Previewing a Subscription

You can preview a subscription with a draft, active, or canceled status to see the invoice charges that will be generated by the subscription. You can preview subscriptions across any time frame, and you can enter usage values to simulate usage charge calculation. Preview all invoices generated for the subscription, including future invoices and taking into account any amendments to the subscription.

Zuora recommends that you preview new subscriptions to check and correct errors before activating new subscriptions.

Preview and Taxation

If you have configured taxation rules in Zuora Tax, the subscription preview will calculate taxes for charges in the subscription.

Preview for Full Term Pricing

Using list base price and full term pricing, you can make subscriptions that charge the price of a full term up front. Preview subscription will let you see the full term price that will be applied to a subscription.

Preview a Subscription through the Zuora UI

You can preview a subscription with a draft, active, or canceled status from the Zuora UI.

Subscription Preview Dates

You can preview a subscription during the period defined in Preview Start Date and Preview Through Date. The period between the preview start date and preview through date must be less than 60 months.

Preview Start Date

The start date of the subscription preview. The subscription start date is used by default.

Preview Through Date

The end date of the subscription preview. You can preview the invoice charges through the preview through date.

When you set the preview through date, pay attention to the following scenarios:

- If the subscription ends after the last invoice date plus 60 months, the latest preview through date you can set is the last invoice date plus 60 months.
• If the subscription ends before the last invoice date plus 60 months, the latest preview through date you can set is the term end date.

• If the subscription is not billed through the subscription term, the latest preview through date is the subscription start date plus 60 months.

You can specify the preview through date with one of the following options:

**Next Number Billing Periods**

This shows you the invoice charges for the next number of billing periods. The preview through date is the last invoice date plus the number of billing periods. If the subscription is not billed through the subscription term, the preview through date is the term start date plus the number of billing periods.

For example:

- **Subscription Start Date**: January 1, 2020
- **Subscription End Date**: January 1, 2022
- **Billing Period**: Month
- **Last invoice date**: June 1, 2020
- **Preview Start Date**: January 1, 2020
- **Preview Through Date**: Next 5 billing periods

The preview through date is on November 1, 2021. You can preview invoice charges from January 1, 2020 to November 1, 2021.

After you specify **Next number Billing periods**, the preview through date is calculated automatically and displayed in the field under the **Specific Date** field. The invoice of the next three billing periods is showed by default. You can specify the number of periods to override the default value.

If there are more than two charges in the subscription, Zuora shows the preview through date of the invoice charges based on the shortest billing period of the charge in the subscription. For example, if there is a charge bills for every month and a charge bills for every five weeks, Zuora shows the preview through date of the invoice charges based on the monthly billing period.

**End of Term**

This shows you what the invoice charges will be through the end of the subscription term. After you select the **End of Term** option, the preview through date is automatically displayed in the field under the **Specific Date** field.

**Specific Date**

This shows you what the invoice charges will be based on the preview through date you specified.
Save and Preview before Activating a Subscription

To preview a new subscription using the "Save and Preview" method:

1. Create a new subscription.
2. Click Save and Preview.
3. Enter the Contract Effective and Customer Acceptance dates. The date fields will be pre-populated with today's date but can be overridden with the actual contact effective and customer acceptance dates. Today's date and all the dates are based on the time zone of the particular Zuora Data Center on which your tenant resides.
4. Specify a preview start date in the Preview Start Date field.
5. Select one of the following options to specify the preview through date in the Preview Through Date area:
   - Next number Billing Periods
   - End of Term
   - Specific Date
6. Click refresh to preview the charges.
7. Click done when you are finishedpreviewing the charges to return to the subscription entry page.

Preview a Draft Subscription

To preview a draft subscription:

1. Create a new subscription.
2. Click save as draft.
3. Within the draft subscription, click more button (on the far right), then click preview.
4. Enter the Contract Effective and Customer Acceptance dates. The date fields will be pre-populated with today's date but can be overridden with the actual contact effective and customer acceptance dates.
5. Specify a preview start date in the Preview Start Date field.
6. Select one of the following options to specify the preview through date in the Preview Through Date area:
   - Next number Billing Periods
   - End of Term
   - Specific Date
7. Click refresh to preview the charges.
8. Click done when you are finished previewing the charges to return to the subscription entry page.

Preview Active or Canceled Subscriptions

You can preview a subscription at any time (when the subscription is in draft, active, or canceled status) to see the invoice charges that will be generated by the subscription.

To preview an active or canceled subscription:
1. Access the subscription you want to preview.
2. In the subscription, click more (on the far right), then click preview.

If the subscription is active or canceled, the subscription’s term start date, term end date, and contract effective date will be pre-populated on the preview page, and you will not be able to edit these values.

3. Specify a preview start date in the Preview Start Date field.
4. Select one of the following options to specify the preview through date in the Preview Through Date area:
   ◦ Next number Billing Periods
   ◦ End of Term
   ◦ Specific Date
5. Click refresh to preview the charges. If the subscription has any invoices associated with it, these invoices will appear in the preview with the invoice number and invoice date (for example, INV00000048(07/09/2010)) to the left of the preview charges.
6. Click done when you are finished previewing the charges to return to the subscription entry page.

Preview a Subscription through Zuora APIs

You can preview a subscription with the SOAP API or with the REST API.