

# Salesforce Scratch Orgs

Trial access  
Pre-release access  
Org duplicates

# Questions we are seeing

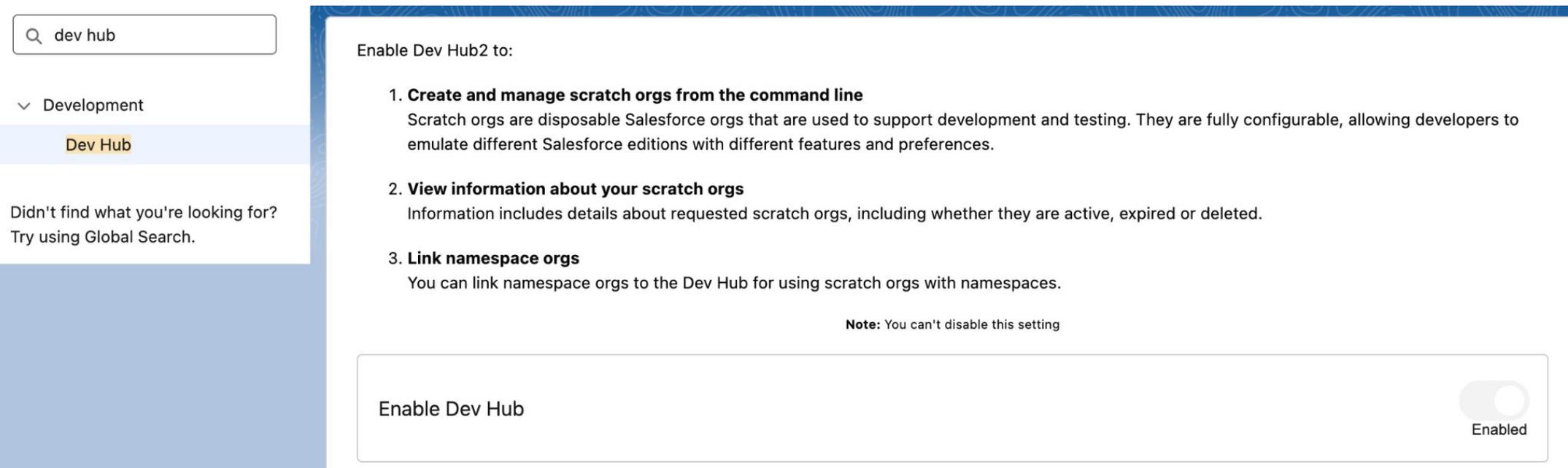
1. How do we access platforms such as Agentforce Revenue Management so we can get hands on trialing and proof of concept against our requirements?
2. How do we get early access to technology pre-releases so we can be ready to take advantage of announced enhancements?
3. How do we setup a sandbox with our core configurations and easily duplicate to other development environments for further builds?

# Answering with Salesforce Scratch Orgs

- ❖ How do we access platforms such as Agentforce Revenue Management so we can get hands on trialling and proof of concept against our requirements?
  - Use Scratch Orgs

# An example Scratch Org for Agentforce Revenue Management

- ❖ Starting with a simple developer org enable Dev Hub from Setup



The screenshot shows the Salesforce Setup interface. On the left, a search bar contains "dev hub". Below it, a navigation menu shows "Development" expanded, with "Dev Hub" selected. A message below the menu reads: "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Enable Dev Hub2 to:" and lists three steps:

- 1. Create and manage scratch orgs from the command line**  
Scratch orgs are disposable Salesforce orgs that are used to support development and testing. They are fully configurable, allowing developers to emulate different Salesforce editions with different features and preferences.
- 2. View information about your scratch orgs**  
Information includes details about requested scratch orgs, including whether they are active, expired or deleted.
- 3. Link namespace orgs**  
You can link namespace orgs to the Dev Hub for using scratch orgs with namespaces.

A note below the list states: **Note:** You can't disable this setting

At the bottom, there is a toggle switch for "Enable Dev Hub" which is currently turned on, labeled "Enabled".

# Using Command-line Interface (CLI)

- ❖ Create a json definition file for features requested
  - Agentforce Revenue Management example on next slide
- ❖ Login to developer Org from CLI
  - Sf org login web -d -a MyDevHub
    - -d sets org as default
    - -a alias name
- ❖ Generate Scratch Org based on json definition file
  - Sf org create scratch -f example-def-file.json -a MyScratchOrg -y 30
    - -f definition file name
    - -a scratchorg alias
    - -y duration in days
- ❖ Login scratch org
  - Sf org open -o MyScratchOrg
  - OR login with user credentials displayed on creation of scratchorg and reset password

# Agentforce Revenue Management JSON definition file example

```
{
  "edition": "Developer",
  "features": [
    "BusinessRulesEngine",
    "Communities",
    "OrderSaveLogicEnabled",
    "OrderManagement",
    "OrderSaveBehaviorBoth",
    "ContextService",
    "CoreCpq",
    "SalesforcePricing",
    "SalesforceConfiguratorEngine",
    "UsageManagement",
    "BillingAdvanced",
    "DocGen",
    "EnableSetPasswordInApi",
    "ProductCatalogManagementPCAddOn"
  ],
  "settings": {
    "communitiesSettings": {
      "enableNetworksEnabled": true
    },
    "customAddressFieldSettings": {
      "enableCustomAddressField": true
    },
    "currencySettings": {
      "enableMultiCurrency": true
    },
    "experienceBundleSettings": {
      "enableExperienceBundleMetadata": true
    },
    "lightningExperienceSettings": {
      "enableS1DesktopEnabled": true
    }
  },
```

```

    "industriesContextSettings": {
      "enableContextDefinitions": true
    },
    "opportunitySettings": {
      "enableOpportunityTeam": true
    },
    "revenueManagementSettings": {
      "enableCoreCPQ": true
    },
    "orderManagementSettings": {
      "enableOrderManagement": true
    },
    "orderSettings": {
      "enableOrders": true,
      "enableEnhancedCommerceOrders": true,
      "enableOrderEvents": true,
      "enableOptionalPricebook": true,
      "enableZeroQuantity": true,
      "enableNegativeQuantity": true
    },
    "quoteSettings": {
      "enableQuote": true,
      "enableQuotesWithoutOppEnabled": true
    },
    "industriesPricingSettings": {
      "enableSalesforcePricing": true
    },
    "industriesRatingSettings": {
      "enableRating": true,
      "enableRatingWaterfall": true,
      "enableRatingWaterfallPersistence": true
    },
    "DynamicFulfillmentOrchestratorSettings": {
      "enableDFOPref": true
    }
  },
  "orgName": "CPQ",
  "adminEmail": "Colin@mobilebeacon.com"
}
```

# Scratch Org configured with permission set licenses as per definition file

<u>Product Catalog Management Administrator</u>	Active	20	1	19
<u>Product Catalog Management Cache</u>	Active	20	1	19
<u>Product Catalog Management Partner Community User</u>	Active	1	0	1
<u>Product Catalog Management Viewer</u>	Active	20	1	19
<u>Product Configuration User</u>	Active	20	1	19
<u>Product Discovery User</u>	Active	20	1	19
<u>Pulse Runtime User</u>	Active	20	1	19
<u>Rate Management Design Time</u>	Active	25	1	24
<u>Rate Management Run Time</u>	Active	25	1	24
<u>Remote Data Cloud</u>	Active	200,000	1	199,999
<u>Revenue Cloud User</u>	Active	20	1	19
<u>Sales Console User</u>	Disabled	0	0	0
<u>Sales Workspace User</u>	Active	1	1	0
<u>Salesforce API Integration</u>	Active	5	0	5
<u>Salesforce Pricing Design Time</u>	Active	25	1	24
<u>Salesforce Pricing Run Time</u>	Active	25	1	24

# Answering with Salesforce Scratch Orgs

- ❖ How do we get early access to technology pre-releases so we can be ready to take advantage of announced enhancements?
  - Review pre-release time scales for preview sandboxes
    - Eg Spring 26 was from Jan 9th to Feb 21st
  - Create a scratch org as a preview instance within selected transition dates
    - `Sf org create scratch -f example-def-file.json --alias MyPreviewOrg -y 30 --release preview`

# Scratch Org configured with the forthcoming release

Example: Spring 26

Agentforce

Revenue Management



*New feature - Separate quote line billing frequency*

Quote Line Items (2)										
2 items										
Manage Header Adjustment Add Assets Bulk Delete Reprice All										
Product Name	List Price	Quantity	Start Date	End Date	Discount (Amount)	Net Unit Price	Net Total Price	Billing Frequency		
<input type="checkbox"/> Digital Frame	GBP 1,000.00	1.00				GBP 1,000.00	GBP 1,000.00		+	▼
<input type="checkbox"/> Art Gallery	GBP 1,200.00	1.00	12/01/2026	11/01/2027		GBP 1,200.00	GBP 1,200.00	Annual	+	▼

*New feature - New context mapping UI*

A screenshot of the Salesforce Context Mapping interface for the SalesTransaction object. The interface is split into two main sections: 'Object Mapping' and 'Input Mapping'. On the left, a tree view shows the 'SalesTransaction' object with its various attributes. The 'Object Mapping' section shows a list of attributes from the object, such as 'SalesTransactionSource', 'ValidationResult\_\_std', and 'AdjustmentDistributionLogic\_\_std'. The 'Input Mapping' section shows a list of fields from the object, such as 'Select Fields', 'AppliedDiscountAmount\_\_std', and 'AppliedDiscount\_\_std'. Arrows indicate the mapping between the object attributes and the input fields.



# Answering with Salesforce Scratch Orgs

- ❖ How do we setup a sandbox with our core configurations and easily duplicate to other development environments for further builds?
  - Create a snapshot from a scratch org
    - `Sf org create snapshot --source-org MyScratchOrg --name MySnapshot`
  - Create a scratch org from the snapshot
    - `Sf org create scratch --snapshot MySnapshot --alias MyScratchOrg2`
  - MyScratchOrg2 is a duplicate of MyScratchOrg

Note: Snapshots expire after 90 days and you cannot create a snapshot from a Scratch org which itself is created from a snapshot. So snapshots are not a substitute for an operational devops solution.

# Some limits to be aware of

## ❖ Number of scratch orgs

Dev Hub Org edition	Active Scratch Orgs	Daily creations
Developer	3	6
Enterprise	40	80
Unlimited	100	200

## ❖ Expiry time

Scratch Org	Up to 30 days
Snapshot	90 days