

Customer Portal Walkthrough

The self-service portal for end-user customers at `/portal`: account setup, two-factor authentication, usage and balance, invoices, reloads, and API documentation.

Audience: your API customers. For the company side see `ACCOUNTING.md` and `USER-MANAGEMENT.md`.

1. Create your account

Open `http://<host>:<port>/portal` and choose **Create an account**.

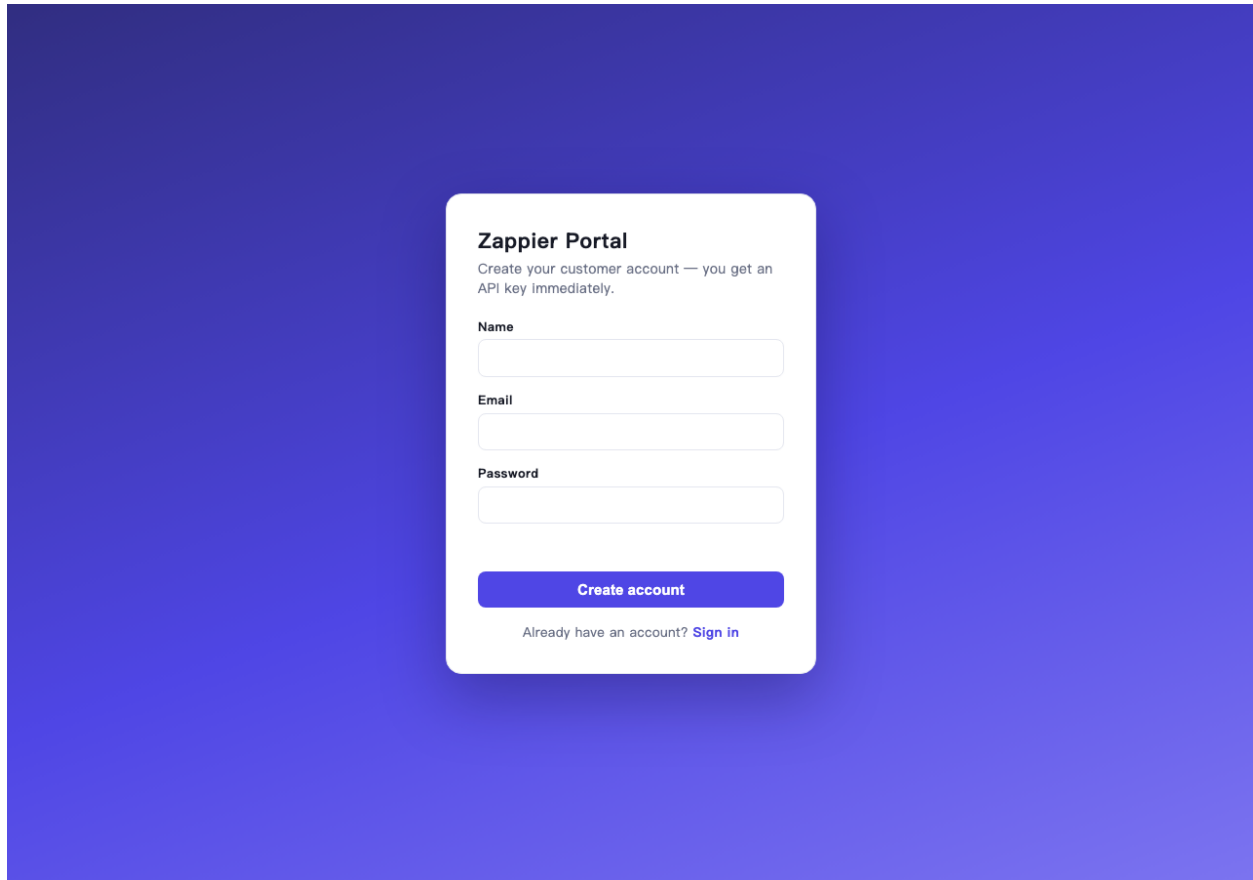
A screenshot of the Zappier Portal sign-up form. The form is centered on a solid blue background. It has a white background with rounded corners. At the top, it says "Zappier Portal" in bold, followed by "Create your customer account — you get an API key immediately." Below this are three input fields labeled "Name", "Email", and "Password". At the bottom of the form is a blue button with the text "Create account". Below the button, it says "Already have an account? [Sign in](#)".

Figure 1: Sign up

- Name, email, and a password of at least 8 characters.
- You start on the **Free** plan and get an **API key immediately**.
- If the company already created an account for you (you received an API key by email), sign up with the **same email address** — your existing account, plan, and API key are kept and the password you choose is attached to it.

Sign-in afterwards is email + password on the same screen.

2. Dashboard

- **Usage this month** — gross usage since the 1st (UTC).

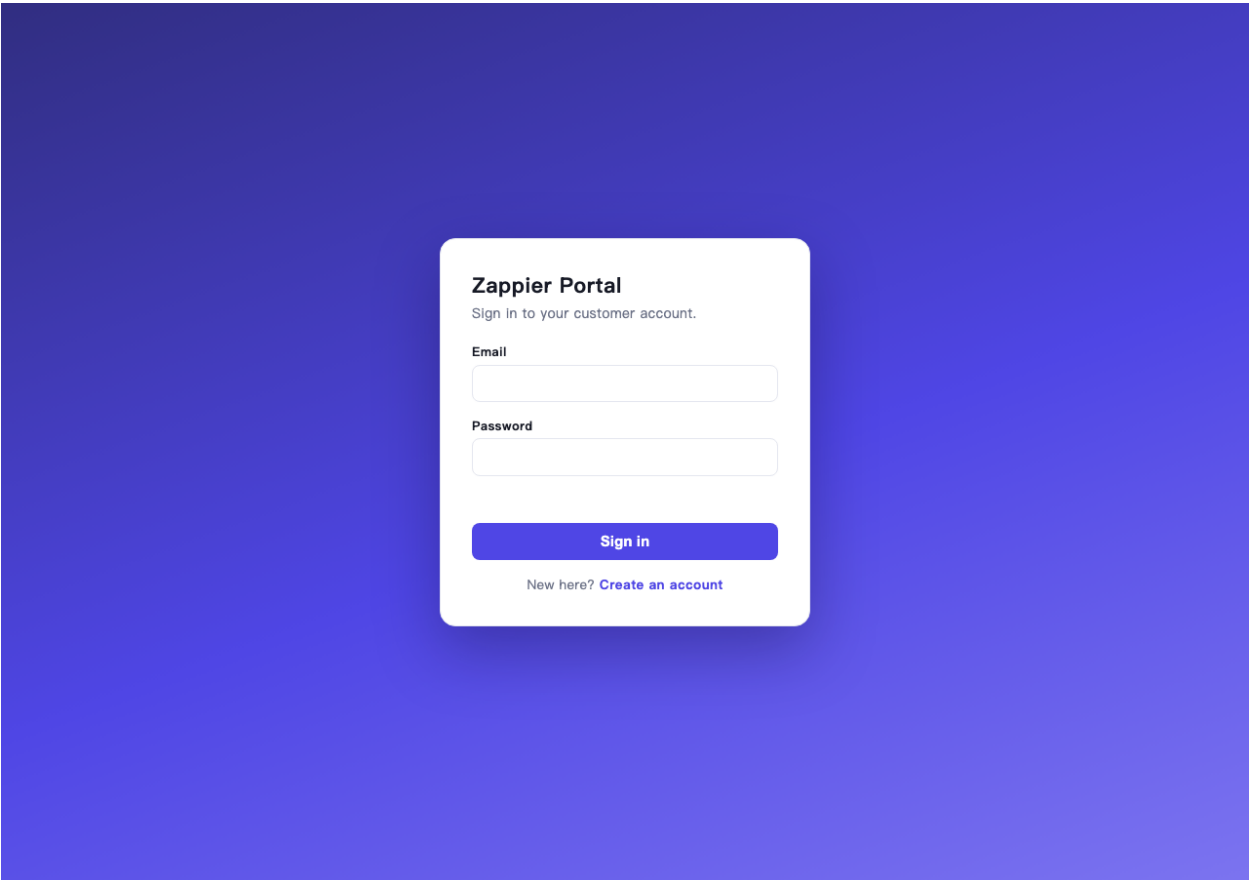


Figure 2: Sign in

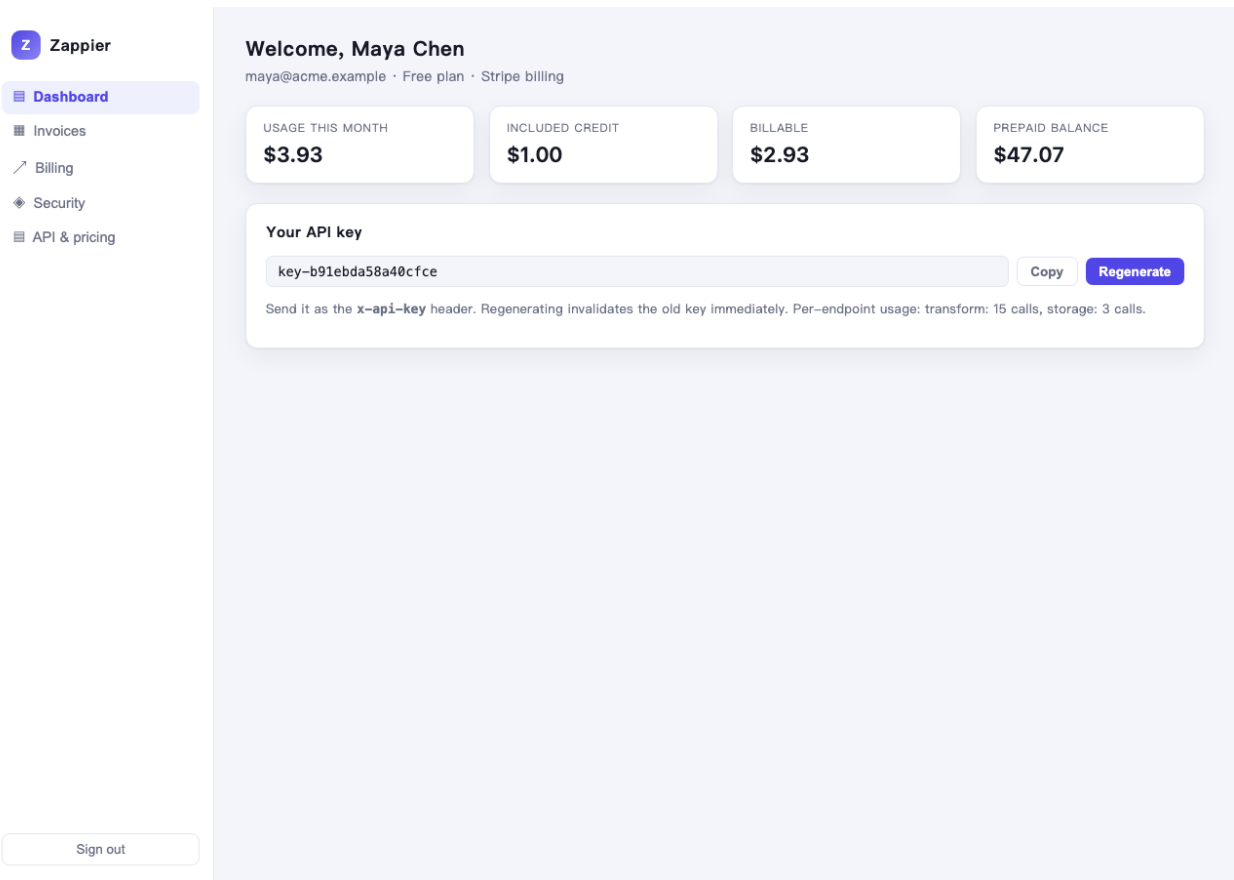


Figure 3: Dashboard

- **Included credit** — how much of your plan’s monthly credit was consumed.
- **Billable** — what exceeds the credit (what you’d be invoiced today).
- **Prepaid balance** — funds available for automatic invoice payment.
- **Your API key** — copy it, or **regenerate** it. Regenerating invalidates the old key immediately; use it as the `x-api-key` header.

3. Usage & pricing

The **API & pricing** tab shows the live rate card (free / fixed / variable per endpoint, with size-based pricing for storage) and every plan’s multiplier and monthly credit — the same numbers the server bills from.

API & pricing
Interactive API reference lives at </docs> (Swagger UI) — use your API key as `x-api-key`.

Rate card (list prices)

ENDPOINT	KIND	LIST PRICE
status	free	Free
storage-list	free	Free
transform	fixed	4¢ / call
storage	variable	10¢ + 1¢/KB + 50¢/MB

Plans

ID	NAME	PRICE MULTIPLIER	MONTHLY CREDIT
free	Free	1x	\$1.00
pro	Pro	0.5x	\$10.00
business	Business	0.25x	\$100.00

Your plan’s multiplier scales list prices; the monthly credit is free included usage. You’re on **free**.

Sign out

Figure 4: API & pricing

The interactive API reference (Swagger UI) is linked at the top (</docs>).

4. Invoices

Your invoice history with status (**draft**, **issued**, **paid**), totals, credit, amount due, and due date. **View / print** opens a print-ready invoice — use the browser’s **Print** → **Save as PDF** for a copy.

Only your own invoices are visible; other customers’ ids return “not found”.

5. Billing: reloads & email invoicing

- **Reload balance** — add \$1–\$10,000. Your prepaid balance is **drawn down automatically** when an invoice is issued: if it fully covers the amount due, the invoice is paid instantly.
- **Email invoicing** — receive a copy of each new invoice by email.

Z

Zapier

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Invoices

Your invoice history. "View / print" opens a print-ready page — use the browser's Print → Save as PDF.

INVOICE	PERIOD	STATUS	TOTAL	CREDIT	AMOUNT DUE	DUE DATE	
INV-2026-07-0004	2026-07	paid	\$3.93	\$1.00	\$2.93	—	View / print
INV-2026-06-0001	2026-06	issued	\$4.12	\$1.00	\$3.12	2026-07-08	View / print

Figure 5: Invoices

Invoice INV-2026-06-0001

Zappier API usage · period 2026-06 · due 2026-07-08

ISSUED

Billed to: Maya Chen (cust_34a14273)
Billing type: stripe

ENDPOINT	CALLS	AMOUNT
storage	3	\$3.00
transform	40	\$1.12
Usage total		\$4.12
Monthly credit		-\$1.00
Amount due		\$3.12

Figure 6: Printable invoice

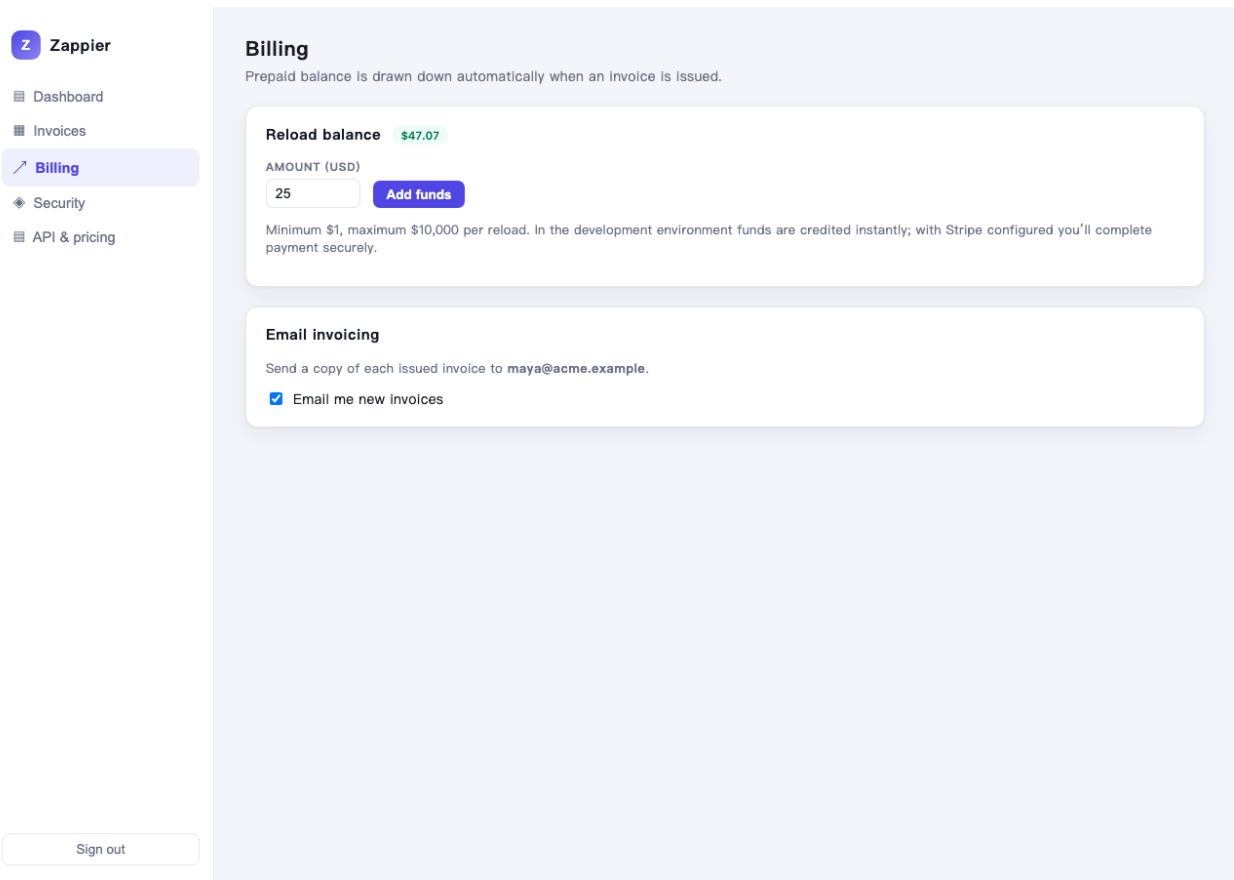


Figure 7: Billing

6. Security: two-factor authentication

On the **Security** tab, click **Set up 2FA**:

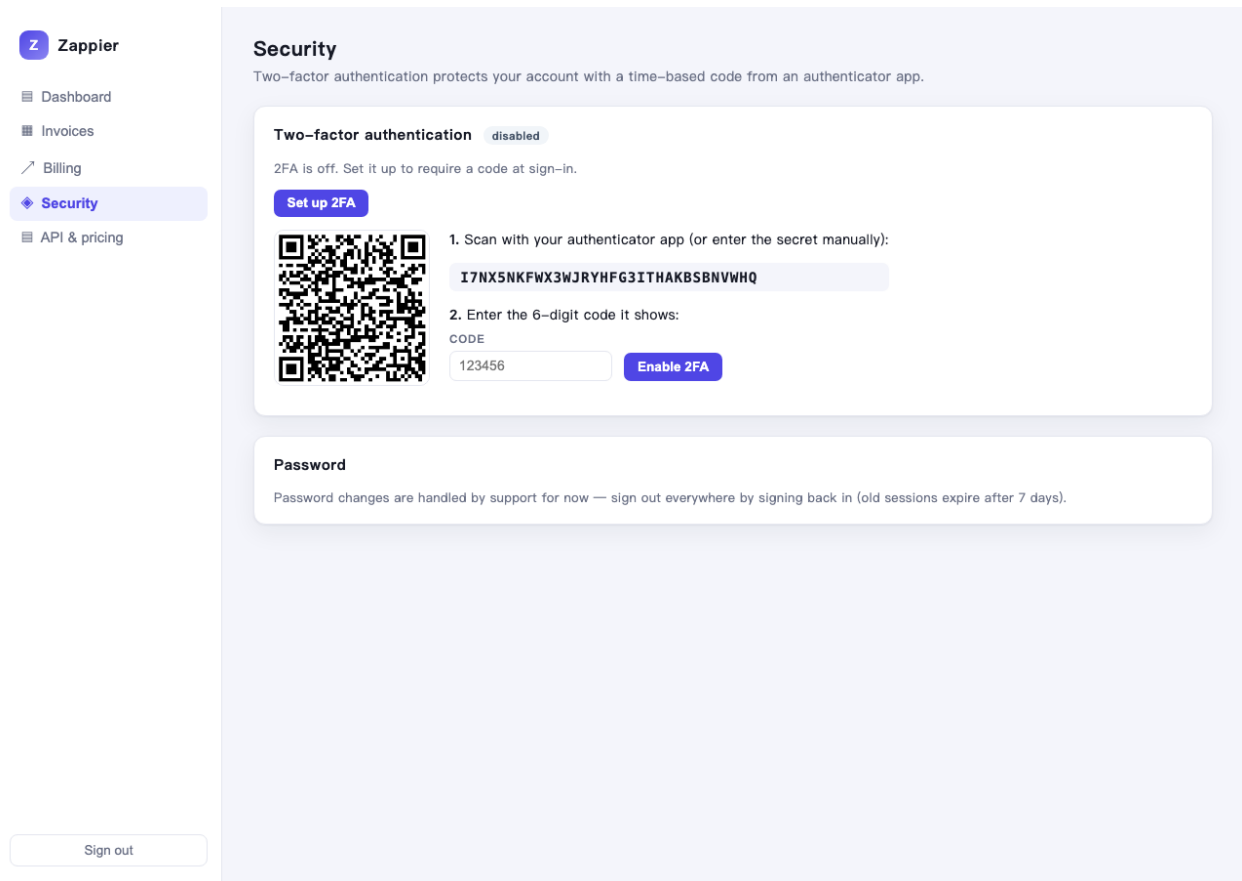


Figure 8: 2FA setup

1. Scan the QR code with any authenticator app (or type the secret manually).
2. Enter the 6-digit code it shows to enable 2FA.

From then on, sign-in requires the password **and** the current code. You can disable 2FA with a valid code from the same tab. Sessions expire after 7 days.

Portal API reference

Session-based (Authorization: Bearer <token> from signup/login):

- POST /portal/api/signup · POST /portal/api/login · POST /portal/api/logout
- GET /portal/api/me · POST /portal/api/api-key
- GET /portal/api/usage · GET /portal/api/pricing
- GET /portal/api/invoices · GET /portal/api/invoices/:id[?format=html]
- POST /portal/api/2fa/setup|enable|disable
- POST /portal/api/reload · PUT /portal/api/email-invoicing

Security notes: passwords are stored as script hashes; TOTP secrets are only shown during setup; no hash or secret is ever returned by the API.