self-registration, to Experience Builder. This feature is required for Aura components.

**SalesUser**
Provides a license for Sales Cloud features.

**SAML20SingleLogout**
Enables usage of SAML 2.0 single logout.

**SCIMProtocol**
Enables access support for the SCIM protocol base API.

**SecurityEventEnabled**
Enables access to security events in Event Monitoring.
**ServiceCloud**

Assigns the Service Cloud license to your scratch org, letting you choose how your customers reach you -- by email, phone, social media, online communities, chat, text, and more.

**ServiceUser**

Adds one Service Cloud User license, and allows access to Service Cloud features.

**SessionIdInLogEnabled**

Enables Apex debug logs to include session IDs. If disabled, session IDs are replaced with "SESSION_ID_REMOVED" in debug logs.

**SingleSignOn**

Enables the configuration and use of single sign-on.

**Sites**

Enables Salesforce Sites, which allows you to create public websites and applications that are directly integrated with your Salesforce org. Users aren’t required to log in with a username and password.

**More Information**

You can create sites and communities in a scratch org, but custom domains, such as www.example.com, aren’t supported.

**SocialCustomerService**

Enables Social Customer Service, sets post defaults, and either activates the Starter Pack or signs into your Social Studio account.

**StateAndCountryPicklist**

Enables state and country picklists. State and country picklists let users select states and countries from predefined, standardized lists, instead of entering state and country data into text fields.

**StreamingAPI**

Enables Streaming API.

**More Information**

Available in Enterprise and Developer Edition scratch orgs.

**StreamingEventsPerDay:<value>**

Increases the maximum number of delivered PushTopic event notifications within a 24-hour period, shared by all CometD clients (API version 36.0 and earlier). Indicate a value between 10,000-50,000.

**Supported Quantities**

10,000-50,000, Multiplier: 1
SubPerStreamingChannel:<value>

Increases the maximum number of concurrent clients (subscribers) per generic streaming channel (API version 36.0 and earlier). Indicate a value between 20-4,000.

Supported Quantities
20-4,000, Multiplier: 1

SubPerStreamingTopic

Increases the maximum number of concurrent clients (subscribers) per PushTopic streaming channel (API version 36.0 and earlier). Indicate a value between 20-4,000.

Supported Quantities
20-4,000, Multiplier: 1

SustainabilityCloud

Provides the permission set licenses and permission sets required to install and configure Sustainability Cloud. To enable or use Einstein Analytics and Analytics templates, include the DevelopmentWave scratch org feature.

More Information
For installation and configuration steps, see Configure and Install Sustainability Cloud in Salesforce Help.

TerritoryManagement

TerritoryManagement enables the original territory management feature, which is scheduled for retirement for all customers as of Summer ’21. We encourage you to migrate to the Enterprise Territory Management (Territory2) scratch org setting to enable Enterprise Territory Management.

More Information
For more information, see The Original Territory Management Module Will Be Retired in the Summer ’21 Release.
To enable Enterprise Territory Management (Territory2), see Metadata Coverage for implementation details.

TimeSheetTemplateSettings

Time Sheet Templates let you configure settings to create time sheets automatically. For example, you can create a template that sets start and end dates. Assign templates to user profiles so that time sheets are created for the right users.

More Information
For configuration steps, see Create Time Sheet Templates in Salesforce Help.

TransactionFinalizers

Enables you to implement and attach Apex Finalizers to Queueable Apex jobs.

More Information

Note: This functionality is currently in open pilot and subject to restrictions.
See the Transaction Finalizers (Pilot) in Apex Developer Guide for more information.
WavePlatform
Enables the Wave Platform license.

Workflow
Enables Workflow so you can automate standard internal procedures and processes.

More Information
Requires configuration in the Setup menu of the scratch org.

WorkflowFlowActionFeature
Allows you to launch a flow from a workflow action.

More Information
This setting is supported only if you’ve already enabled the pilot program in your org for flow trigger workflow actions. If you’ve enabled the pilot, you can continue to create and edit flow trigger workflow actions.

If you didn’t enable the pilot, use the Flows action in the ProcessBuilder scratch org feature instead.

WorkThanksPref
Enables the give thanks feature in Chatter.

Scratch Org Settings
In Winter ’19 and later, scratch org settings are the format for defining org preferences in the scratch org definition. Because you can use all Metadata API settings, they are the most comprehensive way to configure a scratch org. If a setting is supported in Metadata API, it’s supported in scratch orgs. Settings provide you with fine-grained control because you can define values for all fields for a setting, rather than just enabling or disabling it.

For information on Metadata API settings and their supported fields, see Settings in Metadata API Developer Guide.

Important: Although the Settings are upper camel case in the Metadata API Developer Guide, be sure to indicate them as lower camel case in the scratch org definition.

```json
{
    "orgName": "Acme",
    "edition": "Enterprise",
    "features": ["Communities", "ServiceCloud", "Chatbot"],
    "settings": {
        "communitiesSettings": {
            "enableNetworksEnabled": true
        },
        "lightningExperienceSettings": {
            "enableS1DesktopEnabled": true
        },
        "mobileSettings": {
            "enableS1EncryptedStoragePref2": true
        }
    }
}
```
Here's an example of how to configure SecuritySettings in your scratch org. In this case, to define session timeout, you nest the field values.

```
{
  "orgName": "Acme",
  "edition": "Enterprise",
  "features": [],
  "settings": {
    "mobileSettings": {
      "enableS1EncryptedStoragePref2": true
    },
    "securitySettings": {
      "sessionSettings": {
        "sessionTimeout": "TwelveHours"
      }
    }
  }
}
```

Here's an example of how to configure the IoT feature in your scratch org. It requires a combination of indicating the IoT feature and IoT scratch org settings.

```
{
  "orgName": "Acme",
  "edition": "Enterprise",
  "features": [],
  "settings": {
    "mobileSettings": {
      "enableS1EncryptedStoragePref2": true
    },
    "iotSettings": {
      "enableIoT": true,
      "iotInsights": true
    }
  }
}
```

Create Scratch Orgs

After you create the scratch org definition file, you can easily spin up a scratch org and open it directly from the command line.

Before you create a scratch org:

- Set up your Salesforce DX project
- Authorize the Dev Hub org
- Create the scratch org definition file
You can create scratch orgs for different functions, such as for feature development, for development of packages that contain a namespace, or for user acceptance testing.

**Tip:** Delete any unneeded or malfunctioning scratch orgs in the Dev Hub org or via the command line so that they don’t count against your active scratch org allocations.

1. Create the scratch org.

<table>
<thead>
<tr>
<th>To</th>
<th>Run This Command</th>
</tr>
</thead>
</table>
| Create a scratch org for development using a scratch org definition file | The scratch org definition defines the org edition, features, org preferences, and some other options.  
  sfdx force:org:create -f project-scratch-def.json                  |
| Specify scratch org definition values on the command line using key=value pairs | sfdx force:org:create adminEmail=me@email.com edition=Developer \  
  username=admin_user@orgname.org                                    |
| Create a scratch org with an alias                                  | Scratch org usernames are long and unintuitive. Setting an alias each time you create a scratch org is a great way to track the scratch org’s function. And it’s much easier to remember when issuing subsequent CLI commands.  
  sfdx force:org:create -f project-scratch-def.json -a MyScratchOrg   |
| Create a scratch org for user acceptance testing or to test installations of packages | In this case, you don’t want to create a scratch org with a namespace. You can use this command to override the namespace value in the scratch org definition file.  
  sfdx force:org:create -f project-scratch-def.json --nonamespace     |
| Indicate that this scratch org is the default                       | CLI commands that are run from within the project use the default scratch org, and you don’t have to manually enter the username parameter each time.  
  sfdx force:org:create -f project-scratch-def.json --setdefaultusername |
| Specify the scratch org’s duration, which indicates when the scratch org expires (in days) | The default is 7 days. Valid values are from 1-30.  
  sfdx force:org:create -f config/project-scratch-def.json --durationdays 30  
  sfdx force:org:create -f config/project-scratch-def.json -d 3       |
| Specify the Salesforce release for the scratch org                  | During the Salesforce release transition, you can specify the release (preview or previous) when creating a scratch org. See [Select the Salesforce Release for a Scratch Org](https://trailhead.salesforce.com). |

Indicate the path to the scratch definition file relative to your current directory. For sample repos, this file is located in the config directory.
Scratch Orgs

Stdout displays two important pieces of information: the org ID and the username.

Successfully created scratch org: 00D3D0000000PE5UAM, username: test-b4agup43oxmu@example.com

If the create command times out before the scratch org is created (the default wait time is 6 minutes), you see an error. Issue this command to see if it returns the scratch org ID, which confirms the existence of the scratch org:

```
sfdx force:data:soql:query -q "SELECT ID, Name, Status FROM ScratchOrgInfo \n    WHERE CreatedBy.Name = '<your name>' \n    AND CreatedDate = TODAY" -u <Dev Hub org>
```

This example assumes that your name is Jane Doe, and you created an alias for your Dev Hub org called DevHub:

```
sfdx force:data:soql:query -q "SELECT ID, Name, Status FROM ScratchOrgInfo \n    WHERE CreatedBy.Name = 'Jane Doe' AND CreatedDate = TODAY" -u DevHub
```

If that doesn’t work, create another scratch org and increase the timeout value using the --wait parameter. Don’t forget to delete the malfunctioning scratch org.

2. Open the org.

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

If you want to open the scratch org in Lightning Experience or open a Visualforce page, use the --path parameter.

```
sfdx force:org:open --path lightning
```

3. Push local project source to your scratch org.

SEE ALSO:
- Project Setup
- Authorization
- Scratch Org Definition File
- Push Source to the Scratch Org

Select the Salesforce Release for a Scratch Org

During the Salesforce release transition, you can specify the release (preview or previous) when creating a scratch org.

What is Salesforce Preview?

During every major Salesforce release, you have the opportunity to get early access to the release in your scratch orgs and sandboxes to test new customizations and features before your production org is upgraded. This is called the Salesforce Preview, and scratch orgs created on the upcoming release are called preview scratch orgs.

Normally, you create scratch orgs that are the same version as the Dev Hub. However, during the major Salesforce release transition that happens three times a year, you can select the Salesforce release version, Preview or Previous, based on the version of your Dev Hub.

To try out new features in an upcoming release, you no longer have to create a trial Dev Hub on the upcoming version to create preview scratch orgs. You can use your existing Dev Hub that includes your existing scratch org active and daily limits.
For example, you can select a version over the next three releases during these release transition dates. Preview start date is when sandbox instances are upgraded. Preview end date is when all instances are on the GA release.

<table>
<thead>
<tr>
<th>Release Version</th>
<th>Preview Start Date</th>
<th>Preview End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winter '20</td>
<td>September 6, 2019</td>
<td>October 12, 2019</td>
</tr>
<tr>
<td>Spring '20</td>
<td>January 3, 2020</td>
<td>February 15, 2020</td>
</tr>
<tr>
<td>Summer '20</td>
<td>May 8, 2020</td>
<td>June 13, 2020</td>
</tr>
</tbody>
</table>

Because previous and preview are all relative terms, your Dev Hub org version during the release transition determines their relative significance. Here’s what happens when you try to create a scratch org with one of the release values.

<table>
<thead>
<tr>
<th>Dev Hub Version</th>
<th>Preview</th>
<th>Previous</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dev Hub has upgraded to the latest version</td>
<td>Error (Dev Hub is already on the latest version)</td>
<td>Prior Dev Hub version</td>
</tr>
<tr>
<td>Dev Hub is still on the GA version</td>
<td>Version following the Dev Hub version (newly released Salesforce version)</td>
<td>Error (Dev Hub is on the GA version; previous version unavailable)</td>
</tr>
</tbody>
</table>

**Note:** If you don’t specify a release value, the scratch org version is the same version as the Dev Hub org.

### Create a Scratch Org for a Specific Release

You can specify the release version in the scratch org definition file or directly on the command line. Any option you issue on the command line overrides what you have defined in your scratch definition file.

1. Find out which instance your Dev Hub org is on: [https://status.salesforce.com](https://status.salesforce.com).
2. Add the release option to your scratch org definition file.

```json
{
    "orgName": "Dreamhouse",
    "edition": "Developer",
    "release": "Preview",
    "settings": {
        "mobileSettings": {
            "enableS1EncryptedStoragePref2": true
        },
        "securitySettings": {
            "passwordPolicies": {
                "enableSetPasswordInApi": true
            }
        }
    }
}
```

Alternatively, you can specify the release value directly on the command line. Any values you specify on the command line override the values in the scratch org definition.

3. Create the scratch org.
In this example, we’re creating a scratch org on the preview release.

```
sfdx force:org:create -f config/project-scratch-def.json -a PreviewOrg -v DevHub release=Preview
```

If you’re creating a previous scratch org and you have upgraded the CLI to the pre-release version, be sure to set the `apiVersion` to match the scratch org version.

To set it globally for all DX projects:

```
sfdx force:config:set apiVersion=46.0 --global
```

To set it on the command line:

```
SFDX_API_VERSION=46.0 sfdx force:org:create -f config/project-scratch-def.json -a PreviewOrg -v DevHub release=Preview
```

**What If I Want to Create a Pre-Release Scratch Org?**

Pre-release is a very early build of the latest version of Salesforce that’s available before Salesforce Preview. It’s not built to handle scale and doesn’t come with any Salesforce Support service-level agreements (SLAs). For this reason, the only way to create a pre-release scratch org is to sign up for a pre-release trial Dev Hub org (subject to availability).

**Salesforce DX Project Structure and Source Format**

A Salesforce DX project has a specific project structure and source format. Salesforce DX source uses a different set of files and file extensions from what you’re accustomed when using Metadata API.

**Source Transformation**

It’s not uncommon for metadata formatted source to be very large, making it difficult to find what you want. If you work on a team with other developers who update the same metadata at the same time, you have to deal with merging multiple updates to the file. If you’re thinking that there has to be a better way, you’re right.

Before, all custom objects and object translations were stored in one large metadata file.

We solve this problem by providing a new source shape that breaks down these large source files to make them more digestible and easier to manage with a version control system. It’s called source format.

A Salesforce DX project stores custom objects and custom object translations in intuitive subdirectories. Source format makes it much easier to find what you want to change or update. And you can say goodbye to messy merges.
Static Resources

Static resources must reside in the /main/default/staticresources directory. The force:source:push and force:source:pull commands support auto-expanding or compressing archive MIME types within your project. These behaviors support both the .zip and .jar MIME types. This way, the source files are more easily integrated in your Salesforce DX project and version control system.

If, for example, you upload a static resource archive through the scratch org’s Setup UI, force:source:pull expands it into its directory structure within the project. To mimic this process from the file system, add the directory structure to compress directly into the static resources directory root, then create the associated .resource-meta.xml file. If an archive exists as a single file in your project, it’s always treated as a single file and not expanded.

This example illustrates how different types of static resources are stored in your local project. You can see an expanded .zip archive called expandedzippedresource and its related .resource-meta.xml file. You also see a couple .jpg files being stored with their MIME type, and a single file being stored with the legacy .resource extension.
File Extensions

When you convert existing metadata format to source format, we create an XML file for each bit. All files that contain XML markup now have an `.xml` extension. You can then look at your source files using an XML editor. To sync your local projects and scratch orgs, Salesforce DX projects use a particular directory structure for custom objects, custom object translations, Lightning web components, Aura components, and documents.

For example, if you had an object called Case.object, source format provides an XML version called `Case.object-meta.xml`. If you have an app call DreamHouse.app, we create a file called `DreamHouse.app-meta.xml`. You get the idea. For Salesforce DX projects, all source format files have a companion file with the "-meta.xml" extension.

Traditionally, static resources are stored on the file system as binary objects with a `.resource` extension. Source format handles static resources differently by supporting content MIME types. For example, `.gif` files are stored as a `.gif` instead of `.resource`. By storing files with their MIME extensions, you can manage and edit your files using the associated editor on your system.

You can have a combination of existing static resources with their `.resource` extension, and newly created static resources with their MIME content extensions. Existing static resources with `.resource` extensions keep that extension, but any new static resources show up in your project with their MIME type extensions. We allow `.resource` files to support the transition for existing customers. Although you get this additional flexibility, we recommend storing your files with their MIME extensions.

Custom Objects

When you convert from metadata format to source format, your custom objects are placed in the `<package.directory>/main/default/objects` directory. Each object has its own subdirectory that reflects the type of custom object. Some parts of the custom objects are extracted into in these subdirectories:
businessProcesses  
compactLayouts  
fields  
fieldSets  
listViews  
recordTypes  
sharingReasons  
validationRules  
webLinks

The parts of the custom object that are not extracted are placed in a file.

- For objects, `<object>.object-meta.xml`
- For fields, `<field_name>.field-meta.xml`

**Custom Object Translations**

Custom object translations reside in the `<package directory>/main/default/objectTranslations` directory, each in their own subdirectory named after the custom object translation. Custom object translations and field translations are extracted into their own files within the custom object translation's directory.

- For field names, `<field_name>.fieldTranslation-meta.xml`
- For object names, `<object_name>.objectTranslation-meta.xml`

The remaining pieces of the custom object translation are placed in a file called `<objectTranslation>.objectTranslation-meta.xml`.

**Aura Components**

Aura bundles and components must reside in a directory named `aura` under the `<package directory>` directory.
Lightning Web Components

Lightning web components must reside in a directory named `lwc` under the `<package directory>` directory.
Documents

Documents must be inside the directories of their parent document folder. The parent document folder must be in a directory called documents. Each document has a corresponding metadata XML file that you can view with an XML editor.

Push Source to the Scratch Org

After changing the source, you can sync the changes to your scratch org by pushing the changed source to it. The first time you push metadata to the org, all source in the folders you indicated as package directories is pushed to the scratch org to complete the initial setup. At this point, we start change-tracking locally on the file system and remotely in the scratch org to determine which metadata has changed. Let's say you pushed an Apex class to a scratch org and then decide to modify the class in the scratch org instead of your local file system. The CLI tracks in which local package directory the class was created, so when you pull it back to your project, it knows where it belongs.

⚠️ Warning: You can use `force:source:push` for scratch orgs only. If you’re synchronizing source to another org, use the Metadata API.

During development, you change files locally in your file system and change the scratch org directly using the builders and editors that Salesforce supplies. Usually, these changes don’t cause a conflict and involve unique files.
The push command doesn’t handle merges. Projects and scratch orgs are meant to be used by one developer. Therefore, we don’t anticipate file conflicts or the need to merge. However, if the push command detects a conflict, it terminates the operation and displays the conflict information to the terminal. You can rerun the push command and force the changes in your project to the scratch org.

Before running the push command, you can get a list of what’s new, changed, and the conflicts between your local file system and the scratch org by using `force:source:status`. This way you can choose ahead of time which version you want to keep and manually address the conflict.

### Pushing Source to a Scratch Org

To push changed source to your default scratch org:

```
sfdx force:source:push
```

<table>
<thead>
<tr>
<th>STATE</th>
<th>FULL NAME</th>
<th>TYPE</th>
<th>PROJECT</th>
<th>PATH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changed</td>
<td>MyWidgetClass</td>
<td>ApexClass</td>
<td>/classes/</td>
<td>MyWidgetClass.cls-meta.xml</td>
</tr>
<tr>
<td>Changed</td>
<td>MyWidgetClass</td>
<td>ApexClass</td>
<td>/classes/</td>
<td>MyWidgetClass.cls</td>
</tr>
</tbody>
</table>

To push changed source to a scratch org that’s not the default, you can indicate it by its username or alias:

```
sfdx force:source:push --targetusername test-b4agup43oxmu@example.com
```

```
sfdx force:source:push -u test-b4agup43oxmu@example.com
```

```
sfdx force:source:push -u MyGroovyScratchOrg
```

**Tip:** You can create an alias for an org using `force:alias:set`. Run `force:org:list` to display the usernames of all the scratch orgs you have created.

### Selecting Files to Ignore During Push

It’s likely that you have some files that you don’t want to sync between the project and scratch org. You can have the push command ignore the files you indicate in `.forceignore`.

### If Push Detects Warnings

If you run `force:source:push`, and warnings occur, the CLI doesn’t push the source. Warnings can occur, for example, if your project source is using an outdated version. If you want to ignore these warnings and push the source to the scratch org, run:

```
sfdx force:source:push --ignorewarnings
```

**Tip:** Although you can successfully push using this option, we recommend addressing the issues in the source files. For example, if you see a warning because a Visualforce page is using an outdated version, consider updating your page to the current version of Visualforce. This way, you can take advantage of new features and performance improvements.

### If Push Detects File Conflicts

If you run `force:source:push`, and conflicts are detected, the CLI doesn’t push the source.
Notice that you have a conflict. CoolClass exists in your scratch org but not in the local file system. In this new development paradigm, the local project is the source of truth. Consider if it makes sense to overwrite the conflict in the scratch org.

If conflicts have been detected and you want to override them, here's how you use the power of the force (overwrite) to push the source to a scratch org.

`sfdx force:source:push --forceoverwrite`

**If Push Detects a Username Reference in the Source**

Some metadata types include a username in their source. When you run `force:source:push` to push this source to a scratch org, the push command replaces the username with the scratch org’s administrator username. This behavior ensures that the push succeeds, even if the scratch org does not contain the original username.

For example, let’s say that you create a scratch org and use Lightning Experience to create a report folder. You then create a report and save it to the new folder. You run `force:source:pull` to pull down the source from the scratch org to your project. The `*.reportFolder-meta.xml` source file for the new ReportFolder is similar to this example; note the `<sharedTo>` element that contains the username `test-ymlf5@example.com`.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<ReportFolder xmlns="http://soap.sforce.com/2006/04/metadata">
    <folderShares>
        <accessLevel>Manage</accessLevel>
        <sharedTo>test-ymlf5@example.com</sharedTo>
        <sharedToType>User</sharedToType>
    </folderShares>
    <name>TestFolder</name>
</ReportFolder>
```

You then create a different scratch org whose administrator’s username is `test-zuw1xy321@example.com`. If you push the ReportFolder’s source file to the new scratch org, `force:source:push` replaces the `test-ymlf5@example.com` username with `test-zuw1xy321@example.com`.

This behavior applies only to `force:source:push` and scratch orgs. If you use `force:mdapi:deploy` to deploy metadata to a regular production org, for example, the deploy uses the username referenced in the source.

**Next steps:**

- Verify that the source was uploaded successfully to the scratch org, open the org in a browser.
- Add some sample test data.
How to Exclude Source When Syncing or Converting

When syncing metadata between your local file system and a scratch org, you often have source files you want to exclude. Similarly, you often want to exclude certain files when converting source to Salesforce DX project format. In both cases, you can exclude individual files or all files in a specific directory with a .forceignore file.

See Also:

How to Exclude Source When Syncing or Converting
Track Changes Between the Project and Scratch Org
Assign a Permission Set
Ways to Add Data to Your Scratch Org
Pull Source from the Scratch Org to Your Project

How to Exclude Source When Syncing or Converting

When syncing metadata between your local file system and a scratch org, you often have source files you want to exclude. Similarly, you often want to exclude certain files when converting source to Salesforce DX project format. In both cases, you can exclude individual files or all files in a specific directory with a .forceignore file.

Use your favorite text editor to create a .forceignore file to specify the files or directories you want to exclude.


Other Files That the Source Commands Ignore

The source commands ignore these files even if they aren’t included in your .forceignore file.

- Any source file or directory that begins with a “dot”, such as .DS_Store or .sfdx
- Any file that ends in .dup
- package2-descriptor.json
- package2-manifest.json

Exclude Remote Changes Not Yet Synced with Your Local Source

Sometimes, you make a change directly in a scratch org but you don’t want to pull that change into your local DX project. To exclude remote metadata changes, use the format <api name>.<metadata type> in .forceignore.

If you have a permission set named “dreamhouse,” add dreamhouse.permissionset to .forceignore.

Exclude the Same Metadata for Source Tracking Commands

To exclude the same metadata in your local DX project (file system) and in a scratch org, create two entries to cover source:status, source:push, and source:pull. For example, if you have a custom profile called Marketing Profile, include these two entries in .forceignore:

- force-app/main/default/profiles/Marketing Profile.profile-meta.xml (ignores it during source:push or source:status)
- Marketing Profile.profile (ignores it during source:pull or source:status)
Metadata with Special Characters

If a metadata name has special characters (such as forward slashes, backslashes, or quotation marks), we encode the file name on the local file system for all operating systems. For example, if you pull a custom profile called Custom: Marketing Profile, the colon is encoded in the resulting file name.

Custom%3A Marketing Profile.profile-meta.xml

If you reference a file name with special characters in .forceignore, use the encoded file name.

Where to Put .forceignore

Be sure the paths that you specify in .forceignore are relative to the directory containing the .forceignore file. For the .forceignore file to work its magic, you must put it in the proper location, depending on which command you are running.

- Add the file to the Metadata retrieve directory (with package.xml) for force:mdapi:convert.

Sample Syntax

The .forceignore file has similar functionality to .gitignore. Here are some options for indicating which source to exclude. In this example, all paths are relative to the project root directory.

```sh
# Specify a relative path to a directory from the project root
helloWorld/main/default/classes

# Specify a wildcard directory - any directory named "classes" is excluded
**classes

# Specify file extensions
**.cls
**.pdf

# Specify a specific file
helloWorld/main/default/HelloWorld.cls
```

Assign a Permission Set

After creating your scratch org and pushing the source, you must sometimes give your users access to your application, especially if your app contains custom objects.

1. If needed, create the permission set in the scratch org.
   a. Open the scratch org in your browser.
   ```sh
   sfdx force:org:open -u <scratch org username/alias>
   ```
   b. From Setup, enter Perm in the Quick Find box, then select Permission Sets.
   c. Click New.
   d. Enter a descriptive label for the permission set, then click Save.
   e. Under Apps, click Assigned Apps > Edit.
f. Under Available Apps, select your app, then click Add to move it to Enabled Apps.

g. Click Save.

2. Pull the permission set from the scratch org to your project.

```bash
sfdx force:source:pull -u <scratch org username/alias>
```

3. Assign the permission set to one or more users of the org that contains the app:

```bash
dsdx force:user:permset:assign --permsetname <permset_name> --targetusername <username/alias>
```

   The target username must have permission to assign a permission set. Use the --onbehalfof parameter to assign a permission set to non-administrator users.

```bash
dsdx force:user:permset:assign --permsetname <permset_name> --targetusername <admin-user> --onbehalfof <non-admin-user>
```

---

## Ways to Add Data to Your Scratch Org

Orgs for development need a small set of stock data for testing. Scratch orgs come with the same set of data as the edition on which they are based. For example, Developer Edition orgs typically include 10–15 records for key standard objects, such as Account, Contact, and Lead. These records come in handy when you’re testing something like a new trigger, workflow rule, Lightning web component, Aura component, or Visualforce page.

Sometimes, the stock data doesn’t meet your development needs. Scratch orgs have many uses, so we provide you the flexibility to add the data you need for your use cases. Apex tests generally create their own data. Therefore, if Apex tests are the only tests you’re running in a scratch org, you can probably forget about data for the time being. However, other tests, such as UI, API, or user acceptance tests, do need baseline data. Make sure that you use consistent data sets when you run tests of each type.

The following sections describe the Salesforce CLI commands you can use to populate your scratch orgs. The commands you use depend on your current stage of development.

You can also use the `force:data:soql:query` CLI command to run a SOQL query against a scratch org. While the command doesn’t change the data in an org, it’s useful for searching or counting the data. You can also use it with other data manipulation commands.

---

**force:data:tree Commands**

The SObject Tree Save API drives the `force:data:tree` commands for exporting and importing data. The commands use JSON files to describe objects and relationships. The export command requires a SOQL query to select the data in an org that it writes to the JSON files. Rather than loading all records of each type and establishing relationships, the import command loads parents and children already in the hierarchy.

**Note:** These commands are intended for developers to test with small datasets. The query for export can return a maximum of 2000 records. The files for import can have a maximum of 200 records.

---

**force:data:bulk Commands**

Bulk API drives the `force:bulk` commands for exporting a basic data set from an org and storing that data in source control. You can then update or augment the data directly rather than in the org from where it came. The `force:data:bulk` commands use
CSV files to import data files into scratch orgs or to delete sets of data that you no longer want hanging around. Use dot notation to establish child-to-parent relationships.

**force::data::record** Commands

Everyone’s process is unique, and you don’t always need the same data as your teammates. When you want to create, modify, or delete individual records quickly, use the `force::data::record:create|delete|get|update` commands. No data files are needed.

**Example: Export and Import Data Between Orgs**

Let’s say you’ve created the perfect set of data to test your application, and it currently resides in your default scratch org. You finished coding a new feature that you want to test in a new scratch org. You create the scratch org, push your source code, and assign the needed permission sets. Now you want to populate the scratch org with your perfect set of data from the other org. How? Read on!

**SEE ALSO:**
- SObject Tree Request Body (REST API Developer Guide)
- Create Multiple Records (REST API Developer Guide)
- Create Nested Records (REST API Developer Guide)
- Salesforce Object Query Language (SOQL)
- Sample CSV File (Bulk API Developer Guide)
- Salesforce CLI Command Reference

**Example: Export and Import Data Between Orgs**

Let’s say you’ve created the perfect set of data to test your application, and it currently resides in your default scratch org. You finished coding a new feature that you want to test in a new scratch org. You create the scratch org, push your source code, and assign the needed permission sets. Now you want to populate the scratch org with your perfect set of data from the other org. How? Read on!

This use case refers to the Broker and Properties custom objects of the Salesforce DX Github DreamHouse example. It’s assumed that, in the first scratch org from which you are exporting data, you’ve created the two objects by pushing the DreamHouse source. It’s also assumed that you’ve assigned the permission set and populated the objects with the data. In the second scratch org, however, it’s assumed that you’ve created the two objects and assigned the permission set but not yet populated them with data. See the README of the dreamhouse-sfdx GitHub example for instructions on these tasks.

1. Export the data in your default scratch org.

   Use the `force:data:soql:query` command to fine-tune the SELECT query so that it returns the exact set of data you want to export. This command outputs the results to your terminal or command window, but it doesn’t change the data in the org. Because the SOQL query is long, the command is broken up with backslashes for easier reading. You can still cut and paste the command into your terminal window and run it.

   ```shell
   sfdx force:data:soql:query --query "SELECT Id, Name, Title__c, Phone__c, Mobile_Phone__c, 
   Email__c, Picture__c, 
   (SELECT Name, Address__c, City__c, State__c, Zip__c, 
   Price__c, Title__c, Beds__c, Baths__c, Picture__c, 
   Thumbnail__c, Description__c 
   FROM Properties__r) 
   FROM Broker__c"
   ```
2. When you’re satisfied with the SELECT statement, use it to export the data into a set of JSON files.

```bash
sfdx force:data:tree:export --query "SELECT Id, Name, Title__c, Phone__c, Mobile_Phone__c, Email__c, Picture__c, (SELECT Name, Address__c, City__c, State__c, Zip__c, Price__c, Title__c, Beds__c, Baths__c, Picture__c, Thumbnail__c, Description__c FROM Properties__r) FROM Broker__c" --prefix export-demo --outputdir sfdx-out --plan
```

The export command writes the JSON files to the `sfdx-out` directory (in the current directory) and prefixes each file name with the string `export-demo`. The files include a plan definition file, which refers to the other files that contain the data, one for each exported object.

3. Import the data into the new scratch org by specifying the plan definition file.

```bash
sfdx force:data:tree:import --targetusername test-wvkpnfm5z113@example.com --plan sfdx-out/export-demo-Broker__c-Property__c-plan.json
```

Use the `--plan` parameter to specify the full path name of the plan execution file generated by the `force:data:tree:export` command. Plan execution file names always end in `.json`.

In the previous example, you must use the `--targetusername` option because you are importing into a scratch org that is not your default. Use the `force:org:list` command to view all your scratch orgs along with their usernames and aliases. You can also use `force:config:set` to set the new scratch org as your default.

4. (Optional) Open the new scratch org and query the imported data using the Salesforce UI and SOQL.

```bash
sfdx force:org:open --targetusername test-wvkpnfm5z113@example.com
```

If you set an alias for the scratch org username, you can pass it to the `--targetusername` parameter.

```bash
sfdx force:org:open --targetusername <alias>
```

Example: Looking for a more complicated example? The `easy-spaces-lwc` sample app has a data plan showing how to import Accounts, related Contacts and a 3-level deep custom object chain.

SEE ALSO:
- CLI Runtime Configuration Values
- dreamhouse-sfdx Sample GitHub Repo
- Salesforce CLI Command Reference

## Pull Source from the Scratch Org to Your Project

After you do an initial push, Salesforce DX tracks the changes between your local file system and your scratch org. If you change your scratch org, you usually want to pull those changes to your local project to keep both in sync.

During development, you change files locally in your file system and change the scratch org using the builders and editors that Salesforce supplies. Usually, these changes don’t cause a conflict and involve unique files.
Important: You can use `force:source:pull` for scratch orgs only. If you’re synchronizing source to any other org, use the Metadata API (`force:mdapi:retrieve` or `force:mdapi:deploy`).

By default, only changed source is synced back to your project.

The pull command does not handle merges. Projects and scratch orgs are meant to be used by one developer. Therefore, we don’t anticipate file conflicts or the need to merge. However, if the pull command detects a conflict, it terminates the operation and displays the conflict information to the terminal. You can rerun the command with the force option if you want to pull changes from your scratch org to the project despite any detected conflicts.

Before you run the pull command, you can get a list of what’s new, changed, and any conflicts between your local file system and the scratch org by using `force:source:status`. This way you can choose ahead of time which files to keep.

To pull changed source from the scratch org to the project:

```
sfdx force:source:pull
```

You can indicate either the full scratch org username or an alias. The terminal displays the results of the pull command. This example adds two Apex classes to the scratch org. The classes are then pulled to the project in the default package directory. The pull also indicates which files have changed since the last push and if a conflict exists between a version in your local project and the scratch org.

<table>
<thead>
<tr>
<th>STATE</th>
<th>FULL NAME</th>
<th>TYPE</th>
<th>PROJECT_PATH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changed</td>
<td>MyWidgetClass</td>
<td>ApexClass</td>
<td>/classes/MyWidgetClass.cls-meta.xml</td>
</tr>
<tr>
<td>Changed</td>
<td>MyWidgetClass</td>
<td>ApexClass</td>
<td>/classes/MyWidgetClass.cls</td>
</tr>
<tr>
<td>Changed</td>
<td>CoolClass</td>
<td>ApexClass</td>
<td>/classes/CoolClass.cls-meta.xml</td>
</tr>
<tr>
<td>Changed</td>
<td>CoolClass</td>
<td>ApexClass</td>
<td>/classes/CoolClass.cls</td>
</tr>
</tbody>
</table>

To pull source to the project if a conflict has been detected:

```
sfdx force:source:pull --forceoverwrite
```

SEE ALSO:

Track Changes Between the Project and Scratch Org

Track Changes Between the Project and Scratch Org

When you start developing, you can change local files in your project directory or remotely in your scratch org. Before you push local changes to the scratch org or pull remote changes to the local Salesforce DX project, it’s helpful to see what changes you’ve made.

1. To view the status of local or remote files:

```
sfdx force:source:status
```

<table>
<thead>
<tr>
<th>STATE</th>
<th>FULL NAME</th>
<th>TYPE</th>
<th>PROJECT_PATH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local</td>
<td>MyClass</td>
<td>ApexClass</td>
<td>/MyClass.cls-meta.xml</td>
</tr>
<tr>
<td>Local</td>
<td>MyClass</td>
<td>ApexClass</td>
<td>/MyClass.cls</td>
</tr>
<tr>
<td>Local</td>
<td>OtherClass</td>
<td>ApexClass</td>
<td>/OtherClass.cls-meta.xml</td>
</tr>
<tr>
<td>Local</td>
<td>OtherClass</td>
<td>ApexClass</td>
<td>/OtherClass.cls</td>
</tr>
<tr>
<td>Local</td>
<td>Event</td>
<td>QuickAction</td>
<td>/Event.quickAction-meta.xml</td>
</tr>
<tr>
<td>Remote</td>
<td>MyWidgetClass</td>
<td>ApexClass</td>
<td>/MyWidgetClass.cls-meta.xml</td>
</tr>
</tbody>
</table>
Scratch Org Users

A scratch org includes one administrator user by default. The admin user is typically adequate for all your testing needs. But sometimes you need other users to test with different profiles and permission sets.

You can create a user by opening the scratch org in your browser and navigating to the Users page in Setup. You can also use the `force:user:create` CLI command to easily integrate the task into a continuous integration job.

Scratch Org User Limits, Defaults, and Considerations

- You can create a user only for a specific scratch org. If you try to create a user for a non-scratch org, the command fails. Also specify your Developer Hub, either explicitly or by setting it as your default, so that Salesforce can verify that the scratch org is active.
- Your scratch org edition determines the number of available user licenses. Your number of licenses determines the number of users you can create. For example, a Developer Edition org includes a maximum of two Salesforce user licenses. Therefore, in addition to the default administrator user, you can create one standard user.
- The new user’s username must be unique across all Salesforce orgs and in the form of an email address. The username is active only within the bounds of the associated scratch org.
- You can’t delete a user. The user is deactivated when you delete the scratch org with which the user is associated. Deactivating a user frees up the user license. But you can’t reuse usernames, even if the associated user has been deactivated.
- The simplest way to create a user is to let the `force:user:create` command assign default or generated characteristics to the new user. If you want to customize your new user, create a definition file and specify it with the `--definitionfile (-f)` parameter. In the file, you can include all the User sObject fields and a set of Salesforce DX-specific options, described in User Definition File for Customizing a Scratch Org User on page 89. You can also specify these options on the command line.
- If you do not customize your new user, the `force:user:create` command creates a user with the following default characteristics.
  - The username is the existing administrator’s username prepended with a timestamp. For example, if the administrator username is test-wvkpnfm5z113@example.com, the new username is something like 1505759162830_test-wvkpnfm5z113@example.com.
  - The user’s profile is Standard User.
  - The values of the required fields of the User sObject are the corresponding values of the administrator user. For example, if the administrator’s locale (specifically the LocaleSidKey field of User sObject) is en_US, the new user’s locale is also en_US.

Create a Scratch Org User

Sometimes you need other users to test with different profiles and permission sets.

User Definition File for Customizing a Scratch Org User

To customize a new user, rather than use the default and generated values, create a definition file.
Generate or Change a Password for a Scratch Org User

By default, new scratch orgs contain one administrator user with no password. You can optionally set a password when you create a new user. Use the CLI to generate or change a password for any scratch org user. Once set, you can’t unset a password, you can only change it.

SEE ALSO:
    User sObject API Reference

Create a Scratch Org User

Sometimes you need other users to test with different profiles and permission sets.

Use the `force:user:create` command to create a user. Specify the `--setalias` parameter to assign a simple name to the user that you can reference in later CLI commands. When the command completes, it outputs the new username and user ID.

```
sfdx force:user:create --setalias qa-user
```

Successfully created user "test-b4agup43oxmu@example.com" with ID [0059A000000U0psQAC] for org 00D9A0000000SXKUA2.
You can see more details about this user by running "sfdx force:user:display -u test-b4agup43oxmu@example.com".

Users are associated with a specific scratch org and Developer Hub. Specify the scratch org or Developer Hub username or alias at the command line if they aren’t already set by default in your environment. If you try to create a user for a non-scratch org, the `force:user:create` command fails.

```
sfdx force:user:create --setalias qa-user --targetusername my-scratchorg --targetdevhubusername my-dev-hub
```

The `force:user:create` command uses default and generated values for the new user, such as the user’s username, profile, and locale. You can customize the new user by creating a definition file and specifying it with the `--definitionfile` parameter.

```
sfdx force:user:create --setalias qa-user --definitionfile config/user-def.json
```

View the list of users associated with a scratch org with the `force:user:list` command. The (A) on the left identifies the administrator user that was created at the same time that the scratch org was created.

```
sfdx force:user:list
```

<table>
<thead>
<tr>
<th>ALIAS</th>
<th>USERNAME</th>
<th>PROFILE NAME</th>
<th>USER ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>(A)</td>
<td>admin-user</td>
<td>System Administrator</td>
<td>005xx000001SvBPAA0</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:test-b4agup43oxmu@example.com">test-b4agup43oxmu@example.com</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ci-user</td>
<td><a href="mailto:wonder@example.com">wonder@example.com</a></td>
<td>Standard User</td>
<td>005xx000001SvBaAAK</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Display details about a user with the `force:user:display` command.

```
sfdx force:user:display --targetusername ci-user
```

### User Description

<table>
<thead>
<tr>
<th>KEY</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Token</td>
<td>&lt;long-string&gt;</td>
</tr>
</tbody>
</table>
User Definition File for Customizing a Scratch Org User

To customize a new user, rather than use the default and generated values, create a definition file.

The user definition file uses JSON format and can include any Salesforce User sObject field and these Salesforce DX-specific options.

<table>
<thead>
<tr>
<th>Salesforce DX Option</th>
<th>Description</th>
<th>Default If Not Specified</th>
</tr>
</thead>
<tbody>
<tr>
<td>permsets</td>
<td>An array of permission sets assigned to the user. Separate multiple values with commas, and enclose in square brackets. You must have previously pushed the permission sets to the scratch org with force:source:push.</td>
<td>None</td>
</tr>
<tr>
<td>generatePassword</td>
<td>Boolean. Specifies whether to generate a random password for the user. If set to true, force:user:create displays the generated password after it completes. You can also view the password using force:user:describe.</td>
<td>False</td>
</tr>
<tr>
<td>profileName</td>
<td>Name of a profile to associate with the user. Similar to the Profile field of the User sObject except that you specify the name of the profile and not its ID. Convenient when you know only the name of the profile.</td>
<td>Standard User</td>
</tr>
</tbody>
</table>

The user definition file options are case-insensitive. However, we recommend that you use lower camel case for the Salesforce DX-specific options and upper camel case for the User sObject fields. This format is consistent with other Salesforce DX definition files.

This user definition file includes some User sObject fields and three Salesforce DX options (profileName, permsets, and generatePassword).

```json
{
    "Username": "tester1@sfdx.org",
    "LastName": "Hobbs",
    "Email": "tester1@sfdx.org",
    "Alias": "tester1",
    "TimeZoneSidKey": "America/Denver",
    "LocaleSidKey": "en_US",
    ...
}
```
In the example, the username tester1@sfdx.org must be unique across the entire Salesforce ecosystem; otherwise, the `force:user:create` command fails. The alias in the Alias option is different from the alias you specify with the `--setalias` parameter of `force:user:create`. You use the Alias option alias only with the Salesforce UI. The `--setalias` alias is local to the computer from which you run the CLI, and you can use it with other CLI commands.

You indicate the path to the user definition file with the `--definitionfile` parameter of the `force:user:create` CLI command. You can name this file whatever you like and store it anywhere the CLI can access.

```bash
sfdx force:user:create --setalias qa-user --definitionfile config/user-def.json
```

You can override an option in the user definition file by specifying it as a name-value pair at the command line when you run `force:user:create`. This example overrides the username, list of permission sets, and whether to generate a password.

```bash
sfdx force:user:create --setalias qa-user --definitionfile config/user-def.json
permsets="Dreamy,Cloudy" Username=tester345@sfdx.org generatePassword=false
```

You can also add options at the command line that are not in the user definition file. This example adds the City option.

```bash
sfdx force:user:create --setalias qa-user --definitionfile config/user-def.json City=Oakland
```

SEE ALSO:

- User sObject API Reference
- Generate or Change a Password for a Scratch Org User

---

**Generate or Change a Password for a Scratch Org User**

By default, new scratch orgs contain one administrator user with no password. You can optionally set a password when you create a new user. Use the CLI to generate or change a password for any scratch org user. Once set, you can’t unset a password, you can only change it.

**1. Generate a password for a scratch org user with this command:**

```bash
sfdx force:user:password:generate --targetusername <username>
```

You can run this command for scratch org users only. The command outputs the generated password.

The target username must be an administrator user. The `--onbehalfof` parameter lets you assign permsets to multiple users at once, including admin users, or to users who don’t have permissions to do it themselves. Specify multiple users by separating them with commas; enclose them in quotes if you include spaces. The command still requires an administrator user which you specify with the `--targetusername` parameter. For example, let’s say the administrator user has alias `admin-user` and you want to generate a password for users with aliases `ci-user` and `qa-user`:

```bash
sfdx force:user:password:generate --targetusername admin-user --onbehalfof ci-user,qa-user
```

**2. View the generated password and other user details:**

```bash
sfdx force:user:display --targetusername ci-user
```

90
3. Log in to the scratch org with the new password:
   a. From the `force:user:display` output, copy the value of Instance URL and paste it into your browser. In our example, the instance URL is `https://site-fun-3277.cs46.my.salesforce.com`.
   b. If you’ve already opened the scratch org with the `force:org:open` command, you’re automatically logged in again. To try out the new password, log out and enter the username and password listed in the output of the `force:user:display` command.
   c. Click Log In to Sandbox.

   ![Note:](image) If you change a scratch org user’s password using the Salesforce UI, the new password doesn’t show up in the `force:user:display` output.

### Manage Scratch Orgs from Dev Hub

You can view and delete your scratch orgs and their associated requests from the Dev Hub.

In Dev Hub, `ActiveScratchOrgs` represent the scratch orgs that are currently in use. `ScratchOrgInfos` represent the requests that were used to create scratch orgs and provide historical context.

1. Log in to Dev Hub org as the System Administrator or as a user with the Salesforce DX permissions.
2. From the App Launcher, select **Active Scratch Org** to see a list of all active scratch orgs.
   - To view more details about a scratch org, click the link in the Number column.
3. To delete an active scratch org from the Active Scratch Org list view, choose **Delete** from the dropdown.
   - Deleting an active scratch org does not delete the request (`ScratchOrgInfo`) that created it, but it does free up a scratch org so that it doesn’t count against your allocations.
4. To view the requests that created the scratch orgs, select **Scratch Org Info** from the App Launcher.
   - To view more details about a request, click the link in the Number column. The details of a scratch org request include whether it’s active, expired, or deleted.
5. To delete the request that was used to create a scratch org, choose **Delete** from the dropdown.
   - Deleting the request (`ScratchOrgInfo`) also deletes the active scratch org.

SEE ALSO:

*Add Salesforce DX Users (Salesforce DX Setup Guide)*
Sandboxes are copies of your Salesforce org that you can use for development, testing, and training, without compromising the data and applications in your production org.

Salesforce offers sandboxes and a set of deployment tools, so you can:

- Isolate customization and development work from your production environment until you’re ready to deploy changes.
- Test changes against copies of your production data and users.
- Provide a training environment.
- Coordinate individual changes into one deployment to production.

Traditionally, you or your Admin has created and managed your sandboxes through the Setup UI. But we realize that many developers want the ability to create and manage their developer and testing environments programmatically, and to automate their CI processes. Salesforce CLI enables you to do both.

Where Do Sandboxes Fit in the Application Development Lifecycle?

The development model you use determines in which stages you use sandboxes. For more information on our development models and where sandboxes fit, see Determine Which Application Lifecycle Model Is Right for You (Trailhead).
Authorize in to Your Production Org

Right now, to run the sandbox operations commands, we support only the JWT-based flow for authorizing to your production org. This flow requires a production org with sandbox licenses instead of a Dev Hub. However, it’s okay if your production org is also a Dev Hub org.

⚠️ **Important:** If you authenticated to your production org already using the web-based flow, you must authenticate again using the JWT-based flow to use the sandbox operations CLI commands.

The examples in Authorize an Org Using the JJWT-Based Flow are geared toward scratch orgs. Follow these tips to successfully authorize to your production org.

- Be sure to use `https://login.salesforce.com` for `sfdcLoginUrl` in `sfdx-project.json` file. Alternatively, you can use `force:auth:jwt:grant --instanceurl` to specify the URL directly on the command line. This value overrides the login URL you specified in the `sfdx-project.json` file.
- Specify the username for your production org when running the `force:auth:jwt:grant` command. No need to specify a Dev Hub or indicate a default Dev Hub.
- The JWT authorization flow requires that you create a connected app. When you create the connected app, log in to your production org, not a Dev Hub org.

Create a Sandbox Definition File (Beta)

Before you can create a sandbox using Salesforce CLI, you must create a sandbox definition file. The sandbox definition file is a blueprint for the sandbox. You can create different definition files for each sandbox type that you use in the development process.

⚠️ **Note:** As a beta feature, Salesforce CLI for sandbox operations is a preview and isn’t part of the “Services” under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn’t guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It’s offered as is and isn’t supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Salesforce CLI for sandbox operations in the Salesforce DX Trailblazer Community.

### Sandbox Configuration Values

<table>
<thead>
<tr>
<th>Option</th>
<th>Required?</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>apexClassId</td>
<td>No</td>
<td>A reference to the ID of an Apex class that runs after each copy of the sandbox. Allows you to perform business logic on the sandbox to prepare it for use.</td>
</tr>
<tr>
<td>autoActivate</td>
<td>No</td>
<td>If <code>true</code>, you can activate a sandbox refresh immediately.</td>
</tr>
<tr>
<td>copy Archived Activities</td>
<td>No</td>
<td>Full sandboxes only. This field is visible if your organization has purchased an option to copy archived activities for sandbox. To obtain this option, contact Salesforce Customer Support.</td>
</tr>
<tr>
<td>Option</td>
<td>Required?</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>copyChatter</td>
<td>No</td>
<td>If true, archived Chatter data is copied to the sandbox.</td>
</tr>
<tr>
<td>description</td>
<td>No</td>
<td>A description of the sandbox (1000 or fewer characters), which helps you distinguish it from other sandboxes.</td>
</tr>
<tr>
<td>historyDays</td>
<td>No</td>
<td>Full sandboxes only. Represents the number of days of object history to be copied in the sandbox.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Valid values:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• -1, which means all available days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 0 (default)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 20</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 30</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 60</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 90</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 120</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 150</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 180</td>
</tr>
<tr>
<td>licenseType</td>
<td>Yes</td>
<td>Valid values are Developer, Developer_Pro, Partial, and Full.</td>
</tr>
<tr>
<td>sandboxName</td>
<td>Yes</td>
<td>A unique alphanumeric string (10 or fewer characters) to identify the sandbox. You can’t reuse a name while a sandbox is in the process of being deleted.</td>
</tr>
<tr>
<td>sourceSandbox</td>
<td>Yes (for sandbox cloning)</td>
<td>Name of the sandbox being cloned.</td>
</tr>
<tr>
<td>templateId</td>
<td>Yes (for Partial sandboxes)</td>
<td>Optional for Full sandboxes. Not available for Developer and Developer Pro sandboxes. A reference to the sandbox template as identified by the 15-character ID beginning with 1ps in the URL when viewing a sandbox template in a browser. A sandbox template lets you select which objects to copy in a sandbox.</td>
</tr>
</tbody>
</table>
Sample Sandbox Definition File

Although you can place the sandbox definition file anywhere, we recommend keeping it in your Salesforce DX project in the `config` directory. When naming the file, we suggest providing a descriptive name that ends in `sandbox-def.json`, for example, `developer-sandbox-def.json`.

```json
{
    "sandboxName": "dev1",
    "licenseType": "Developer"
}
```

SEE ALSO:

* [Tooling API: SandboxInfo](#)

Create, Clone, or Delete a Sandbox (Beta)

Create a sandbox to use for development, testing, or training. Clone a sandbox to copy its data and metadata to another sandbox.

**Note:** As a beta feature, Salesforce CLI for sandbox operations is a preview and isn’t part of the “Services” under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn’t guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It’s offered as is and isn’t supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Salesforce CLI for sandbox operations in the Salesforce DX Trailblazer Community.

Before you create or clone a sandbox:

- Create a Salesforce DX project with a manifest file.
- Authorize to a production org with available sandbox licenses.
- Create the sandbox definition file.

Why We Recommend Using Aliases

When you create or clone a sandbox, the usernames generated in the sandbox are based on the usernames present in the production org or sandbox. The username looks like an email address, such as `username@company.com.dev1`. If the resulting username is not unique, we prepend some characters and digits to the username. The modified username looks something like `00x7Vqusername@company.com.dev1`.

As you can imagine, remembering these usernames can be challenging, especially if you have several sandboxes you’re managing. Aliasing is a powerful way to manage and track your orgs, and we consider it a best practice. So when you issue a command that requires the username, using an alias that you can remember can speed up things.

If you didn’t set an alias when you created the sandbox, you can set one later.

```
sfdx force:alias:set MyDevSandbox=username@company.com.dev1
```
Create a Sandbox

Optional: Create a Sandbox Definition File (Beta)

When you create a sandbox, Salesforce copies the metadata and optionally data from your production org to a sandbox org.

```
sfdx force:org:create --type sandbox --targetusername prodOrg --definitionfile
cfg/dev-sandbox-def.json -a MyDevSandbox -s -w 30
```

The `-a` flag indicates that this sandbox is your default org for all CLI commands. If you’re working with several orgs and you don’t want this one to be the default, exclude this flag.

To directly define the required sandbox options, or to override the values defined in the sandbox definition file, specify key=value pairs on the command line.

```
sfdx force:org:create -t sandbox sandboxName=FullSbx licenseType=Full -u prodOrg -a
MyFullSandbox -w 30
```

**Tip:** Because the sandbox is processed in a queue, the sandbox creation process can take longer than the default wait time of 6 minutes. We recommend setting a larger value for `--wait`, for example, 30 minutes.

How long the creation process takes depends on the size and complexity of your production org. You see status messages posted to output:

```
Sandbox request dev1(0GXQ0000000CftJOWS) is Pending (0% completed). Sleeping 30 seconds.
Will wait 30 minutes more before timing out.
Sandbox request dev1(0GXQ0000000CftJOWS) is Processing (0% completed). Sleeping 30 seconds.
Will wait 29 minutes 30 seconds more before timing out.
```

Once the wait period is over, you can run the `force:org:status` command to check the status of the sandbox creation process. If the sandbox is created within the wait time, the CLI automatically authenticates in to the sandbox. And the sandbox appears in the output of the `force:org:list` command. Team members can authenticate to the sandbox by running the `auth:web:login` command and providing their usernames and passwords.

```
```

Clone a Sandbox

You can create a sandbox by cloning an existing sandbox rather than using your production org as your source. You can save time by customizing a sandbox with a set of data and metadata and then replicating it.

Sandbox cloning simplifies having multiple concurrent streams of work in your application life cycle. You can set up a sandbox for each type of work, such as development, testing, and staging. Your colleagues can easily clone individual sandboxes instead of sharing one sandbox and stepping on each other’s toes.

```
sfdx force:org:clone -t sandbox -f config/dev-sandbox-def.json -u prodOrg -a MyDevSandbox
-s -w 30
```

To override the configuration values defined in the sandbox definition file, specify key=value pairs on the command line.

```
sfdx force:org:clone -t sandbox sandboxName=DevSbx1 sourceSandboxName=Sbx2Clone -u prodOrg
-a MyDevSandbox -w 30
```

**Tip:** Because the sandbox is processed in a queue, the sandbox cloning process can take longer than the default wait time of 6 minutes. We recommend setting a larger value for `--wait`, for example, 30 minutes.
Once the wait period is over, you can run the `force:org:status` command to check the status of the sandbox cloning process. If the sandbox is cloned within the wait time, the CLI automatically authenticates in to the sandbox. And the sandbox appears in the output of the `force:org:list` command. Team members can authenticate to the sandbox by running the `auth:web:login` command and providing their usernames and passwords.

```
```

**Check the Sandbox Status**

Creating or cloning a sandbox can take several minutes. Once the command times out, you can run the `force:org:status` command to report on creation or cloning status. When the sandbox is ready, this command authenticates to the sandbox.

If the `org:create` or `org:clone` command times out, the alias isn’t set. However, you can set it using the `org:status` command:

```
sfdx force:org:status -n DevSbx1 -a MyDevSandbox -u prodOrg
```

**Open a Sandbox**

Once the sandbox is ready, you can open it by specifying its username or alias. However, you don’t have to provide its password because the CLI manages the authentication details for you.

```
sfdx force:org:open -u MyDevSandbox
```

**Delete a Sandbox**

You can delete a sandbox using the CLI if it was authenticated when running `org:create`, `org:clone`, or `org:status`. Other sandboxes that you authenticated using `force:auth:web:login` or `force:auth:jwt:grant` also appear on the org list, but must be deleted using the sandbox detail page in your production org.

```
sfdx force:org:delete -u MyDevSandbox
```

**Next:**

- Retrieve metadata from your sandbox to your local DX project.
- Develop directly in your sandbox, then retrieve the changes to your local DX project.
- Deploy local changes to a sandbox.

**SEE ALSO:**

- *Salesforce Help: Deploy Enhancements from Sandboxes*
- *Salesforce Help: Create, Clone, or Refresh a Sandbox Using Setup UI*
- *Authorize an Org Using the JWT-Based Flow*
CHAPTER 8

Development

In this chapter ...

- Develop Against Any Org
- Create Lightning Apps and Aura Components
- Create Lightning Web Components
- Create an Apex Class
- Create an Apex Trigger
- Testing
- View Apex Debug Logs
- Apex Debugger

After you import some test data, you’ve completed the process of setting up your project. Now, you’re ready to start the development process.

Create Source Files from the CLI

To add source files from the CLI, make sure that you’re working in an appropriate directory. For example, if your package directory is called `force-app`, create Apex classes in `force-app/main/default/classes`. You can organize your source as you want underneath each package directory except for documents, custom objects, and custom object translations.

As of API version 45.0, you can build Lightning components using two programming models: Lightning Web Components and Aura Components. To organize your components’ source files, your Aura components must be in the `aura` directory. Your Lightning web components must be in the `lwc` directory.

Execute one of these commands.

- `apex:class:create`
- `apex:trigger:create`
- `lightning:app:create`
- `lightning:component:create`
- `lightning:event:create`
- `lightning:interface:create`
- `lightning:test:create`
- `visualforce:component:create`
- `visualforce:page:create`

Consider using these two powerful optional flags:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>-d, --outputdir</td>
<td>The directory for saving the created files. If you don’t indicate a directory, your source is added to the current folder.</td>
</tr>
<tr>
<td>-t, --template</td>
<td>Template used for the file creation.</td>
</tr>
</tbody>
</table>

Tip: If you want to know more information about a command, run it with the `--help` option. For example, `sfdx apex:class:create --help`.  

98
Edit Source Files

Use your favorite code editor to edit Apex classes, Visualforce pages and components, Lightning web components, and Aura components in your project. You can also make edits in your default scratch org and then use `force:source:pull` to pull those changes down to your project. For Lightning pages (FlexiPage files) that are already in your scratch org, use the shortcut to open Lightning App Builder in a scratch org from your default browser. Lightning Pages are stored in the `flexipages` directory.

To edit a FlexiPage in your default browser—for example, to edit the `Property_Record_Page` source—execute this command.

```
sfdx force:source:open -f Property_Record_Page.flexipage-meta.xml
```

If you want to generate a URL that loads the `.flexipage-meta.xml` file in Lightning App Builder but does not launch your browser, use the `--urlonly` flag.

```
sfdx force:source:open -f Property_Record_Page.flexipage-meta.xml -r
```

SEE ALSO:

* Salesforce CLI Command Reference*
Develop Against Any Org

Regardless of the development model you’re using, you eventually test and validate your changes in a non-source-tracked org. For those of you who don’t use scratch orgs, we provide a similar experience for developing and unit testing in other environments, such as sandboxes.

You can use Salesforce CLI to retrieve and deploy metadata to non-source-tracked orgs with the same ease of pushing and pulling source to and from scratch orgs. And best of all, no extra conversion steps are required! After you retrieve the metadata, you don’t have to convert it to source format. When you’re ready to deploy it back to the org, you don’t have to convert it to metadata format. If you’re new to Salesforce CLI, Salesforce DX Project Structure and Source File Format explains the difference between source format and metadata format.

Using `force:source:retrieve`, you can retrieve the metadata you need in source format to your local file system (DX project). When your changes are ready for testing or production, you can use `force:source:deploy` to deploy your local files directly to a non-source-tracked org.

So, how do these source commands differ from the scratch org commands, `source:push` and `source:pull`? Because the changes aren’t tracked, you retrieve or deploy all the specified metadata instead of only what’s changed. The source you retrieve or deploy overwrites what’s you have locally or in your org, respectively.

Not sure what metadata types are supported or which metadata types support wild cards in `package.xml`? See Metadata Types in the Metadata API Developer Guide.

Before You Begin

Before you begin, don’t forget to:

- Create a Salesforce DX project that includes a manifest (package.xml). Run `force:project:create -n MyProject --manifest`.
- Authorize your non-source-tracked org. If connecting to a sandbox, edit your `sfdx-project.json` file to set `sfdcLoginUrl` to `https://test.salesforce.com` before you authorize the org. Don’t forget to create aliases for your non-source-tracked orgs.

Metadata Names That Require Encoding on the Command Line

When retrieving or deploying metadata using the `--metadata` option, commas in metadata names require encoding to work properly.

**Don’t:** `sfdx force:source:deploy -m "Profile:Standard User,Layout:Page,Console"

**Do:** `sfdx force:source:deploy -m "Profile:Standard User,Layout:Page%2CConsole"

Retrieve Source from a Non-Source-Tracked Org

Use the `force:source:retrieve` command to retrieve source from orgs that don’t have source tracking, such as a sandbox or your production org. If you already have the source code and metadata in a VCS, you might be able to skip this step. If you’re starting anew, you retrieve the metadata associated with the feature, project, or customization you’re working on.

**Note:** The `source:retrieve` command works differently from `source:pull` for scratch orgs. This command doesn’t notify you if there’s a conflict. Instead, the source you retrieve overwrites the corresponding source files in your local project. To retrieve metadata that’s in the metadata format, use `force:mdapi:retrieve`.

You can retrieve metadata in source format using one of these methods:
• Specify a `package.xml` that lists the components to retrieve.
• Specify a comma-separated list of metadata component names.
• Specify a comma-separated list of source file paths to retrieve. You can use the source path option when source exists locally, for example, after you’ve done an initial retrieve.
• Specify a comma-separated list of package names.

If the comma-separated list you’re supplying contains spaces, enclose the entire comma-separated list in one set of double quotes.

### To Retrieve:

<table>
<thead>
<tr>
<th>To Retrieve:</th>
<th>Command Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>All metadata components listed in a manifest</td>
<td><code>sfdx force:source:retrieve -x path/to/package.xml</code></td>
</tr>
<tr>
<td>Source files in a directory</td>
<td><code>sfdx force:source:retrieve -p path/to/source</code></td>
</tr>
<tr>
<td>A specific Apex class and the objects whose source is in a directory</td>
<td><code>sfdx force:source:retrieve -p path/to/apex/classes/MyClass.cls,path/to/source/objects</code></td>
</tr>
<tr>
<td>Source files in a comma-separated list that contains spaces</td>
<td><code>sfdx force:source:retrieve -p &quot;path/to/objects/MyCustomObject/fields/MyField.field-meta.xml,path/to/apex/classes&quot;</code></td>
</tr>
<tr>
<td>All Apex classes</td>
<td><code>sfdx force:source:retrieve -m ApexClass</code></td>
</tr>
<tr>
<td>A specific Apex class</td>
<td><code>sfdx force:source:retrieve -m ApexClass:MyApexClass</code></td>
</tr>
<tr>
<td>A layout name that contains a comma (Layout: Page, Console)</td>
<td><code>sfdx force:source:retrieve -m &quot;Layout:Page%2C Console&quot;</code></td>
</tr>
<tr>
<td>All the metadata related to a specific package or packages</td>
<td><code>sfdx force:source:retrieve -n DreamHouse</code></td>
</tr>
</tbody>
</table>

You can specify only one scoping parameter when retrieving metadata: `--metadata`, `--sourcepath`, or `--manifest`. If you indicate `--packagenames`, you can include one additional scoping parameter.

```
sfdx force:source:retrieve -n DreamHouse, -x manifest/package.xml
```

### Deploy Source to a Non-Source-Tracked Org

Use the `force:source:deploy` command to deploy source to orgs that don’t have source tracking, such as a sandbox or production org.

**Note:** The `source:deploy` command works differently from `source:push` for scratch orgs. The source you deploy overwrites the corresponding metadata in your org, similar to running `source:push` with the `--force` option. To deploy metadata that’s in the metadata format, use `force:mdapi:deploy`.

You can deploy metadata in source format using these methods:

• Specify a `package.xml` that lists the components to deploy
• Specify a comma-separated list of metadata component names
• Specify a comma-separated list of source file paths to deploy

If the comma-separated list you’re supplying contains spaces, enclose the entire comma-separated list in one set of double quotes.
### To Deploy:

<table>
<thead>
<tr>
<th>Description</th>
<th>Command Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>All components listed in a manifest</td>
<td><code>sfdx force:source:deploy -x path/to/package.xml</code></td>
</tr>
<tr>
<td>Source files in a directory</td>
<td><code>sfdx force:source:deploy -p path/to/source</code></td>
</tr>
<tr>
<td>A specific Apex class and the objects whose source is in a directory</td>
<td><code>sfdx force:source:deploy -p path/to/apex/classes/MyClass.cls,path/to/source/objects</code></td>
</tr>
<tr>
<td>Source files in a comma-separated list that contains spaces</td>
<td><code>sfdx force:source:deploy -p &quot;path/to/objects/MyCustomObject/fields/MyField.field-meta.xml, path/to/apex/classes&quot;</code></td>
</tr>
<tr>
<td>All Apex classes</td>
<td><code>sfdx force:source:deploy -m ApexClass</code></td>
</tr>
<tr>
<td>A specific Apex class</td>
<td><code>sfdx force:source:deploy -m ApexClass:MyApexClass</code></td>
</tr>
<tr>
<td>All custom objects and Apex classes</td>
<td><code>sfdx force:source:deploy -m CustomObject,ApexClass</code></td>
</tr>
<tr>
<td>All Apex classes and a profile that has a space in its name</td>
<td><code>sfdx force:source:deploy -m &quot;ApexClass, Profile:Content Experience Profile&quot;</code></td>
</tr>
<tr>
<td>A recently validated set of components without running Apex tests (often referred to as a quick deploy)</td>
<td><code>sfdx force:source:deploy -q VALIDATEDDEPLOYREQUESTID</code> You can run this option after you have run tests, passed code coverage requirements, and performed a check-only deployment using the `-c</td>
</tr>
<tr>
<td>Even if the deployment contains warnings</td>
<td><code>sfdx force:source:deploy -g</code></td>
</tr>
<tr>
<td>Regardless of whether the deployment contains errors (not recommended if deploying to a production org)</td>
<td><code>sfdx force:source:deploy -o</code></td>
</tr>
</tbody>
</table>

### Delete Non-Tracked Source

Use the `force:source:delete` command to delete components from orgs that don’t have source tracking, such as sandboxes.

**Note:** Run this command from within a Salesforce DX project. To remove deleted items from scratch orgs, which have change tracking, use `force:source:push`.

If the source exists locally in a DX project, you can delete metadata by specifying the path to the source or by listing individual metadata components. If the comma-separated list you’re supplying contains spaces, enclose the entire comma-separated list in one set of double quotes.

<table>
<thead>
<tr>
<th>Description</th>
<th>Command Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source files in a directory</td>
<td><code>sfdx force:source:delete -p path/to/source</code></td>
</tr>
<tr>
<td>A specific component, such as a FlexiPage</td>
<td><code>sfdx force:source:delete -m FlexiPage:Broker_Record_Page</code></td>
</tr>
</tbody>
</table>
Do You Want to Retain the Generated Metadata?

Normally, when you run some CLI commands, a temporary directory with all the metadata is created then deleted upon successful completion of the command. However, retaining these files can be useful for several reasons. You can debug problems that occur during command execution. You can use the generated `package.xml` when running subsequent commands, or as a starting point for creating a manifest that includes all the metadata you care about.

To retain all the metadata in a specified directory path when you run these commands, set the `SFDX_MDAPI_TEMP_DIR` environment variable:

- `force:source:deploy`
- `force:source:retrieve`
- `force:source:delete`
- `force:source:push`
- `force:source:pull`
- `force:source:convert`
- `force:org:create` (if your scratch org definition contains scratch org settings, not org preferences)

Example:

```
SFDX_MDAPI_TEMP_DIR=/users/myName/myDXProject/metadata
```

Create Lightning Apps and Aura Components

To create Lightning apps and Aura components from the CLI, you must have an `aura` directory in your Salesforce DX project.

1. In `<app dir>/main/default`, create the `aura` directory.
2. Change to the `aura` directory.
3. In the `aura` directory, create a Lightning app or an Aura component.

```
sfdx force:lightning:app:create -n myAuraapp
```

```
sfdx force:lightning:component:create --type aura -n myAuraComponent
```

SEE ALSO:

Create Lightning Web Components

Create Lightning Web Components

To create a Lightning web component from the CLI, you must have an `lwc` directory in your Salesforce DX project.

1. In `<app dir>/main/default`, create the `lwc` directory.
2. Change to the `lwc` directory.
3. In the lwc directory, create the Lightning web component.

```
sfdx force:lightning:component:create --type lwc -n myLightningWebComponent
```

SEE ALSO:
- Create Lightning Apps and Aura Components

## Create an Apex Class

You can create Apex classes from the CLI.

1. If the classes directory doesn’t exist in `<app dir>/main/default`, create it.
2. In the classes directory, create the class.

```
sfdx force:apex:class:create -n myclass
```

## Create an Apex Trigger

Use Apex triggers to perform custom actions before or after a change to a Salesforce record, such as an insertion, update, or deletion. You can create Apex triggers from the CLI.

1. If the triggers directory doesn’t exist in `<app-dir>/main/default`, create it.
   - Use the `-s` parameter to specify the sObject associated with this trigger, such as Account.
   - Use the `-e` parameter to specify the triggering events, such as `before delete` or `after upsert`.
   - Specify that the command generate its output into the triggers directory with the `-d` parameter.

```
sfdx force:apex:trigger:create -n mytrigger -s Account -e 'before insert, after upsert'
```

The command generates two files.
- `mytrigger.trigger-meta.xml`—metadata format
- `mytrigger.trigger`—Apex source file

3. Update the generated Apex and metadata format file with your code.

SEE ALSO:
- Triggers (Apex Developer Guide)
- Apex Triggers (Trailhead Module)

## Testing

When you’re ready to test changes to your Salesforce app source code, you can run Apex tests from the Salesforce DX CLI. Apex tests are run in your scratch org.
You can also execute the CLI command for running Apex tests (force:apex:test:run) from within third-party continuous integration tools, such as Jenkins.

To run Apex tests from the command line:

```
sfdx force:apex:test:run
```

This command runs all Apex tests in the scratch org asynchronously and then outputs a job ID. Pass the ID to the force:apex:test:report command to view the results. The results include the outcome of individual tests, how long each test ran, and the overall pass and fail rate.

```
sfdx force:apex:test:report --testrunid 7074C00000988ax
```

Use the --synchronous parameter to run tests from a single class synchronously. The command waits to display the test results until all tests have completed.

```
sfdx force:apex:test:run --synchronous --classnames TestA
```

Use parameters to list the test classes or suites to run, specify the output format, view code coverage results, and more. For example, the following command runs the TestA and TestB test classes, provides results in Test Anything Protocol (TAP) format, and requests code coverage results.

```
sfdx force:apex:test:run --classnames TestA,TestB --resultformat tap --codecoverage
```

Use the --tests parameter to run specific test methods using the standard notation Class.method. If you are testing a managed package, use namespace.Class.method. If you specify a test class without a method, the command runs all methods in the class. This example shows how to run two methods in the TestA class and all methods in the TestB class.

```
sfdx force:apex:test:run --tests TestA.excitingMethod,TestA.boringMethod,TestB
```

Here's the same example but with a namespace.

```
```

You can specify either --tests or --classnames with force:apex:test:run but not both.

SEE ALSO:
- Test Anything Protocol (TAP)
- Salesforce CLI Command Reference

View Apex Debug Logs

Apex debug logs can record database operations, system processes, and errors that occur when executing a transaction or running unit tests in your scratch org. You can use the Salesforce CLI to view the debug logs.

1. Open your scratch org by running force:org:open. If you have not set a default username, specify the scratch org's username or alias with the -u parameter.

2. Under the quick access menu (Lightning Experience) or your name (Salesforce Classic), click Developer Console. Opening the Developer Console starts a listener that is required by the force:apex:log commands.

3. If necessary, run Apex tests to generate some debug logs.

```
sfdx force:apex:test:run
```
4. Get a list of the debug logs.

```
sfdx force:apex:log:list
```

<table>
<thead>
<tr>
<th>APPLICATION DURATION (MS)</th>
<th>ID</th>
<th>LOCATION</th>
<th>SIZE (B)</th>
<th>LOG USER</th>
<th>OPERATION</th>
<th>REQUEST</th>
</tr>
</thead>
<tbody>
<tr>
<td>1143</td>
<td>07L9Axx</td>
<td>SystemLog</td>
<td>23900</td>
<td>User</td>
<td>User</td>
<td>ApexTestHandler Api</td>
</tr>
<tr>
<td>2017-09-05x</td>
<td>Success</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

5. View a debug log by passing its ID to the `force:apex:log:get` command.

```
sfdx force:apex:log:get --logid 07L9A000000aBYGUA2
```

38.0
APEX_CODE,FINEST;APEX_PROFILING,INFO;CALLOUT,INFO;INFO;SYSTEM,DEBUG;VALIDATION,INFO;VISUALFORCE,INFO;WAVE,INFO;WORKFLOW,INFO
15:58:57.3 (3717091)|USER_INFO|[EXTERNAL]|0059A000000TwPM|test-ktjauhgadin@example.com|Pacific Standard Time|GMT-07:00
15:58:57.3 (3888677)|EXECUTION_STARTED
15:58:57.3 (3924515)|CODE_UNIT_STARTED|[EXTERNAL]|01p9A000000FmMN|RejectDuplicateFavoriteTest.acceptNonDuplicate()
15:58:57.3 (5372873)|HEAP_ALLOCATE|[72]|Bytes:3
...

SEE ALSO:
- Debug Log (Apex Developer Guide)

**Apex Debugger**

If you use Visual Studio Code (VSC) to develop Lightning Platform applications, you can use the Apex Debugger extension to debug your Apex code. Set breakpoints in your Apex classes and step through their execution to inspect your code in real time to find bugs.

You must have at least one available Apex Debugger session in your Dev Hub org.

- Trial and Developer Edition orgs do not include any Apex Debugger sessions.
- Performance Edition and Unlimited Edition orgs include one Apex Debugger session.
- To purchase Apex Debugger sessions for Enterprise Edition orgs, or to purchase more sessions for orgs that already have allocated sessions, contact Salesforce.

Enable the Apex Debugger in your scratch orgs by adding the `DebugApex` feature to your scratch org definition file:

```
"features": "DebugApex"
```

SEE ALSO:
- Scratch Org Definition File
- Apex Debugger for Visual Studio Code
CHAPTER 9 Build and Release Your App

In this chapter ...

- Build and Release Your App with Metadata API

When you finish writing your code, the next step is to deploy it. We offer different deployment options based on your role and needs as a customer, system integrator, or independent software vendor (ISV) partner.

To learn about the benefits of the different development models, review these Trailhead modules:

- Org Development Model
- Package Development Model
- Quick Start: Unlocked Packages
- Unlocked Packages for Customers

Based on your adoption readiness, review this table for your recommended options:

### Ready To Create Packages to Deliver Apps

<table>
<thead>
<tr>
<th>Customers and Non-ISV Partners</th>
<th>ISV Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unlocked package</td>
<td>First-Generation (1GP) managed package</td>
</tr>
<tr>
<td>An unlocked package is for customers who want to organize metadata into a package and deploy the metadata (via packages) to different orgs. Unlocked packages were previously called developer-controlled packages.</td>
<td>If you are an ISV that develops apps and lists them on AppExchange, Salesforce recommends managed packages. Second-Generation (2GP) managed packages are in beta, and many ISVs are testing them in their internal development stages. However, we recommend that you continue using 1GP managed packages for customer distribution until 2GP is generally available. 2GP doesn’t yet include certain key parity features with managed packages, such as push upgrades, LMA, ability to list on AppExchange, and patch versions. For more information on 1GP managed packages, see First-Generation Managed Packages. For more information on 2GP managed packages, see Second-Generation Managed Packages.</td>
</tr>
</tbody>
</table>

**Note:** An unlocked package offers a super-set of the capabilities of an unmanaged package. Therefore, unmanaged packages aren’t listed in this table.

For more information, see Second-Generation Managed Packages.

| Change sets, or org development via Salesforce CLI | N/A |
Not Ready for Package Development

If you or your team isn’t ready for package development, you can continue to use change sets, or try to the org development model, where you deploy changes using Salesforce CLI. For more information, see Build and Release Your App with Metadata API.
Build and Release Your App with Metadata API

Develop and test your app in your sandboxes. Use Salesforce CLI or Salesforce Extensions for VS Code to retrieve and deploy your source. This development work flow is called the org development model.

Develop and Test in a Sandbox Using the Org Development Model

With the org development model, you develop and test your changes in a sandbox using Salesforce CLI, then use Metadata API to deploy to production. Similar to change sets, the release artifact is a set of changed metadata to update in the production org. If you want to know more about this development model, see the Org Development Model module in Trailhead.

Development and Release Environments

1. **Develop and test:** Each team member has their own Developer sandbox to create their assigned customization. Developer sandboxes contain no production data.
2. **Build release:** Team members each migrate their customizations from their respective developer sandboxes to a shared Developer Pro sandbox for integration. Developer Pro sandboxes don’t contain production data, but you can seed them with testing data.
3. **Test release:** For user-acceptance testing, the team uses a Partial sandbox to create a complete replica of production.
4. **Release:** After the release is in production, the team can use the Full sandbox to train users without the risk of altering production data. A Full sandbox includes a copy of production data.
What Tools Do I Need?

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salesforce DX project</td>
<td>The Salesforce DX project contains the metadata and source files that comprise your changes. A DX project has a specific project structure and source format. In addition to source files, the project contains a configuration file, sfdx-project.json. This file contains project information and enables you to leverage Salesforce DX tools for many of your development tasks.</td>
</tr>
<tr>
<td>Deployment artifact</td>
<td>After testing the changes, you create the deployment artifact, a .zip file that contains changed files to deploy. Deploy the release artifact to the full (staging) sandbox first, and then finally to production. You can think of the deployment artifact as the inbound change set. The changes don’t take effect until they are deployed.</td>
</tr>
<tr>
<td>Source control system</td>
<td>All changes are merged and stored in a source control system, which contains the Salesforce DX project.</td>
</tr>
<tr>
<td>Salesforce CLI</td>
<td>You can use Salesforce CLI for every phase of the org development life cycle. It improves productivity by providing a single interface for all your development, testing, and automation use cases.</td>
</tr>
<tr>
<td>Salesforce Extensions for VS Code</td>
<td>Salesforce Extensions for VS Code is built on top of Salesforce CLI and Visual Studio Code. Together, they are an integrated development environment for custom development on Lightning Platform. You can run Salesforce CLI commands directly from the command palette or terminal.</td>
</tr>
<tr>
<td>Change management mechanisms</td>
<td>It’s still important to capture your changes externally using formal change-tracking tools, such as a change list, a deployment run list, and other project management tools.</td>
</tr>
</tbody>
</table>

Considerations for Deploying Apex Code

To deploy Apex to production, unit tests of your Apex code must meet coverage requirements. Code coverage indicates how many executable lines of code in your classes and triggers are covered by your test methods. Write test methods to test your triggers and classes, and then run those tests to generate code coverage information.

If you don’t specify a test level when initiating a deployment, the default test execution behavior depends on the contents of your deployment package.

- If your deployment package contains Apex classes or triggers, when you deploy to production, all tests are executed, except tests that originate from a managed package.
- If your package doesn’t contain Apex code, no tests are run by default.

You can run tests for a deployment of non-Apex components. You can override the default test execution behavior by setting the test level in your deployment options. Test levels are enforced regardless of the types of components present in your deployment package.
We recommend that you run all local tests in your development environment, such as a sandbox, before deploying to production. Running tests in your development environment reduces the number of tests required in a production deployment.

**Develop and Test Changes Locally**
Develop changes in source format, deploying to and retrieving from your Developer sandbox.

**Build and Test the Release Artifact**
After your team has finished its development tasks, transition to the build release phase to integrate your changes in a Developer Pro sandbox. Then build the release artifact.

**Test the Release Artifact in a Staging Environment**
Stage the changes and run regression tests in a Full sandbox.

**Release Your App to Production**
Now that all your tests have passed in the Full sandbox, you’re ready to deploy to production.

**Cancel a Metadata Deployment**
You can cancel a metadata deployment from the CLI and specify a wait time for the command to complete.

SEE ALSO:
- Metadata API Developer Guide
- Salesforce CLI Command Reference

## Develop and Test Changes Locally

Develop changes in source format, deploying to and retrieving from your Developer sandbox.

These steps provide the high-level work flow.

1. Create the source control repository.
2. Create a DX project.
3. Add the DX project files to your source control repository.
4. Authorize the Developer sandbox.
5. Perform development tasks in your developer sandbox.
6. Retrieve the changes from the developer sandbox. If you have a few changes, you can indicate a comma-separated list of metadata component names. If you have many changes, you can use a manifest (`package.xml`).

    ```bash
    sfdx force:source:retrieve --manifest path/to/package.xml
    ```

7. Commit the changes to the source control repository.

**Next:** Deploy all changes the team has made to the Developer Pro sandbox, then test those changes.

SEE ALSO:
- Metadata API Developer Guide
- Salesforce CLI Command Reference
**Build and Test the Release Artifact**

After your team has finished its development tasks, transition to the build release phase to integrate your changes in a Developer Pro sandbox. Then build the release artifact.

In the early testing phases, you use the `source` commands to deploy and retrieve metadata to and from your Developer sandboxes. The `source:deploy` command is not transactional and attempts to deploy all components. If any change in your project has errors but other changes are valid, the command deploys all changes that are valid and compile. Those changes that can’t compile are not deployed, but the overall command completes successfully. Therefore, when building and testing your release artifact, use the `mdapi:deploy` command.

Here are the high-level steps in the work flow to create the release artifact.

1. Pull the changes from the repo so your local project contains all the changes your team has made.
2. Authorize the Developer Pro sandbox.
3. Build the release artifact so you can deploy the changes to the sandbox.
   a. Convert the source to metadata format.
      ```bash
      sfdx force:source:convert --rootdir force-app --outputdir tmp_convert
      ```
      This command also creates a manifest in the output directory. The manifest indicates what changes to include in the build artifact.
   b. Create a `.zip` file of the contents in the `tmp_convert` directory.
4. Delete the output directory, for example, `tmp_convert`.
5. Run the deploy command that mimics what you’ll deploy to production, for example:
   ```bash
   sfdx force:mdapi:deploy --zipfile winter19.zip --targetusername dev-pro-sandbox \ 
   --testlevel RunSpecifiedTests --runtests TestMyCode
   ```
6. Open the sandbox.
7. Perform testing.
8. If the testing passes, continue to the test release phase where you deploy the release artifact to the partial sandbox. Then perform user-acceptance testing.

After the testing passes, move to the release phase and perform regression tests in the Full sandbox.

**Test the Release Artifact in a Staging Environment**

Stage the changes and run regression tests in a Full sandbox.

After you have made all your changes based on the integration testing, the next step is to stage the changes in a Full sandbox. The process of deploying changes to the Full sandbox is similar to the process you used to deploy changes to your Developer Pro sandbox. This phase includes regression testing and mimics how you release the changes to production.

These steps provide the high-level work flow.

1. Authorize the Full sandbox.
2. (Optional) If you made any changes based on your testing in the Developer Pro sandbox, create a new release artifact (.zip). If not, use the existing release artifact.
3. To validate the deployment without saving the components in the target org, run all local (regression) tests. A validation enables you to verify the results of tests that would be executed during a deployment, but doesn’t commit any changes.

```bash
dsfdx force:mdapi:deploy --checkonly --zipfile mdapi_output/winter19.zip --targetusername full-sandbox --testlevel RunLocalTests
```

4. Test the actual production deployment steps in the staging sandbox. Set up the same quick deploy that you plan to execute against the production org.

```bash
```

This command returns a job ID that you reference in the quick deploy.

5. Next, test the quick deploy using the job ID returned in the previous step.

```bash
dsfdx force:mdapi:deploy --targetusername full-sandbox --validateddeployrequestid jobID
```

After you run the quick deploy, you have 10 days to perform the deployment to production.

**Release Your App to Production**

Now that all your tests have passed in the Full sandbox, you’re ready to deploy to production.

You have two options to deploy your metadata to production using Salesforce CLI. For information on all command options, view the command --help.

- Deploy your metadata directly to your production org using the source:deploy command.
- Convert your local DX project files to metadata format, then use the mdapi:deploy command.

1. In your deployment run list, complete any pre-deployment tasks.
2. Authorize your production org.
3. If you plan to use the mdapi:deploy command, convert your files from source format to metadata format.

```bash
dsfdx force:source:convert
```

4. Set up the quick deploy.

<table>
<thead>
<tr>
<th>Salesforce CLI Command</th>
<th>Command-Line Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>sfdx force:source:deploy</td>
<td>sfdx force:source:deploy --checkonly \ --sourcepath force-app --targetusername production-org \ --testlevel RunLocalTests</td>
</tr>
</tbody>
</table>

| sfdx force:mdapi:deploy | sfdx force:mdapi:deploy --checkonly \ --zipfile winter19.zip --targetusername production-org \ --testlevel RunLocalTests |

This command returns a job ID that you reference in the quick deploy.
5. After the tests are run, verify that all the Apex tests have passed. Be sure that the tests cover at least 75% of the code being deployed.

6. Run the quick deploy:

<table>
<thead>
<tr>
<th>Salesforce CLI Command</th>
<th>Command-Line Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>sfdx force:source:deploy</td>
<td>sfdx force:source:deploy \</td>
</tr>
<tr>
<td></td>
<td>--targetusername production-org \</td>
</tr>
<tr>
<td></td>
<td>--validateddeployrequestid jobID</td>
</tr>
<tr>
<td>sfdx force:mdapi:deploy</td>
<td>sfdx force:mdapi:deploy \</td>
</tr>
<tr>
<td></td>
<td>--targetusername production-org \</td>
</tr>
<tr>
<td></td>
<td>--validateddeployrequestid jobID</td>
</tr>
</tbody>
</table>

7. Open the production org, then perform any post-deployment tasks listed in the deployment run list.

SEE ALSO:
- Metadata API Developer Guide
- Salesforce CLI Command Reference

### Cancel a Metadata Deployment

You can cancel a metadata deployment from the CLI and specify a wait time for the command to complete.

To cancel your most recent deployment, run `force:mdapi:deploy:cancel`. You can cancel earlier deployments by adding the `-i (JOBID)` parameter to specify the deployment that you want to cancel.

```
$ sfdx force:mdapi:deploy:cancel -i <jobid>
```

The default wait time for the cancel command to complete and display its results in the terminal window is 33 minutes. If the command isn’t completed by the end of the wait period, the CLI returns control of the terminal window to you. You can adjust the wait time as needed by specifying the number of minutes in the `-w (WAIT)` parameter, as shown in the following example:

```
$ sfdx force:mdapi:deploy:cancel -w 20
```

Curious about the status of a canceled deployment? Run a deployment report.

```
$ sfdx force:mdapi:deploy:report
```

SEE ALSO:
- Metadata API Developer Guide
- Salesforce CLI Command Reference
If you’re an ISV, you want to build a managed package. A managed package is a bundle of components that make up an application or piece of functionality. A managed package is a great way to release an app for sale and to support licensing your features. You can protect intellectual property because the source code of many components is not available through the package. You can also roll out upgrades to the package.

When you’re working with your production org, you create a .zip file of metadata components and deploy them through Metadata API. The .zip file contains:

- A package manifest (package.xml) that lists what to retrieve or deploy
- One or more XML components organized into folders

If you don’t have the packaged source already in the source format, you can retrieve it from the org and convert it using the CLI.
Build and Release Your App with Managed Packages

If you developed and tested your app, you’re well on your way to releasing it. Luckily, when it’s time to build and release an app as a managed package, you’ve got options. You can package an app you developed from scratch. If you’re experimenting, you can also build the sample app from Salesforce and emulate the release process.

Working with a package is an iterative process. You typically retrieve, convert, and deploy source multiple times as you create scratch orgs, test, and update the package components.

Chances are, you already have a namespace and package defined in your packaging org. If not, run this command to open the packaging org in your browser.

```bash
sfdx force:org:open --targetusername me@my.org --path lightning/setup/Package/home
```

In the Salesforce UI, you can define a namespace and a package. Each packaging org can have a single managed package and one namespace.

Be sure to link the namespace to your Dev Hub org.

Packaging Checklist
Ready to deploy your packaging metadata and start creating a package? Take a few minutes to verify that you covered the items in this checklist, and you’re good to go.

Deploy the Package Metadata to the Packaging Org
Before you deploy the package metadata into your packaging org, you convert from source format to metadata format.

Create a Beta Version of Your App
Test your app in a scratch org, or share the app for evaluation by creating a beta version.

Install the Package in a Target Org
After you create a package with the CLI, install the package in a target org. You can install the package in any org you can authenticate, including a scratch org.

Create a Managed Package Version of Your App
After your testing is done, your app is almost ready to be published in your enterprise or on AppExchange. Generate a new managed package version in your Dev Hub org.

SEE ALSO:
- ISVforce Guide
- Link a Namespace to a Dev Hub Org
- Retrieve Source from an Existing Managed Package

Packaging Checklist
Ready to deploy your packaging metadata and start creating a package? Take a few minutes to verify that you covered the items in this checklist, and you’re good to go.

1. Link the namespace of each package you want to work with to the Dev Hub org.
2. Copy the metadata of the package from your version control system to a local project.
3. Update the config files, if needed.
For example, to work with managed packages, sfdx-project.json must include the namespace.

"namespace": "acme_example",

4. (Optional) Create an alias for each org you want to work with.

If you haven’t yet created an alias for each org, consider doing that now. Using aliases is an easy way to switch between orgs when you’re working in the CLI.

5. Authenticate the Dev Hub org.

6. Create a scratch org.

A scratch org is different than a sandbox org. You specify the org shape using project-scratch.json. To create a scratch org and set it as the default username org, run this command from the project directory.

   `sfdx force:org:create -s -f config/project-scratch-def.json`

7. Push source to the scratch org.

8. Update source in the scratch org as needed.

9. Pull the source from the scratch org if you used declarative tools to make changes there.

With these steps complete, you’re ready to deploy your package metadata to the packaging org.

SEE ALSO:

   Sample Repository on GitHub
   Authorization
   Create Scratch Orgs
   Push Source to the Scratch Org

Deploy the Package Metadata to the Packaging Org

Before you deploy the package metadata into your packaging org, you convert from source format to metadata format.

It’s likely that you have some files that you don’t want to convert to metadata format. Create a `.forceignore` file to indicate which files to ignore.

1. Convert from source format to the metadata format.

   `sfdx force:source:convert --outputdir mdapi_output_dir --packagename managed_pkg_name`

   Create the output directory in the root of your project, not in the package directory. If the output directory doesn’t exist, it’s created. Be sure to include the --packagename so that the converted metadata is added to the managed package in your packaging org.

2. Review the contents of the output directory.

   `ls -lR mdapi_output_dir`

3. Authenticate the packaging org, if needed. This example specifies the org with an alias called MyPackagingOrgAlias, which helps you refer to the org more easily in subsequent commands.

   `sfdx force:auth:web:login --setalias MyPackagingOrgAlias`

   You can also authenticate with an OAuth client ID: sfdx force:auth:web:login --clientid oauth_client_id

4. Deploy the package metadata back to the packaging org.

   `sfdx force:mdapi:deploy --deploydir mdapi_output_dir --targetusername me@example.com`
The `--targetusername` is the username. Instead of the username, you can use `--u MyPackagingOrgAlias` to refer to your previously defined org alias. You can use other options, like `--wait` to specify the number of minutes to wait. Use the `--zipfile` parameter to provide the path to a zip file that contains your metadata. Don’t run tests at the same time as you deploy the metadata. You can run tests during the package upload process. A message displays the job ID for the deployment.

5. Check the status of the deployment.

When you run `force:mdapi:deploy`, the job ID and target username are stored, so you don’t have to specify these required parameters to check the status. These stored values are overwritten when you run `force:mdapi:deploy` again.

```bash
sfdx force:mdapi:deploy:report
```

If you want to check the status of a different deploy operation, specify the job ID on the command line, which overrides the stored job ID.

SEE ALSO:

*Salesforce CLI Command Reference*

*How to Exclude Source When Syncing or Converting*

## Create a Beta Version of Your App

Test your app in a scratch org, or share the app for evaluation by creating a beta version.

If you specified the package name when you converted source to metadata format, both the changed and new components are automatically added to the package. Including the package name in that stage of the process lets you take full advantage of end-to-end automation.

If, for some reason, you don’t want to include new components, you have two choices. You can omit the package name when you convert source or remove components from the package in the Salesforce UI before you create the package version.

Create the beta version of a managed package by running the commands against your packaging org, not the Dev Hub org.

1. Ensure that you’ve authorized the packaging org.

```bash
sfdx force:auth:web:login --targetusername me@example.com
```

2. Create the beta version of the package.

```bash
sfdx force:package1:version:create --packageid package_id --name package_version_name
```

You can get the package ID on the package detail page in the packaging org. If you want to protect the package with an installation key, add it now or when you create the released version of your package. The `--installationkey` supplied from the CLI is equivalent to the Password field that you see when working with packages through the Salesforce user interface. When you include a value for `--installationkey`, you or a subscriber must supply the key before you can install the package in a target org.

You’re now ready to create a scratch org and install the package there for testing. By default, the `create` command generates a beta version of your managed package.

Later, when you’re ready to create the Managed - Released version of your package, include the `--m` (`--managedreleased true`) parameter.
Note: After you create a managed-released version of your package, many properties of the components added to the package are no longer editable. Refer to the ISVforce Guide to understand the differences between beta and managed-released versions of your package.

SEE ALSO:
- Salesforce CLI Command Reference
- ISVforce Guide
- Link a Namespace to a Dev Hub Org

Install the Package in a Target Org

After you create a package with the CLI, install the package in a target org. You can install the package in any org you can authenticate, including a scratch org.

If you want to create a scratch org and set it as the default username org, run this command from the project directory.

```
sfdx force:org:create -s -f config/project-scratch-def.json
```

To locate the ID of the package version to install, run `force:package1:version:list`.

<table>
<thead>
<tr>
<th>METADATAPACKAGEVERSIONID</th>
<th>METADATAPACKAGEID</th>
<th>NAME</th>
<th>VERSION</th>
<th>RELEASESTATE</th>
<th>BUILDNUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>04txx0000000069oAAA</td>
<td>033xx000000007coAAA</td>
<td>r00</td>
<td>1.0.0</td>
<td>Released</td>
<td>1</td>
</tr>
<tr>
<td>04txx0000000069tAAA</td>
<td>033xx000000007coAAA</td>
<td>r01</td>
<td>1.1.0</td>
<td>Released</td>
<td>1</td>
</tr>
<tr>
<td>04txx0000000069uAAA</td>
<td>033xx000000007coAAA</td>
<td>r02</td>
<td>1.2.0</td>
<td>Released</td>
<td>1</td>
</tr>
<tr>
<td>04txx0000000069yAAA</td>
<td>033xx000000007coAAA</td>
<td>r03</td>
<td>1.3.0</td>
<td>Released</td>
<td>1</td>
</tr>
<tr>
<td>04txx0000000069zAAA</td>
<td>033xx000000007coAAA</td>
<td>r04</td>
<td>1.4.0</td>
<td>Released</td>
<td>1</td>
</tr>
</tbody>
</table>

You can then copy the package version ID you want to install. For example, the ID 04txx0000000069zAAA is for version 1.4.0.

1. Install the package. You supply the package alias or version ID, which starts with 04t, in the required `--package` parameter.

```
sfdx force:package:install --package 04txx0000000069zAAA
```

If you've set a default target org, the package is installed there. You can specify a different target org with the `--targetusername` parameter. If the package is protected by an installation key, supply the key with the `--installationkey` parameter.

To uninstall a package, open the target org and choose Setup. On the Installed Packages page, locate the package and choose Uninstall.

SEE ALSO:
- ISVforce Guide
- Salesforce CLI Command Reference

Create a Managed Package Version of Your App

After your testing is done, your app is almost ready to be published in your enterprise or on AppExchange. Generate a new managed package version in your Dev Hub org.
Ensure that you’ve authorized the packaging org and can view the existing package versions.

```
sfdx force:auth:web:login --instanceurl https://test.salesforce.com --setdefaultusername org_alias
```

View the existing package versions for a specific package to get the ID for the version you want to install.

```
sfdx force:package1:version:list --packageid 033...
```

To view details for all packages in the packaging org, run the command with no parameters.

More than one beta package can use the same version number. However, you can use each version number for only one managed package version. You can specify major or minor version numbers.

You can also include URLs for a post-installation script and release notes. Before you create a managed package, make sure that you’ve configured your developer settings, including the namespace prefix.

**Note:** After you create a managed package version, you can’t change some attributes of Salesforce components used in the package. The ISVforce Guide has information on editable components.

1. Create the managed package. Include the `--managedreleased` parameter.

```
sfdx force:package1:version:create --packageid 033xx00000007oi --name ”Spring 17” --description ”Spring 17 Release” --version 3.2 --managedreleased
```

You can use other options, like `--wait` to specify the number of minutes to wait.

To protect the package with an installation key, include a value for `--installationkey`. Then, you or a subscriber must supply the key before you can install the package in a target org.

After the managed package version is created, you can retrieve the new package version ID using `force:package1:version:list`.

**SEE ALSO:**
- Salesforce CLI Command Reference
- ISVforce Guide
- Link a Namespace to a Dev Hub Org

## View Information About a Package

View the details about a specific package version, including its metadata package ID, package name, release state, and build number.

1. From the project directory, run this command, supplying a package version ID.

```
force:package1:version:display -i 04txx000000069yAAA
```

The output is similar to this example.

```
METADATAPACKAGEVERSIONID METADATAPACKAGEID NAME VERSION RELEASESTATE BUILDNUMBER
04txx0000000069yAAA 033xx000000007coAAA r03 1.3.0 Released 1
04txx0000000069yAAA 033xx00000011coAAA r03 1.4.0 Released 1
```

**View All Package Versions in the Org**

View the details about all package versions in the org.
Package IDs
When you work with packages using the CLI, the package IDs refer either to a unique package or a unique package version.

SEE ALSO:
Salesforce CLI Command Reference

View All Package Versions in the Org

View the details about all package versions in the org.

1. From the project directory, run the `list` command.
   
   `force:package1:version:list`

   The output is similar to this example. When you view the package versions, the list shows a single package for multiple package versions.

<table>
<thead>
<tr>
<th>METADATAPACKAGEVERSIONID</th>
<th>METADATAPACKAGEID</th>
<th>NAME</th>
<th>VERSION</th>
<th>RELEASESTATE</th>
<th>BUILDNUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>04txx000000069oAAA</td>
<td>033xx000000007coAAA</td>
<td>r00</td>
<td>1.0.0</td>
<td>Released</td>
<td>1</td>
</tr>
<tr>
<td>04txx000000069tAAA</td>
<td>033xx000000007coAAA</td>
<td>r01</td>
<td>1.1.0</td>
<td>Released</td>
<td>1</td>
</tr>
<tr>
<td>04txx000000069uAAA</td>
<td>033xx000000007coAAA</td>
<td>r02</td>
<td>1.2.0</td>
<td>Released</td>
<td>1</td>
</tr>
<tr>
<td>04txx000000069yAAA</td>
<td>033xx000000007coAAA</td>
<td>r03</td>
<td>1.3.0</td>
<td>Released</td>
<td>1</td>
</tr>
<tr>
<td>04txx000000069zAAA</td>
<td>033xx000000007coAAA</td>
<td>r04</td>
<td>1.4.0</td>
<td>Released</td>
<td>1</td>
</tr>
</tbody>
</table>

SEE ALSO:
Salesforce CLI Command Reference

Package IDs
When you work with packages using the CLI, the package IDs refer either to a unique package or a unique package version.

The relationship of package version to package is one-to-many.

<table>
<thead>
<tr>
<th>ID Example</th>
<th>Description</th>
<th>Used Where</th>
</tr>
</thead>
<tbody>
<tr>
<td>033xx00000007oi</td>
<td>Metadata Package ID</td>
<td>Generated when you create a package. A single package can have one or more associated package version IDs. The package ID remains the same, whether it has a corresponding beta or released package version.</td>
</tr>
<tr>
<td>04tA000000081MX</td>
<td>Metadata Package Version ID</td>
<td>Generated when you create a package version.</td>
</tr>
</tbody>
</table>
Second-generation managed packaging (2GP) ushers in a new way for AppExchange partners to develop, distribute, and manage their apps and metadata. You can use 2GP to organize your source, build small modular packages, integrate with your version control system, and better utilize your custom Apex code. With version control being the source of truth, there are no packaging or patch orgs. You can execute all packaging operations via Salesforce CLI, or automate them using scripts. Submit second-generation managed packages for security review, and list them on AppExchange.

Use 2GP to create new managed packages. You can’t currently migrate a first-generation package to a second-generation package.

**Note:** Second-generation managed packaging addresses the specific needs of AppExchange partners. If you’re a customer or system integrator and you don’t plan to distribute a package to multiple customers, unlocked packaging is the preferred tool. You can use unlocked packages to organize your existing metadata, package an app or extension, or package new metadata. See [Unlocked Packages](#) for more information.
What’s a Package?

If you’re new to packaging, you can think about a package as a container that you fill with metadata. It contains a set of related features, customizations, and schema. You use packages to move metadata from one Salesforce org to another.

Each second-generation managed package follows a distinct life cycle. You add metadata to a package, and create a new package version. While the package is continually evolving, each package version is an immutable artifact.

A package version contains the specific metadata and features associated with the package version, at the time it was created. As you iterate on your package, and add, remove, or change the packaged metadata, you create many package versions.

You can install a package version in a scratch, sandbox, trial, developer edition, or production org. Installing a package version is similar to deploying metadata. Each package version has a version number, and subscribers can install a new package version into their org through a package upgrade.

You can repeat the package development cycle any number of times. You can change metadata, create a package version, test the package version, and distribute it to your customers via AppExchange. This distinct app development life cycle lets you control exactly what, when, and how your metadata rolls out. In the installed org, you can inspect which metadata came from which package and the set of all metadata associated with a specific package.

Comparison of 2GP and 1GP Managed Packages

If you are familiar with first-generation managed packages (1GP) and wonder how 2GP differs from 1GP, here are some key distinctions.

<table>
<thead>
<tr>
<th>1GP Managed Packages</th>
<th>2GP Managed Packages</th>
</tr>
</thead>
<tbody>
<tr>
<td>The packaging org is the source of truth for the metadata in your package.</td>
<td>Your version control system is the source of truth (source-driven system) for the metadata in your package. And unlike 1GP, 2GP doesn’t use packaging or patch orgs.</td>
</tr>
<tr>
<td>The packaging org owns the package. The metadata in the package resides in the packaging org.</td>
<td>The Dev Hub owns the package, but the Dev Hub doesn’t contain the packaged metadata. We recommend that you enable Dev Hub in your Partner Business Org (PBO).</td>
</tr>
<tr>
<td>A packaging org can own only one managed package.</td>
<td>A Dev Hub can own one or more packages.</td>
</tr>
<tr>
<td>The namespace of the managed package is created in the packaging org.</td>
<td>The namespace of a managed package is created in a namespace org and linked to the Dev Hub. See Namespaces for more details. And you can associate multiple namespaces to a single Dev Hub. A namespace is linked with a 2GP when you run the <code>force:package:create</code> Salesforce CLI command. And you must specify the namespace in the <code>sfdx-project.json</code> file.</td>
</tr>
<tr>
<td>A namespace can be associated with only one package.</td>
<td>Multiple packages can use the same namespace.</td>
</tr>
<tr>
<td>Global Apex is the only way to share code across packages.</td>
<td>Multiple packages sharing the same namespace can share code using public Apex classes and methods with <code>@namespaceAccessible</code> annotation.</td>
</tr>
</tbody>
</table>
1GP Managed Packages | 2GP Managed Packages
---|---
Some packaging operations, like package create and package uninstall, can't be automated. | All packaging operations can be automated using Salesforce CLI.
Package versioning is linear. | Package versioning supports branches.
Patch versions can only be created in specialized orgs called patch orgs. | Patch versions are created using Salesforce CLI. The version control system is the source of truth, and there are no patch orgs.

Despite these distinctions, 1GP and 2GP managed packages have many things in common. They share the key packaging concept of associating metadata with a package. And they both allow you to iterate and create package and patch versions, which can be installed and uninstalled in subscriber orgs. Both managed package types enable you to submit a package for AppExchange security review, and list your package on AppExchange. And both managed package types can use the License Management App, Subscriber Support Console, and Feature Management App.

Namespaces

A namespace is a 1–15 character alphanumeric identifier that distinguishes your package and its contents from other packages in your customer’s org. A namespace is assigned to a package at the time that it’s created, and can’t be changed.

**Important:** When creating a namespace, use something that’s useful and informative to users. However, don’t name a namespace after a person (for example, by using a person’s name, nickname, or private information).

When you work with namespaces, keep these considerations in mind.

- You can develop more than one package with the same namespace but you can associate each package with only a single namespace.
- If you work with more than one namespace, we recommend that you set up one project for each namespace.

When you specify a package namespace, every component added to a package has the namespace prefixed to the component API name. Let’s say you have a custom object called Insurance_Agent with the API name, Insurance_Agent__c. If you add this component to a package associated with the Acme namespace, the API name becomes Acme__Insurance_Agent__c.

Namespace-Based Visibility for Apex Classes in Second-Generation Packages

The @namespaceAccessible makes public Apex in a package available to other packages that use the same namespace. Without this annotation, Apex classes, methods, interfaces, and properties defined in a 2GP package aren’t accessible to the other packages with which they share a namespace. Apex that is declared global is always available across all namespaces, and needs no annotation.

Considerations for Apex Accessibility Across Packages

- You can’t use the @namespaceAccessible annotation for an @AuraEnabled Apex method referenced from a Lightning component.
- In Winter ’20, you can’t submit a 2GP for security review if it contains Visualforce pages or components. This restriction will be removed in a future release.
- You can add or remove the @namespaceAccessible annotation at any time, even on managed and released Apex code. Make sure that you don’t have dependent packages relying on the functionality of the annotation before adding or removing it.
• When adding or removing @namespaceAccessible Apex from a package, consider the impact to customers with installed versions of other packages that reference this package’s annotation. Before pushing a package upgrade, ensure that no customer is running a package version that would fail to fully compile when the upgrade is pushed.

This example shows an Apex class marked with the @namespaceAccessible annotation. The class is accessible to other packages within the same namespace. The first constructor is also visible within the namespace, but the second constructor isn’t.

```apex
// A namespace-visible Apex class
@namespaceAccessible
public class MyClass {
    private Boolean bypassFLS;

    // A namespace-visible constructor that only allows secure use
    @namespaceAccessible
    public MyClass() {
        bypassFLS = false;
    }

    // A package private constructor that allows use in trusted contexts,
    // but only internal to the package
    public MyClass (Boolean bypassFLS) {
        this.bypassFLS = bypassFLS;
    }
    @namespaceAccessible
    protected Boolean getBypassFLS() {
        return bypassFLS;
    }
}
```

Create and Register Your Namespace

With 2GP, you can share a single namespace with multiple packages. Since sharing of code is much easier if your package shares the same namespace, we recommend that you use a single namespace for all of your 2GP packages.

SEE ALSO:

Configure Packages

Create and Register Your Namespace

With 2GP, you can share a single namespace with multiple packages. Since sharing of code is much easier if your package shares the same namespace, we recommend that you use a single namespace for all of your 2GP packages.

To create a namespace:

2. In Setup, enter Package Manager in the Quick Find box, and select Package Manager.
3. In Developer Settings, click Edit, and under Change Developer Settings, click Continue.
4. In Namespace Prefix enter a namespace, and select Check Availability.
5. For Package to be managed, select None, then click Review My Selections.
6. Review your selections, and then click Save.

To register a namespace:
To link the namespace that you created with your Dev Hub, use Namespace Registry. See [Link a Namespace to a Dev Hub Org](#) for details.

In the `sfdx-project.json` file, specify your namespace using the namespace attribute. When you create a new 2GP package, the package is associated with the namespace specified in the `sfdx-project.json` file.

### Package IDs and Aliases

When you create a package or package version, Salesforce CLI creates a package alias based on the package name, and stores that name in the `packageAliases` section of the `sfdx-project.json` file. When you run CLI commands or write scripts to automate packaging workflows, it’s often easier to reference the package alias, instead of the package ID or package version ID.

Package aliases are stored in the `sfdx-project.json` file as name-value pairs, in which the name is the alias and the value is the ID. You can modify package aliases for existing packages and package versions in the project file.

At the command line, you also see IDs for things like package members (a component in a package) and requests (like a `package:version:create` request).

**Note:** As a shortcut, the documentation sometimes refers to an ID by its three-character prefix. For example, a package version ID always starts with `04t`.

Here are the most commonly used IDs.

<table>
<thead>
<tr>
<th>ID Example</th>
<th>Short ID Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>04t6A00000004eytQAA</td>
<td>Subscriber Package Version ID</td>
<td>Use this ID to install a package version. Returned by <code>force:package:version:create</code>.</td>
</tr>
<tr>
<td>0Hoxx00000000CqCAI</td>
<td>Package ID</td>
<td>Use this ID on the command line to create a package version. Or enter it into the <code>sfdx-project.json</code> file and use the directory name. Generated by <code>force:package:create</code>.</td>
</tr>
<tr>
<td>08cxx00000000BEAAY</td>
<td>Version Creation Request ID</td>
<td>Use this ID to view the status and monitor progress for a specific request to create a package version such as <code>force:package:version:create:report</code>.</td>
</tr>
</tbody>
</table>

### Before You Create Second-Generation Managed Packages

When you use second-generation managed packaging, to be sure that you set it up correctly, verify the following.

Did you?

- Enable Dev Hub in Your Org
- Enable Second-Generation Managed Packaging
- Install Salesforce CLI?
- Create and Register Your Namespace?
Developers who work with 2GP packages need the correct permission set in the Dev Hub org. Developers need either the System Administrator profile or the Create and Update Second-Generation Packages permission. For more information, see Add Salesforce DX Users in the Salesforce DX Setup Guide.

The maximum number of 2GP package versions that you can create from a Dev Hub per day is the same as your daily scratch org allocation. To request a limit increase, contact Salesforce Customer Support.

Scratch orgs and packages count separately, so creating a second-generation managed package doesn’t count against your daily scratch org limit. To view your scratch org limits, use the CLI:

```
    sfdx force:limits:api:display -u <Dev Hub username or alias>
```

For more information on scratch org limits, see Scratch Orgs.

---

**Know Your Orgs**

Some of the orgs that you use with second-generation managed packaging have a unique purpose.

---

**Know Your Orgs**

Some of the orgs that you use with second-generation managed packaging have a unique purpose.

---

**Choose Your Dev Hub Org**

Use the Dev Hub org for these purposes.

- As owner of all second-generation managed packages
- To link your namespaces
- To authorize and run your force:package commands

**Note:** We recommend that your Partner Business Org is also your Dev Hub org.

---

**Namespace Org**

The primary purpose of the namespace org is to acquire a package namespace. If you want to use the namespace strictly for testing, choose a disposable namespace.

After you create a namespace org and specify the namespace in it, open the Dev Hub org and link the namespace org to the Dev Hub org.

---

**Other Orgs**

When you work with packages, you also use these orgs:

- You can create scratch orgs on the fly to use while testing your packages.
- The target or installation org is where you install the package.

**SEE ALSO:**

Link a Namespace to a Dev Hub Org
Workflow for Second-Generation Packages

You can create and install a second-generation managed package directly from the Salesforce command line.

Review and complete the steps in Before You Create Second-Generation Managed Packages before starting this workflow.

The basic workflow includes these steps. See specific topics for details about each step.

1. Create a DX project

   ```bash
   sfdx force:project:create --outputdir expense-manager-workspace --projectname expenser-app
   --defaultpackagedir source-folder --namespace exp-mgr
   ```

2. Authorize the Dev Hub org, and create a scratch org.

   ```bash
   sfdx force:auth:web:login --setdefaultdevhubusername
   ```

   When you perform this step, include the `--setdefaultdevhubusername` option. You can then omit the Dev Hub username when running subsequent Salesforce CLI commands.

   **Tip:** If you define an alias for each org you work with, it’s easy to switch between different orgs from the command line. You can authorize different orgs as you iterate through the package development cycle.

3. Create a scratch org and develop the app you want to package. You can use VS Code and the Setup UI in the scratch org to build and retrieve the pieces you want to include in your package.

   ```bash
   sfdx force:org:create --definitionfile config/project-scratch-def.json --targetusername MyScratchOrg1
   ```

4. Verify that all package components are in the project directory where you want to create a package.

5. In the sfdx-project.json file, specify a namespace using the namespace attribute. For example: “namespace”: “exp-mgr”

   If you specified a namespace when you created a Salesforce DX project in step one, you can skip this step. Before adding a namespace, make sure that you have linked the namespace to your Dev Hub org.

6. From the Salesforce DX project directory, create the package.

   ```bash
   sfdx force:package:create --name "Expense Manager" --path source-folder \ --packagetype Managed
   ```

   Your new 2GP managed package has the namespace you specified in the sfdx-project.json file.

   **Important:** Once you create a package you can’t change or add a namespace, or change the Dev Hub the package is associated with.

7. Review your sfdx-project.json file. The CLI automatically updates the project file to include the package directory and creates an alias based on the package name.

   ```json
   
   {   
       "packageDirectories": [   
           {   
               "path": "source-folder",  
               "default": true,  
               "package": "Expense Manager",  
               "versionName": "ver 0.1",  
               "versionNumber": "0.1.0.NEXT"
           }]
   ```
Notice the placeholder values for `versionName` and `versionNumber`. You can update these values, or indicate base packages that this package depends on.

Specify the features and org settings required for the metadata in your package using an external `.json` file, such as the scratch org definition file. You can specify using the `--definitionfile` flag with the `force:package:version:create` command, or list the definition file in your `sfdx-project.json` file. See: Project Configuration File for Packages

8. Create a package version. This example assumes the package metadata is in the `force-app` directory.

```bash
sfdx force:package:version:create --package "Expense Manager" \
--installationkey test1234 --wait 10
```

9. Install and test the package version in a scratch org. Use a different scratch org from the one you used in step three.

```bash
sfdx force:package:install --package "Expense Manager@0.1.0-1" --targetusername MyTestOrg1 \
--installationkey test1234 --wait 10 --publishwait 10
```

10. After the package is installed, open the scratch org to view the package.

```bash
sfdx force:org:open --targetusername MyTestOrg1
```

Package versions are beta until you promote them to a managed-released state. See: Release a Second-Generation Managed Package.

## Configure Packages

You include an entry in the `sfdx-project.json` file for each package to specify its alias, version details, dependencies, features, and org settings. From the command line, you can also set or change options, such as specifying an installation key, update the package name, or add a description.

### Project Configuration File for Packages

The project configuration file is a blueprint for your project and for the outline of a package. The settings in the file determine the package attributes and package contents.

### Keywords

A keyword is a variable that you can use to specify a package version number.
Package Installation Key
To ensure the security of the metadata in your package, you must specify an installation key when creating a package version. Package creators provide the key to authorized subscribers so they can install the package. Package installers provide the key during installation, whether installing the package from the CLI or from a browser. An installation key is the first step during installation. The key ensures that no package information, such as the name or components, is disclosed until the correct installation key is supplied.

Customize Package Installs and Uninstalls Using Scripts
Customize a package install or upgrade by specifying an Apex post install script to run automatically after a subscriber installs or upgrades a 2GP managed package. You can also specify an Apex uninstall script to run automatically when a subscriber uninstalls a 2GP managed package.

Share Release Notes and Post-Install Instructions
Share details about what’s new and changed in a released 2GP managed package with your subscribers.

Project Configuration File for Packages
The project configuration file is a blueprint for your project and for the outline of a package. The settings in the file determine the package attributes and package contents.

Here are the parameters you can specify in the project configuration file.

<table>
<thead>
<tr>
<th>Name</th>
<th>Required?</th>
<th>Default if Not Specified</th>
</tr>
</thead>
<tbody>
<tr>
<td>path</td>
<td>Yes</td>
<td>If you don’t specify a path, the Salesforce CLI uses a placeholder when you create a package.</td>
</tr>
<tr>
<td>default</td>
<td>Yes, if you’ve specified more than one package directory</td>
<td>true</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Indicates the default package directory. Use the <code>force:source:pull</code> command to copy metadata from your scratch org to your default package directory. There can be only one package directory in which the default is set to true.</td>
</tr>
<tr>
<td>package</td>
<td>Yes</td>
<td>The package name specified in the project json file.</td>
</tr>
<tr>
<td>versionName</td>
<td>No</td>
<td>If not specified, the CLI uses <code>versionNumber</code> as the version name.</td>
</tr>
<tr>
<td>versionDescription</td>
<td>No</td>
<td>None.</td>
</tr>
<tr>
<td>versionNumber</td>
<td>Yes</td>
<td>None. Version numbers are formatted as major.minor.patch.build. For example, 1.2.1.8. To automatically increment the build number to the next available build for the package, use the keyword NEXT (1.2.1.NEXT).</td>
</tr>
<tr>
<td>Name</td>
<td>Required?</td>
<td>Default if Not Specified</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>dependencies</td>
<td>No</td>
<td>None. Specify the dependencies on other packages.</td>
</tr>
</tbody>
</table>

To specify dependencies for managed packages within the same Dev Hub, use either the package version alias or a combination of the package name and the version number.

```
"dependencies": [
    {
        "package": "MyPackageName@0.1.0.1"
    }
]
```

```
"dependencies": [
    {
        "package": "MyPackageName",
        "versionNumber": "0.1.0.LATEST"
    }
]
```

To specify dependencies for managed packages outside of the Dev Hub use:

```
"dependencies": [
    {
        "package": "OtherOrgPackage@1.2.0"
    }
]
```

**Note:** You can use the LATEST keyword for the version number to set the dependency.

To denote dependencies with package IDs instead of package aliases, use:

- The 0Ho ID if you specify the package ID along with the version number
- The 04t ID if you specify only the package version ID

If the package has more than one dependency, provide a comma-separated list of packages in the order of installation. For example, if a package depends on the package Expense Manager - Util, which in turn depends on the package External Apex Library, the package dependencies are:

```
"dependencies": [
    {
        "package": "Expense Manager - Util",
        "versionNumber": "4.7.0.LATEST"
    },
    {
        "package": "External Apex Library - 1.0.0.4"
    }
]
```
<table>
<thead>
<tr>
<th>Name</th>
<th>Required?</th>
<th>Default if Not Specified</th>
</tr>
</thead>
</table>
| ancestorId          | No        | None. The ID of the immediate parent in the package ancestry tree of the package version you’re creating. The ancestorId requires the 04t of the package version, or an alias to the package version. When specifying ancestors, you can use either ancestorId or ancestorVersion. Example:  
"ancestorId": "Expenser Logic@0.1.0-1"  
For more information, see Package Ancestors. |
| ancestorVersion     | No        | None. The version number of the immediate parent in the package ancestry tree of the package version you are creating. Specify the ancestor version using the format of major.minor.patch.build. When specifying ancestors, you can use either ancestorId or ancestorVersion. Example:  
"ancestorVersion": "0.1.0.1"  
For more information, see Package Ancestors. |
| definitionFile      | No        | None. A reference to an external .json file used to specify the features and org settings required for the metadata of your package, such as the scratch org definition. Example:  
"definitionFile":  
"config/project-scratch-def.json", |
| namespace           | yes       | None. A 1–15 character alphanumeric identifier that distinguishes your package and its contents from packages of other developers. |
| packageAliases      | Yes       | Salesforce CLI updates this file with the aliases when you create a package or package version. You can also manually update this section for existing packages or package versions. You can use the alias instead of the cryptic package ID when running CLI force:package commands. |
| postinstallscript   | No        | None. An Apex script to run automatically in the subscriber org after the managed package is installed or upgraded. |
| uninstallscript     | No        | None. An Apex script to run automatically in the subscriber org before the managed package is uninstalled. |
| releasenotesurl     | No        | None. A URL to release notes. |
| postinstallurl      | No        | None. A URL to post-install instructions for subscribers. |
When you specify a parameter using Salesforce CLI, it overrides the value listed in the project definition file.

The Salesforce DX project definition file is a JSON file is located in the root directory of your project. Use the `force:project:create` CLI command to generate a project file that you can build upon. Here’s how the parameters in `packageDirectories` appear.

```json
{
  "namespace": "exp-mgr",
  "sfdcLoginUrl": "https://login.salesforce.com",
  "sourceApiVersion": "47.0",
  "packageDirectories": [
    {
      "path": "util",
      "default": true,
      "package": "Expense Manager - Util",
      "versionName": "Winter '20",
      "versionDescription": "Welcome to Winter 2020 Release of Expense Manager Util Package",
      "versionNumber": "4.7.0.NEXT",
      "definitionFile": "config/scratch-org-def.json"
    },
    {
      "path": "exp-core",
      "default": false,
      "package": "Expense Manager",
      "versionName": "v 3.2",
      "versionDescription": "Winter 2020 Release",
      "versionNumber": "3.2.0.NEXT",
      "ancestorVersion": "3.0.0.7",
      "postInstallScript": "PostInstallScript",
      "uninstallScript": "PreUninstallScript",
      "postInstallUrl": "https://expenser.com/post-install-instructions.html",
      "releaseNotesUrl": "https://expenser.com/winter-2020-release-notes.html",
      "definitionFile": "config/scratch-org-def.json",
      "dependencies": [
        {
          "package": "Expense Manager - Util",
          "versionNumber": "4.7.0.LATEST"
        },
        {
          "package": "External Apex Library - 1.0.0.4"
        }
      ]
    }
  ],
  "packageAliases": {
    "Expense Manager - Util": "0HoB00000004CFpKAM",
    "External Apex Library@1.0.0.4": "04tB00000001B1EIAN",
    "Expense Manager": "0HoB00000004CFuKAM"
  }
}
```
What If I Don’t Want My Salesforce DX Project Automatically Updated?

In some circumstances, you don’t want to have automatic updates to the `sfdx-project.json` file. When you require more control, use these environment variables to suppress automatic updates to the project file.

<table>
<thead>
<tr>
<th>For This Command</th>
<th>Set This Environment Variable to True</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>force:package:create</code></td>
<td><code>SFDO_PROJECT_AUTOUPDATE_DISABLE_FOR_PACKAGE_CREATE</code></td>
</tr>
<tr>
<td><code>force:package:version:create</code></td>
<td><code>SFDO_PROJECT_AUTOUPDATE_DISABLE_FOR_PACKAGE_VERSION_CREATE</code></td>
</tr>
</tbody>
</table>

**Keywords**

A keyword is a variable that you can use to specify a package version number.

You can use two different keywords to automatically increment the value of the package build numbers and set the package dependency to the latest version.

Use the `NEXT` keyword to increment the build number to the next available for the package.

```
"versionNumber": "1.2.0.NEXT"
```

Use the `LATEST` keyword in the version number to assign the latest version of the package dependency when you create a package version.

```
"dependencies": [
  {
    "package": "MyPackageName",
    "versionNumber": "0.1.0.LATEST"
  }
]
```

**Package Installation Key**

To ensure the security of the metadata in your package, you must specify an installation key when creating a package version. Package creators provide the key to authorized subscribers so they can install the package. Package installers provide the key during installation, whether installing the package from the CLI or from a browser. An installation key is the first step during installation. The key ensures that no package information, such as the name or components, is disclosed until the correct installation key is supplied.

To set the installation key, add the `--installationkey` parameter to the command when you create the package version. This command creates a package and protects it with the installation key.

```
sfdx force:package:version:create --package "Expense Manager" --installationkey "JSB7s8vXU93fI"
```

Supply the installation key when you install the package version in the target org.

```
sfdx force:package:install --package "Expense Manager" --installationkey "JSB7s8vXU93fI"
```
Change the Installation Key for an Existing Package Version

You can change the installation key for an existing package version with the `force:package:version:update` command.

```
sfdx force:package:version:update --package "Expense Manager@1.2.0-4" --installationkey "HIF83kS8kS7C"
```

Create a Package Version Without an Installation Key

If you don’t require security measures to protect your package metadata, you can create a package version without an installation key.

```
sfdx force:package:version:create --package "Expense Manager" --installationkeybypass
```

Check Whether a Package Version Requires an Installation Key

To determine whether a package version requires an installation key, use either the `force:package:version:list` or `force:package:version:report` CLI command.

Customize Package Installs and Uninstalls Using Scripts

Customize a package install or upgrade by specifying an Apex post install script to run automatically after a subscriber installs or upgrades a 2GP managed package. You can also specify an Apex uninstall script to run automatically when a subscriber uninstalls a 2GP managed package.

For more information, see Running Apex on Package Install/Upgrade and Running Apex on Package Uninstall.

Specify post install and uninstall scripts in the `sfdx-project.json` file.

```json
"packageDirectories": [  
  {  
    "path": "expenser-schema",  
    "default": true,  
    "package": "Expense Schema",  
    "versionName": " ver 0.3.2 " ,  
    "versionNumber": "0.3.2.NEXT",  
    "postInstallScript": "PostInstallScript",  
    "uninstallScript": "UninstallScript",  
    "postInstallUrl": "https://expenser.com/post-install-instructions.html",  
    "releaseNotesUrl": "https://expenser.com/winter-2020-release-notes.html"  
  },  
  ]  
  {  
    "namespace": "db_exp_manager",  
    "sfdcLoginUrl": "https://login.salesforce.com",  
    "sourceApiVersion": "47.0",  
    "packageAliases": {  
      "Expense Schema": "0HoB00000004CzHKAU",  
      "Expense Schema@0.1.0-1": "04tB0000000719qIAA"  
    }  
  }
```

You can also use the `--postinstallscript` and the `--uninstallscript` Salesforce CLI parameters with the `force:package:version:create` command. The CLI parameters override the scripts specified in the `sfdx-project.json` file.
Share Release Notes and Post-Install Instructions

Share details about what's new and changed in a released 2GP managed package with your subscribers. You can specify a release notes URL to display on the package detail page in the subscriber's org. And you can share instructions about using your package by specifying a post install URL. The release notes and post install URLs display on the Installed Packages page in Setup, after a successful package installation. For subscribers who install packages using an installation URL, the package installer page displays a link to release notes. And subscribers are redirected to your post install URL following a successful package installation or upgrade.

Specify the postInstallUrl and releaseNotesUrl attributes in the packageDirectories section for the package.

```
"packageDirectories": [
  {
    "path": "expenser-schema",
    "default": true,
    "package": "Expense Schema",
    "versionName": "ver 0.3.2",
    "versionNumber": "0.3.2.NEXT",
    "postInstallScript": "PostInstallScript",
    "uninstallScript": "UninstallScript",
    "postInstallUrl": "https://expenser.com/post-install-instructions.html",
    "releaseNotesUrl": "https://expenser.com/winter-2020-release-notes.html"
  },
],

"namespace": "db_exp_manager",
"sfdcLoginUrl": "https://login.salesforce.com",
"sourceApiVersion": "47.0",
"packageAliases": {
  "Expenser Schema": "0HoB00000004CzHKAU",
  "Expenser Schema@0.1.0-1": "04tB0000000719qIAA"
}
```

You can also use the --postinstallurl and the --releasenotesurl Salesforce CLI parameters with the force:package:version:create command. The CLI parameters override the URLs specified in the sfdx-project.json file.

Best Practices for Second-Generation Managed Packages

We suggest that you follow these best practices when working with second-generation managed packages.

- We recommend that you work with only one Dev Hub, and enable Dev Hub in your partner business org.
- The Dev Hub org against which you run the force:package:create command becomes the owner of the package. If the Dev Hub org associated with a package expires or is deleted, its packages no longer work.
- Include the --tag option when you use the package:version:create and package:version:update commands. This option helps you keep your version control system tags in sync with specific package versions.
- Create user-friendly aliases for packaging IDs, and include those aliases in your Salesforce DX project file and when running CLI packaging commands. See: Package IDs and Aliases.
### Frequently Used Packaging Operations

For a complete list of Salesforce CLI packaging commands, see: Salesforce Command Line Reference Guide.

<table>
<thead>
<tr>
<th><strong>Salesforce CLI command</strong></th>
<th><strong>What it Does</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><code>force:package:create</code></td>
<td>Creates a package. When you create a package, you specify its package type and name, among other things.</td>
</tr>
<tr>
<td><code>force:package:install</code></td>
<td>Installs a package version in a scratch, sandbox, or production org.</td>
</tr>
<tr>
<td><code>force:package:uninstall</code></td>
<td>Removes a package that has been installed in an org. This process deletes the metadata and data associated with the package.</td>
</tr>
<tr>
<td><code>force:package:version:promote</code></td>
<td>Changes the state of the package version from beta to the managed-released state.</td>
</tr>
<tr>
<td><code>force:org:create</code></td>
<td>Creates a scratch org.</td>
</tr>
<tr>
<td><code>force:org:open</code></td>
<td>Opens an org in the browser.</td>
</tr>
</tbody>
</table>

### Create a Package

A package is a top-level container that holds important details about the app or package: the package name, description, and associated namespace.

You supply the package details when you create a package using Salesforce CLI, and the package descriptor section of your `sfdx-project.json` project configuration file is automatically updated.

You can associate multiple second-generation managed packages with a single Dev Hub org. Unlike first-generation managed packages, a second-generation package has no packaging org.

*Generate the Package*

When you're ready to test or share your package, use the `force:package:create` command to create a package.

*Generate a Package Version*

A package version is a fixed snapshot of the package contents and related metadata. The package version lets you manage changes and track what’s different each time you release or deploy a specific set of changes.

*Create a Patch Version*

Patch versions of a package are a way to fix small issues with your package without introducing major feature changes. Customers who are using an older version of your package can install a patch and not be forced to upgrade to a new major package version.

*Package Ancestors*

2GP managed packages offer the flexibility of branch versioning when developing new package versions. Package ancestry allows you to create a tree-like version structure, and abandon a package version you no longer want to build on top of.

*Package Upgrades in Second-Generation Managed Packaging*

Review how package ancestry impacts which package version upgrades are allowed.
Code Coverage for 2GP Managed Packages
Before you can release and distribute a 2GP package version on AppExchange, the Apex code must meet a minimum 75% code coverage requirement. And every Apex Trigger in a package needs test coverage.

Release a Second-Generation Managed Package
Each new package version is marked as beta when created. As you develop your package, you may create several package versions before you create a version that is ready to be released and distributed. Only released package versions can be listed on AppExchange and installed in customer orgs.

Update a Package Version
You can update most properties of a package version from the command line. For example, you can change the package version name or description. One important exception is that you can’t change the release status.

View Package Details
View the details of previously created packages and package versions from the command line.

Generate the Package
When you’re ready to test or share your package, use the `force:package:create` command to create a package.

You specify the package namespace in the `sfdx-project.json` file.
To create the package, change to the project directory. The name becomes the package alias, which is automatically added to the project file.

```
sfdx force:package:create --name "Expenser App" --packagetype Managed --path "expenser-main" \\
--targetdevhubusername my-hub
```

The output is similar to this example.

```
sfdx-project.json has been updated.
Successfully created a package. 0HoB00000004CzHKAU
=== Ids
NAME          VALUE
-------------
Package Id  0HoB00000004CzHKAU
```

Update the Package
To update the name or description of an existing package, use this command.

```
sfdx force:package:update --package "Expense App" --name "Expense Manager App" \\
--description "The Winter ’20 release is packed with an exciting set of features."
```

⚠️ **Note:** You can’t change the package namespace or package type after you create the package.

Generate a Package Version
A package version is a fixed snapshot of the package contents and related metadata. The package version lets you manage changes and track what’s different each time you release or deploy a specific set of changes.
Before you create a package version, first verify package details, such as the package name, dependencies, and major, minor, and patch version numbers, in the `sfdx-project.json` file. Verify that the metadata you want to change or add in the new package version is located in the package's main directory.

### How Many Package Versions Can I Create Per Day?

Run this command to see how many package versions you can create per day and how many you have remaining.

```
sfdx force:limits:api:display
```

Look for the `Package2VersionCreates` entry.

<table>
<thead>
<tr>
<th>NAME</th>
<th>REMAINING</th>
<th>MAXIMUM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Package2VersionCreates</td>
<td>23</td>
<td>50</td>
</tr>
</tbody>
</table>

### Create a Package Version

Create the package version with this command. Specify the package alias or ID (0Ho). You can also include a scratch definition file that contains a list of features and setting that the metadata of the package version depends on.

```
sfdx force:package:version:create --package "Expenser App" --installationkey "HIF83kS8kS7C" --definitionfile config/project-scratch-def.json --wait 10
```

**Note:** When creating a package version, specify a `--wait` time to run the command in non-asynchronous mode. If the package version is created within that time, the `sfdx-project.json` file is automatically updated with the package version information. If not, you must manually edit the project file.

It can be a long-running process to create a package version, depending on the package size and other variables. You can easily view the status and monitor progress.

```
sfdx force:package:version:create:report --packagecreaterequestid 08cxx00000000YDAAY
```

The output shows details about the request.

<table>
<thead>
<tr>
<th>=== Package Version Create Request</th>
<th>NAME</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version Create Request Id</td>
<td>08cB000000004CBxIAM</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>InProgress</td>
<td></td>
</tr>
<tr>
<td>Package Id</td>
<td>0HoB00000004C9hKAE</td>
<td></td>
</tr>
<tr>
<td>Package Version Id</td>
<td>05iB0000000CaaNIAS</td>
<td></td>
</tr>
<tr>
<td>Subscriber Package Version Id</td>
<td>04tB0000000NOimIAG</td>
<td></td>
</tr>
<tr>
<td>Tag</td>
<td>git commit id 08dcfsdf</td>
<td></td>
</tr>
<tr>
<td>Branch</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CreatedDate</td>
<td>2018-05-08 09:48</td>
<td></td>
</tr>
<tr>
<td>Installation URL</td>
<td><a href="https://login.salesforce.com/packaging/installPackage.apexp?p0=04tB0000000NOimIAG">https://login.salesforce.com/packaging/installPackage.apexp?p0=04tB0000000NOimIAG</a></td>
<td></td>
</tr>
</tbody>
</table>

You can find the request ID (08c) in the initial output of `force:package:version:create`. 

---

139
Depending on the size of the package and other variables, the create request can take several minutes. When you have more than one pending request to create package versions, you can view a list of all requests with this command.

```
sfdx force:package:version:create:list --createdlastdays 0
```

Details for each request display as shown here (IDs and labels truncated).

```
=== Package Version Create Requests [3]
ID STATUS PACKAGE2 ID PKG2 VERSION ID SUB PKG2 VER ID TAG BRANCH CREATED DATE ===
08c... Error 0Ho... 08c... Success 0Ho... 05i... 04t... 2017-06-22 12:07
08c... Success 0Ho... 05i... 04t... 2017-06-23 14:55
```

### Skip Validation to Quickly Iterate Package Development

Iterate package development more efficiently by skipping validation of dependencies, package ancestors, and metadata during package version creation. Skipping validation reduces the time it takes to create a new package version, but you can promote only validated package versions to the released state.

```
sfdx force:package:version:create --skipvalidation
```

In Tooling API, use the SkipValidation field on the `Package2VersionCreateRequest` object.

**Note:** You can't specify both skip validation and code coverage, because code coverage is calculated during validation.

### Create a Patch Version

Patch versions of a package are a way to fix small issues with your package without introducing major feature changes. Customers who are using an older version of your package can install a patch and not be forced to upgrade to a new major package version.

Package versions follow a major.minor.patch.build number format. Any package version number that contains a non-zero patch number is a patch version.

For example, 1.1.2.5.

**Note:** Patch versions are intended for minor changes. You can't:

- Add package components.
- Delete existing package components.
- Change the API and dynamic Apex access controls.
- Deprecate any Apex code.
- Add new Apex class relationships, such as extends.
- Add Apex access modifiers, such as virtual or global.
- Add features, settings, package dependencies, or web services.
- Change a component from protected to global.
- Change the visibility of CustomSettings or CustomMetadataType from protected to public.

When creating a patch version, you must specify the package ancestor. Keep in mind that the major and minor version number of the patch and the package ancestor must match. And the specified package ancestor must be managed-released.

You can specify another patch version as the package ancestor. See `Package Ancestors` for more information on how to specify a package ancestor.
When you create a patch version, the patch automatically inherits the features and settings defined in the package ancestor’s external definition file. To create a patch, follow the same steps as you do when you create a package version, and increment the patch number.

**Note:** To enable patch versioning, log a case in the Salesforce Partner Community and request patch versioning be enabled in the org where you created the namespace for this package.

### Package Ancestors

2GP managed packages offer the flexibility of branch versioning when developing new package versions. Package ancestry allows you to create a tree-like version structure, and abandon a package version you no longer want to build on top of.

### Example of a Package Ancestry Tree

![Package Ancestry Tree Diagram]

A) Represents an abandoned package version.

B) Package version 1.3.0.7 declared version 0.3.0.1 as the ancestor, and inherits the manageability rules of 0.3.0.1.

### Specify a Package Ancestor

Specify the package ancestor in the `sfdx-project.json` file using either the `ancestorVersion` or `ancestorId` attribute. Use the ancestor that’s the immediate parent of the version you’re creating.
Example using the ancestorVersion number.

```
"packageDirectories": [ 
  { 
    "path": "util",
    "package": "Expense Manager - Util",
    "versionNumber": "4.7.0.NEXT",
    "ancestorVersion": "4.6.0.1"
  }
],
```

Example using the ancestorId number.

```
"packageDirectories": [ 
  { 
    "path": "util",
    "package": "Expense Manager - Util",
    "versionNumber": "4.7.0.NEXT",
    "ancestorId": "04tB0000000cWwnIAE"
  }
],
```

Example using the package alias.

```
"packageDirectories": [ 
  { 
    "path": "util",
    "package": "Expense Manager - Util",
    "versionNumber": "4.7.0.NEXT",
    "ancestorId": "expense-manager@4.6.0.1"
  }
],
```

**Note:** Only package versions that have been promoted to managed-released state, can be listed as an ancestor.

When you create a scratch org, any ancestors defined for a package version that you include in the `sfdx-project.json` file are automatically added to the scratch org. You can exclude the ancestors by using the `--noancestors` option when you create a scratch org with `force:org:create`.

### View Package Ancestor Details in Salesforce CLI

For package versions created in Spring ’20 or after, use the `package:version:report` or `package:version:list` command to view the name and version number of the package ancestor.

Output from `package:version:report` command.

```
Package AncestorsSecond-Generation Managed Packages
```

Output from `package:version:list` command.
Package Upgrades in Second-Generation Managed Packaging

Review how package ancestry impacts which package version upgrades are allowed.

Understanding Package Upgrades with Ancestry

Refer to this table and the package ancestry tree to understand whether your subscribers can upgrade between these 2GP package versions.

<table>
<thead>
<tr>
<th>Upgrade From</th>
<th>Upgrade To</th>
<th>Will This Package Upgrade Succeed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.2.0.1</td>
<td>0.3.4.3</td>
<td>Yes</td>
</tr>
<tr>
<td>0.1.0.3</td>
<td>0.3.5.2</td>
<td>Yes</td>
</tr>
<tr>
<td>0.3.3.6</td>
<td>0.3.5.2</td>
<td>Yes. Ancestry isn’t enforced for patch version upgrades that occur between package versions that share the same major and minor package version numbers. In this example, both versions begin with 0.3.</td>
</tr>
<tr>
<td>0.2.0.1</td>
<td>1.2.0.3</td>
<td>Yes</td>
</tr>
<tr>
<td>0.3.0.1</td>
<td>0.1.0.3</td>
<td>No. Downgrading an installed package isn’t allowed.</td>
</tr>
<tr>
<td>0.3.4.3</td>
<td>0.3.3.6</td>
<td>No. Downgrading an installed package isn’t allowed.</td>
</tr>
<tr>
<td>1.2.0.3</td>
<td>1.3.0.7</td>
<td>No. These two package versions don’t share the same ancestor.</td>
</tr>
</tbody>
</table>

Example Package Ancestry Tree
Code Coverage for 2GP Managed Packages

Before you can release and distribute a 2GP package version on AppExchange, the Apex code must meet a minimum 75% code coverage requirement. And every Apex Trigger in a package needs test coverage.

To compute code coverage using Salesforce CLI, use the `--codecoverage` parameter when you run the `force:package:version:create` command.

Package version creation often takes longer to complete when code coverage is being computed, so consider when to include the code coverage parameter. You can create beta package versions without computing code coverage, but these beta versions cannot be promoted.

If you try to promote a beta package version to managed-released and the version was created without specifying code coverage, or the code coverage in the package version is less than 75%, the package promotion fails. Code coverage is calculated during package version validation. If you skip validation using the `--skipvalidation` parameter, code coverage isn’t calculated for that package version.

View code coverage information for a package version using `force:package:version:list` with the `--verbose` parameter, or `force:package:version:report` command in Salesforce CLI.
Release a Second-Generation Managed Package

Each new package version is marked as beta when created. As you develop your package, you may create several package versions before you create a version that is ready to be released and distributed. Only released package versions can be listed on AppExchange and installed in customer orgs.

Before you promote the package version, ensure that the user permission, **Promote a package version to released**, is enabled in the Dev Hub org associated with the package. Consider creating a permission set with this user permission, and then assign the permission set to the appropriate user profiles.

When you're ready to release, use `force:package:version:promote`.

```
sfdx force:package:version:promote --package "Expense Manager@1.3.0-7"
```

If the command is successful, a confirmation message appears.

```
Successfully promoted the package version, ID: 04tB0000000719qIAA to released.
```

After the update succeeds, view the package details.

```
sfdx force:package:version:report --package "Expense Manager@1.3.0.7"
```

Confirm that the value of the Released property is true.

<table>
<thead>
<tr>
<th>NAME</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>ver 1.0</td>
</tr>
<tr>
<td>Alias</td>
<td>Expense Manager-1.0.0.5</td>
</tr>
<tr>
<td>Package Version Id</td>
<td>05iB0000000CaaHIAC</td>
</tr>
<tr>
<td>Package Id</td>
<td>0HoB0000000CabmKAC</td>
</tr>
<tr>
<td>Subscriber Package Version Id</td>
<td>04tB0000000NPbBAW</td>
</tr>
<tr>
<td>Version</td>
<td>1.0.0.5</td>
</tr>
<tr>
<td>Description</td>
<td>update version</td>
</tr>
<tr>
<td>Branch</td>
<td></td>
</tr>
<tr>
<td>Tag</td>
<td>git commit id 08dcfsdf</td>
</tr>
<tr>
<td>Released</td>
<td>true</td>
</tr>
<tr>
<td>Created Date</td>
<td>2018-05-08 09:48</td>
</tr>
<tr>
<td>Installation URL</td>
<td><a href="https://login.salesforce.com/packaging/installPackage.apexp?p0=04tB0000000NPbBAW">https://login.salesforce.com/packaging/installPackage.apexp?p0=04tB0000000NPbBAW</a></td>
</tr>
</tbody>
</table>

You can promote and release only once for each package version number, and you can’t undo this change.

Update a Package Version

You can update most properties of a package version from the command line. For example, you can change the package version name or description. One important exception is that you can’t change the release status.

If the most recent package version has been released, increment either the major, minor, or patch version number for the next package version you create.

Package version numbers use the format major.minor.patch.build. For example, if you released package 1.0.0.2, you could use 1.1.0.0, 2.0.0.0, or 1.0.1.0 for the next package version.
View Package Details

View the details of previously created packages and package versions from the command line.

To display a list of all packages in the Dev Hub org, use this command:

```bash
sfdx force:package:list --targetdevhubusername my-hub
```

You can view the namespace, package name, ID, and other details in the output.

<table>
<thead>
<tr>
<th>Namespace Prefix</th>
<th>Name</th>
<th>Id</th>
<th>Alias</th>
<th>Description</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>db_exp_manager</td>
<td>Expenser App</td>
<td>0HoB00000004CzRKAU</td>
<td>Expenser App</td>
<td>Managed</td>
<td></td>
</tr>
<tr>
<td>db_exp_manager</td>
<td>Expenser Logic</td>
<td>0HoB00000004CzMKAU</td>
<td>Expenser Logic</td>
<td>Managed</td>
<td></td>
</tr>
<tr>
<td>db_exp_manager</td>
<td>Expenser Schema</td>
<td>0HoB00000004CzHKAU</td>
<td>Expenser Schema</td>
<td>Managed</td>
<td></td>
</tr>
</tbody>
</table>

Include optional parameters to filter the list results based on the modification date, creation date, and to order by specific fields or package IDs. To limit the details, use `--concise`. To show expanded details, use `--verbose`.

To display a list of all package versions in the Dev Hub org, use this command:

```bash
sfdx force:package:version:list --targetdevhubusername my-hub
```

You can view the namespace, version name, and other details in the output.

<table>
<thead>
<tr>
<th>Package Name</th>
<th>Installation Key</th>
<th>Version</th>
<th>Sub Pkg Ver Id</th>
<th>Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenser Schema</td>
<td>false</td>
<td>0.1.0.1</td>
<td>04tB0000000719qIAA</td>
<td>Expenser Schema@0.1.0-1</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>false</td>
<td>0.2.0.1</td>
<td>04tB000000071AjIAI</td>
<td>Expenser Schema@0.2.0-1</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>false</td>
<td>0.3.0.1</td>
<td>04tB000000071AtIAI</td>
<td>Expenser Schema@0.3.0-1</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>false</td>
<td>0.3.0.2</td>
<td>04tB000000071AyIAI</td>
<td>Expenser Schema@0.3.0-2</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>false</td>
<td>0.3.1.1</td>
<td>04tB0000000KGU6IAQ</td>
<td>Expenser Schema@0.3.1-1</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>false</td>
<td>0.3.1.2</td>
<td>04tB0000000KGB1IA4</td>
<td>Expenser Schema@0.3.1-2</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>false</td>
<td>0.3.2.1</td>
<td>04tB0000000KGBQIA4</td>
<td>Expenser Schema@0.3.2-1</td>
</tr>
<tr>
<td>Expenser Logic</td>
<td>false</td>
<td>0.1.0.1</td>
<td>04tB0000000719vIAA</td>
<td>Expenser Logic@0.1.0-1</td>
</tr>
<tr>
<td>Expenser App</td>
<td>false</td>
<td>0.1.0.1</td>
<td>04tB000000071A0IAI</td>
<td>Expenser App@0.1.0-1</td>
</tr>
</tbody>
</table>

Install a Package

Install second-generation managed packages using the CLI or the browser. You can install package versions in a scratch org, sandbox org, DE org, or production org.
Install Packages with the CLI

If you're working with the Salesforce CLI, you can use the `force:package:install` command to install packages in a scratch org or target subscriber org.

### Install Packages from a URL

Install 2GP managed packages from the CLI or from a browser.

### Upgrade a Package Version

Are you introducing metadata changes to an existing package? You can use the CLI to upgrade one package version to another.

### Sample Script for Installing Packages with Dependencies

Use this sample script as a basis to create your own script to install packages with dependencies. This script contains a query that finds dependent packages and installs them in the correct dependency order.

```
Sample Script for Installing Packages with Dependencies

Use this sample script as a basis to create your own script to install packages with dependencies. This script contains a query that finds dependent packages and installs them in the correct dependency order.
```

### Control Package Installation Timeouts

When you issue a `force:package:install` command, it takes a few minutes for a package version to become available in the target org and for installation to complete. To allow sufficient time for a successful install, use these parameters that represent mutually exclusive timers.

- `--publishwait` defines the maximum number of minutes that the command waits for the package version to be available in the target org. The default is 0. If the package is not available in the target org in this time frame, the install is terminated.
  
  Setting `--publishwait` is useful when you create a new package version and then immediately try to install it to target orgs.

  **Note:** If `--publishwait` is set to 0, the package installation immediately fails, unless the package version is already available in the target org.
---wait defines the maximum number of minutes that the command waits for the installation to complete after the package is available. The default is 0. When the --wait interval ends, the install command completes, but the installation continues until it either fails or succeeds. You can poll the status of the installation using `sfdx force:package:install:report`.

**Note:** The --wait timer takes effect after the time specified by --publishwait has elapsed. If the --publishwait interval times out before the package is available in the target org, the --wait interval never starts.

For example, consider a package called Expense Manager that takes five minutes to become available on the target org, and 11 minutes to install. The following command has publishwait set to three minutes and wait set to 10 minutes. Because Expense Manager requires more time than the set publishwait interval, the installation is aborted at the end of the three minute publishwait interval.

```
sfdx force:package:install --package "Expense Manager@1.2.0-12" --publishwait 3 --wait 10
```

The following command has publishwait set to six minutes and wait set to 10 minutes. If not already available, Expense Manager takes five minutes to become available on the target org. The clock then starts ticking for the 10 minute wait time. At the end of 10 minutes, the command completes because the wait time interval has elapsed, although the installation is not yet complete. At this point, package:install:report indicates that the installation is in progress. After one more minute, the installation completes and package:install:report indicates a successful installation.

```
sfdx force:package:install --package "Expense Manager@1.2.0-12" --publishwait 6 --wait 10
```

Install Packages from a URL

Install 2GP managed packages from the CLI or from a browser.

If you create packages from the CLI, you can derive an installation URL for the package by adding the subscriber package ID to your Dev Hub URL. You can use this URL to test different deployment or installation scenarios.

For example, if the package version has the subscriber package ID, 04tB00000009oZ3JBI, add the ID as the value of apvId.

https://my-domain.lightning.force.com/packagingSetupUI/ipLanding.app?apvId=04tB00000009oZ3JBI

Anyone with the URL and a valid login to a Salesforce org can install the package.

To install the package:

1. In a browser, enter the installation URL.
2. Enter your username and password for the Salesforce org in which you want to install the package, and then click **Login**.
3. If the package is protected by an installation key, enter the installation key.
4. For a default installation, click **Install**.

   A message describes the progress. You receive a confirmation message when the installation is complete.

Upgrade a Package Version

Are you introducing metadata changes to an existing package? You can use the CLI to upgrade one package version to another.

When you perform a package upgrade, here’s what to expect for metadata changes.

- Metadata introduced in the new version is installed as part of the upgrade.
- Metadata modified in the new version is updated as part of the upgrade.
- Metadata removed in the new version is deleted as part of the upgrade.
To upgrade a package version, the new version must be a direct descendent of the package version installed in your org. See Package Ancestors for more information.

Sample Script for Installing Packages with Dependencies

Use this sample script as a basis to create your own script to install packages with dependencies. This script contains a query that finds dependent packages and installs them in the correct dependency order.

Sample Script

Note: Be sure to replace the package version ID and scratch org user name with your own specific details.

```bash
#!/bin/bash

# The execution of this script stops if a command or pipeline has an error.
set -e

# Specify a package version id (starts with 04t)
# If you know the package alias but not the id, use force:package:version:list to find it.
PACKAGE=04tB0000000NmnHIAS

# Specify the user name of the subscriber org.
USER_NAME=test-bvdfz3m9tqdf@example.com

# Specify the timeout in minutes for package installation.
WAIT_TIME=15

echo "Retrieving dependencies for package Id: "$PACKAGE

RESULT_JSON=`sfdx force:data:soql:query -u $USER_NAME -t -q "SELECT Dependencies FROM SubscriberPackageVersion WHERE Id='$PACKAGE'" --json`

# Parse the json string using python to test whether the result json contains a list of ids or not.
```

Second-Generation Managed Packages

Sample Script for Installing Packages with Dependencies

To upgrade a package version, the new version must be a direct descendent of the package version installed in your org. See Package Ancestors for more information.

Sample Script for Installing Packages with Dependencies

Use this sample script as a basis to create your own script to install packages with dependencies. This script contains a query that finds dependent packages and installs them in the correct dependency order.

Sample Script

Note: Be sure to replace the package version ID and scratch org user name with your own specific details.

```bash
#!/bin/bash

# The execution of this script stops if a command or pipeline has an error.
set -e

# Specify a package version id (starts with 04t)
# If you know the package alias but not the id, use force:package:version:list to find it.
PACKAGE=04tB0000000NmnHIAS

# Specify the user name of the subscriber org.
USER_NAME=test-bvdfz3m9tqdf@example.com

# Specify the timeout in minutes for package installation.
WAIT_TIME=15

echo "Retrieving dependencies for package Id: "$PACKAGE

RESULT_JSON=`sfdx force:data:soql:query -u $USER_NAME -t -q "SELECT Dependencies FROM SubscriberPackageVersion WHERE Id='$PACKAGE'" --json`

# Parse the json string using python to test whether the result json contains a list of ids or not.
```

DEPENDENCIES=`echo $RESULT_JSON | python -c 'import sys, json; print json.load(sys.stdin)["result"]["records"][0]["Dependencies"]'`

# If the parsed dependencies is None, the package has no dependencies. Otherwise, parse the result into a list of ids.

# Then loop through the ids to install each of the dependent packages.

if [[ "$DEPENDENCIES" != 'None' ]]; then

    DEPENDENCIES=`echo $RESULT_JSON | python -c 'import sys, json
    ids = json.load(sys.stdin)["result"]["records"][0]["Dependencies"]["ids"]
    dependencies = []
    for id in ids:
        dependencies.append(id["subscriberPackageVersionId"])'

    print "$DEPENDENCIES"
    for id in $DEPENDENCIES
        do
            echo "Installing dependent package: "$id
            sfdx force:package:install --package "$id" -u $USER_NAME -w $WAIT_TIME --publishwait 10
        done
    else
        echo "The package has no dependencies"
    fi

# After processing the dependencies, proceed to install the specified package.
Uninstall a Package

You can uninstall a package from a subscriber org using Salesforce CLI or from the Setup UI. When you uninstall second-generation managed packages, all components in the package are deleted from the org.

To use the CLI to uninstall a package from the target org, authorize the Dev Hub org and run this command.

```bash
sfdx force:package:uninstall --package "Expense Manager@2.3.0-5"
```

You can also uninstall a package from the web browser. Open the Salesforce org where you installed the package.

```bash
sfdx force:org:open -u me@my.org
```

Then uninstall the package.

1. From Setup, enter **Installed Packages** in the Quick Find box, then select **Installed Packages**.
2. Click **Uninstall** next to the package that you want to remove.
3. Select **Yes, I want to uninstall** and click **Uninstall**.
4. After an uninstall, Salesforce automatically creates an export file containing the package data, associated notes, and any attachments. When the uninstall is complete, Salesforce sends an email containing a link to the export file to the user performing the uninstall. The export file and related notes and attachments are listed below the list of installed packages. We recommend storing the file elsewhere because it's available for only two days after the uninstall completes, then it's deleted from the server.

   **Tip:** If you reinstall the package later and want to reimport the package data, see **Importing Package Data**.

SEE ALSO:

* Salesforce CLI Command Reference

Publishing Your App on AppExchange

If you've published a 1GP managed package, you'll notice the process for publishing a 2GP managed package is different. Once you link your Dev Hub org to the AppExchange publishing console, all your released 2GP package versions are visible in the publishing console.

To list an app on AppExchange, it must pass the AppExchange security review. For more information, see **Pass the AppExchange Security Review**.

**Link Dev Hub to the AppExchange Publishing Console**

- Log in to the **Salesforce Partner Community**.
- Select the **Publishing** tab, and then select **Organizations**.
- Click **Connect Org**, and enter the login credentials for your Dev Hub org.

**Register Your Package**
• From Packages tab, locate the package version you want to register, and click Register Package in the Licenses column. Registering a package links the package to your license management app.

• Enter the login credentials for the Dev Hub org associated with the package, in the modal window.

• Set the default license behavior for the package, including trial length, and number of seats included with the license, and click Save. Packages that share a namespace can be associated the same License Management Org (LMO), or you can associate the packages with different LMOs.
CHAPTER 12 Unlocked Packages

Salesforce offers different types of packages, and unlocked packages are especially suited for internal business apps. Unless you plan to distribute an app on AppExchange, an unlocked package is the right package type for most use cases. You can use unlocked packages to organize your existing metadata, package an app, extend an app that you’ve purchased from AppExchange, or package new metadata.

Unlocked packages follow a source-driven development model. The source of truth of the metadata contained in the package is your version control system, not what’s in an org. This model brings with it all the benefits of modern source-driven development models.

Note: If you’re an AppExchange partner that plans to distribute your app to customers via AppExchange, second-generation managed packaging is the preferred tool. See Second-Generation Managed Packages for more information.
What’s a Package

If you’re new to packaging, you can think about a package as a container that you fill with metadata. It contains a set of related features, customizations, and schema. You use packages to move metadata from one Salesforce org to another.

Each unlocked package has a distinct life cycle. You add metadata to a package, and create a new package version. While the package is continually evolving, each package version is an immutable artifact.

A package version contains the specific metadata and features associated with the package version, at the time it was created. As you iterate on your package, and add, remove, or change the packaged metadata, you create many package versions.

You can install a package version in a scratch, sandbox, trial, developer edition, or production org. Installing a package version is similar to deploying metadata. Each package version has a version number, and subscribers can install a new package version into their org through a package upgrade.

Note: Since package versions are immutable, they can also be used as artifacts for Continuous Integration (CI) and Continuous Delivery (CD) processes.

You can repeat the package development cycle any number of times. You can change metadata, create a package version, test the package version, and finally deploy or install the package to a production org. This distinct app development lifecycle lets you control exactly what, when and how your metadata is rolled out. In the installed org, you can inspect which metadata came from which package and the set of all metadata associated with a specific package.

Package-Based Development Model

To demonstrate the power of unlocked packages, here’s how packaging works in the traditional development model. For most production orgs, metadata traditionally is contained in two buckets: a set of managed packages installed from AppExchange, and unpackaged metadata.

Customers often invest in Salesforce customizations to support business processes and extend the power of the Salesforce platform. In the development model, your Salesforce org’s monolith of unpackaged metadata contains all the metadata that belongs to a custom app or extension. Because that metadata isn’t isolated or organized, it can be difficult to understand, upgrade, and maintain.

In the package development model, you can organize your unpackaged metadata in your production org into well-defined packages. And you can use Salesforce DX projects to organize your source into package directories with everything managed in a version control system of your choice. Your end goal is to create packages using those directories that are versionable, easy to maintain, update, install, and upgrade.

Unlocked packages allow you to declare multi-level dependencies on one or many managed and unlocked packages, which keeps your packages small and modular. You can use the command line to execute unlocked packaging operations, or you can include packaging-specific Salesforce CLI commands in a script and automate your package development.

Before You Create Unlocked Packages

When you use unlocked packaging, to be sure that you set it up correctly, verify the following.

Did you?

- Enable Dev Hub in Your Org
- Enable Second-Generation Managed Packaging
- Install Salesforce CLI?

Note: Unlocked packaging is available with these licenses: Salesforce or Salesforce Limited Access - Free (partners only).
Developers who work with unlocked packages need the correct permission set in the Dev Hub org. Developers need either the System Administrator profile or the Create and Update Second-Generation Packages permission. For more information, see Add Salesforce DX Users in the Salesforce DX Setup Guide.

The maximum number of unlocked package versions that you can create from a Dev Hub per day is the same as your daily scratch org allocation. To request a limit increase, contact Salesforce Customer Support.

Scratch orgs and packages count separately, so creating an unlocked package doesn’t count against your daily scratch org limit. To view your scratch org limits, use the CLI:

```bash
sfdx force:limits:api:display -u <Dev Hub username or alias>
```

For more information on scratch org limits, see Scratch Orgs.

## Know Your Orgs

Some of the orgs that you use with unlocked packaging have a unique purpose.

### Choose Your Dev Hub Org

Use the Dev Hub org for these purposes.

- As owner of all unlocked packages
- To link your namespaces if you want to create namespaced unlocked packages
- To authorize and run your `force:package` commands

When you create an unlocked package using Salesforce CLI, you associate the package with a specific Dev Hub org. The Dev Hub org owns the package, and you can’t transfer package ownership from one Dev Hub org to another. When you’re ready to define and create a package for production use, be sure to create the package using the Dev Hub in one of your production orgs.

### Namespace Org

If you are using a namespace, you’ll need a namespace org to acquire a package namespace. If you want to use the namespace strictly for testing, choose a disposable namespace.

After you create a namespace org and specify the namespace in it, open the Dev Hub org and link the namespace org to the Dev Hub org.

### Other Orgs

When you work with packages, you also use these orgs:

- You can create scratch orgs on the fly to use while testing your packages.
- The target or installation org is where you install the package.

### Workflow for Unlocked Packages

You can create and install an unlocked package directly from the Salesforce command line. Review and complete the steps in Before You Create Unlocked Packages before starting this workflow.

The basic workflow includes these steps. See specific topics for details about each step.
1. Create a DX project

   `sfdx force:project:create --outputdir expense-manager-workspace --projectname expenser-app --defaultpackagedir source-folder`

2. Authorize the Dev Hub org, and create a scratch org.

   `sfdx force:auth:web:login --setdefaultdevhubusername`

   When you perform this step, include the `--setdefaultdevhubusername` option. You can then omit the Dev Hub username when running subsequent Salesforce CLI commands.

   **Tip:** If you define an alias for each org you work with, it’s easy to switch between different orgs from the command line. You can authorize different orgs as you iterate through the package development cycle.

3. Create a scratch org and develop the package. You can use VS Code and the Setup UI in the scratch org to build and retrieve the pieces you want to include in your package.

   `sfdx force:org:create --definitionfile config/project-scratch-def.json --targetusername MyScratchOrg1`

4. Verify that all package components are in the project directory where you want to create a package.

5. From the Salesforce DX project directory, create the package.

   `sfdx force:package:create --name "Expense Manager" --path source-folder --packagetype Unlocked`

6. Review your `sfdx-project.json` file. The CLI automatically updates the project file to include the package directory and creates an alias based on the package name.

   ```
   {
       "packageDirectories": [
       {
           "path": "source-folder",
           "default": true,
           "package": "Expense Manager",
           "versionName": "ver 0.1",
           "versionNumber": "0.1.0.NEXT"
       }
       
       "namespace": "",
       "sfdcLoginUrl": "https://login.salesforce.com",
       "sourceApiVersion": "47.0",
       "packageAliases": {
           "Expense Manager": "0Hoxxx"
       }
   }
   
   Notice the placeholder values for `versionName` and `versionNumber`. Specify the features and org settings required for the metadata in your package using an external `.json` file, such as the scratch org definition file. You can specify using the `--definitionfile` flag with the `force:package:version:create` command, or list the definition file in your `sfdx-project.json` file. See: Project Configuration File for Packages
   ```
7. Create a package version. This example assumes the package metadata is in the `force-app` directory.

```bash
sfdx force:package:version:create --package "Expense Manager" \
--installationkey test1234 --wait 10
```

8. Install and test the package version in a scratch org. Use a different scratch org from the one you used in step three.

```bash
sfdx force:package:install --package "Expense Manager@0.1.0-1" --targetusername MyTestOrg1 \
--installationkey test1234 --wait 10 --publishwait 10
```

9. After the package is installed, open the scratch org to view the package.

```bash
sfdx force:org:open --targetusername MyTestOrg1
```

Package versions are beta until you promote them to a managed-released state. See: Release an Unlocked Package.

## Configure Packages

You include an entry in the `sfdx-project.json` file for each package to specify its alias, version details, dependencies, features, and org settings. From the command line, you can also set or change options, such as specifying an installation key, update the package name, or add a description.

**Project Configuration File for Packages**

The project configuration file is a blueprint for your project and for the outline of a package. The settings in the file determine the package attributes and package contents.

**Keywords**

A keyword is a variable that you can use to specify a package version number.

**Package Installation Key**

To ensure the security of the metadata in your package, you must specify an installation key when creating a package version. Package creators provide the key to authorized subscribers so they can install the package. Package installers provide the key during installation, whether installing the package from the CLI or from a browser. An installation key is the first step during installation. The key ensures that no package information, such as the name or components, is disclosed until the correct installation key is supplied.

**Extract Dependency Information from Unlocked Packages**

For an installed unlocked package, you can now run a simple SOQL query to extract its dependency information. You can also create a script to automate the installation of unlocked packages with dependencies.

**Understanding Namespaces**

A namespace is a 1-15 character alphanumeric identifier that distinguishes your package and its contents from other packages in your org.

**Create and Register Your Namespace**

With unlocked packages, you can share a single namespace with multiple packages. Since sharing of code is much easier if your package shares the same namespace, we recommend that if use namespaces, you use a single namespace for your namespaced unlocked packages.

**Share Release Notes and Post-Install Instructions**

Share details about what’s new and changed in a released unlocked package with your users.
Best Practices for Unlocked Packages

We suggest that you follow these best practices when working with unlocked packages.

Package IDs and Aliases

When you create a package or package version, Salesforce CLI creates a package alias based on the package name, and stores that name in the `sfdx-project.json` file. When you run CLI commands or write scripts to automate packaging workflows, it's often easier to reference the package alias, instead of the package ID or package version ID.

Frequently Used Packaging Operations

Project Configuration File for Packages

The project configuration file is a blueprint for your project and for the outline of a package. The settings in the file determine the package attributes and package contents.

Here are the parameters you can specify in the project configuration file.

<table>
<thead>
<tr>
<th>Name</th>
<th>Required?</th>
<th>Default if Not Specified</th>
</tr>
</thead>
<tbody>
<tr>
<td>path</td>
<td>Yes</td>
<td>If you don't specify a path, the Salesforce CLI uses a placeholder when you create a package.</td>
</tr>
<tr>
<td>default</td>
<td>Yes, if you’ve specified more than one package directory</td>
<td>true</td>
</tr>
<tr>
<td>package</td>
<td>Yes</td>
<td>The package name specified in the project json file.</td>
</tr>
<tr>
<td>versionName</td>
<td>No</td>
<td>If not specified, the CLI uses <code>versionNumber</code> as the version name.</td>
</tr>
<tr>
<td>versionDescription</td>
<td>No</td>
<td>None. Version numbers are formatted as major.minor.patch.build. For example, 1.2.1.8.</td>
</tr>
<tr>
<td>versionNumber</td>
<td>Yes</td>
<td>None. Version numbers are formatted as major.minor.patch.build. For example, 1.2.1.8.</td>
</tr>
<tr>
<td>dependencies</td>
<td>No</td>
<td>None. Specify the dependencies on other packages.</td>
</tr>
</tbody>
</table>

To specify dependencies for unlocked packages within the same Dev Hub, use either the package version alias or a combination of the package name and the version number.

```
"dependencies": [
  {
    "package": "MyPackageName@0.1.0.1"
  }
]
```
To specify dependencies for unlocked packages outside of the Dev Hub use:

```
"dependencies": [
  {
    "package": "OtherOrgPackage@1.2.0"
  }
]
```

**Note:** You can use the LATEST keyword for the version number to set the dependency.

To denote dependencies with package IDs instead of package aliases, use:

- The ID if you specify the package ID along with the version number
- The ID if you specify only the package version ID

If the package has more than one dependency, provide a comma-separated list of packages in the order of installation. For example, if a package depends on the package Expense Manager - Util, which in turn depends on the package External Apex Library, the package dependencies are:

```
"dependencies": [
  {
    "package": "Expense Manager - Util",
    "versionNumber": "4.7.0.LATEST"
  },
  {
    "package": "External Apex Library - 1.0.0.4"
  }
]
```

See: Extract Dependency Information from Unlocked Packages

<table>
<thead>
<tr>
<th>Name</th>
<th>Required?</th>
<th>Default if Not Specified</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Required?</td>
<td>Default if Not Specified</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>definitionFile</td>
<td>No</td>
<td>None. A reference to an external .json file used to specify the features and org settings required for the metadata of your package, such as the scratch org definition. Example:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>&quot;definitionFile&quot;: &quot;config/project-scratch-def.json&quot;,</td>
</tr>
<tr>
<td>namespace</td>
<td>no</td>
<td>None. A 1–15 character alphanumeric identifier that distinguishes your package and its contents from packages of other developers.</td>
</tr>
<tr>
<td>packageAliases</td>
<td>Yes</td>
<td>Salesforce CLI updates the project file with aliases when you create a package or package version. You can also manually update this section for existing packages or package versions. You can use the alias instead of the cryptic package ID when running CLI force:package commands.</td>
</tr>
<tr>
<td>releasenotesurl</td>
<td>No</td>
<td>None. A URL to release notes.</td>
</tr>
<tr>
<td>postinstallurl</td>
<td>No</td>
<td>None. A URL to post-install instructions for subscribers.</td>
</tr>
</tbody>
</table>

When you specify a parameter using Salesforce CLI, it overrides the value listed in the project definition file.

The Salesforce DX project definition file is a JSON file located in the root directory of your project. Use the force:project:create CLI command to generate a project file that you can build upon. Here’s how the parameters in packageDirectories appear.

```json
{
    "namespace": "",
    "sfdcLoginUrl": "https://login.salesforce.com",
    "sourceApiVersion": "47.0",
    "packageDirectories": [
        {
            "path": "util",
            "default": true,
            "package": "Expense Manager - Util",
            "versionName": "Winter '20",
            "versionDescription": "Welcome to Winter 2020 Release of Expense Manager Util Package",
            "versionNumber": "4.7.0.NEXT",
            "definitionFile": "config/scratch-org-def.json"
        },
        {
            "path": "exp-core",
            "default": false,
            "package": "Expense Manager",
            "versionName": "v 3.2",
            "versionDescription": "Winter 2020 Release",
            "versionNumber": "3.2.0.NEXT",
            "postInstallUrl": "https://expenser.com/post-install-instructions.html",
            "releaseNotesUrl": "https://expenser.com/winter-2020-release-notes.html",
            "definitionFile": "config/scratch-org-def.json"
        }
    ]
}
```
What If I Don’t Want My Salesforce DX Project Automatically Updated?

In some circumstances, you don’t want to have automatic updates to the `sfdx-project.json` file. When you require more control, use these environment variables to suppress automatic updates to the project file.

<table>
<thead>
<tr>
<th>For This Command</th>
<th>Set This Environment Variable to True</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>force:package:create</code></td>
<td><code>SFDX_PROJECT_AUTOUPDATE_DISABLE_FOR_PACKAGE_CREATE</code></td>
</tr>
<tr>
<td><code>force:package:version:create</code></td>
<td><code>SFDX_PROJECT_AUTOUPDATE_DISABLE_FOR_PACKAGE_VERSION_CREATE</code></td>
</tr>
</tbody>
</table>

Keywords

A keyword is a variable that you can use to specify a package version number.

You can use two different keywords to automatically increment the value of the package build numbers and set the package dependency to the latest version.

Use the NEXT keyword to increment the build number to the next available for the package.

```
"versionNumber": "1.2.0.NEXT"
```

Use the LATEST keyword in the version number to assign the latest version of the package dependency when you create a package version.

```
"versionNumber": "1.2.0.LATEST"
```

```
"dependencies": [
    {
        "package": "Expense Manager - Util",
        "versionNumber": "4.7.0.LATEST"
    },
    {
        "package": "External Apex Library - 1.0.0.4"
    }
]
```
Package Installation Key

To ensure the security of the metadata in your package, you must specify an installation key when creating a package version. Package creators provide the key to authorized subscribers so they can install the package. Package installers provide the key during installation, whether installing the package from the CLI or from a browser. An installation key is the first step during installation. The key ensures that no package information, such as the name or components, is disclosed until the correct installation key is supplied.

To set the installation key, add the `--installationkey` parameter to the command when you create the package version. This command creates a package and protects it with the installation key.

```
sfdx force:package:version:create --package "Expense Manager" --installationkey "JSB7s8vXU93fI"
```

Supply the installation key when you install the package version in the target org.

```
sfdx force:package:install --package "Expense Manager" --installationkey "JSB7s8vXU93fI"
```

Change the Installation Key for an Existing Package Version

You can change the installation key for an existing package version with the `force:package:version:update` command.

```
sfdx force:package:version:update --package "Expense Manager@1.2.0-4" --installationkey "HIF83kS8kS7C"
```

Create a Package Version Without an Installation Key

If you don’t require security measures to protect your package metadata, you can create a package version without an installation key.

```
sfdx force:package:version:create --package "Expense Manager" --directory common \  --tag 'Release 1.0.0' --installationkeybypass
```

Check Whether a Package Version Requires an Installation Key

To determine whether a package version requires an installation key, use either the `force:package:version:list` or `force:package:version:report` CLI command.

Extract Dependency Information from Unlocked Packages

For an installed unlocked package, you can now run a simple SOQL query to extract its dependency information. You can also create a script to automate the installation of unlocked packages with dependencies.

The SubscriberPackageVersion Tooling API object now provides dependency information. Using a SOQL query on SubscriberPackageVersion, you can identify the packages on which your unlocked package has a dependency. You can get the (04t) IDs and the correct install order for those packages.

**Example:** Package B has a dependency on package A. Package D depends on packages B and C. Here’s a sample `sfdx-project.json` that you would have specified while creating a package version. Package D dependencies are noted as packages A, B, and C.

```json
{
   "packageDirectories": [ 
   {
      "path": "pkg-a-workspace",
```

162
"package": "pkgA",
"versionName": "ver 4.9",
"versionNumber": "4.9.0.NEXT",
"default": true
},
{
  "path": "pkg-b-workspace",
  "package": "pkgB",
  "versionName": "ver 3.17",
  "versionNumber": "3.17.0.NEXT",
  "default": false,
  "dependencies": [
    {
      "package": "pkgA",
      "versionNumber": "3.3.0.LATEST"
    }
  ]
},
{
  "path": "pkg-c-workspace",
  "package": "pkgC",
  "versionName": "ver 2.1",
  "versionNumber": "2.1.0.NEXT",
  "default": false
},
{
  "path": "pkg-d-workspace",
  "package": "pkgD",
  "versionName": "ver 1.1",
  "versionNumber": "1.1.0.NEXT",
  "default": false,
  "dependencies": [
    {
      "package": "pkgA",
      "versionNumber": "3.3.0.LATEST"
    },
    {
      "package": "pkgB",
      "versionNumber": "3.12.0.LATEST"
    },
    {
      "package": "pkgC",
      "versionNumber": "2.1.0.LATEST"
    }
  ]
},
"namespace": "",
"sfdcLoginUrl": "https://login.salesforce.com",
"sourceApiVersion": "44.0",
"packageAliases": {
  "pkgA": "0HoB00000008Oq6KAE",
  "pkgB": "0HoB00000008qBKAU",
  "pkgC": "0HoB00000008qGKAU"}
Before installing pkgD (with ID=04txx000000082hAAA), use this SOQL query to determine its dependencies. The username is typically the target subscriber org where the unlocked package is to be installed.

```bash
sfdx force:data:soql:query -u {USERNAME} -t -q "SELECT Dependencies FROM SubscriberPackageVersion WHERE Id='04txx000000082hAAA'" --json
```

You see this output when you run the query, with the (04t) IDs for pkgA, pkgB, and pkgC in that order.

```
"Dependencies": {"Ids": [
   {"subscriberPackageVersionId":"04txx000000080vAAA"},
   {"subscriberPackageVersionId":"04txx000000082XAAQ"},
   {"subscriberPackageVersionId":"04txx0000000AiGAAU"}]
}
```

---

**Understanding Namespaces**

A namespace is a 1-15 character alphanumeric identifier that distinguishes your package and its contents from other packages in your org.

When you specify a package namespace, every component added to a package has the namespace prefixed to the component API name. Let’s say you have a custom object called Insurance_Agent with the API name, `Insurance_Agent__c`. If you add this component to a package associated with the Acme namespace, the API name becomes `Acme__Insurance_Agent__c`.

You can choose to create unlocked packages with or without a specific namespace. A namespace is assigned to a package at the time it’s created and can’t be changed.

<table>
<thead>
<tr>
<th>Use No-Namespace Packages If</th>
<th>Use Namespace Packages If</th>
</tr>
</thead>
<tbody>
<tr>
<td>You want to migrate metadata from your org’s monolith of unpackaged metadata to unlocked packages. Creating a no-namespace package gives you more control over how you organize and distribute parts of an application.</td>
<td>You’re new to packaging and you’re adopting packages in several stages. Using a namespace prefix such as Acme__ can help you identify what’s packaged and what’s still unpackaged metadata in your production orgs.</td>
</tr>
<tr>
<td>You want to retain the API name of previously unpackaged metadata elements.</td>
<td>You have more than one development team. A namespace can ensure your API names don’t collide with another team. In general, working with a single namespace is easier, and you can easily share code across packages that share a namespace.</td>
</tr>
</tbody>
</table>

**Important:** When creating a namespace, use something that’s useful and informative to users. However, don’t name a namespace after a person (for example, by using a person’s name, nickname, or private information).

When you work with namespaces, keep these considerations in mind:

- You can develop more than one package with the same namespace but you can associate each package with only a single namespace.
- If you work with more than one namespace, we recommend that you set up one project for each namespace.
Namespace-Based Visibility for Apex Classes in Unlocked Packages

The @namespaceAccessible makes public Apex in a package available to other packages that use the same namespace. Without this annotation, Apex classes, methods, interfaces, and properties defined in an unlocked package aren’t accessible to the other packages with which they share a namespace. Apex that is declared global is always available across all namespaces, and needs no annotation.

Considerations for Apex Accessibility Across Packages

- A Lightning component outside the package can access a public Apex method installed from a no-namespace unlocked package. The component can be installed from another package or created in the org. For accessing Apex methods, a no-namespace unlocked package is treated the same as an unmanaged package.
- You can’t use the @namespaceAccessible annotation for an @AuraEnabled Apex method referenced from a Lightning component.
- You can add or remove the @namespaceAccessible annotation at any time, even on managed and released Apex code. Make sure that you don’t have dependent packages relying on the functionality of the annotation before adding or removing it.
- When adding or removing @namespaceAccessible Apex from a package, consider the impact to users with installed versions of other packages that reference this package’s annotation. Before pushing a package upgrade, ensure that no user is running a package version that would fail to fully compile when the upgrade is pushed.

This example shows an Apex class marked with the @namespaceAccessible annotation. The class is accessible to other packages within the same namespace. The first constructor is also visible within the namespace, but the second constructor isn’t.

```apex
// A namespace-visible Apex class
@namespaceAccessible
public class MyClass {
    private Boolean bypassFLS;

    // A namespace-visible constructor that only allows secure use
    @namespaceAccessible
    public MyClass() {
        bypassFLS = false;
    }

    // A package private constructor that allows use in trusted contexts,
    // but only internal to the package
    public MyClass (Boolean bypassFLS) {
        this.bypassFLS = bypassFLS;
    }

    @namespaceAccessible
    protected Boolean getBypassFLS() {
        return bypassFLS;
    }
}
```

Create and Register Your Namespace

With unlocked packages, you can share a single namespace with multiple packages. Since sharing of code is much easier if your package shares the same namespace, we recommend that if use namespaces, you use a single namespace for your namespaced unlocked packages.

To create a namespace:

2. In Setup, enter Package Manager in the Quick Find box, and select Package Manager.
3. In Developer Settings, click **Edit**, and under Change Developer Settings, click **Continue**.

4. In Namespace Prefix enter a namespace, and select **Check Availability**.

5. For **Package to be managed**, select **None**, then click **Review My Selections**.

6. Review your selections, and then click **Save**.

To register a namespace:

1. To link the namespace that you created with your Dev Hub, use Namespace Registry. See [Link a Namespace to a Dev Hub](#) for details.

2. In the `sfdx-project.json` file, specify your namespace using the namespace attribute. When you create a new unlocked package, the package is associated with the namespace specified in the `sfdx-project.json` file.

### Share Release Notes and Post-Install Instructions

Share details about what’s new and changed in a released unlocked package with your users.

Share details about what’s new and changed in an unlocked package with your users. You can specify a release notes URL to display on the package detail page in the user’s org. And you can share instructions about using your package by specifying a post install URL. The release notes and post install URLs display on the Installed Packages page in Setup, after a successful package installation. For users who install packages using an installation URL, the package installer page displays a link to release notes. And users are redirected to your post install URL following a successful package installation or upgrade.

Specify the `postInstallUrl` and `releaseNotesUrl` attributes in the `packageDirectories` section for the package.

```json
"packageDirectories": [ 
  { 
    "path": "expenser-schema",
    "default": true,
    "package": "Expense Schema",
    "versionName": ""ver 0.3.2"",
    "versionNumber": "0.3.2.NEXT",
    "postInstallUrl": "https://expenser.com/post-install-instructions.html",
    "releaseNotesUrl": "https://expenser.com/winter-2020-release-notes.html"
  },
  {
    "namespace": "",
    "sfdcLoginUrl": "https://login.salesforce.com",
    "sourceApiVersion": "47.0",
    "packageAliases": { 
      "Expenser Schema": "0HoB00000004CzHKAU",
      "Expenser Schema@0.1.0-I": "04tB0000000719qIAA"
    }
  }
] 
```

You can also use the `--postinstallurl` and the `--releasenotesurl` Salesforce CLI parameters with the `force:package:version:create` command. The CLI parameters override the URLs specified in the `sfdx-project.json` file.

### Best Practices for Unlocked Packages

We suggest that you follow these best practices when working with unlocked packages.

- We recommend that you work with only one Dev Hub, and enable Dev Hub in a production org.
• The Dev Hub org against which you run the `force:package:create` command becomes the owner of the package. If the Dev Hub org associated with a package expires or is deleted, its packages no longer work.

• Use care in deciding how to utilize namespaces. For most customers, we recommend working with no namespace or a single namespace to avoid unnecessary complexity in managing components. If you’re test-driving unlocked packages, use a test namespace. Use real namespaces only when you’re ready to embark on a development path headed for release in a production org.

  ✨ Note: You can’t install a no-namespace, unlocked package into any org with a namespace (for example, a scratch org with a namespace).

• Include the `--tag` option when you use the `package:version:create` and `package:version:update` commands. This option helps you keep your version control system tags in sync with specific package versions.

• Create user-friendly aliases for packaging IDs, and include those aliases in your Salesforce DX project file and when running CLI packaging commands. See: Package IDs and Aliases.

Package IDs and Aliases

When you create a package or package version, Salesforce CLI creates a package alias based on the package name, and stores that name in the `sfdx-project.json` file. When you run CLI commands or write scripts to automate packaging workflows, it’s often easier to reference the package alias, instead of the package ID or package version ID.

Package aliases are stored in the `sfdx-project.json` file as name-value pairs, in which the name is the alias and the value is the ID. You can modify package aliases for existing packages and package versions in the project file.

At the command line, you also see IDs for things like package members (a component in a package) and requests (like a `package:version:create` request).

  ✨ Note: As a shortcut, the documentation sometimes refers to an ID by its three-character prefix. For example, a package version ID always starts with `04t`.

Here are the most commonly used IDs.

<table>
<thead>
<tr>
<th>ID Example</th>
<th>Short ID Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>04t6A00000004eytQAA</td>
<td>Subscriber Package Version ID</td>
<td>Use this ID to install a package version. Returned by <code>force:package:version:create</code>.</td>
</tr>
<tr>
<td>0Hoxx00000000CqCAI</td>
<td>Package ID</td>
<td>Use this ID on the command line to create a package version. Or enter it into the <code>sfdx-project.json</code> file and use the directory name. Generated by <code>force:package:create</code>.</td>
</tr>
<tr>
<td>08cxx00000000BEAAY</td>
<td>Version Creation Request ID</td>
<td>Use this ID to view the status and monitor progress for a specific request to create a package version such as <code>force:package:version:create:report</code>.</td>
</tr>
</tbody>
</table>

Frequently Used Packaging Operations

For a complete list of Salesforce CLI packaging commands, see: Salesforce Command Line Reference Guide.
Salesforce CLI command | What it Does
---|---
force:package:create | Creates a package. When you create a package, you specify its package type and name, among other things.
force:package:install | Installs a package version in a scratch, sandbox, or production org.
force:package:uninstall | Removes a package that has been installed in an org. This process deletes the metadata and data associated with the package.
force:package:version:promote | Changes the state of the package version from beta to the managed-released state.
force:org:create | Creates a scratch org.
force:org:open | Opens an org in the browser.

Create a Package

A package is a top-level container that holds important details about the app or package: the package name, description, and associated namespace.

You supply the package details in the package descriptor section of your `sfdx-project.json` project configuration file.

Generate the Package

When you're ready to test or share your package, use the `force:package:create` command to create a package.

Generate a Package Version

A package version is a fixed snapshot of the package contents and related metadata. The package version lets you manage changes and track what’s different each time you release or deploy a specific set of changes.

Code Coverage for Unlocked Packages

Although code coverage isn’t enforced for unlocked packages, it’s a best practice to include Apex tests in your unlocked packages.

Release an Unlocked Package

Each new package version is marked as beta when it’s created. As you develop your package, you may create several package versions before you create a version that is ready to be released and installed in production orgs.

Update a Package Version

You can update most properties of a package version from the command line. For example, you can change the package version name or description. One important exception is that you can’t change the release status.

View Package Details

View the details of previously created packages and package versions from the command line.

Generate the Package

When you’re ready to test or share your package, use the `force:package:create` command to create a package.

If you are using a namespace, specify the package namespace in the `sfdx-project.json` file. To learn more, see Understanding Namespaces.
To create the package, change to the project directory. The name becomes the package alias, which is automatically added to the project file.

```bash
sfdx force:package:create --name "Expenser App" --packagetype Unlocked --path "expenser-main" \
--targetdevhubusername my-hub
```

The output is similar to this example.

```bash
sfdx-project.json has been updated. Successfully created a package. 0HoB00000004CzHKAU
```

<table>
<thead>
<tr>
<th>NAME</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Package Id</td>
<td>0HoB00000004CzHKAU</td>
</tr>
</tbody>
</table>

### Update the Package

To update the name or description of an existing package, use this command.

```bash
sfdx force:package:update --package "Expense App" --name "Expense Manager App" --description "New Description"
```

⚠️  Note: You can’t change the package namespace or package type after you create the package.

### Generate a Package Version

A package version is a fixed snapshot of the package contents and related metadata. The package version lets you manage changes and track what’s different each time you release or deploy a specific set of changes.

Before you create a package version, first verify package details, such as the package name, dependencies, and major, minor, and patch version numbers, in the `sfdx-project.json` file. Verify that the metadata you want to change or add in the new package version is located in the package’s main directory.

### How Many Package Versions Can I Create Per Day?

Run this command to see how many package versions you can create per day and how many you have remaining.

```bash
sfdx force:limits:api:display
```

Look for the `Package2VersionCreates` entry.

<table>
<thead>
<tr>
<th>NAME</th>
<th>REMAINING</th>
<th>MAXIMUM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Package2VersionCreates</td>
<td>23</td>
<td>50</td>
</tr>
</tbody>
</table>
Create a Package Version

Create the package version with this command. Specify the package alias or ID (0Ho). You can also include a scratch definition file that contains a list of features and setting that the metadata of the package version depends on.

```
sfdx force:package:version:create --package "Expenser App" --installationkey "HIF83kS8kS7C"
\n--definitionfile config/project-scratch-def.json --wait 10
```

**Note:** When creating a package version, specify a `--wait` time to run the command in non-asynchronous mode. If the package version is created within that time, the `sfdx-project.json` file is automatically updated with the package version information. If not, you must manually edit the project file.

It can be a long-running process to create a package version, depending on the package size and other variables. You can easily view the status and monitor progress.

```
sfdx force:package:version:create:report --packagecreaterequestid 08cxx00000000YDAAY
```

The output shows details about the request.

```
<table>
<thead>
<tr>
<th>NAME</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version Create Request Id</td>
<td>08cB000000004CBxIAM</td>
</tr>
<tr>
<td>Status</td>
<td>InProgress</td>
</tr>
<tr>
<td>Package Id</td>
<td>0HoB000000004ChKAE</td>
</tr>
<tr>
<td>Package Version Id</td>
<td>05iB0000000CaaNIAS</td>
</tr>
<tr>
<td>Subscriber Package Version Id</td>
<td>04tB0000000NOimIAG</td>
</tr>
<tr>
<td>Tag</td>
<td>git commit id 08dcfsdf</td>
</tr>
<tr>
<td>Branch</td>
<td></td>
</tr>
<tr>
<td>CreatedDate</td>
<td>2018-05-08 09:48</td>
</tr>
<tr>
<td>Installation URL</td>
<td><a href="https://login.salesforce.com/packaging/installPackage.apexp?p0=04tB0000000NOimIAG">https://login.salesforce.com/packaging/installPackage.apexp?p0=04tB0000000NOimIAG</a></td>
</tr>
</tbody>
</table>
```

You can find the request ID (08c) in the initial output of `force:package:version:create`.

Depending on the size of the package and other variables, the create request can take several minutes. When you have more than one pending request to create package versions, you can view a list of all requests with this command.

```
sfdx force:package:version:create:list --createdlastdays 0
```

Details for each request display as shown here (IDs and labels truncated).

```
<table>
<thead>
<tr>
<th>ID</th>
<th>STATUS</th>
<th>PACKAGE2 ID</th>
<th>PKG2 VERSION</th>
<th>ID SUB PKG2 VER ID</th>
<th>TAG</th>
<th>BRANCH</th>
<th>CREATED DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>08c...</td>
<td>Error</td>
<td>0Ho...</td>
<td>05i...</td>
<td>04t...</td>
<td></td>
<td></td>
<td>2017-06-22</td>
</tr>
<tr>
<td>08c...</td>
<td>Success</td>
<td>0Ho...</td>
<td>05i...</td>
<td>04t...</td>
<td></td>
<td></td>
<td>2017-06-23</td>
</tr>
</tbody>
</table>
```

Skip Validation to Quickly Iterate Package Development

Iterate package development more efficiently by skipping validation of dependencies, package ancestors, and metadata during package version creation. Skipping validation reduces the time it takes to create a new package version, but you can promote only validated package versions to the released state.

```
sfdx force:package:version:create --skipvalidation
```
In Tooling API, use the SkipValidation field on the `Package2VersionCreateRequest` object.

**Note:** You can't specify both skip validation and code coverage, because code coverage is calculated during validation.

### Code Coverage for Unlocked Packages

Although code coverage isn’t enforced for unlocked packages, it’s a best practice to include Apex tests in your unlocked packages.

To compute code coverage using Salesforce CLI, use the `--codecoverage` parameter when you run the `force:package:version:create` command.

Package version creation may take longer to complete when code coverage is being computed, so consider when to include the code coverage parameter.

View code coverage information for a package version using `force:package:version:list` with the `--verbose` parameter, or `force:package:version:report` command in Salesforce CLI.

### Release an Unlocked Package

Each new package version is marked as beta when its created. As you develop your package, you may create several package versions before you create a version that is ready to be released and installed in production orgs.

Before you promote the package version, ensure that the user permission, **Promote a package version to released**, is enabled in the Dev Hub org associated with the package. Consider creating a permission set with this user permission, and then assign the permission set to the appropriate user profiles.

When you’re ready to release, use `force:package:version:promote`.

```
sfdx force:package:version:promote --package "Expense Manager@1.3.0-7"
```

If the command is successful, a confirmation message appears.

```
Successfully promoted the package version, ID: 04tB0000000719qIAA to released.
```

After the update succeeds, view the package details.

```
sfdx force:package:version:report --package "Expense Manager@1.3.0.7"
```

Confirm that the value of the Released property is `true`.

<table>
<thead>
<tr>
<th><strong>--- Package Version</strong></th>
<th><strong>VALUE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>ver 1.0</td>
</tr>
<tr>
<td>Alias</td>
<td>Expense Manager-1.0.0.5</td>
</tr>
<tr>
<td>Package Version Id</td>
<td>05iB0000000CaahIAC</td>
</tr>
<tr>
<td>Package Id</td>
<td>0HoB0000000CbmbKAC</td>
</tr>
<tr>
<td>Subscriber Package Version Id</td>
<td>04tB0000000NPbBIAW</td>
</tr>
<tr>
<td>Version</td>
<td>1.0.0.5</td>
</tr>
<tr>
<td>Description</td>
<td>update version</td>
</tr>
<tr>
<td>Branch</td>
<td></td>
</tr>
<tr>
<td>Tag</td>
<td>git commit id 08dcfsdf</td>
</tr>
<tr>
<td>Released</td>
<td>true</td>
</tr>
<tr>
<td>Created Date</td>
<td>2018-05-08 09:48</td>
</tr>
<tr>
<td>Installation URL</td>
<td><a href="https://login.salesforce.com/packaging/installPackage.apexp?p0=04tB0000000NPbBIAW">https://login.salesforce.com/packaging/installPackage.apexp?p0=04tB0000000NPbBIAW</a></td>
</tr>
</tbody>
</table>
You can promote and release only once for each package version number, and you can’t undo this change.

### Update a Package Version

You can update most properties of a package version from the command line. For example, you can change the package version name or description. One important exception is that you can’t change the release status.

If the most recent package version has been released, increment either the major, minor, or patch version number for the next package version you create.

Package version numbers use the format major.minor.patch.build. For example, if you released package 1.0.0.2, you could use 1.1.0.0, 2.0.0.0, or 1.0.1.0 for the next package version.

### View Package Details

View the details of previously created packages and package versions from the command line.

To display a list of all packages in the Dev Hub org, use this command:

```
sfxc force:package:list --targetdevhubusername my-hub
```

You can view the namespace, package name, ID, and other details in the output.

<table>
<thead>
<tr>
<th>Name</th>
<th>Id</th>
<th>Alias</th>
<th>Description</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenser App</td>
<td>0HoB00000004CrKIAU</td>
<td>Expenser App</td>
<td></td>
<td>Unlocked</td>
</tr>
<tr>
<td>Expenser Logic</td>
<td>0HoB00000004CzMKIAU</td>
<td>Expenser Logic</td>
<td></td>
<td>Unlocked</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>0HoB00000004CzHKIAU</td>
<td>Expenser Schema</td>
<td></td>
<td>Unlocked</td>
</tr>
</tbody>
</table>

Include optional parameters to filter the list results based on the modification date, creation date, and to order by specific fields or package IDs. To limit the details, use `--concise`. To show expanded details, use `--verbose`.

To display a list of all package versions in the Dev Hub org, use this command:

```
sfxc force:package:version:list --targetdevhubusername my-hub
```

You can view the namespace, version name, and other details in the output.

<table>
<thead>
<tr>
<th>Package Name</th>
<th>Namespace</th>
<th>Version</th>
<th>Sub Pkg Ver Id</th>
<th>Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenser Schema</td>
<td>true</td>
<td>0.1.0.1</td>
<td>04tB0000000719qIAA</td>
<td>Expenser Schema@0.1.0-1 false</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>true</td>
<td>0.2.0.1</td>
<td>04tB000000071AjIAI</td>
<td>Expenser Schema@0.2.0-1 false</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>false</td>
<td>0.3.0.1</td>
<td>04tB000000071AtIAI</td>
<td>Expenser Schema@0.3.0-1 false</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>true</td>
<td>0.3.0.2</td>
<td>04tB000000071AyIAI</td>
<td>Expenser Schema@0.3.0-2 false</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>false</td>
<td>0.3.1.1</td>
<td>04tB0000000KGu6IAO</td>
<td>Expenser Schema@0.3.1-1 false</td>
</tr>
<tr>
<td>Expenser Schema</td>
<td>true</td>
<td>0.3.1.2</td>
<td>04tB0000000KGu8IAA</td>
<td>Expenser Schema@0.3.1-2 false</td>
</tr>
</tbody>
</table>
Install a Package

Install unlocked packages using the CLI or the browser. You can install package versions in a scratch org, sandbox org, DE org, or production org.

Install Packages with the CLI
If you’re working with the Salesforce CLI, you can use the `force:package:install` command to install packages in a scratch org or target subscriber org.

Install Packages from a URL
Install unlocked packages from the CLI or from a browser, similar to how you install managed packages.

Upgrade a Package Version
Are you introducing metadata changes to an existing package? You can use the CLI to upgrade one package version to another.

Sample Script for Installing Packages with Dependencies
Use this sample script as a basis to create your own script to install packages with dependencies. This script contains a query that finds dependent packages and installs them in the correct dependency order.

Install Packages with the CLI
If you’re working with the Salesforce CLI, you can use the `force:package:install` command to install packages in a scratch org or target subscriber org.

Before you install a package to a scratch org, run this command to list all the packages and locate the ID or package alias.

```
sfdx force:package:version:list
```

Identify the version you want to install. Enter this command, supplying the package alias or package ID (starts with 04t).

```
sfdx force:package:install --package "Expense Manager@1.2.0-12" --targetusername jdoe@example.com
```

If you’ve already set the scratch org with a default username, enter just the package version ID.

```
sfdx force:package:install --package "Expense Manager@1.2.0-12"
```

**Note:** If you’ve defined an alias (with the `-a` parameter), you can specify the alias instead of the username for `--targetusername`.

The CLI displays status messages regarding the installation.

```
Waiting for the subscriber package version install request to get processed. Status = InProgress Successfully installed the subscriber package version: 04txx0000000F1uAAM.
```
Control Package Installation Timeouts

When you issue a `force:package:install` command, it takes a few minutes for a package version to become available in the target org and for installation to complete. To allow sufficient time for a successful install, use these parameters that represent mutually exclusive timers.

- **--publishwait** defines the maximum number of minutes that the command waits for the package version to be available in the target org. The default is 0. If the package is not available in the target org in this time frame, the install is terminated.

  Setting `--publishwait` is useful when you create a new package version and then immediately try to install it to target orgs.

  **Note:** If `--publishwait` is set to 0, the package installation immediately fails, unless the package version is already available in the target org.

- **--wait** defines the maximum number of minutes that the command waits for the installation to complete after the package is available. The default is 0. When the `--wait` interval ends, the install command completes, but the installation continues until it either fails or succeeds. You can poll the status of the installation using `sfdx force:package:install:report`.

  **Note:** The `--wait` timer takes effect after the time specified by `--publishwait` has elapsed. If the `--publishwait` interval times out before the package is available in the target org, the `--wait` interval never starts.

For example, consider a package called Expense Manager that takes five minutes to become available on the target org, and 11 minutes to install. The following command has `publishwait` set to three minutes and `wait` set to 10 minutes. Because Expense Manager requires more time than the set `publishwait` interval, the installation is aborted at the end of the three minute `publishwait` interval.

```
sfdx force:package:install --package "Expense Manager@1.2.0-12" --publishwait 3 --wait 10
```

The following command has `publishwait` set to six minutes and `wait` set to 10 minutes. If not already available, Expense Manager takes five minutes to become available on the target org. The clock then starts ticking for the 10 minute `wait` time. At the end of 10 minutes, the command completes because the `wait` time interval has elapsed, although the installation is not yet complete. At this point, `package:install:report` indicates that the installation is in progress. After one more minute, the installation completes and `package:install:report` indicates a successful installation.

```
sfdx force:package:install --package "Expense Manager@1.2.0-12" --publishwait 6 --wait 10
```

Install Packages from a URL

Install unlocked packages from the CLI or from a browser, similar to how you install managed packages.

If you create packages from the CLI, you can derive an installation URL for the package by adding the subscriber package ID to your Dev Hub URL. You can use this URL to test different deployment or installation scenarios.

For example, if the package version has the subscriber package ID, 04tB00000009oZ3JBI, add the ID as the value of `apvId`.

```
https://my-domain.lightning.force.com/packagingSetupUI/ipLanding.app?apvId=04tB00000009oZ3JBI
```

Anyone with the URL and a valid login to a Salesforce org can install the package.

To install the package:

1. In a browser, enter the installation URL.
2. Enter your username and password for the Salesforce org in which you want to install the package, and then click **Login**.
3. If the package is protected by an installation key, enter the installation key.
4. For a default installation, click **Install**.

   A message describes the progress. You receive a confirmation message when the installation is complete.
Upgrade a Package Version

Are you introducing metadata changes to an existing package? You can use the CLI to upgrade one package version to another.

When you upgrade to a new package version, determine whether to compile all Apex in the org and package (--apexcompile all), or only the Apex in the package (--apexcompile package).

When you perform a package upgrade, here’s what to expect for metadata changes.

- Metadata introduced in the new version is installed as part of the upgrade.
- If an upgraded component has the same API name as a component already in the target org, the component is overwritten with the changes.
- If a component in the upgrade was deleted from the target org, the component is re-created during the upgrade.
- Metadata that was removed in the new package version is also removed from the target org as part of the upgrade. Some examples where metadata is deprecated and not deleted are:
  - User-entered data in custom objects and fields are deprecated and not deleted. Admins can export such data if necessary.
  - An object such as an Apex class is deprecated and not deleted if it is referenced in a Lightning component that is part of the package.

- In API version 45.0 and later (salesforcedx plug-in for Salesforce CLI version 45.0.9 or later), you can specify what happens to removed metadata during package upgrade. Use the `force:package:install` command's `-t | --upgradetype` parameter, specifying one of these values:
  - `Delete` specifies to delete all removed components, except for custom objects and custom fields, that don’t have dependencies.
  - `DeprecateOnly` specifies that all removed components must be marked deprecated. The removed metadata exists in the target org after package upgrade, but is shown in the UI as deprecated from the package. This option is useful when migrating metadata from one package to another.
  - `Mixed` (the default) specifies that some removed components are deleted, and other components are marked deprecated. For more information on hard-deleted components, see Metadata Coverage.

Sample Script for Installing Packages with Dependencies

Use this sample script as a basis to create your own script to install packages with dependencies. This script contains a query that finds dependent packages and installs them in the correct dependency order.

Sample Script

```bash
#!/bin/bash
# The execution of this script stops if a command or pipeline has an error.
# For example, failure to install a dependent package will cause the script
# to stop execution.
```

Note: Be sure to replace the package version ID and scratch org user name with your own specific details.
set -e

# Specify a package version id (starts with 04t)
# If you know the package alias but not the id, use force:package:version:list to find it.
PACKAGE=04tB0000000NmnHIAS

# Specify the user name of the subscriber org.
USER_NAME=test-bvdf3m9tqdf@example.com

# Specify the timeout in minutes for package installation.
WAIT_TIME=15

echo "Retrieving dependencies for package Id: "$PACKAGE

# Execute soql query to retrieve package dependencies in json format.
RESULT_JSON=`sfdx force:data:soql:query -u $USER_NAME -t -q "SELECT Dependencies FROM SubscriberPackageVersion WHERE Id='$PACKAGE'" --json`

# Parse the json string using python to test whether the result json contains a list of ids or not.
DEPENDENCIES=`echo $RESULT_JSON | python -c 'import sys, json; print json.load(sys.stdin)
"result")["records"][0]["Dependencies"]\''

# If the parsed dependencies is None, the package has no dependencies. Otherwise, parse the result into a list of ids.
if [[ "$DEPENDENCIES" != 'None' ]]; then
    DEPENDENCIES=`echo $RESULT_JSON | python -c 'import sys, json
ids = json.load(sys.stdin)
"result")["records"][0]["Dependencies"]\"ids"
dependencies = []
for id in ids:

    echo "Installing dependent package id: $id"
    sfdx force:package:install -l "$id"

    echo "Sleeping for $WAIT_TIME minutes..."
    sleep $WAIT_TIME

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_TIME minutes...

    echo "Sleeping for $WAIT_Time}
dependencies.append(id["subscriberPackageVersionId"])  
print " ".join(dependencies)  

    echo "The package you are installing depends on these packages (in correct dependency order): "$DEPENDENCIES  
    for id in $DEPENDENCIES  
        do  
            echo "Installing dependent package: "$id  
            sfdx force:package:install --package $id -u $USER_NAME -w $WAIT_TIME --publishwait 10  
        done  
    else  
        echo "The package has no dependencies"  
    fi  

    # After processing the dependencies, proceed to install the specified package.  
    echo "Installing package: "$PACKAGE  
    sfdx force:package:install --package $PACKAGE -u $USER_NAME -w $WAIT_TIME --publishwait 10  
    exit 0;

Migrate Deprecated Metadata from Unlocked Packages

You can deprecate metadata in an unlocked package, move that metadata to a new package, and then install the new package in your production org.

As you create more unlocked packages, you can refactor your package and move metadata from one unlocked package to another unlocked package if necessary.

To move production metadata from package A to package B, follow these steps.

1. Identify the metadata to be moved from package A to package B.
2. Remove the metadata from package A, create a version, and release the package.
3. Add the metadata to package B, create a version, and release the package.
4. In your production org, upgrade package A.
5. In your production org, install package B.

Your metadata is now a part of package B in your production org.

## Uninstall a Package

You can uninstall a package from a subscriber org using Salesforce CLI or from the Setup UI. When you uninstall unlocked packages, all components in the package are deleted from the org.

To use the CLI to uninstall a package from the target org, authorize the Dev Hub org and run this command.

```
sfdx force:package:uninstall --package "Expense Manager@2.3.0-5"
```

You can also uninstall a package from the web browser. Open the Salesforce org where you installed the package.

```
sfdx force:org:open -u me@my.org
```

Then uninstall the package.

1. From Setup, enter *Installed Packages* in the Quick Find box, then select *Installed Packages*.
2. Click **Uninstall** next to the package that you want to remove.
3. Select **Yes, I want to uninstall** and click **Uninstall**.
4. After an uninstall, Salesforce automatically creates an export file containing the package data, associated notes, and any attachments. When the uninstall is complete, Salesforce sends an email containing a link to the export file to the user performing the uninstall.

   The export file and related notes and attachments are listed below the list of installed packages. We recommend storing the file elsewhere because it's available for only two days after the uninstall completes, then it's deleted from the server.

   - **Tip:** If you reinstall the package later and want to reimport the package data, see Importing Package Data.
Continuous integration (CI) is a software development practice in which developers regularly integrate their code changes into a source code repository. To ensure that the new code does not introduce bugs, automated builds and tests run before or after developers check in their changes.

Many third-party CI tools are available for you to choose from. Salesforce DX easily integrates into these tools so that you can set up continuous integration for your Salesforce applications.

SEE ALSO:
Trailhead: Build an Automated CI/CD Pipeline with GitLab
Continuous Integration Using CircleCI

CircleCI is a commonly used integration tool that integrates with your existing version control system to push incremental updates to the environments you specify. CircleCI can be used as a cloud-based or on-premise tool. These instructions demonstrate how to use GitHub, CircleCI, and your Dev Hub org for continuous integration.

Configure Your Environment for CircleCI

Before integrating your existing CircleCI framework, configure your Dev Hub org and CircleCI project.

Connect CircleCI to Your DevHub

Authorize CircleCI to push content to your Dev Hub via a connected app.

SEE ALSO:

CircleCI
The sfdx-circleci Github Repo

Configure Your Environment for CircleCI

Before integrating your existing CircleCI framework, configure your Dev Hub org and CircleCI project.

1. Set up your GitHub repository with CircleCI. You can follow the sign-up steps on the CircleCI website to access your code on GitHub.
2. Install the Salesforce CLI, if you haven't already.
3. Follow Authorize an Org Using the JWT-Based Flow for your Dev Hub org, if you haven't already.
4. Encrypt your server key.
   a. First, generate a key and initialization vector (iv) to encrypt your server.key file locally. CircleCI uses the key and iv to decrypt your server key in the build environment.
      Run the following command in the directory containing your server.key file. For the <passphrase> value, enter a word of your own choosing to create a unique key.

      ```
      openssl enc -aes-256-cbc -k <passphrase> -P -md sha1 -nosalt
      ```

      The key and iv value display in the output.

      ```
      key=****24B2
      iv =****DA58
      ```

   b. Note the key and iv values, you need them later.
   c. Encrypt the server.key file using the newly generated key and iv values. Run the following command in the directory containing your server.key file, replacing <key> and <iv> with the values from the previous step.

      ```
      openssl enc -nosalt -aes-256-cbc -in server.key -out server.key.enc -base64 -K <key> -iv <iv>
      ```

   Note: Use the key and iv values only once, and don't use them to encrypt more than the server.key. While you can reuse this pair to encrypt other things, it is considered a security violation to do so.

   You generate a new key and iv value every time you run the command in step a. In other words, you can't regenerate the same pair. If you lose these values you must generate new ones and encrypt again.
Next, you’ll store the key, iv, and contents of server.key.enc as protected environment variables in the CircleCI UI. These values are considered secret, so take the appropriate precautions to protect them.

**Connect CircleCI to Your DevHub**

Authorize CircleCI to push content to your Dev Hub via a connected app.

1. Make sure that you have the Salesforce CLI installed. Check by running `sfdx force --help` and confirm that you see the command output. If you don’t have it installed, see [Install the Salesforce CLI](#).
2. Confirm you can perform a JWT-based authorization from the directory containing your server.key file. Run the following command from the directory containing your server.key (replace `<your_consumer_key>` and `<your_username>` values where indicated).

   ```bash
   sfdx force:auth:jwt:grant --clientid <your_consumer_key> --jwtkeyfile server.key --username <your_username> --setdefaultdevhubusername
   ```

3. [Fork](#) the sfdx-circleci repo into your GitHub account using the Fork link at the top of the page.
4. Create a local directory for this project and clone your forked repo locally into the new directory. Replace `<git_username>` with your own GitHub username.

   ```bash
   git clone https://github.com/<git_username>/sfdx-circleci.git
   ```

5. Retrieve the generated consumer key from your JWT-Based Authorization connected app. From Setup, in the Quick Find box, enter App, and then select **App Manager**. Select View in the row-menu next to the connected app.
6. In the CircleCI UI, you should see a project named sfdx-circleci. In the project settings, store the consumer key in a CircleCI environment variable named **HUB_CONSUMER_KEY**. For more information, see the CircleCI documentation [Setting an Environment Variable in a Project](#).
7. Store the username that you use to access your Dev Hub in a CircleCI environment variable named **HUB_SFDX_USER** using the CircleCI UI.
8. Store the key and iv values from Encrypt Your Server Key in CircleCI environment variables named **DECRYPTION_KEY** and **DECRYPTION_IV**, respectively. When you finish setting the environment variables, your project screen should look like the following image.
Note: In the directory containing your server.key file, use the command `rm server.key` to remove the server.key. Never store keys or certificates in a public place.

You’re ready to go! Now when you commit and push a change, your change kicks off a CircleCI build.

**Contributing to the Repository**

If you find any issues or opportunities for improving this repository, fix them! Feel free to contribute to this project, fork this repository, and then change the content. Once you’ve made your changes, share them back with the community by sending a pull request. See How to send pull requests for more information about contributing to GitHub projects.

**Reporting Issues**

If you find any issues with this demo that you can’t fix, feel free to report them in the issues section of this repository.

---

**Continuous Integration Using Jenkins**

Jenkins is an open-source, extensible automation server for implementing continuous integration and continuous delivery. You can easily integrate Salesforce DX into the Jenkins framework to automate testing of Salesforce applications against scratch orgs.

To integrate Jenkins, we assume:

- You are familiar with how Jenkins works. You can configure and use Jenkins in many ways. We focus on integrating Salesforce DX into Jenkins multibranch pipelines.
- The computer on which the Jenkins server is running has access to your version control system and to the repository that contains your Salesforce application.

**Configure Your Environment for Jenkins**

Before integrating Salesforce DX into your existing Jenkins framework, configure your Jenkins environment.
Jenkinsfile Walkthrough

The sample Jenkinsfile shows how to integrate Salesforce DX into a Jenkins job. The sample uses Jenkins multibranch pipelines. Every Jenkins setup is different. This walkthrough describes one of the ways to automate testing of your Salesforce applications. The walkthrough highlights the Salesforce DX CLI commands to create a scratch org, upload your code, and run your tests.

Sample Jenkinsfile

A Jenkinsfile is a text file that contains the definition of a Jenkins Pipeline. This Jenkinsfile shows how to integrate the Salesforce DX CLI commands to automate testing of your Salesforce applications using scratch orgs.

SEE ALSO:

Jenkins
Pipeline-as-code with Multibranch Workflows in Jenkins

Configure Your Environment for Jenkins

Before integrating Salesforce DX into your existing Jenkins framework, configure your Jenkins environment.

1. In your Dev Hub org, create a connected app as described by the JWT-based authorization flow. This step includes obtaining or creating a private key and digital certificate.

Make note of your consumer key (sometimes called a client ID) when you save the connected app. You need the consumer key to set up your Jenkins environment. Also have available the private key file used to sign the digital certificate.

2. On the computer that is running the Jenkins server, do the following.
   a. Download and install the Salesforce DX CLI.
   b. Store the private key file as a Jenkins Secret File using the Jenkins Admin Credentials interface. Make note of the new entry’s ID. You later reference this Credentials entry in your Jenkinsfile.
   c. Set the following variables in your Jenkins environment.
      • HUB_ORG_DH—The username for the Dev Hub org, such as juliet.capulet@myenvhub.com.
      • SFDC_HOST_DH—The login URL of the Salesforce instance that is hosting the Dev Hub org. The default is https://login.salesforce.com
      • CONNECTED_APP_CONSUMER_KEY_DH—The consumer key that was returned after you created a connected app in your Dev Hub org.
      • JWT_CRED_ID_DH—The credentials ID for the private key file that you stored in the Jenkins Admin Credentials interface. The names for these environment variables are just suggestions. You can use any name as long as you specify it in the Jenkinsfile.

You can also optionally set the SFDX_AUTOUPDATE_DISABLE variable to true to disable auto-update of the Salesforce CLI. CLI auto-update can interfere with the execution of a Jenkins job.

3. Set up your Salesforce DX project so that you can create a scratch org.
4. (Optional) Install the Custom Tools Plugin into your Jenkins console, and create a custom tool that references the Salesforce CLI. The Jenkins walkthrough assumes that you created a custom tool named toolbelt in the /usr/local/bin directory, which is the directory in which the Salesforce CLI is installed.

SEE ALSO:
- Authorize an Org Using the JWT-Based Flow
- Salesforce DX Setup Guide
- Jenkins: Credentials Binding Plugin
- Project Setup

Jenkinsfile Walkthrough

The sample Jenkinsfile shows how to integrate Salesforce DX into a Jenkins job. The sample uses Jenkins multibranch pipelines. Every Jenkins setup is different. This walkthrough describes one of the ways to automate testing of your Salesforce applications. The walkthrough highlights the Salesforce DX CLI commands to create a scratch org, upload your code, and run your tests.

We assume that you are familiar with the structure of the Jenkinsfile, Jenkins Pipeline DSL, and the Groovy programming language. This walkthrough focuses solely on Salesforce DX information. See the Salesforce DX Command Reference regarding the commands used.

This Salesforce DX workflow most closely corresponds to Jenkinsfile stages.

- Define Variables
- Check Out the Source Code
- Wrap All Stages in a withCredentials Command
- Authorize Your Dev Hub Org and Create a Scratch Org
- Push Source and Assign a Permission Set
- Run Apex Tests
- Delete the Scratch Org

Define Variables

Use the `def` keyword to define the variables required by the Salesforce DX CLI commands. Assign each variable the corresponding environment variable that you previously set in your Jenkins environment.

```groovy
def HUB_ORG=env.HUB_ORG_DH
def SFDC_HOST = env.SFDC_HOST_DH
def JWT_KEY_CRED_ID = env.JWT_CRED_ID_DH
def CONNECTED_APP_CONSUMER_KEY=env.CONNECTED_APP_CONSUMER_KEY_DH
```

Define the `SFDC_USERNAME` variable, but don’t set its value. You do that later.

```groovy
def SFDC_USERNAME
```

Although not required, we assume you’ve used the Jenkins Global Tool Configuration to create the `toolbelt` custom tool that points to the CLI installation directory. In your Jenkinsfile, use the tool command to set the value of the `toolbelt` variable to this custom tool.

```groovy
def toolbelt = tool 'toolbelt'
```

You can now reference the Salesforce CLI executable in the Jenkinsfile using `${toolbelt}/sfdx`.  

184
Check Out the Source Code

Before testing your code, get the appropriate version or branch from your version control system (VCS) repository. In this example, we use the `checkout scm` Jenkins command. We assume that the Jenkins administrator has already configured the environment to access the correct VCS repository and check out the correct branch.

```groovy
stage('checkout source') {
    // when running in multi-branch job, one must issue this command
    checkout scm
}
```

Wrap All Stages in a withCredentials Command

You previously stored the JWT private key file as a Jenkins Secret File using the Credentials interface. Therefore, you must use the `withCredentials` command in the body of the `Jenkinsfile` to access the secret file. The `withCredentials` command lets you name a credential entry, which is then extracted from the credential store and provided to the enclosed code through a variable.

When using `withCredentials`, put all stages within its code block.

This example stores the credential ID for the JWT key file in the variable `JWT_KEY_CRED_ID`. You defined `JWT_KEY_CRED_ID` earlier and set it to its corresponding environment variable. The `withCredentials` command fetches the contents of the secret file from the credential store and places the contents in a temporary location. The location is stored in the variable `jwt_key_file`. You use the `jwt_key_file` variable with the `force:auth:jwt` command to specify the private key securely.

```groovy
withCredentials([file(credentialsId: JWT_KEY_CRED_ID, variable: 'jwt_key_file')]) {
    # all stages will go here
}
```

Authorize Your Dev Hub Org and Create a Scratch Org

The `dreamhouse-sfdx` example uses one stage to authorize the Dev Hub org and create a scratch org.

```groovy
stage('Create Scratch Org') {
    rc = sh returnStatus: true, script: "${toolbelt}/sfdx force:auth:jwt:grant --clientid ${CONNECTED_APP_CONSUMER_KEY} --username ${HUB_ORG} --jwtkeyfile ${jwt_key_file} --setdefaultdevhubusername --instanceurl ${SFDC_HOST}"
    if (rc != 0) { error 'hub org authorization failed' }

    // need to pull out assigned username
    rmsg = sh returnStdout: true, script: "${toolbelt}/sfdx force:org:create --definitionfile config/project-scratch-def.json --json --setdefaultusername"
    printf rmsg
    def jsonSlurper = new JsonSlurperClassic()
    def robj = jsonSlurper.parseText(rmsg)
    if (robj.status != "ok") { error 'org creation failed: ' + robj.message }
    SFDC_USERNAME=robj.username
    robj = null
}
```

Use the `force:auth:jwt:grant` CLI command to authorize your Dev Hub org.
You are required to run this step only once, but we suggest you add it to your Jenkinsfile and authorize each time you run the Jenkins job. This way you're always sure that the Jenkins job is not aborted due to lack of authorization. There is typically little harm in authorizing multiple times, although keep in mind that the API call limit for your scratch org's edition still applies.

Use the parameters of the `force:auth:jwt:grant` command to provide information about the Dev Hub org that you are authorizing. The values for the `--clientid`, `--username`, and `--instanceurl` parameters are the `CONNECTED_APP_CONSUMER_KEY`, `HUB_ORG`, and `SFDC_HOST` environment variables you previously defined, respectively. The value of the `--jwtkeyfile` parameter is the `jwt_key_file` variable that you set in the previous section using the `withCredentials` command. The `--setdefaultdevhubusername` parameter specifies that this `HUB_ORG` is the default Dev Hub org for creating scratch orgs.

Use the `force:org:create` CLI command to create a scratch org. In the example, the CLI command uses the `config/project-scratch-def.json` file (relative to the project directory) to create the scratch org. The `--json` parameter specifies that the output be in JSON format. The `--setdefaultusername` parameter sets the new scratch org as the default.

The Groovy code that parses the JSON output of the `force:org:create` command extracts the username that was auto-generated as part of the org creation. This username, stored in the `SFDC_USERNAME` variable, is used with the CLI commands that push source, assign a permission set, and so on.

### Push Source and Assign a Permission Set

Let's populate your new scratch org with metadata. This example uses the `force:source:push` command to upload your source to the org. The source includes all the pieces that make up your Salesforce application: Apex classes and test classes, permission sets, layouts, triggers, custom objects, and so on.

```groovy
stage('Push To Test Org') {

    rc = sh returnStatus: true, script: "${toolbelt}/sfdx force:source:push --targetusername ${SFDC_USERNAME}"
    if (rc != 0) {
        error 'push all failed'
    }
    // assign permset
    rc = sh returnStatus: true, script: "${toolbelt}/sfdx force:user:permset:assign --targetusername ${SFDC_USERNAME} --permsetname DreamHouse"
    if (rc != 0) {
        error 'push all failed'
    }
}
```

Recall the `SFDC_USERNAME` variable that contains the auto-generated username that was output by the `force:org:create` command in an earlier stage. The code uses this variable as the argument to the `--targetusername` parameter to specify the username for the new scratch org.

The `force:source:push` command pushes all the Salesforce-related files that it finds in your project. Add a `.forceignore` file to your repository to list the files that you do not want pushed to the org.

After pushing the metadata, the example uses the `force:user:permset:assign` command to assign a permission set (named DreamHouse) to the `SFDC_USERNAME` user. The XML file that describes this permission set was uploaded to the org as part of the push.
Run Apex Tests

Now that your source code and test source have been pushed to the scratch org, run the `force:apex:test:run` command to run Apex tests.

```groovy
stage('Run Apex Test') {
    sh "mkdir -p ${RUN_ARTIFACT_DIR}"
    timeout(time: 120, unit: 'SECONDS') {
        rc = sh returnStatus: true, script: "${toolbelt}/sfdx force:apex:test:run --testlevel RunLocalTests --outputdir ${RUN_ARTIFACT_DIR} --resultformat tap --targetusername ${SFDC_USERNAME}"
        if (rc != 0) {
            error 'apex test run failed'
        }
    }
}
```

You can specify various parameters to the `force:apex:test:run` CLI command. In the example:

- The `--testlevel RunLocalTests` option runs all tests in the scratch org, except tests that originate from installed managed packages. You can also specify `RunSpecifiedTests` to run only certain Apex tests or suites or `RunAllTestsInOrg` to run all tests in the org.
- The `--outputdir` option uses the `RUN_ARTIFACT_DIR` variable to specify the directory into which the test results are written. Test results are produced in JUnit and JSON formats.
- The `--resultformat` tap option specifies that the command output is in Test Anything Protocol (TAP) format. The test results that are written to a file are still in JUnit and JSON formats.
- The `--targetusername` option specifies the username for accessing the scratch org (the value in SFDC_USERNAME).

The `force:apex:test:run` command writes its test results in JUnit format. You can collect the results using industry-standard tools as shown in the following example.

```groovy
stage('collect results') {
    junit keepLongStdio: true, testResults: 'tests/**/*-junit.xml'
}
```

Delete the Scratch Org

Salesforce reserves the right to delete a scratch org a specified number of days after it was created. You can also create a stage in your pipeline that uses `force:org:delete` to explicitly delete your scratch org when the tests complete. This cleanup ensures better management of your resources.

```groovy
stage('Delete Test Org') {
    timeout(time: 120, unit: 'SECONDS') {
        rc = sh returnStatus: true, script: "${toolbelt}/sfdx force:org:delete --targetusername ${SFDC_USERNAME} --noprompt"
        if (rc != 0) {
            error 'org deletion request failed'
        }
    }
}
```
A Jenkinsfile is a text file that contains the definition of a Jenkins Pipeline. This Jenkinsfile shows how to integrate the Salesforce DX CLI commands to automate testing of your Salesforce applications using scratch orgs.

The Jenkinsfile Walkthrough topic uses this Jenkinsfile as an example.

```groovy
#!/groovy
import groovy.json.JsonSlurperClassic
node {

    def BUILD_NUMBER=env.BUILD_NUMBER
    def RUN_ARTIFACT_DIR="tests/${BUILD_NUMBER}"
    def SFDC_USERNAME
    def HUB_ORG=env.HUB_ORG_DH
    def SFDC_HOST = env.SFDC_HOST_DH
    def JWT_KEY_CRED_ID = env.JWT_CRED_ID_DH
    def CONNECTED_APP_CONSUMER_KEY=env.CONNECTED_APP_CONSUMER_KEY_DH

def toolbelt = tool 'toolbelt'

stage('checkout source') {
    // when running in multi-branch job, one must issue this command
    checkout scm
}

withCredentials([file(credentialsId: JWT_KEY_CRED_ID, variable: 'jwt_key_file')]) {
    stage('Create Scratch Org') {

        rc = sh returnStatus: true, script: "${toolbelt}/sfdx force:auth:jwt:grant
--clientid ${CONNECTED_APP_CONSUMER_KEY} --username ${HUB_ORG} --jwtkeyfile ${jwt_key_file}
--setdefaultdevhubusername --instanceurl ${SFDC_HOST}"
        if (rc != 0) { error 'hub org authorization failed' }

        // need to pull out assigned username
        rmsg = sh returnStdout: true, script: "${toolbelt}/sfdx force:org:create
--definitionfile config/project-scratch-def.json --json --setdefaultusername"
        println rmsg
        def jsonSlurper = new JsonSlurperClassic()
        def robj = jsonSlurper.parseText(rmsg)
        def
```
if (robj.status != 0) { error 'org creation failed: ' + robj.message }
SFDC_USERNAME=robj.result.username
robj = null
}

stage('Push To Test Org') {
    rc = sh returnStatus: true, script: "${toolbelt}/sfdx force:source:push
--targetusername ${SFDC_USERNAME}"
    if (rc != 0) {
        error 'push failed'
    }
    // assign permset
    rc = sh returnStatus: true, script: "${toolbelt}/sfdx force:user:permset:assign
--targetusername ${SFDC_USERNAME} --permsetname DreamHouse"
    if (rc != 0) {
        error 'permset:assign failed'
    }
}

stage('Run Apex Test') {
    sh "mkdir -p ${RUN_ARTIFACT_DIR}"
    timeout(time: 120, unit: 'SECONDS') {
        rc = sh returnStatus: true, script: "${toolbelt}/sfdx force:apex:test:run
--testlevel RunLocalTests --outputdir ${RUN_ARTIFACT_DIR} --resultformat tap
--targetusername ${SFDC_USERNAME}"
        if (rc != 0) {
            error 'apex test run failed'
        }
    }
}

stage('collect results') {
    junit keepLongStdio: true, testResults: 'tests/**/*-junit.xml'
}

SEE ALSO:
Jenkinsfile Walkthrough

Continuous Integration with Travis CI

Travis CI is a cloud-based continuous integration (CI) service for building and testing software projects hosted on GitHub.
Setting up Salesforce DX with Travis CI is easy. See the sfdx-travisci GitHub sample and the Salesforce DX Trailhead modules to get started.

SEE ALSO:
sfdx-travisci Sample GitHub Repo
Travis CI
Sample CI Repos for Org Development Model

Get started quickly with CI by cloning a sample repository from your vendor of choice. Each repo has a sample configuration file and a comprehensive README.md with step-by-step information.

These sample repositories support the org development model. This model uses Salesforce CLI, a source control system, and sandboxes during the application life cycle. To determine if this model is right for you, head over and earn your badge by completing the Org Development Model module.

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Link to GitHub Repository</th>
</tr>
</thead>
<tbody>
<tr>
<td>AppVeyor</td>
<td><a href="https://github.com/forcedotcom/sfdx-appveyor-org">https://github.com/forcedotcom/sfdx-appveyor-org</a></td>
</tr>
<tr>
<td>Bamboo</td>
<td><a href="https://github.com/forcedotcom/sfdx-bamboo-org">https://github.com/forcedotcom/sfdx-bamboo-org</a></td>
</tr>
<tr>
<td>Bitbucket</td>
<td><a href="https://github.com/forcedotcom/sfdx-bitbucket-org">https://github.com/forcedotcom/sfdx-bitbucket-org</a></td>
</tr>
<tr>
<td>CircleCI</td>
<td><a href="https://github.com/forcedotcom/sfdx-circleci-org">https://github.com/forcedotcom/sfdx-circleci-org</a></td>
</tr>
<tr>
<td>GitLab</td>
<td><a href="https://github.com/forcedotcom/sfdx-gitlab-org">https://github.com/forcedotcom/sfdx-gitlab-org</a></td>
</tr>
<tr>
<td>Jenkins</td>
<td><a href="https://github.com/forcedotcom/sfdx-jenkins-org">https://github.com/forcedotcom/sfdx-jenkins-org</a></td>
</tr>
<tr>
<td>TravisCI</td>
<td><a href="https://github.com/forcedotcom/sfdx-travis-ci-org">https://github.com/forcedotcom/sfdx-travis-ci-org</a></td>
</tr>
</tbody>
</table>

Sample CI Repos for Package Development Model

Get started quickly with CI by cloning a sample repository from your vendor of choice. Each repo has a sample configuration file and a comprehensive README.md with step-by-step information.

These sample repositories support the package development model. This model uses Salesforce CLI, a source control system, scratch orgs for development, and sandboxes for testing and staging. To determine if this model is right for you, head over and earn your badge by completing the Package Development Model module.

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Link to GitHub Repository</th>
</tr>
</thead>
<tbody>
<tr>
<td>AppVeyor</td>
<td><a href="https://github.com/forcedotcom/sfdx-appveyor-package">https://github.com/forcedotcom/sfdx-appveyor-package</a></td>
</tr>
<tr>
<td>Bamboo</td>
<td><a href="https://github.com/forcedotcom/sfdx-bamboo-package">https://github.com/forcedotcom/sfdx-bamboo-package</a></td>
</tr>
<tr>
<td>Bitbucket</td>
<td><a href="https://github.com/forcedotcom/sfdx-bitbucket-package">https://github.com/forcedotcom/sfdx-bitbucket-package</a></td>
</tr>
<tr>
<td>CircleCI</td>
<td><a href="https://github.com/forcedotcom/sfdx-circleci-package">https://github.com/forcedotcom/sfdx-circleci-package</a></td>
</tr>
<tr>
<td>GitLab</td>
<td><a href="https://github.com/forcedotcom/sfdx-gitlab-package">https://github.com/forcedotcom/sfdx-gitlab-package</a></td>
</tr>
<tr>
<td>Jenkins</td>
<td><a href="https://github.com/forcedotcom/sfdx-jenkins-package">https://github.com/forcedotcom/sfdx-jenkins-package</a></td>
</tr>
</tbody>
</table>

CI/CD template for Salesforce/Apex apps:

- GitLab: https://gitlab.com/sfdx/sfdx-cicd-template

190
## Continuous Integration

### Sample CI Repos for Package Development Model

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Link to GitHub Repository</th>
</tr>
</thead>
<tbody>
<tr>
<td>TravisCI</td>
<td><a href="https://github.com/forcedotcom/sfdx-traviscl-package">https://github.com/forcedotcom/sfdx-traviscl-package</a></td>
</tr>
</tbody>
</table>

SEE ALSO:

- Trailhead: Build an Automated CI/CD Pipeline with GitLab
CHAPTER 14  Troubleshoot Salesforce DX

In this chapter ...

• CLI Version Information
• Run CLI Commands on macOS Sierra (Version 10.12)
• Error: No defaultdevhubusername org found
• Unable to Work After Failed Org Authorization
• Error: Lightning Experience-Enabled Custom Domain Is Unavailable

This guide is a work in progress. Log in to the Salesforce Trailblazer Community and let us know if you find a solution that would help other users so that we can incorporate it.

SEE ALSO:
Salesforce Trailblazer Community
CLI Version Information

Use these commands to view version information about Salesforce CLI.

```
sfdx plugins --core  // Versions for all installed plug-ins and sfdx-cli
sfdx plugins       // salesforcedx plug-in versions
sfdx --version     // sfdx-cli version
```

Run CLI Commands on macOS Sierra (Version 10.12)

Some users who upgrade to macOS Sierra can’t execute CLI commands. This is a general problem and not isolated to Salesforce DX. To resolve the issue, reinstall your Xcode developer tools.

Execute this command in Terminal:

```
xcode-select --install
```

If you still can’t execute CLI commands, download the **Command Line Tools (macOS sierra) for Xcode 8** package from the Apple Developer website.

SEE ALSO:
- [Apple Developer Downloads](#)
- [Stack Overflow: Command Line Tools bash (git) not working - macOS Sierra Final Release Candidate](#)

Error: No defaultdevhubusername org found

Let’s say you successfully authorize a Dev Hub org using the `--setdefaultdevhubusername` parameter. The username associated with the org is your default Dev Hub username. You then successfully create a scratch org without using the `--targetdevhubusername` parameter.

But when you try to create a scratch org another time using the same CLI command, you get this error:

```
Unable to invoke command. name: NoOrgFound message: No defaultdevhubusername org found
```

What happened?

**Answer**: You are no longer in the directory where you ran the authorization command. The directory from which you use the `--setdefaultdevhubusername` parameter matters.

If you run the authorization command from the root of your project directory, the `defaultdevhubusername` config value is set locally. The value applies only when you run the command from the same project directory. If you change to a different directory and run `force:org:create`, the local setting of the default Dev Hub org no longer applies and you get an error.

Solve the problem by doing one of the following.

- Set `defaultdevhubusername` globally so that you can run `force:org:create` from any directory.

  ```
sfdx force:config:set defaultdevhubusername=<devhubusername> --global
  ```

- Run `force:org:create` from the same project directory where you authorized your Dev Hub org.
Use the `--targetdevhubusername` parameter with `force:org:create` to run it from any directory.

```
sfdx force:org:create --definitionfile <file> --targetdevhubusername <devhubusername> --setalias my-scratch-org
```

To check whether you've set configuration values globally or locally, use this command.

```
sfdx force:config:list
```

SEE ALSO:
- How Salesforce Developer Experience Changes the Way You Work

### Unable to Work After Failed Org Authorization

Sometimes you try to authorize a Dev Hub org or a scratch org using the Salesforce CLI or an IDE, but you don't successfully log in to the org. The port remains open for the stray authorization process, and you can't use the CLI or IDE. To proceed, end the process manually.

### macOS or Linux

To recover from a failed org authorization on macOS or Linux, use a terminal to kill the process running on port 1717.

1. From a terminal, run:
   ```
   lsof -i tcp:1717
   ```
2. In the results, find the ID for the process that's using the port.
3. Run:
   ```
   kill -9 <the process ID>
   ```

### Windows

To recover from a failed org authorization on Windows, use the Task Manager to end the Node process.

1. Press Ctrl+Alt+Delete, then click **Task Manager**.
2. Select the **Process** tab.
3. Find the process named **Node**.
   
   - **Note**: If you're a Node.js developer, you might have several running processes with this name.
4. Select the process that you want to end, and then click **End Process**.

### Error: Lightning Experience-Enabled Custom Domain Is Unavailable

If you create a scratch org with `force:org:create`, and then immediately try to use it, you sometimes get an error after waiting a few minutes for the command to finish.
For example, if you try to open the new scratch org in a browser with `force:org:open`, you might get this error:

```
Waiting to resolve the Lightning Experience-enabled custom domain...
ERROR running force:org:open: The Lightning Experience-enabled custom domain is unavailable.
```

The error occurs because it takes a few minutes for the Lightning Experience-enabled custom domain to internally resolve. When using the CLI interactively, wait a few more minutes and run the command again. In a CI environment, however, you can avoid the error altogether by changing how long the CLI itself waits.

By default, the CLI waits 240 seconds (4 minutes) for the custom domain to become available. You can configure the CLI to wait longer by setting the `SFDX_DOMAIN_RETRY` environment variable to the number of seconds you want it to wait. For example, to wait 5 minutes (300 seconds):

```
export SFDX_DOMAIN_RETRY=300
```

If you want the CLI to bypass the custom domain check entirely, set `SFDX_DOMAIN_RETRY` to 0.
CHAPTER 15

Limitations for Salesforce DX

Here are some known issues you could run into while using Salesforce DX.
For the latest known issues, visit the Trailblazer Community’s Known Issues page.

Salesforce CLI

Authorization Fails If Using auth:web:login with Client Secret

**Description:** If you run `force:auth:web:login` with a client ID and client secret, you can't use Salesforce CLI to issue commands to the scratch org because the authorization file isn’t properly created.

**Workaround:** Use the web-based flow without client ID and client secret, or use the JWT-based flow to authorize to the org. See Authorization in the Salesforce DX Developer Guide for instructions on Dev Hub and scratch org authorization methods.

Windows Defender Suspends CLI Installation

**Description:** When you are installing the Salesforce CLI on Windows, you see a Windows Defender warning. This message is expected because we updated the installer’s code signing certificate.

**Workaround:** To ignore this message, click Run anyway.

Can’t Import Record Types Using the Salesforce CLI

**Description:** We don’t support RecordType when running the `data:tree:import` command.

**Workaround:** None.
Limited Support for Shell Environments on Windows

**Description:** Salesforce CLI is tested on the Command Prompt (cmd.exe) and Powershell. There are known issues in the Cygwin and Min-GW environments, and with Windows Subsystem for Linux (WSL). These environments might be tested and supported in a future release. For now, use a supported shell instead.

**Workaround:** None.

The `force:apex:test:run` Command Doesn’t Finish Executing

**Description:** In certain situations, the `force:apex:test:run` command doesn’t finish executing. Examples of these situations include a compile error in the Apex test or an Apex test triggering a pre-compile when another is in progress.

**Workaround:** Stop the command execution by typing control-C. If the command is part of a continuous integration (CI) job, try setting the environment variable `SFDC_PRECOMPILE_DISABLE=true`.

Dev Hub and Scratch Orgs

Salesforce CLI Sometimes Doesn’t Recognize Scratch Orgs with Communities

**Description:** Sometimes, but not in all cases, the Salesforce CLI doesn’t acknowledge the creation of scratch orgs with the Communities feature. You can’t open the scratch org using the CLI, even though the scratch org is listed in Dev Hub.

**Workaround:** You can try this workaround, although it doesn’t fix the issue in all cases. Delete the scratch org in Dev Hub, then create a new scratch org using the CLI. Deleting and recreating scratch orgs counts against your daily scratch org limits.

Error Occurs If You Pull a Community and Deploy It

**Description:** The error occurs because the scratch org doesn’t have the required guest license.

**Workaround:** In your scratch org definition file, if you specify the Communities feature, also specify the Sites feature.

Source Management

**ERROR: No Results Found for force:source:status After Deleting a Custom Label**

**Description:** The `force:source:status` command returns a No Results Found error after you delete a custom label in a scratch org.

**Workaround:** Option #1: If you have only one or two scratch orgs and you can easily identify the affected scratch org by its generated username, use this workaround. In the `Your DX project/.sfdx/org` directory, delete only the folder of the affected scratch org.

Option #2: If you have several scratch orgs associated with your DX project and you don’t know which scratch org’s local data to delete, use this workaround. Delete the `Your DX project/.sfdx/org` directory. This directory contains source tracking information for all scratch orgs related to the project. When you run the next source-tracking command for this or another scratch org (source:push, source:pull, or source:status), the CLI reconstructs the source tracking information for that org.

After you delete the directory (after option #1 or option #2), run `force:source:status` again.
ERROR: Entity of type 'RecordType' named 'Account.PersonAccount' cannot be found

Description: Although you can turn on Person Accounts in your scratch org by adding the feature to your scratch org definition, running source:push or source:pull results in an error.

Workaround: None.

force:source:convert Doesn’t Add Post-Install Scripts to package.xml

Description: If you run force:source:convert, package.xml does not include the post install script.

Workaround: To fix this issue, choose one of these methods:

• Manually add the <postInstallClass> element to the package.xml in the metadata directory that force:source:convert produces
• Manually add the element to the package in the release org or org to which you are deploying the package.

Must Manually Enable Feed Tracking in an Object's Metadata File

Description: If you enable feed tracking on a standard or custom object, then run force:source:pull, feed tracking doesn’t get enabled.

Workaround: In your Salesforce DX project, manually enable feed tracking on the standard or custom object in its metadata file (<metaxml>) by adding <enableFeeds>true</enableFeeds>.

Unable to Push Lookup Filters to a Scratch Org

Description: When you execute the force:source:push command to push the source of a relationship field that has a lookup filter, you sometimes get the following error:

duplicate value found: <unknown> duplicates value on record with id: <unknown> at line num, col num.

Workaround: None.

Deployment

Compile on Deploy Can Increase Deployment Times in Scratch Orgs

Description: If your deployment times for Apex code are slow, your scratch org might have the enableCompileOnDeploy setting set to true.

Workaround: To turn it off, set it to false (the default) or delete the setting from the scratch org definition.

```json
{
    "orgName": "ekapner Company",
    "edition": "Developer",
    "features": [],
    "settings": {
        "lightningExperienceSettings": {
            "enableS1DesktopEnabled": true
        },
        "apexSettings": {
            "enableCompileOnDeploy": false
        }
    }
}
```
Managed First-Generation Packages

When You Install a Package in a Scratch Org, No Tests Are Performed

Description: If you include tests as part of your continuous integration process, those tests don’t run when you install a package in a scratch org.

Workaround: You can manually execute tests after the package is installed.

New Terminology in CLI for Managed Package Password

Description: When you use the CLI to add an installation key to a package version or to install a key-protected package version, the parameter name of the key is --installationkey. When you view a managed package version in the Salesforce user interface, the same package attribute is called “Password”. In the API, the corresponding field name, “password”, is unchanged.

Workaround: None.

Managed Second-Generation Packages

Unable to Specify a Patch Version for Managed Packages

Description: The four-part package version number includes a patch segment, defined as major.minor.patch.build. However, you can’t create a patch for a second-generation managed package. Package creation fails if you set a patch number in the package descriptor. We plan to provide this functionality for managed packages in the Winter ’20 release.

Workaround: Always set the patch segment of the version number, to 0. For example, 1.2.0.1 is valid but 1.2.1.1 is not.

Protected Custom Metadata and Custom Settings are Visible to Developers in a Scratch Org If Installed Packages Share a Namespace

Description: Use caution when you store secrets in your second-generation packages using protected custom metadata or protected custom settings. You can create multiple second-generation packages with the same namespace. However, when you install these packages in a scratch org, these secrets are visible to any of your developers that are working in a scratch org with a shared namespace. In the future, we might add a “package-protected” keyword to prevent access to package secrets in these situations.

Workaround: None.

Unlocked Packages

Protected Custom Metadata and Custom Settings are Visible to Developers in a Scratch Org If Installed Packages Share a Namespace

Description: Use caution when you store secrets in your unlocked packages using protected custom metadata or protected custom settings. You can create multiple unlocked packages with the same namespace. However, when you install these packages in a scratch org, these secrets are visible to any of your developers that are working in a scratch org with a shared namespace. In the future, we might add a “package-protected” keyword to prevent access to package secrets in these situations.

Workaround: None.