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Signup, 2FA, API keys, reloads

site/packages/zapier/docs/CUSTOMER-PORTAL.md

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**.

Sign up

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.

Sign in

Sign in

2. Dashboard

Dashboard

Dashboard

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

API & pricing

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

4. Invoices

Invoices

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.

Printable invoice

Printable invoice

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

5. Billing: reloads & email invoicing

Billing

Billing

- **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.

6. Security: two-factor authentication

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

2FA setup

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 scrypt hashes; TOTP secrets are only shown during setup; no hash or secret is ever returned by the API.